Getting started

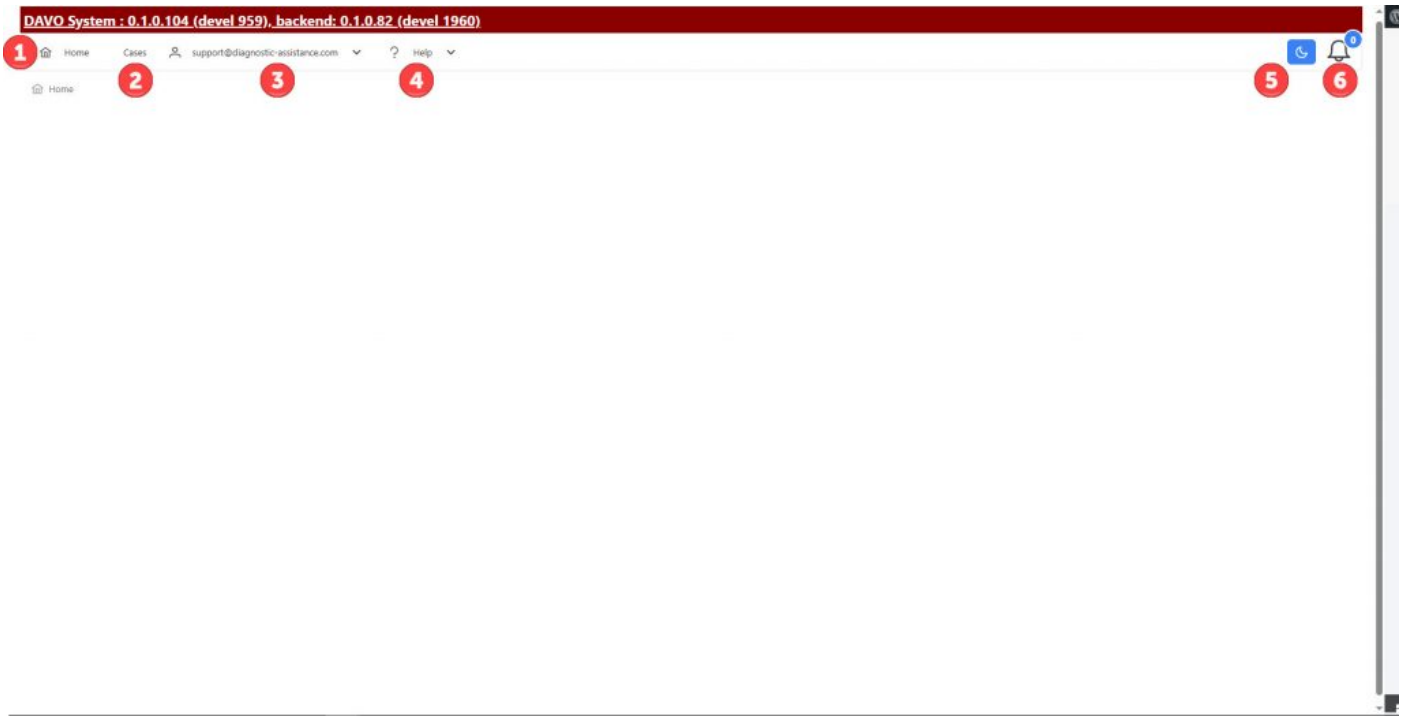
getting started · https://www.diagnostic-assistance.com/docs/get-going-it-all-starts-with-a-case/

Within the diagnostic assistance software, each diagnostic job begins with the creation of a case.

Cases are essentially diagnostic jobs or tasks that the technician would like to complete.

All of the actions and interactions that are carried out with and to that vehicle are recorded within the case.

This unique approach to managing cases enables technicians and garages to look back in history to see jobs that they've done and what we're done to those jobs.



1 - Home,

2 - View or Start a Case

3 - User Login

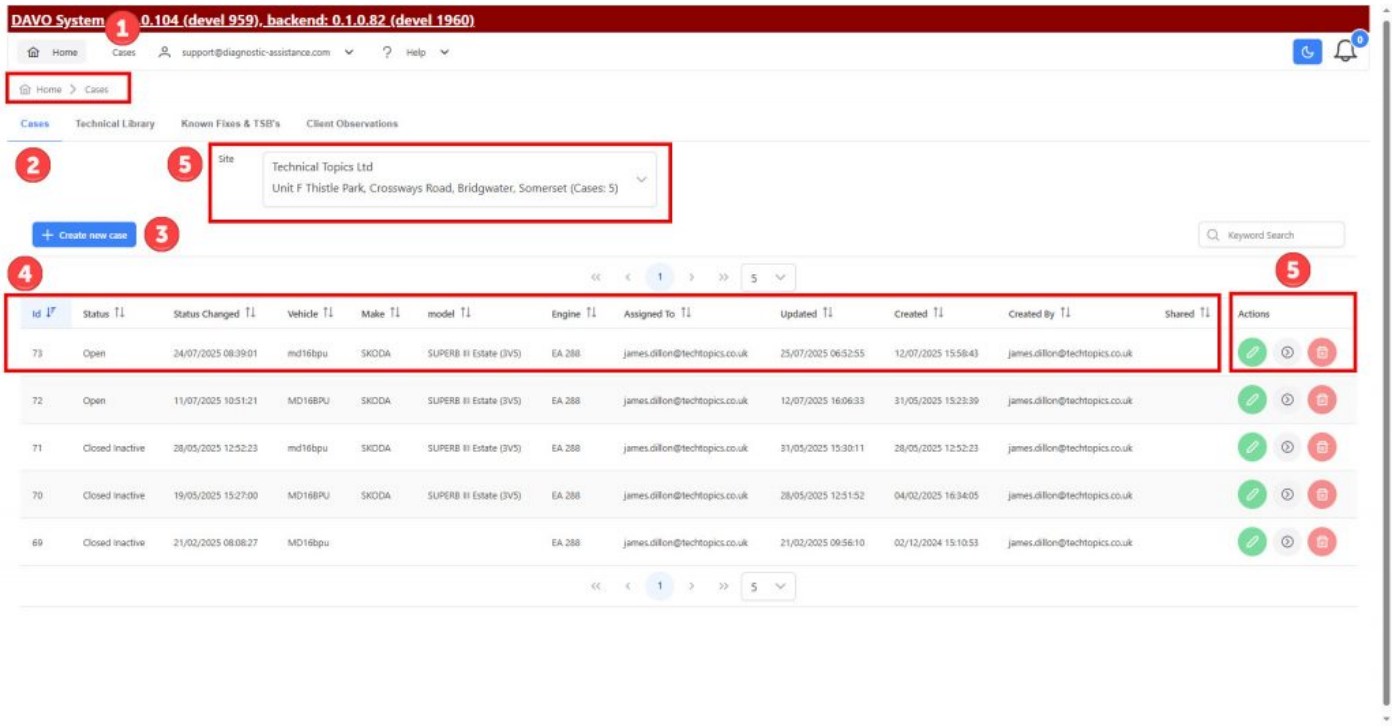
4 - Access Help

5 - Toggle dark/light mode

6 - System Notifications

one job one case.

When a vehicle problem first comes to the workshop, it should be created as a case within the diagnostic assistance software.



Click on Cases (1).

This will open up the **cases page (2)**, where you can either **create a new case (3)**, or review **existing cases (4)**.

The cases page will show a list of cases available to the currently logged in user.

A summary is shown in this view to enable the correct case to be identified.

Your **business site details** are shown on this page also **(5)**. The system has single and multi-site capabilities depending upon your business structure.

For each case which exists, you can use the **actions (6)** to either **edit**, **view** details or **delete** the case.

existing cases - status.

The cases which are **associated with the user** are listed in the case list **(4)**.

Once a case is started in diagnostic assistance software, it is assigned a unique case identifier.

All interactions with that case, are time and date stamped to enable an audit trail to be created.

The case is centred around a vehicle, make and model.

Cases have a status. The **status of a case** is typically either **OPEN, CLOSED FIXED, CLOSED UNFIXED, CLOSED INACTIVE or PAUSED**

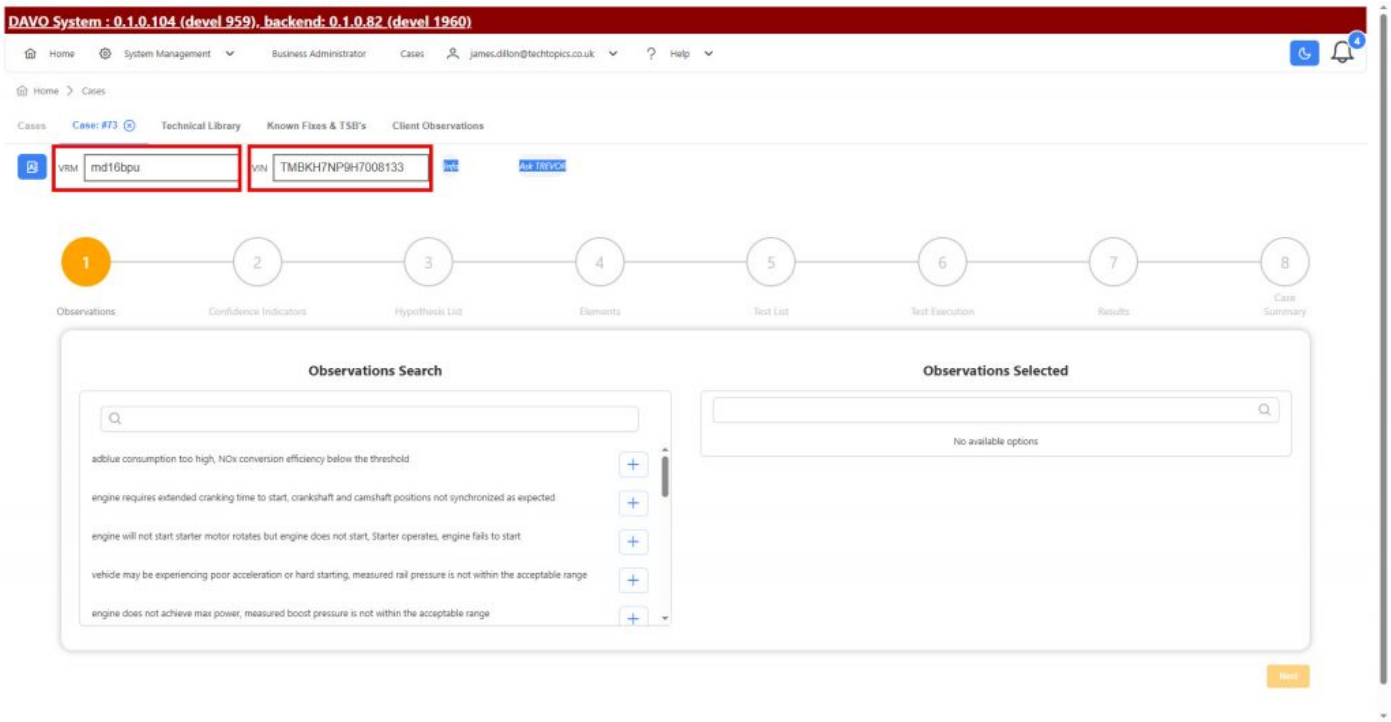
Where there is a garage user, the master administrator for that garage account will be able to see all cases on that garage account. Multiple cases for multiple users. Typical functionality for a garage manager and technician relationship.

Cases can be 'shared' between users. Users will either be in the same business (or group of businesses) or in the same friendship group.

building the case.

When a new case is created, the user has to indentify the vehicle, make and model via the VRM look-up.

The VRM look-up should return vehicle details and a VIN number. This basic information will allow the case to be started.



A case is started by either:

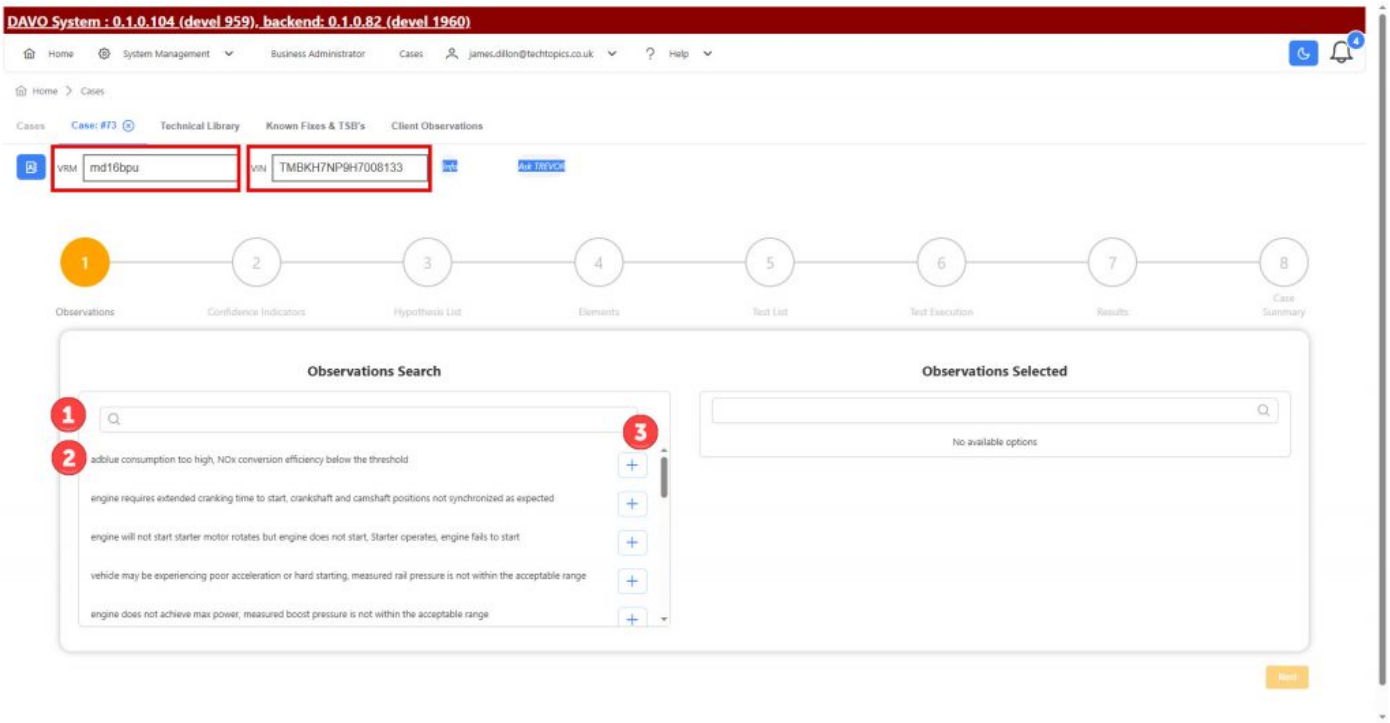
searching and selecting the **observation** - what symptoms or behaviours is the vehicle exhibiting **(1)**.

selecting the fault codes - what DTCs the vehicle is setting (1).

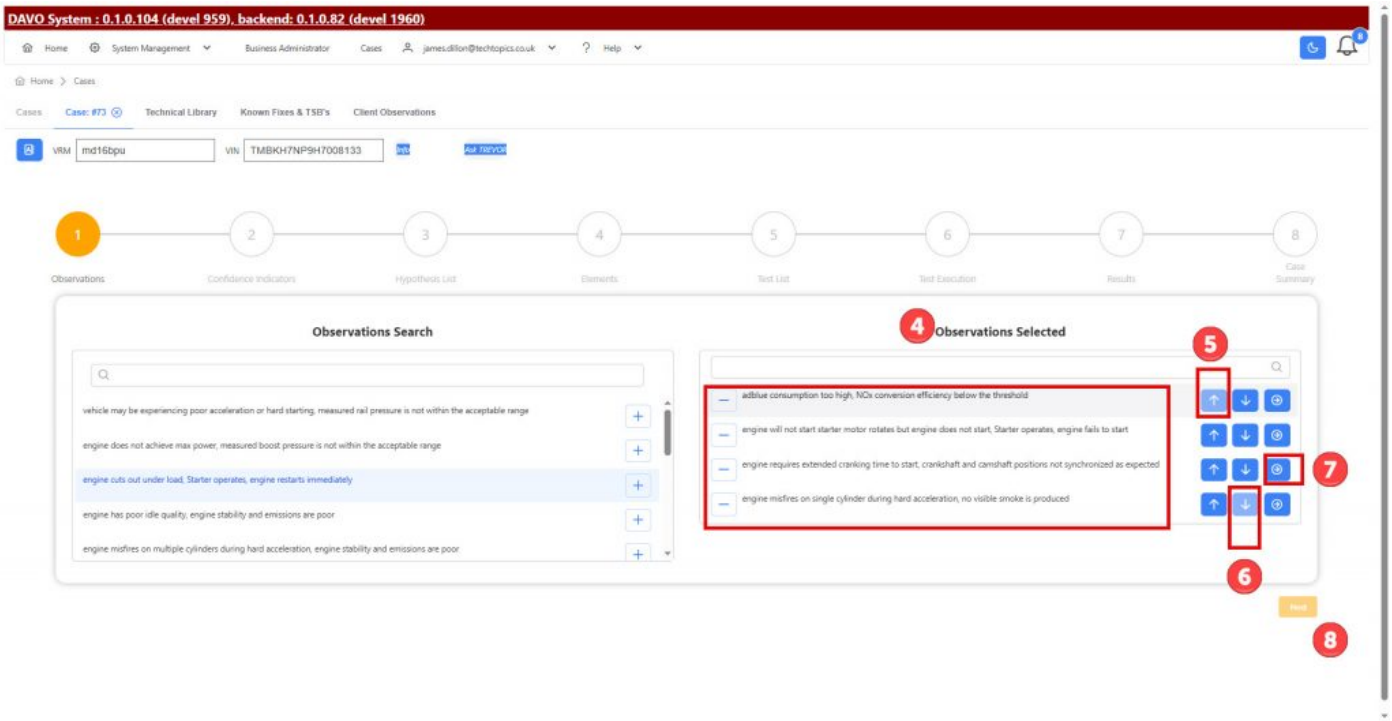
Either route will result in defining the starting observation(s) list (2).

Simply add the starting observations to the selected observations on the case using the **add button (3)**.

You can add as many or as few as are relevant for the job at hand.



In the following image, it can be seen that the user has added four observations to the **selected list (4)**.



These selected observations can be sorted from, most likely to least likely using the **promote button (5)** and the **demote button (6)**.

Once the user has organised the next step plan of action through the promote and demote process, they can begin by pressing the **commence button (7)**.

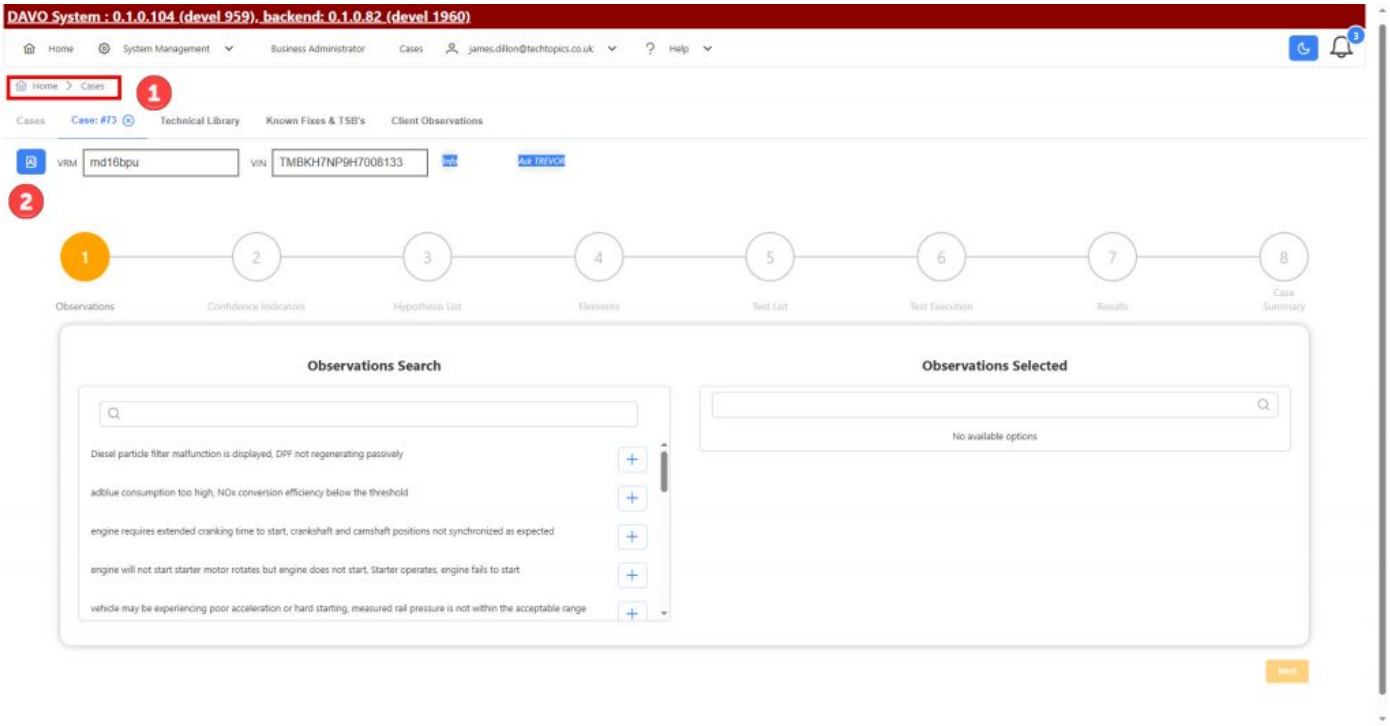
sharing and unsharing cases with others.

The case which was created as assigned to the technician who created it.

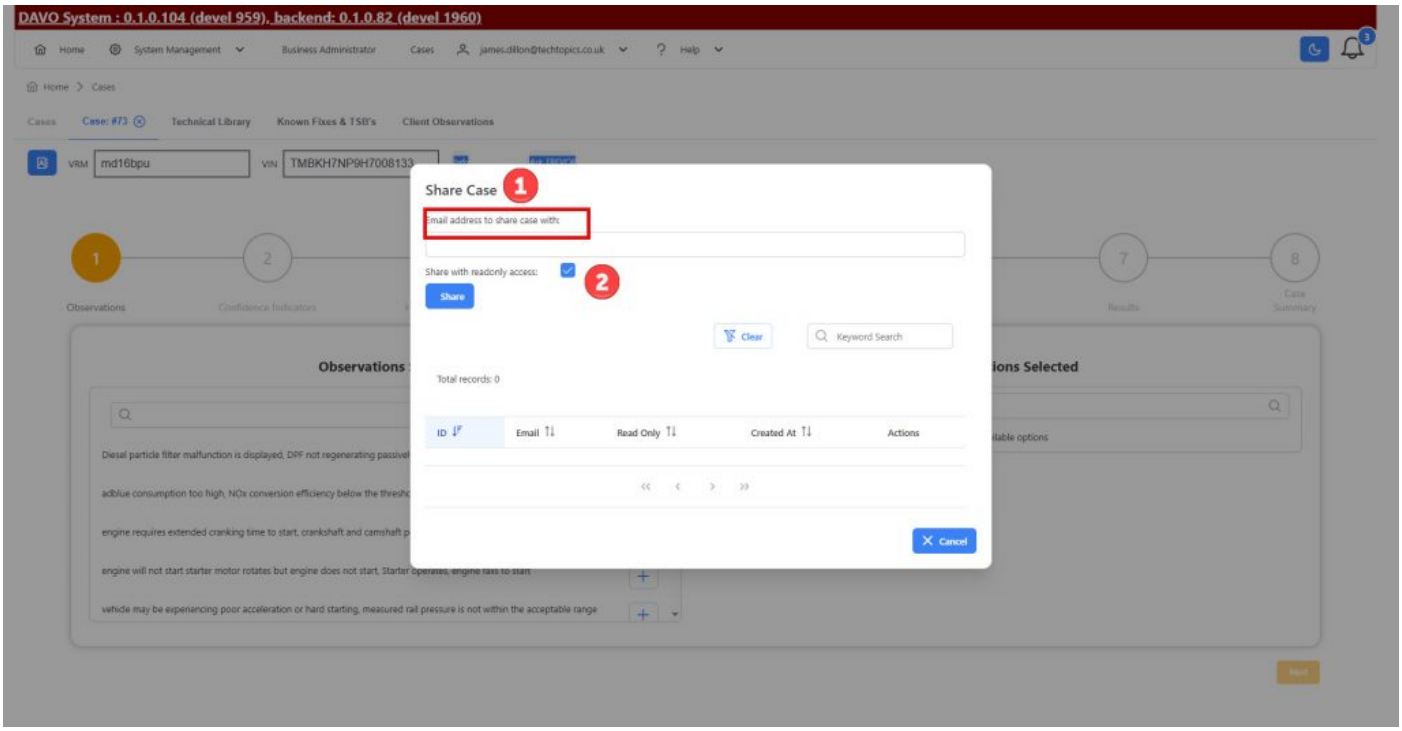
Technicians within the same garage and within the same friendship group have the ability to share cases among themselves.

This makes it particularly easy to collaborate on difficult jobs and to solicit advice within the context of the job from other technicians.

To assign a case simply open the case you wish to **share (1)**.



A pop-up box then opens, where the user enters an email address of the person they wish to share the case with **(1)**.



The option is to share a case as read only or fully editable case **(2)**.

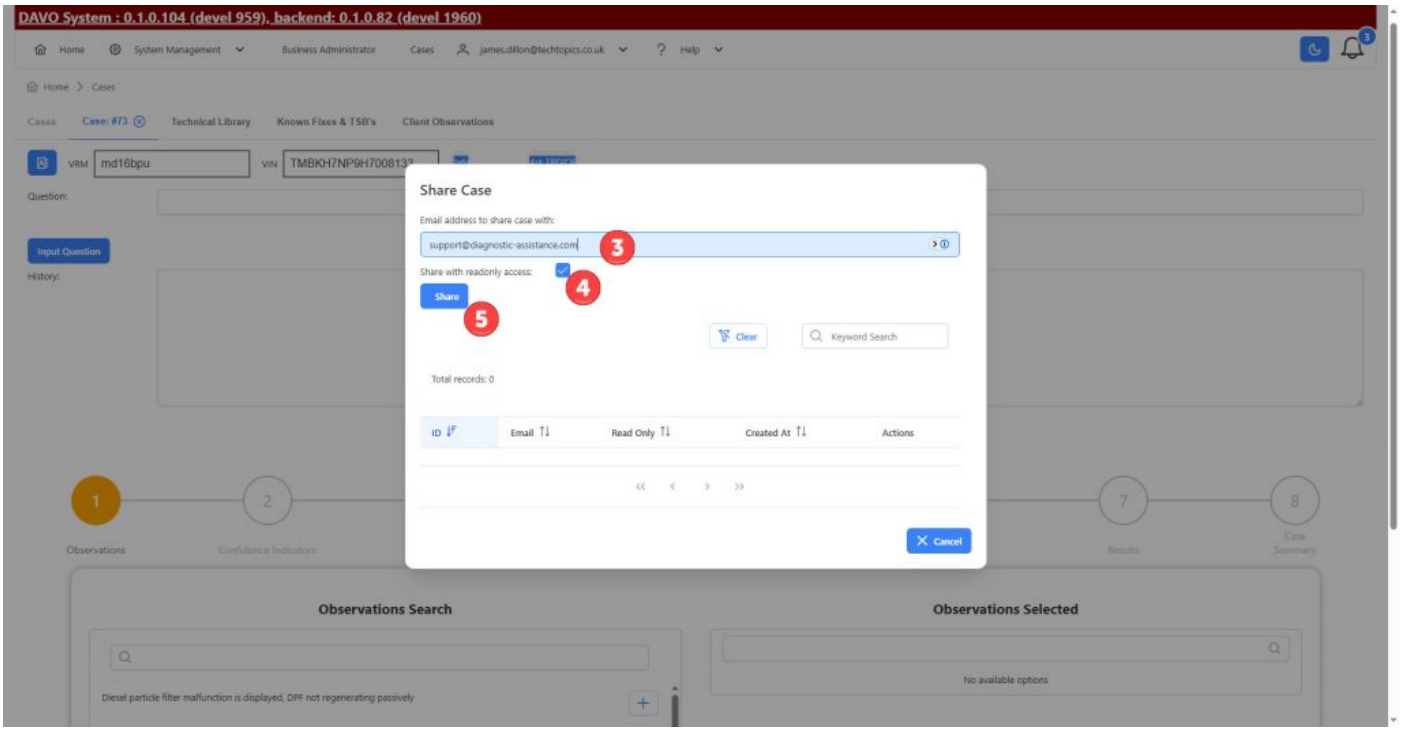
Read only enbles the sharee to read the case but not make any changes.

Where a case has been shared as fully editable, the sharee has the abilily to modify the case in the same manner as if they were the original owner.

To share the selected case, simply enter the email of the person you want to share your case with (3). The person MUST have an active account on Diagnostic Assistance.

Set the read only or not read only permission with the check box (4).

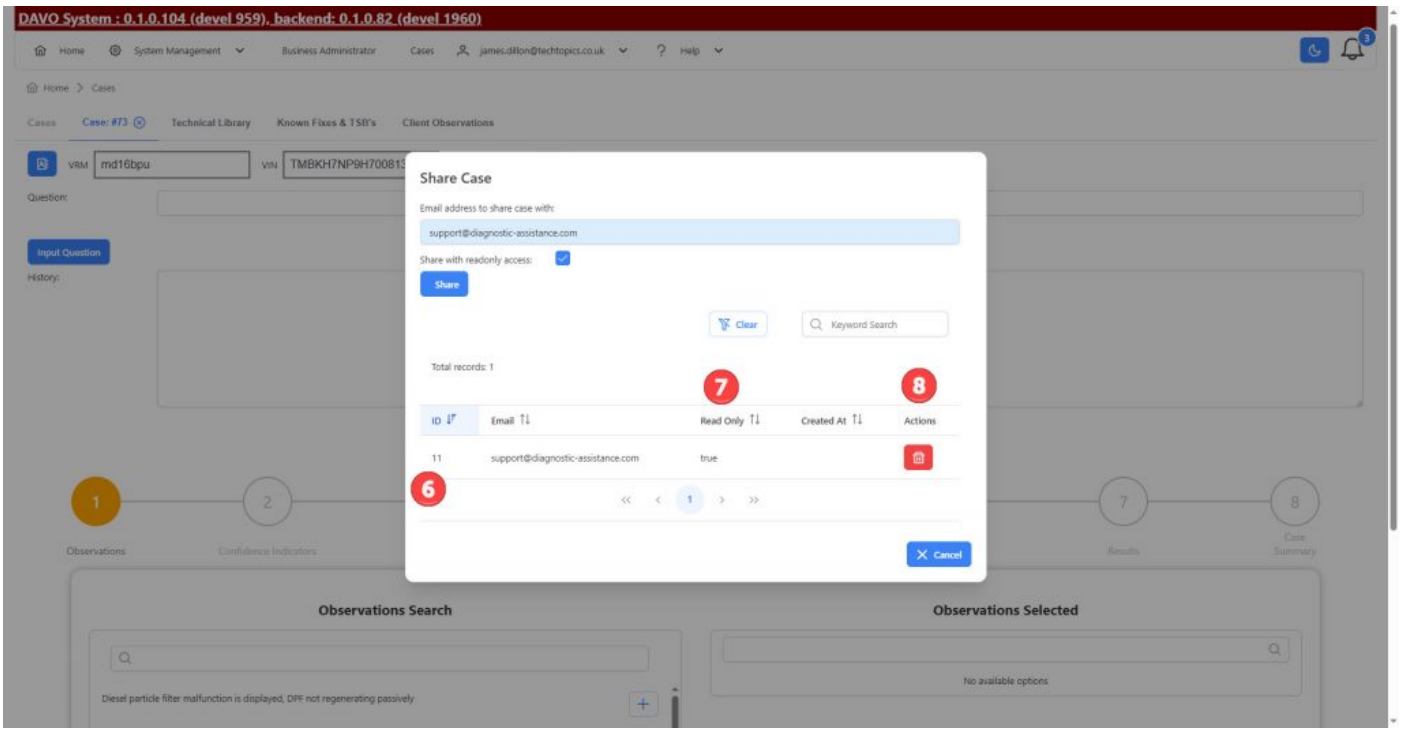
Click **share (5)**.



Once a case is shared, it will appear as a line item in your **shared cases list (6)**.

The status of case, shareded or not, will appear as a true or false flag in the Read Only column.

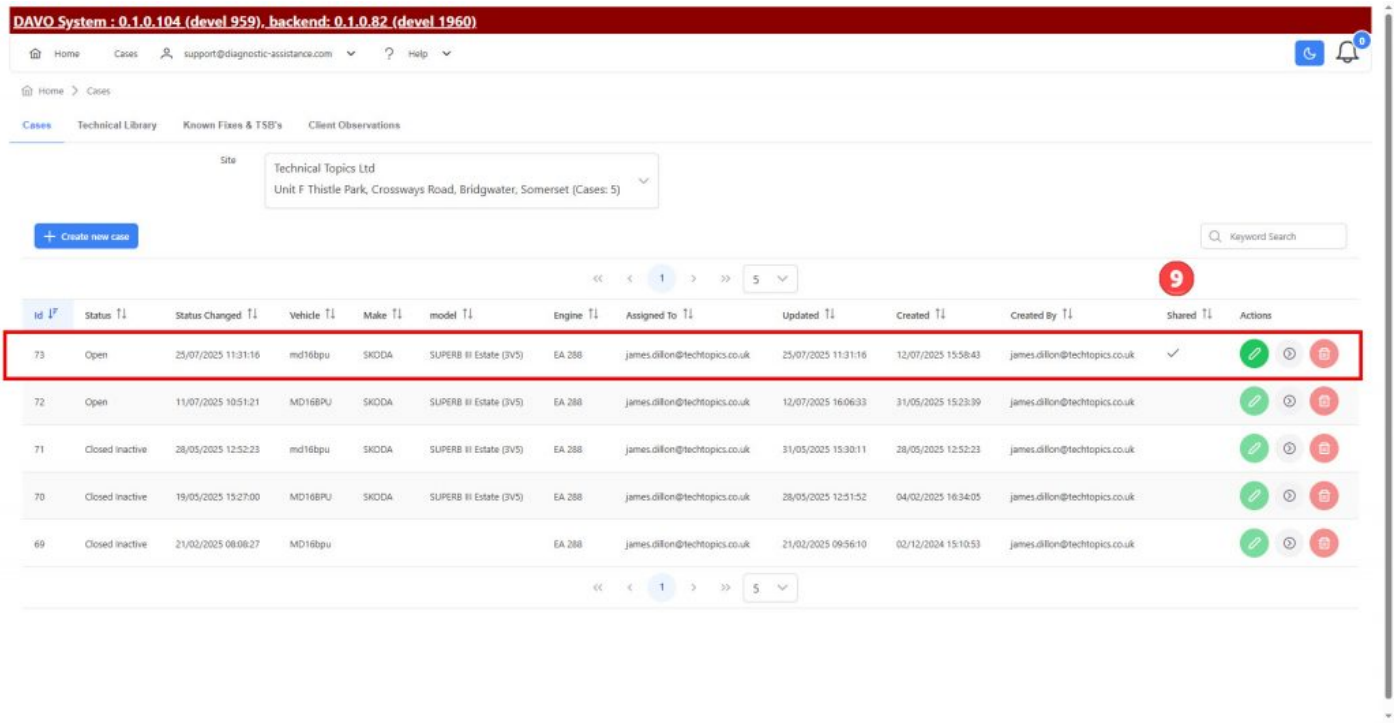
To remove access to the case share, select the case from the list, and press the BIN in the actions column for that case (8). Then the share will be removed.



Whe you share a case with another user, that case will appear in their own case overview page. It will have a status of shared (9).

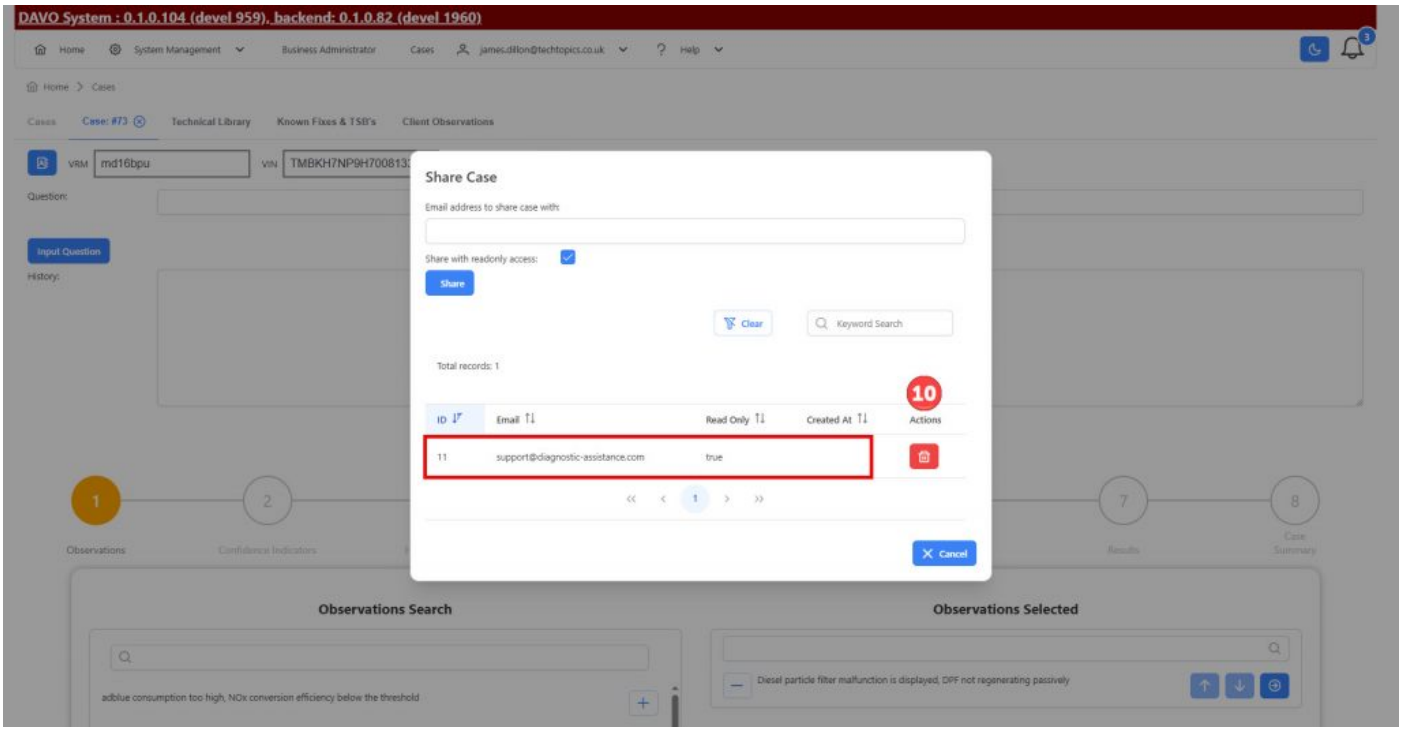
A read only shared case can be opened and examined, but not altered.

A fully shared case can be modified by the sharee in exactly the same way as the original owner. This is a powerful feature, so take cate to only share cases with other trustworty technicians.



The original technician will retain ownership of the case. When the shared case has been reviewed by the 'consultant' technician, the share can be deleted by the original 'owner'.

To delete a share, go to the cases share screen. Select the user from which you want to remove the share, and click **'delete' (10)** on the actions. The case will be unshared to that user.



Even whilst the case is shared, the original technician (and Garage) maintains full responsibility for that case.

Cases can be shared with one or more other users.

Exercise great caution to limit the users to whom you allow to have full access. Muitlple editors make for messy cases.