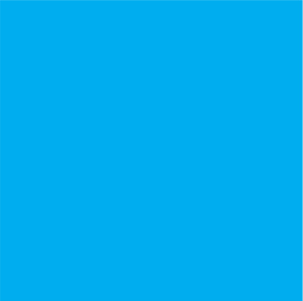
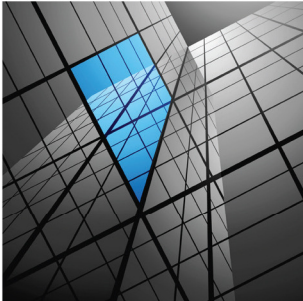




QFM Release Notes



What's New in QFM Web 1.35.00.08





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Version Log

Version #	Summary of Revision	Date	Author
1.0	First Issue	05/02/2016	MR
2.0	Second Issue. General changes made and Known Issues added.	18/02/2016	MR

Statement of Confidentiality

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Release Notices

There are no notices for the QFM Web 1.35.00.08 release.



New Features

Service Works Group is pleased to release QFM Web version 1.35.00.08. This document describes the new features included in this software version.

Changing an Event Contractor - Retaining the Original Visits

When using the QFM functionality which allows the contractor assigned to an event to be changed, it is now possible to retain visit records carried out by the previous contractor.

The ability to change the contractor on events which are in progress (i.e. not completed) remains unchanged. This is controlled by the General Setting **Max Status at which Contractor may be altered** (General Settings \ General Event Logging \ Performance Management). This setting should be set to **Completed** to enable the contractor to be changed at any active event status.

When changing the contractor, you can now configure QFM to retain (or remove) visit records from the original contractor assigned. Previously, in this scenario the original contractor's visit records would be automatically removed and there was no option to retain them.

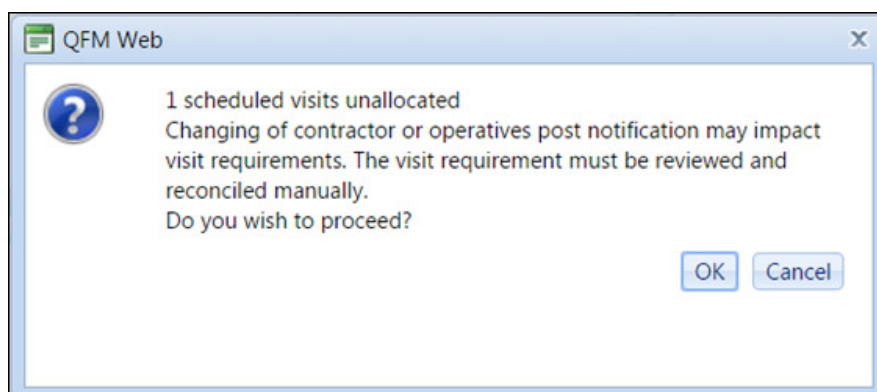
General Settings to Control Contractor Changes

The new General Setting **Keep Visit History if Contractor Changes after Notification** (General Settings \ General Event Logging \ Performance Management) enables original contractor visit records to be retained or removed.

If the new setting is set to **ON** and the **Max Status at which Contractor may be altered** setting is set to an appropriate status, then the contractor becomes editable and is able to be changed provided there are no outstanding confirmed visits. (Unconfirmed, Completed and Cancelled visits allow the contractor to be changed).

If there are visits in progress with the original contractor, (e.g. Dispatched, Confirmed, Started or On Hold), then the contractor is not able to be changed until these visits are finalised.

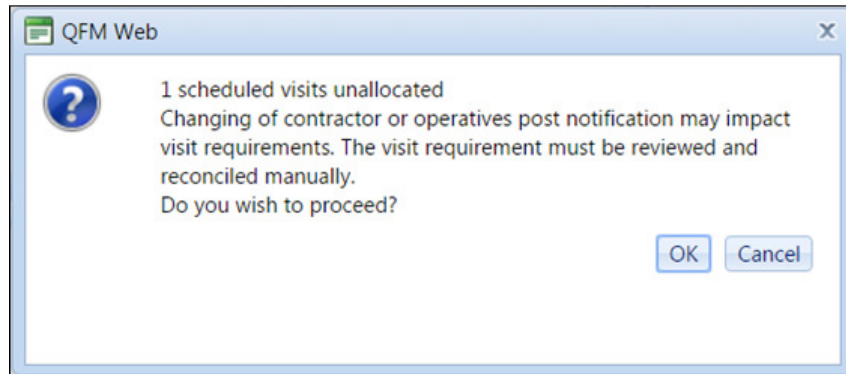
If there are visits assigned to the original contractor but they are Unconfirmed, QFM will unallocate these at the point of save. The user is warned (see example below) and allowed to proceed with this action or abandon the save. This is so that any visits made for specific skills but which have not yet been completed will remain present and be available to allocate to another operative.





Changing an Event Contractor - Removing the Original Visits

If the new setting **Keep Visit History if Contractor Changes after Notification** is set to **OFF** and the contractor is changed, the user is warned if active (non-cancelled) visits exist. They then have the choice to proceed or cancel the action.



Visit Features

There are a number of points to note when changing the contractor and wishing to retain previous visits from the original contractor:

- All previous visits must be Completed (or Cancelled).
If visits exist which are in progress, i.e. Dispatched, Confirmed, Started or On Hold status then the contractor cannot be changed.
- Any visits at Provisional or Scheduled status are automatically allocated to the new contractor.
- If a new contractor is assigned then the original Started Date of the event and any existing visits is retained.
- Event Worksheets always display visits assigned to the contractor currently assigned to the event. (Visits are displayed from previous contractors but without details such as contractor name, operative name etc.).

Extended Field Lengths

A selection of QFM fields now has a greater character capacity. The table below lists the fields together with the old and new character limit.

Field Name	Characters Increased From	Characters Increased To
Name (Site)	20	50
Name (Geography)	30	50
Location	20	50
Service	20	50



Field Name	Characters Increased From	Characters Increased To
Description (Service)	40	50
Service Group	20	50
Description (Service Group)	40	50
Worktype	20	60
Description (Worktype)	20	60
Model	20	50
Description (Model)	20	50
Equipment Group	20	50
Description (Equipment Group)	20	50
Asset Number	20	40
Equipment ID	20	50
Serial	20	30

These fields may be displayed in a range of screens.

Guest Self-Service Login to QFM

QFM now provides the ability to configure Guest User Accounts for Self-Service access to QFM Web. A guest account can be logged in simultaneously by multiple users, and would typically be configured to have access to a limited set of QFM features.

Guest Login functionality is particularly suited to a shared or 'kiosk' device which can be assigned its own Guest User Account, which is in turn mapped to a Guest Personnel record with an associated geography.

Guest Login functionality for Self-Service Users is licensed separately. Please contact your SWG Account Manager if you would like further details.

Note: Changes to the UI Wizard to support anonymous access and guest accounts are NOT supported for organisations using AD or SSO solutions.

Wizard Enhancements

General enhancements are made to the Wizard function.

Copy Tile Facility

The facility to make a copy of an existing Wizard Tile is added to the Design Mode.



When using Design Mode simply select the Copy icon to reproduce the tile. An example is shown below.



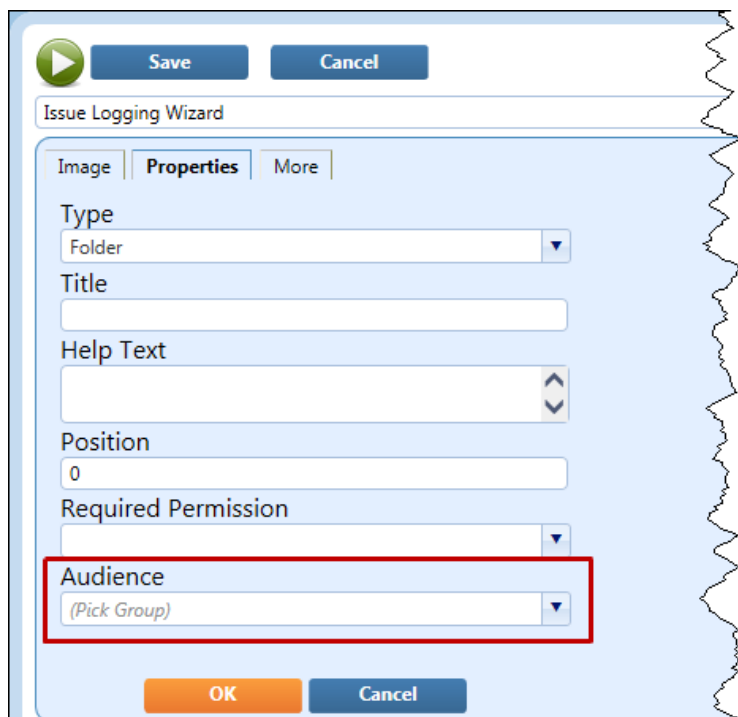
Properties Tab

A new **Audience** field allows you to specify a particular personnel Work Group, thereby restricting access to the UI form to members of the Work Group only.

Where no Work Group is selected, access is not controlled which means that anyone with access to the Event Wizard will be able to see the Wizard tile.

Where a Work Group is selected as the Audience, users who are not a member of that Work Group will not see the Wizard form.

Where a Wizard tile should be restricted to multiple User Classes, you will need to create a Work Group containing those User Classes and set the Audience to be that Work Group.



More Tab

New fields are added to all Event-based UI forms.



- **Project** field; select the method of population or a pre-populated value.
In the adjacent field to the right, configure the field to be Hidden, Read Only or Updatable.
- **Cost Code** field; select the method of population or a pre-populated value.
In the adjacent field to the right, configure the field to be Hidden, Read Only or Updatable.
- **Contact Name** field; select the method of population from the drop-down list
In the adjacent field to the right, configure the field to be **Hidden, Read Only** or **Updatable**.
Tick the box * to make this field mandatory for users.
- **Contact Email** field; select the method of population from the drop-down list
In the adjacent field to the right, configure the field to be **Hidden, Read Only** or **Updatable**.
Tick the box * to make this field mandatory for users.
- **Contact Phone** field; select the method of population from the drop-down list
In the adjacent field to the right, configure the field to be Hidden, Read Only or Updatable.
Tick the box * to make this field mandatory for users.

In addition, users now have the ability to default the **On Behalf Of** field to a value of **Reported By**, and the ability to default the **Cost Code** field to a value of **On Behalf Of**.

Where **Contact Name, Email** or **Phone** are displayed in the Wizard an additional **Contact Method** will also be shown with the following options; **Email Only, Email and Phone, Phone Only, No Contact**.

The screenshot shows a configuration wizard with several sections. The 'Project' and 'Cost Code' fields are highlighted with a red box. Below them, the 'Contact Name', 'Contact Email', and 'Contact Phone' fields are also highlighted with a red box. Each of these contact fields has a dropdown menu for population method and a 'Hidden' dropdown for visibility. The mandatory checkbox (input checked="" type="checkbox"/> *) is checked for all three contact fields. Other fields include Event Type, Workflow, Initial Event, On Behalf Of, Contractor, Operative, Site, Location, Unit, Partition, Service Group, Service, Work Type, Priority, Instructions, Reference, and various prompts like Submit Request and Cancel.

User Defined Forms - Satisfaction Surveys

QFM Web now provides the facility to create and distribute Customer Satisfaction Surveys. Customised survey questions, with a range of response type options can now be built. Surveys can be automatically produced at specified times and are completed by users via a URL link.

Survey results, including weighted scores, can be reported on in QFM Lists, from which notifications and dashboards can be configured.

The graphic below shows an example of a survey form.



The screenshot shows a satisfaction survey form for 'generic logo company'. The form is titled '7544 Rectified (Completed) Service Event, Install'. It asks the user to rate their level of satisfaction for four categories: Service Quality, Service Responsiveness, Self Service, and Communication. Each category has a dropdown menu with five options: Very Dissatisfied, Dissatisfied, Neither Satisfied nor Dissatisfied, Satisfied, and Very Satisfied. The 'Dissatisfied' option is currently selected for all categories. A 'Submit' button is located at the bottom right of the form.

Satisfaction Survey configuration is currently only available to Service Works' personnel. Please contact your SWG Account Manager for further details.

Scheduled User Reports

QFM Web now enables the scheduling of User Reports. This provides a flexible solution for the automated production and distribution of information from QFM Web. The scheduling of reports enables users (with the correct authorisation) to define specific timetables for the automated production and distribution (via email) of reports and information lists. The Schedule Profile provides a flexible choice of date/time ranges and frequencies, providing complete control over the process.

Scheduled User Reports functionality is currently only available to Service Works' personnel. Please contact your SWG Account Manager for further details.



System Administration

General Settings

General Event Logging

A new setting is added to the Performance Management section as follows:

- **Keep Visit History if Contractor Changes after Notification**
When set to **ON** enables original contractor visit records to be retained, when the contractor assigned to an event is changed.



General Reference Data - Guest Account Map

A new General Reference Data - Guest Account Map screen is added. This enables Guest User Accounts to be mapped to computer terminals or devices on a network, allowing a specific terminal to allow Guest User Logins.

The screenshot shows a web application interface for 'General Reference Data (Guest Account Map)'. At the top, there is a navigation menu with items: Events, Assets, People, Places, System, Bookings, Administration, Help, Logout, and a user profile for 'tester5_RS'. Below the navigation is a header with a home icon and the title 'General Reference Data (Guest Account Map)'. A dropdown menu shows 'Select the items you wish to update' with 'Guest Account Map' selected. The main content area features a table with columns: IP Address, Guest User, Landing Page, and End Date. Each column has a dropdown arrow. Below the table, it says 'No records to display.' At the bottom of the main area, there is an 'Add Item(s)' section with a plus icon and a checkbox. Below this is a form with fields for IP Address (placeholder: '(Enter IP Address)'), Guest User (placeholder: '(Enter Guest User)' with a dropdown arrow), Landing Page (placeholder: '(Enter Landing Page)'), and End Date (with a calendar icon). An orange 'Add' button is at the bottom of the form. The footer contains 'Powered by QFM Web Technology', a 'Licence Information' link, and 'Copyright 2015 Service Works Group'.



Follow the steps below to add new account maps:

1. Select   **Add Item(s)**..
2. Add the **IP Address** of the terminal to be used.
3. Add the **Guest User** name (as set up previously in the Manage Users screen).
4. Add a **Landing Page**, (the initial page displayed after login). For example, `~/App/Events/Pages/WizardFMPickIssueAdmin.aspx?FOLDER=Self%20Service`
5. Add an **End Date** (optional) on which the Guest Login will no longer be active.
6. Select **Add**.

Generating Custom Routes with QR and Barcodes - Manage Routes Screen

Support for QR Codes is enhanced to include the creation of a QR Code for any page in QFM Web.

The existing Routes page allows you to create individual routes and also generate batches automatically for various features, such as Sites, Geographies, Assets and Check-Ins/Check-Outs. A new Custom Routes feature allows this to become slightly more dynamic, so that you can specify a place holder and an Entity Type. Manage Routes will generate URLs for every Entity entry of that Entity Type, substituting the place holder for the ID.

This has the following benefits:

- Using a static URL mapped to a real QFM Web page means the URL stays the same forever even if the underlying page changes. You simply modify the route in the routing table. This is particularly useful for QR Codes and Bar-codes.
- The number of times the page is accessed (Log Hits) can be tracked along with the location of the users who have accessed it (Geo Tag).
- Pages can be generated automatically for URLs that contain ID parameters.

Please contact your SWG Account Manager if you are interested in utilising Custom Routes functionality.



Known Issues

Service Works Group is currently aware of the following software issues in the QFM Web release 1.35.00.08. These will be rectified at the earliest opportunity.

Event History Reports

The new format Event History Reports are incompatible with older legacy Event History Reports. Any filters applied to legacy reports are not carried forwards. Clients are advised that whilst they can still make use of older reports and their associated filtering this is not recommended as they will not benefit from future changes and may be incompatible with newly introduced features. It is recommended that Clients manually re-apply required filters to new reports and suppress their legacy reports as soon as is practical.

Login

QFMW-22137 Users may be unable to login to QFM Web using their current time zone when a daylight saving time change occurs (local time). This only occurs on the first login after such a change. Users need to select a different time zone with which to login.

Events

Find Event

QFMW-18837 When searching for event records in the Advanced tab using the 'Event Group' (Service Group) and 'Event Name' (Service) fields, then change to a different Event Type, the 'Event Group' and 'Event Name' search values are incorrectly retained.

Event

QFMW-14769 Service Events - if the Service Work Type is changed and the new value is set to automatically populate event Instructions, the system does not present an option to retain the original event Instructions and will overwrite these with the Instructions attached to the new Service Work Type. As an interim measure, users are recommended to also add Instructions to the Notes facility.

QFMW-14776 When using QFM Mobile in View Only mode, selecting field drop-down lists by clicking/tapping the down arrow, may cause JavaScript errors.

QFMW-16715 When attempting to amend the Priority of an existing event, if the database setting 'Synchronise Due Date with Escalations' is in use but the Event Priority does not have the correct escalations set up, the attempt may fail with the message "The system is set up to Synchronize Due Date with Escalations but an appropriate Escalation is not set up for this Priority".

QFMW-16769 When attempting to generate scheduled events, if the database setting 'Synchronise Due Date with Escalations' is in use but the Event Priority does not have the correct escalations set up, the attempt may fail with the message "The system is set up to Synchronize Due Date with Escalations but an appropriate Escalation is not set up for this Priority".

QFMW-18382 When attempting to complete an Incident Event (Key Dates tab) by adding a date in the 'Completed' field then selecting the 'Update' button, a validation error may occur stating that the event "cannot be Completed before Started". The interim solution is to use the 'Completed' button.



- QFMW-18688 When two or more operatives, using QFM Mobile, have carried out work on an Event, the Worksheets generated from QFM Web display all signatures on the last page only and signatures may not relate to the operative shown on the worksheet.
- QFMW-20440 Event worksheets for events where the Event Type is inactive, cannot be generated.
- QFMW-21025 When logging an Asset Event, if you include an additional level of geography to the Event which is lower than the Asset geography, when saving the Event there is no validation warning that the asset is registered at a different geography.
- QFMW-23122 When a contractor assigned to an event is changed, QFM does not automatically allocate a Visit to the new operative.
- QFMW-22060 The cost of items added in the Event screen Parts tab are not currently picked up in the 'Parts Cost' Actual field in the Event screen Costs tab.
- QFMW-22393 Issues exist after default Instructions are set for a Work Type (in QFM desktop) and new Events are logged.
If Instructions or audit stamp are entered and the user then picks or changes the Work Type, the default Instructions text overwrites the text entered.
Additionally, if a user saves an Event at Reported stage and has locked-down read-only Instructions, then changes the Work Type, the default Instructions text will still overwrite the read-only text.
- QFMW-22643 Quotes are not currently supported on Asset Events.
- QFMW-22656 Porterage Events - if Event Costs are configured as mandatory to complete, it is then not possible to save Porterage Events as they do not display a Cost tab.
- QFMW-22659 When adding Parts to an Event, the 'Req. Date' calendar default may be set to the beginning of the year rather than the current date.
- QFMW-23131 When the contractor/operative is changed on an event, the Event History does not display a record of the new contractor/operative.

Event Director

- QFMW-20652 When viewing a saved View, if you click the 'Column filters are applied' link, the column filters are removed and the screen re-loads. At this point other functionality, e.g. the Include/Exclude columns link, may fail to work. The screen must be refreshed after clicking the 'Column filters are applied' link, to enable other links to work.
- QFMW-23346 When selecting Quick Watch and Shared Watch views, the results returned in the list of events may be incorrect.

Resource Scheduler

- QFMW-19906 Attempting to sort Visit grid columns before the Resource Scheduler screen has fully loaded, may result in a system error.
- QFMW-21192 Users are unable to move between Resource Scheduler tabs when using the display 'Optimised for Tablet' option.
- QFMW-21922 When a Visit Reference is selected, if the user then selects the Map first then either the Details View or summary View the system fails (Tablet mode) or errors occur (Desktop mode).



Timesheets

QFMW-20517 Event Timesheets are not splitting Event Visits which are created via QFM Mobile and span multiple days.

Assets

Find Assets

QFMW-23195 When loading an asset from a list of returned results, the following message may be displayed briefly "The server method 'GetLocationGeography' failed". The asset record will be loaded as normal.

Schedule Planner

QFMW-21777 When applying filter criteria for assets, the search returns results including all assets which share a connection with any matching assets, not just schedules for matching assets.

Places

Property Viewer

QFMW-19388 When selecting several properties at different hierarchical levels for the same site in the tree view panel, then selecting the search button, the navigation arrows above the main panel fail to move between the different properties.

Site Explorer

QFMW-23352 Attachments are not being displayed at Site level in the Documents screen, despite being displayed on the event and in the Geography Details section.

System

Options

QFMW-14615 The job count, displayed on the Options screen icons, may not match the number of events in the relevant list, when the administrative setting 'Check In Includes Child Geography' is set to 'Off'.

Explorer

QFMW-15277 System issues may occur when selecting a category of Active Events with a large volume of records (i.e. 15,000 + records).

QFMW-21281 The system may not be accurately scoping events by user and as such folder counts may be incorrect.

QFMW-23347 When the tree structure parent folders for Quick Watches and Shared Watches are selected, no events are displayed in the main panel despite the folders showing a number indicating events are present. (Events are correctly shown when sub-folders are selected).



Report Centre

User Reports

QFMW-20747 It is recommended to manually refresh the screen prior to running each report, otherwise data may be persisted from previous report generation.

Room Booking Reports

QFMW-23341 The Room Booking Daily Updates Report has an extended summary box which runs over from the first page to the second page.

Event History Reports

QFMW-20874 The 'Event History Report - With Operatives' does not return correct results when searching for Events with multiple specific Operatives assigned (e.g. both Operative A and Operative B are assigned to an Event). Although users can set this criteria up using separate Operative criteria lines and the 'AND' logic selector, this feature isn't supported for operative search functionality.

Dashboard

QFMW-21659 Affects Chrome browser only - event site summary information is not displayed when a flag is selected in the Google Map widget.

Lists

QFMW-22678 Warning. The Lists available from the Report Centre do not respect Data Scope constraints implemented in other areas of the product. It is recommended that Lists are not made available to end users where this may cause data security concerns.

QFMW-23337 When exporting a List to Excel, a file format message may be displayed. Selecting 'Yes' allows the process to continue.

QFMW-23348 The 'Room Booking Meetings' List report fails to include hourly equipment costs. These costs are correctly displayed on the booking itself but not on Lists.

System Diary

QFMW-22902 Booking setup and clear times may not be correctly displayed in the Activity Details window. The setup and clear times appear not to respect time zones, when in use.

Bookings

Book a Room

QFMW-16740 When rooms are set up for partitioned (overlap) bookings, (e.g. Rooms A, B and C) and two of the rooms are incorporated in a booking (e.g. Rooms A and B) then the remaining room configuration which should be *available* for booking (in this example Room C) may incorrectly show as *unavailable* for bookings.

QFMW-23336 The 'Booked By' field currently displays personnel in an inconsistent manner. All personnel available are shown in the drop-down list. However, the Lookup window shows a restricted list.

QFMW-23340 The 'Cost' and 'Charge' field labels need to be swapped on the Catering and Refreshment screens. (The Cost value is the amount to buy the item and the Charge value is the amount charged to the customer for the item).



QFMW-23339 An inconsistency exists between QFM Web and Desktop Bookings. When applying an hourly cost to a booking on QFM Desktop the Setup and Clear times are excluded from the calculated cost. When applying an hourly cost to a booking on QFM Web the Setup and Clear times are included from the calculated cost.

Administration

General Settings

QFMW-6954 Room Bookings - there is no setting present to control email notifications to attendees. Notifications are sent to attendees if added, therefore settings from the QFM Desktop application are being used.

General Reference Data

QFMW-18855 'Import / Export' - a server error may occur when importing an Excel file, if the file format is changed.

User Defined Forms

Survey Forms

QFMW-22982 When adding a new Lookup Type, the 'In Use' tick box which enables/disables the functionality is not ticked by default. In this scenario the tick box should be ticked by default.

Additionally, when deactivating the 'In Use' tick box there is no validation or warning that this can cause a blank survey item.

QFMW-23282 When defining question and answer sets for use by UDFs, apostrophes should be avoided as these cause problems with generated results list.



QFM Installation Notices

The QFM desktop minimum version requirement for this release is QFM 164.08.06.
This release is compatible with QFM Desktop 164 versions only.

Service Works Group (SWG) does not recommend QFM Web is run with Internet Explorer 6, 7 or 8 browsers. Use of these lower specification browsers may result in users experiencing unstable operation, script, rendering and performance issues. SWG has no current plan to address these issues.

The Workflow Scheduler is a mandatory requirement in order to run this QFM Web release, as it performs essential background tasks.

SWG is not responsible for user defined reports and should a client upgrade from a non-time zone database to a time zone enabled database it is likely that their user defined reports will be affected as all times and dates will be relative to UTC not local time.

SWG strongly recommends clients review all reports against an upgraded database before relying on the output.

It is the responsibility of the client to ensure any issues are addressed, however Service Works Group may provide consultancy at the standard rates specified in the Customer Order to help the process should this be required by a client.

Please contact your SWG account manager if you need to make use of this service.

QFM Web includes SAP Crystal Reports runtime environment to enable users to benefit from integrated web based reporting. Clients should refer to the SAP website (www.sap.com) to understand the full strengths and capabilities of the product. SWG will make best endeavours to help support and resolve any issues that arise in this environment but as it is a third party product SWG does not provide any warranties over its abilities or functionality. SWG will aim to implement new patches to this software as they become available and are viewed as stable. It is the client's responsibility to ensure that any bespoke user reports work within the environment provided. Furthermore, extensive concurrent use of reporting within QFM Web can negatively impact the performance experienced by interactive users. This should be monitored and controlled accordingly.

QFM Web utilises some 3rd party components, as listed below, in order to provide extended functionality. Use of these products may be subject to separate license agreements with the specific vendors/service providers. Use of these 3rd party components is not covered under the QFM Web licensing agreement with SWG. It is the client's responsibility to ensure that they have up to date licensing for these specific 3rd party products before they are used within the QFM Web product.

Crystal Reports (<http://www.sap.com/uk/solutions/sap-crystal-solutions/query-reporting-analysis/sapcrystalreports/licensing/index.epx>)

Google maps (<https://developers.google.com/maps/licensing>) (a business license may apply)

QFM Web is designed to be run on a range of devices such as tablets and smartphones. These devices may have little or no native support for certain features such as printing, Skype, Facetime, Telephony, etc. QFM does not limit the use of these features but their use is not supported under the standard QFM license agreement.

Please note that support for some Self Service user profile settings has changed. A default value of zero is no longer supported for the following administration settings applied to the Self Service user profile:

- Priority
- Worktype
- Service
- Service Group

Users with a Self Service profile will no longer be able to save events if their default values have not been updated. Client organisations upgrading to version 1.29 onwards should check these Self Service default settings to ensure they have a value other than '0', as '0' is no longer supported.

Users who use Self Service express event logging should validate that the process is unaffected. If any issues are encountered, users simply need to check the aforementioned settings and replace any values of '0'.