**Information**

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| --- | --- | --- |
| **CRIM ID** | **Title** | **Workstream** |
| C0740 | Bring notes from service contract to service request– v0.1 | Service Management |

**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision** | **Date** | **By** | **Remarks** |
| 0.1 | 28/07/2021 | Erika Sukevic | Base spec |
| 1.0 |  |  |  |
| 1.1 |  |  |  |
| 1.2 |  |  |  |

# CRIM Narrative

We need a new custom field on the Service Request and Prepare Work Order screen (Prepare tab) which would bring the notes from the service contract this job has been raised against. The notes should be populated as the Service Request is saved.

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application, email

Description automatically generated

Please note that the notes from service contract should be taken from both contract header and the service line which associated with the work order.

Graphical user interface, application

Description automatically generated

Graphical user interface, application, Word

Description automatically generated

To find which contract and line event should look at it needs to use Contract ID and Line No fields from the Service Request.

Graphical user interface, text, application, email

Description automatically generated

Graphical user interface, application

Description automatically generated

However, in some circumstances the work order can be raised on the back of the PM Action or Service Quotation meaning these fields will be blank. If they are blank, please use Contract ID and Line No fields from work task instead to populate custom field.

Graphical user interface, application

Description automatically generated

# Technical Solution

* Added custom field - Notes

Graphical user interface, text, application

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Approved detail views – Active\_Separate\_UIV needs to be approved, published.

Graphical user interface, application

Description automatically generated

* Database Method - C\_EA\_Customization\_Util\_API.Get\_Service\_Contract\_Notes\_WO

Permission granted as follows,

Go to Permission Sets Window 🡪 Permission Set – IFS\_ALL 🡪 Database Objects Tab 🡪 Select IFS Customer runtime configuration component 🡪 C\_EA\_CUSTOMIZATION\_UTIL\_API 🡪 Grant Permissions to the Get\_Service\_Contract\_Notes\_Wo Method.

Graphical user interface, text, application, chat or text message

Description automatically generated



# Delivery Notes

**Package** – EA\_SERVICES

**Permissions Granted** – IFS\_ALL

**Custom Field**

1. **Service Request Window**

**Note –** If the Notes Custom field is not available in the Service Request Window, RMB on the General Tab Section, Properties, Layout, Tick Use Customized screen layout and add the Notes Field.

Graphical user interface, text, application, email

Description automatically generated

Graphical user interface, application

Description automatically generated

1. **Prepare Work Order – Prepare Tab**

**Note –** If the Notes Custom field is not available in the Prepare Work Order – Prepare Tab, RMB on the General Tab Section, Properties, Layout, Tick Use Customized screen layout and add the Notes Field.

Graphical user interface, application

Description automatically generated