IFS Mobile Work-Order Process Readiness Checklist

Completed readiness assessment for evaluating IFS Mobile Work Order functionality in IFS Cloud 25R2 and 26R1. Complete the organization, date, and owner fields before using this document for a pilot decision.

Organization / Date / Completed by:	_____ / _____ / _____ (unverified)
Readiness summary:	This checklist provides field service teams with a practical assessment framework for evaluating organizational and technical readiness to deploy IFS mobile work-order functionality in IFS Cloud 25R2 and 26R1. The checklist is grounded entirely in official IFS documentation and addresses five core readiness dimensions: mobile resource configuration, work task and assignment management, workflow design, technical infrastructure, and data governance. Each item reflects documented IFS capabilities or supported workflows. Teams should complete this assessment before pilot deployment to identify gaps and confirm prerequisites.
Documented IFS capabilities:	The following capability groups are documented IFS reference material from the supplied checklist. They are not proof that Spindlewick has configured, activated, or connected an IFS environment.
Capability 1:	IFS Mobile Work-Order Capabilities (25R2, 26R1) IFS Service MWO and IFS Maintenance MWO are mobile apps for work order management [1]. Mobile users execute Work Assignments or Work Tasks from the Task Pool [1]. Work Assignments and Pool Tasks are created in IFS Cloud and transferred to mobile users [1]. The mobile app works both online and offline, but some features are limited to online only [1]. Resources must be defined as mobile users in Resource Details/Maintenance/Service. A resource used with IFS Mobile Work Order must be set as Mobile User in Company Settings, and the resource must belong to a resource group connected to the task company [2].
Capability 2:	Work Assignment status and workflow behavior Work Assignment status cannot be updated in IFS Work Order Management once it is transferred to Mobile [1]. Only Work Assignment status can be updated from the Mobile Client; Work Task status can be updated automatically as a result of Work Assignment changes [4]. When a Work Task is ready but no Work Assignment exists, the mobile system can automatically create one when the task is transferred to mobile [4]. Workflow statuses can include Accepted, Travel, Waiting at Location, Work Start, Cancel, Pause, Pending Completion, Complete, and Incomplete [4].
Capability 3:	Workflow configuration Configuration is done in Service/Work Management/Mobile Maintenance/Workflow Configuration in IFS Cloud Web [3]. Configuration Types include Work Task and Configured Work Task, with subtypes for Standard, New or Additional Work, and Bundle Tasks [3]. Filters trigger a configuration when a Work Task meets the defined criteria. Configured Work Task actions can be placed in a defined sequence in the Actions

	Flow tab [3].
Capability 4:	Field service workflow and task assignment Work orders can be assigned to the logged-on user or to an employee suggested by the Scheduling Engine [5]. Work orders or work tasks can be transferred to one or more mobile devices belonging to technicians who work for the service organization of the work-order site and have the IFS Mobile Application installed [5]. Work is executed through Work Assignments connected to Work Tasks [5]. Tasks can be assigned to a technician or a common pool. The first technician accepting a Pool Task becomes its owner; Pool-Keep tasks can be accepted by multiple users [1][4]. Allocated Start and Allocated Finish dates can be modified to re-plan an Assignment [4].
Capability 5:	Work Task and Bundle Task management Bundle Tasks group multiple individual Work Tasks into one piece of work that can be scheduled and executed as one [6]. A Bundle Task can include tasks from Work Orders, calculate duration from its included tasks, define resource demands for a person, crew, or tool, and carry an address and planned start and finish dates [6]. Work Assignments are created for allocated resources and can be executed in IFS Cloud Web or transferred to mobile clients. Bundle Task status drives the status of included tasks, and connected Work Assignments are cancelled when tasks are bundled [6][7].
Capability 6:	Integration and data requirements Parts required on the mobile client must be registered in Mobile Part Basic Data. A mobile user can be connected to an assortment so its parts are available in the mobile application [4]. A mobile user needs site access to the Work Task site through Sites per User. A Request Work Task also requires access through a connected Task User Access Group [1]. Mobile Integration can configure IFS Mobile Work Order integrations with Android third-party apps or web pages, including whether an integration appears on the Home screen or as a Work Task Action [1][4]. Configured Request Task and Configured Work Task configurations, including Bundle Task subtypes, are supported only in the Mobile Work Order solution [9].
Pilot discovery readiness checklist:	Assessment aid: distinguish documented IFS findings from open questions that must be confirmed in the target environment before a pilot conversation.
[ ] Documented IFS finding 1: Site access governs mobile transfer:	When a Work Order Task is transferred to a mobile user, that user should have access to the task site through Sites per User. A Pool Task synchronizes to resources that have access to its task site [1].
[ ] Documented IFS finding 2: Work Assignments and Pool Tasks move from IFS Cloud:	Work Assignments and Pool Tasks are created in IFS Cloud and transferred to mobile users. Mobile users update Work Assignment status; Work Task status is not updated directly in mobile and may change automatically as a result [1][4].
[ ] Documented IFS finding 3: Online and offline behavior has limits:	The mobile app works online and offline, but some features are online-only. The supplied assessment also documents an Integration Log that records completion states and supports offline execution [1].
[ ] Documented IFS finding 4: Mobile Integrations can be part of completion validation:	Mobile Integrations can launch third-party apps or web pages from the Home screen or a Task Action. Mandatory integrations can require an expected return parameter and value before task completion; the Allow

	User to Skip Integration Validation setting controls whether that requirement is hard or soft [1].
[ ] Open question — confirm before pilot 5: Target tenant and release:	Open question: which IFS tenant, enabled modules, and release configuration will the pilot use? The supplied assessment does not establish these environment details.
[ ] Open question — confirm before pilot 6: Administrator setup and activation:	Confirmation needed: has an IFS administrator configured and activated the mobile workflow, site access, workflow rules, and any mandatory integrations for the target environment?
[ ] Open question — confirm before pilot 7: Pilot team and participating resources:	Confirmation needed: which technicians, resources, resource groups, and team owner will participate, and are the resources set up as active Mobile Users with the required company connections?
[ ] Open question — confirm before pilot 8: Site and task access:	Confirmation needed: which pilot sites and tasks are in scope, and do participating users have the required Sites per User and, where applicable, Task User Access Group access?
[ ] Open question — confirm before pilot 9: Devices and connectivity conditions:	Confirmation needed: which supported devices and OS versions will be used, where are the coverage gaps, and how will charging, authentication, camera/GPS needs, security, and offline recovery be tested?
[ ] Open question — confirm before pilot 10: Data readiness:	Confirmation needed: are the customer, site, asset, technician, job-type, open-work-order, Mobile Part Basic Data, assortment, and other records needed for synchronization current and complete?
[ ] Open question — confirm before pilot 11: Assignment handoff and ownership:	Confirmation needed: which tasks move to named technicians or a common pool, who owns a pooled task after acceptance, and who handles status or handoff decisions while the assignment is on mobile?
[ ] Open question — confirm before pilot 12: Integration endpoints and credentials:	Confirmation needed: what integration names, endpoints, methods, payloads, expected return values, authentication mode, credentials, and administrator activation apply in the target environment?
[ ] Open question — confirm before pilot 13: Support ownership and recovery:	Confirmation needed: who supports technicians and administrators, who owns recovery after a connectivity gap or failed handoff, and what escalation path applies during the pilot?
[ ] Open question — confirm before pilot 14: Pilot measures and success criteria:	Confirmation needed: which representative jobs, field conditions, readiness sign-off, handoffs, and team-defined measures will determine whether the pilot is ready for a broader rollout?
Operational guidance:	Operations managers should assess process, data, mobile readiness, workflow design, and ownership before pilot deployment [8]. Test supported devices and OS versions, connectivity, offline operation, charging, security, authentication, data coverage, camera and GPS needs, and support under real field conditions [8]. Test the full job rather than app login alone: assignment, history, forms or photos, time or parts, completion, and recovery after a connectivity gap [8]. Clean active customer, site, asset, technician, job-type, and open-work-order records before migration [8].
Assumption 1:	Assumption: Native IFS Capabilities The assessment treats resource and user setup, Work Task creation and transfer, Work Assignment status management, workflow configuration, Bundle Task grouping and duration calculation, Pool Task distribution, online/offline operation, Mobile Part Basic Data and assortment synchronization, third-party integration configuration, Configured Work Task and Request Task workflows, and work-order preparation with budgets and customer details as native IFS Cloud capabilities

	documented in the supplied report.
Assumption 2:	Assumption: Operational Readiness Assessment Industry best practices recommend assessing process, data, mobile device infrastructure, workflow design, and organizational governance before a pilot, in order to identify prerequisites and gaps.
Assumption 3:	Assumption: Team Preparation Scope Successful deployment requires confirming that technicians understand supported devices, offline functionality, authentication methods, data coverage expectations, and the action sequence defined in Configured Work Task workflows when those workflows are deployed.
Environment unknowns:	Environment-specific unknowns: this assessment does not establish the target IFS tenant, enabled modules or release configuration, administrator activation state, mobile users or resource groups, site and task access, device or OS inventory, connectivity conditions, integration endpoints, authentication credentials, mandatory integration parameters, or pilot data quality. Confirm each item in the target environment before treating a capability as ready.
Readiness dimensions:	Use each section to record evidence, the accountable owner, and the date checked. A blank field is not evidence of readiness.
Checklist section 1:	SECTION 1: RESOURCE AND MOBILE USER SETUP Confirm mobile users are defined in Resource Details/Maintenance/Service, have the correct Company Settings value, belong to resource groups connected to the task company, and have site access for the work they will perform. Evidence / owner / date: _____
Checklist section 2:	SECTION 2: WORK TASK AND ASSIGNMENT MANAGEMENT Confirm how Work Tasks move to assigned technicians or the Task Pool, who owns a pooled task after acceptance, when Work Assignments are created, and how allocated dates are re-planned. Evidence / owner / date: _____
Checklist section 3:	SECTION 3: WORKFLOW CONFIGURATION AND STATUS MANAGEMENT Document the Configuration Types, filter criteria, action sequence, and Work Assignment statuses used by the organization. Confirm the distinction between Work Assignment status and Work Task status in the mobile flow. Evidence / owner / date: _____
Checklist section 4:	SECTION 4: BUNDLE TASK MANAGEMENT Decide whether related Work Tasks will be bundled. Confirm automatic duration, resource demands, planned dates, assignment behavior, and the way Bundle Task status drives included task status. Evidence / owner / date: _____
Checklist section 5:	SECTION 5: MOBILE DATA SYNCHRONIZATION Verify Mobile Part Basic Data, assortments, site access, Task User Access Groups, and the customer, site, asset, technician, job-type, and open-work-order records required for synchronization.

	Evidence / owner / date: _____
Checklist section 6:	SECTION 6: INTEGRATION AND THIRD-PARTY APPS List every Mobile Integration, its target Android app or web page, its Home screen or Work Task Action placement, expected return values, and the completion rules that depend on it. Evidence / owner / date: _____
Checklist section 7:	SECTION 7: MOBILE DEVICE AND CONNECTIVITY INFRASTRUCTURE Test supported devices and OS versions in real field conditions, including coverage gaps, offline behavior, charging, camera/GPS needs, authentication, security, and the support path when connectivity is unavailable. Evidence / owner / date: _____
Checklist section 8:	SECTION 8: END-TO-END WORKFLOW TESTING Run a complete representative job from assignment through completion, including history, forms or photos, time, parts, sign-off, status changes, and recovery after a connectivity gap. Evidence / owner / date: _____
Checklist section 9:	SECTION 9: TEAM TRAINING AND PROCESS DOCUMENTATION Prepare technician guidance for supported devices, authentication, offline functionality, Work Assignment statuses, configured action sequences, escalation, and the difference between mobile execution and IFS Cloud administration. Evidence / owner / date: _____
Checklist section 10:	SECTION 10: DATA GOVERNANCE AND SECURITY Confirm data ownership, site and task access, least-necessary mobile data, authentication, device security, record cleanup, integration credentials, and the process for correcting or removing outdated field data. Evidence / owner / date: _____
Checklist section 11:	SECTION 11: PILOT AND GO-LIVE SUCCESS FACTORS Define the pilot population, representative jobs, support owner, recovery plan, readiness sign-off, operational handoffs, and the measures that will determine whether the organization is ready for broader rollout. Evidence / owner / date: _____
Recommended actions:	Use the action list below to close prerequisites and prepare a pilot decision.
Action 1:	[ ] 1. Validate Resource Configuration Confirm all field technicians who will use mobile work orders are defined as Mobile Users in Resource Details/Maintenance/Service and belong to resource groups with company connections [1][2]. Verify site access per user entries match the sites where work will be performed [1].
Action 2:	[ ] 2. Define Workflow Configuration

	Access Service/Work Management/Mobile Maintenance/Workflow Configuration and define the Configuration Types your organization will use: Standard Work Order Task, New or Additional Work, Bundle Task, or Configured Work Task [3]. Set filter criteria to trigger configurations at the right point in the Work Task lifecycle [3].
Action 3:	[ ] 3. Establish Work Assignment Status Workflow Document which Work Assignment statuses your organization will use, including Accepted, Travel, Waiting, Work Start, Complete, and others as needed. Map them to actions or form triggers, and confirm that team members understand that mobile updates Work Assignment status, not Work Task status directly [4].
Action 4:	[ ] 4. Plan Bundle Task Deployment If related tasks are grouped, configure Bundle Tasks to calculate duration from included tasks and create Work Assignments for allocated resources [6]. Document that Bundle Task status changes automatically drive the status of relevant individual tasks [6][7].
Action 5:	[ ] 5. Prepare Mobile Data Register required parts in Mobile Part Basic Data and connect mobile users to appropriate assortments [4]. Clean and validate customer, site, asset, technician, job-type, and open-work-order records before synchronization [8].
Action 6:	[ ] 6. Test Device Infrastructure Identify and test supported mobile devices and OS versions under real field conditions, including connectivity gaps, offline mode, charging, camera/GPS functionality, and security authentication [8].
Action 7:	[ ] 7. Conduct End-to-End Workflow Testing Test the complete job workflow from assignment through completion, including task history, forms, photos, time tracking, parts consumption, sign-off, and recovery from connectivity loss [8].
Action 8:	[ ] 8. Document and Train Prepare comprehensive documentation for technicians covering supported devices, authentication, offline functionality, Work Assignment statuses, configured action sequences, support escalation, and the limits of online-only features. Train the pilot team before field testing.
Action 9:	[ ] 9. Assign readiness ownership Name owners for resource setup, workflow configuration, mobile data, devices, integrations, training, security, pilot support, and the go-live decision. Record open gaps and the evidence required to close each one.
Action 10:	[ ] 10. Confirm governance and security controls Review access by site and task, device authentication, integration credentials, data retention, record cleanup, and the procedure for handling a lost device or an incorrect synchronized record before expanding the pilot.
Action 11:	[ ] 11. Define pilot and go-live criteria Select representative jobs and field conditions, establish support and recovery handoffs, and agree on the evidence required for pilot completion and a broader rollout. Operational metrics and handoff processes were not researched in the supplied report and should be confirmed by the implementing team.

Workflow boundary:	Current Spindlewick surface: an assessment/request workflow only. It is not an IFS integration and does not execute, synchronize, create, or update IFS records.

Proposed Spindlewick workflow (separate from the documented IFS capabilities): the current Spindlewick surface is an assessment/request workflow that captures and validates a work-order reference, site, and work description and saves a member result. It is not an IFS integration, does not execute a mobile task, does not synchronize with IFS, and does not create or update an external IFS record.

Assessment limitation: Not found / failed: What operational metrics and handoff processes support successful mobile field-service execution? Not researched in this run (budget). This checklist is an assessment aid and does not prove that Spindlewick has configured or connected an external IFS account.

Source notes: Citation markers [1]-[9] are retained from the supplied source-backed IFS assessment and appear beside the claims they support. The supplied materials identify official IFS Cloud documentation for Mobile Work Order (release 23R2), Mobile Integrations (release 26R1), and Dynamic Work Planning and Scheduling (release 25R2): https://docs.ifs.com/ifsclouddocs/23r2/WorkProcessing/AboutMobileWorkOrder.htm?StandAlone=true ; https://docs.ifs.com/ifsclouddocs/26r1/lang/en/MobileWorkOrder/AboutMobileIntegrations.htm ; https://ifs.com/ifsclouddocs/25r2/lang/en/DynamicWorkPlanningAndScheduling/AboutDynamicWorkPlanningAndScheduling.htm. Release and environment-specific details must be checked against the team's target IFS documentation and tenant.