Vimsoft Inc.

VimBiz
Service Request
Updates

April 2018
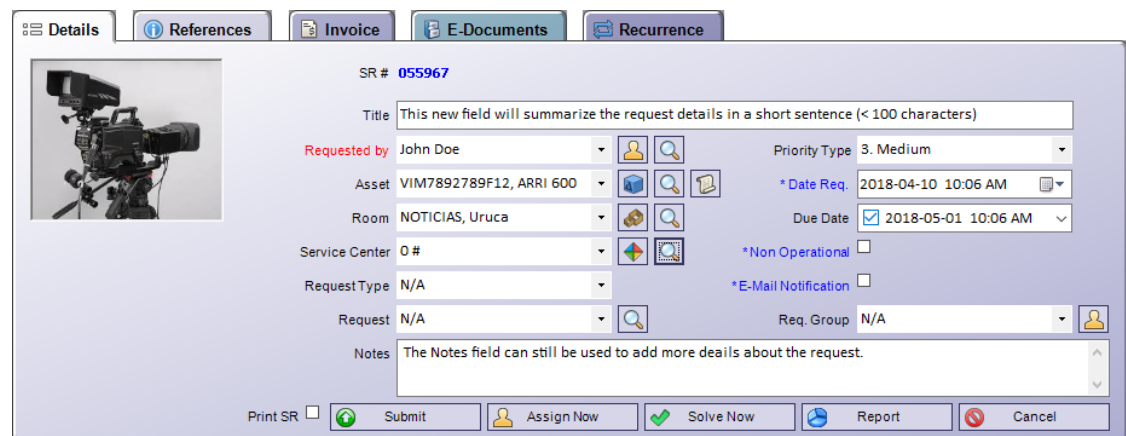Version 1.0

Contents

BACKGROUND

VimBiz users have requested improvements to the Service Request (SR) module to simplify information formatting and management. The VimBiz 2018 release contains improvements to the SR module which will allow users to maximize the documentation and communication of the activities needed for each Service Request. The two major changes are as follows:

REQUEST #1

To allow a quick review of multiple Service Request's in a more simplified grid view, it would help to summarize each SR in a short sentence using a new text field.
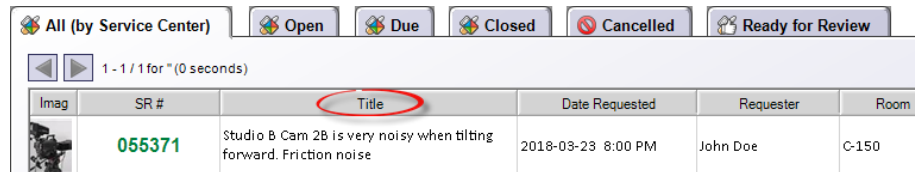
SOLUTION

New Service Request form

- A new **Title** field has been added to the Service Request which can be used to summarize the details of the request.
- The **Title** field will be used to quickly view and manage SR lists.
- The main Service Request functionalities and workflows do not need to change; however, it is highly recommended that the requester summarize the details of a Service Request in the **Title** field.

- Forms that display multiple Service Requests in a grid have been updated to display the new **Title** field.
- All Service Request forms and reports have been reviewed and updated to display the new **Title** field, where required.
- If more details are required, the requester can use the Notes field.

Manage Service Requests form

Imag	SR #	Title	Date Requested	Requester	Room
	055371	Studio B Cam 2B is very noisy when tilting forward. Friction noise	2018-03-23 8:00 PM	John Doe	C-150

Tabs: All (by Service Center) · Open · Due · Closed · Cancelled · Ready for Review

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- The Manage Service Requests forms have been simplified to display all the Service Requests in a single row (no longer stacked).
- Users can add or remove their preferred fields to the grid.

Email Notification

The Email notification format has also been updated to display the Title field.
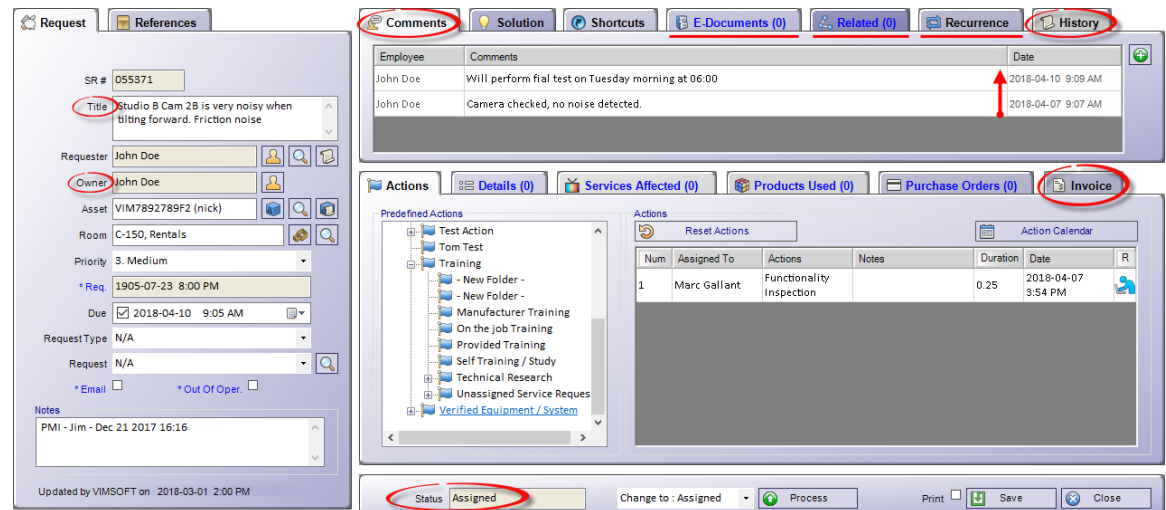
REQUEST #2

The Service Request process should allow multiple users to easily add multiple comments during the actions and testing activities. Adding Comment records should be quick and easy to write and read. The information should be organized in a similar format as an email tread and linked to the Service Request.

SOLUTION

The VimBiz Service Request forms have been optimized to allow easier access to the Comments tab. The Comments records are not new functionality; however, the layout of the forms has been optimized to use the existing Comments records as the preferred method to add all Comments during the execution of a Service Request.

New Layout Notes

- The Service Request details are now displayed in the left pane of the form along with the Reference, Owner and Request information.
- The new **Title** field has been added.
- The Comments Tab is displayed in the top panel and is now the default Tab.
- The E-Documents, Related and Recurrence tabs are now always displayed and available.
- The new **History** Tab is used to track important status-type changes.
- The **Comments** records thread is ordered by date/time in descending order; the latest comment is always displayed at the top.
- The current Status and Next status setting options are now displayed in a separate panel at the **bottom** of the form. The Process button activates the Next status process.
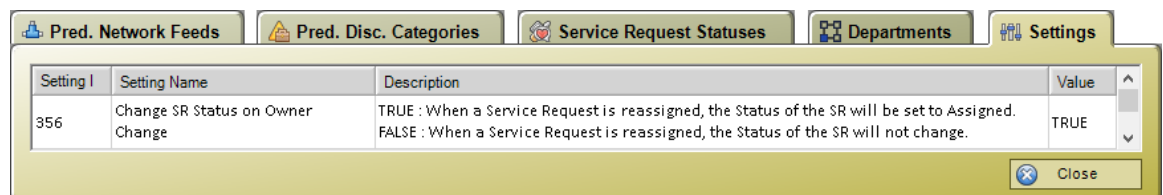
ADDITIONAL NOTES

- The Email notification format has been updated to display the **Comment** information.
- The **Shortcut** tab has been updated with a new layout:
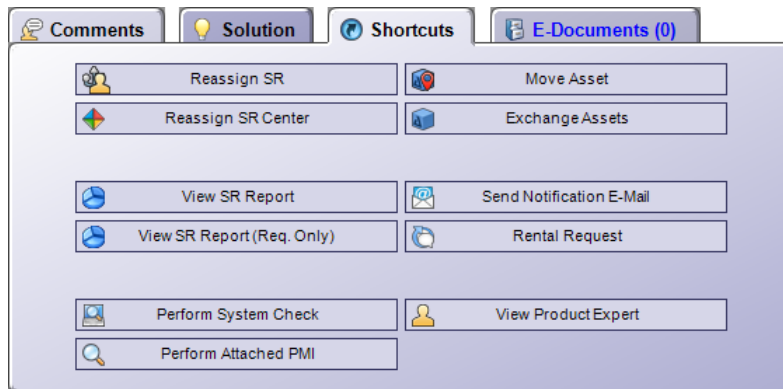
Service Request Reassignment option
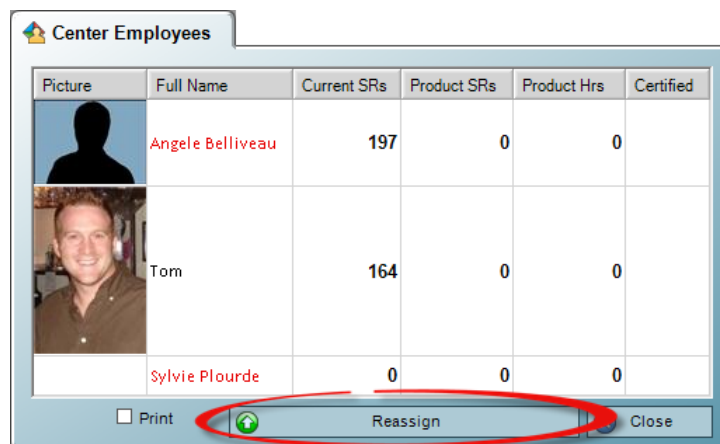
The re-assignment of the SR has been updated to allow the selection of a different SR Owner without updating the SR Status. New Service Center setting 356 is used to set this option.

Additional Comment Usage Notes

- Users cannot change the Comments author's name.
- Each Comment record is automatically time-stamped to assist the user when adding a new comment.

- To avoid confusion, the Comments text will only be editable by the author for one hour after its creation.

Closing Note

- The user has the option to use the Solution notes to log the solution to more complex requests.
- The Solution notes should be used for Knowledge Base information, which can be compiled to help find the proper solution to similar diagnostic and symptoms company-wide.
- The Comments records should be used as the main source of information to communicate the progress of the Actions and Testing.
- If a user prefers to use the Solution tab, this can be set as the favorite tab.