QFM 1.14 Release Notes

What's New in QFM App v1.14

August 2018

Contents

Version #	Summary of Revision	Date	Author
1.0	First edition v1.14.02	Aug 2018	MR

Statement of Confidentiality

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Release Notices

QFM Compatibility

This release is compatible with the following:

- **QFM Mobile Server v2.05.01.00 (recommended), v 2.04.01.00, v2.03.0016, v2.02.00.07, v2.01.00.01**
- **QFM v2.03.02.00**
- **QFM Workflow Scheduler v2.03.02.00**
- **QFM Desktop v164.08.11.01**

In order for the QFM app v1.14.02 to perform at an optimum level, Service Works strongly recommends that client organisations upgrade to these software versions or later.

The QFM 1.33 release (onwards) is designed to support multiple client contracts. This support is not yet fully extended to the QFM app v1.10 as it does not respect contract specific business rules around data selection. This specifically affects any Express Events logged on the Mobile application. Currently, these must be logged with valid contract specific values otherwise the event may not be processed when it is returned to the central QFM application.

Installation

Existing installed versions of the QFM app can now be upgraded, which allows users to retain their current visits and other app data. Upgrades are available for users moving from version 1.10.07 or later. Users running an earlier version of the app (1.10.02 or earlier) will need to uninstall the previous version before installing the new app v1.14.02.

Scanner Hardware Notice for iOS Users

Users of Apple devices with an iOS operating system must only use scanning devices which are included in the Apple MFi program. These include the Socket Mobile scanning devices listed below.

- 102806-0002 (for the DuraScan™ D750, CHS 7Xi, 7Qi, S850(8Qi))
- 102806-0003 (for the DuraScan™ D700, D730, CHS 7Ci, 7Di, 7Mi, 7Pi and S800(8Ci))

If you would like to use an alternative scanning device, please contact your SWG Account Manager.

Users of devices running an Android operating system are unaffected by this process.

Release Overview

The QFM app 1.14 release consists of a range of new features. A summary is provided below, with a detailed breakdown starting on the following pages.

Improved Operative Selection List
When a job cannot be completed at the first attempt and a return visit is required, **selecting another operative to return is now made easier** with an upgraded method of selection. This makes it quicker to select another operative, particularly if there is a long list from which to pick.

Improved Geography Selection Feature
When creating a new Event on the QFM app, selecting geography is now made easier with an upgraded method of selection. This makes it **quicker to select the appropriate level of geography**.

Made Safe and Temporary Fix Statuses
New intermediate **Visit statuses of 'Made Safe' and 'Temporary Fix' are added to workflows**. These provide improved support for FM contracts which include Service Level Agreements to measure the time taken to complete critical tasks. They also deliver a more detailed record of Visit activities which enables **improved analysis of job rectification and contractor performance**.

Link to QFM Timesheets
A direct link to Timesheets is now available in the QFM app, **enabling users to submit their work timesheets at any time or location, from within the QFM app**.

Dynamic Forms Enhancement
Dynamic Forms questions which prompt a response from up to three pre-defined answers, now enable users to simply tap a button instead of opening a drop down list to select a response. **This makes forms quicker and easier to complete**.

New Features

The QFM app 1.14 release provides the following new features:

- Improved Operative Selection List
- Improved Geography Selection Feature
- Made Safe and Temporary Fix Statuses
- Link to QFM Timesheets
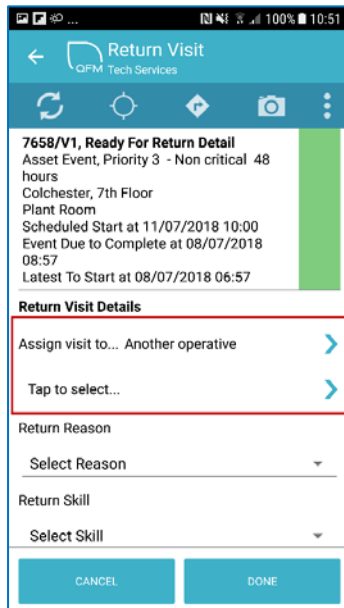- Dynamic Forms Enhancement

A Feature Overview and detailed procedures for each are provided in this section.

Improved Operative Selection List

Feature Overview

Features

- The method of selecting an operative for a return visit is enhanced.

Selecting an operative to carry out a return visit is made easier with an upgraded method of selection.

Benefits

- The improved selector makes it quicker and easier to assign operatives to those jobs which require a return visit.

Introduction

When a job cannot be completed at the first attempt and a return visit is required, selecting another operative to return is now made easier with an upgraded method of selection. This makes it quicker to select another operative, particularly if there is a long list from which to pick.
A new full screen operative list replaces the previous drop-down (Android) and scrolling (iOS) lists. The new list is sorted alphabetically, making it quicker and easier to make a selection.

Operative Selection

The steps below describe the method for selecting an operative to assign to a return visit.

1. In the Return Visit screen tap the **Assign visit to…** field (shown in the example below).

    Note: This field automatically defaults to the user logged in (yourself).
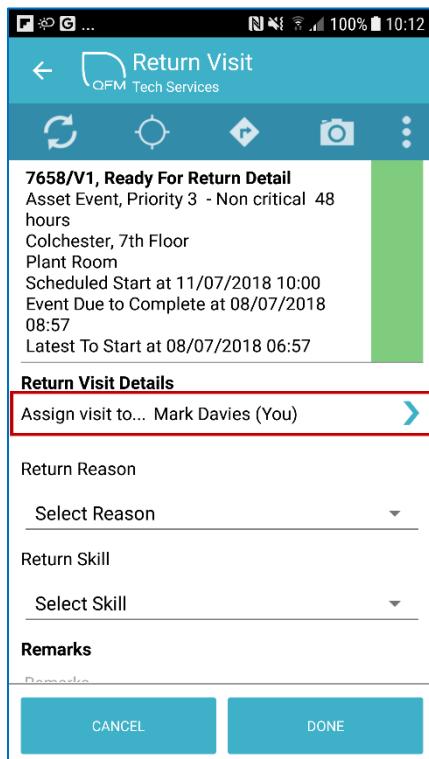
Return Visit screen.

2. In the **Assign return visit to…** panel you can assign the Return Visit to:

    ● Yourself (default value)
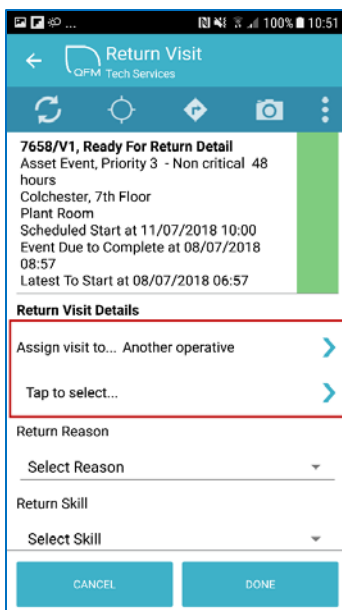   ● **Another operative**
    ● **No-one**
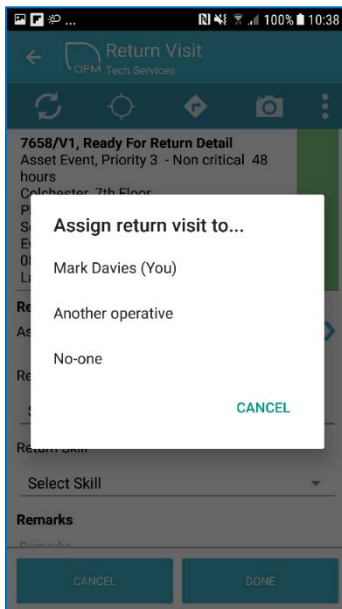
Choose who to assign to the Return Visit.

3. Selecting yourself keeps the Return Visit assigned to you (the same operative as the original Visit).

   Selecting **No-one** ensures no operative is assigned.

   Selecting **Another operative** enables you to access a full screen list of operatives from which to select.
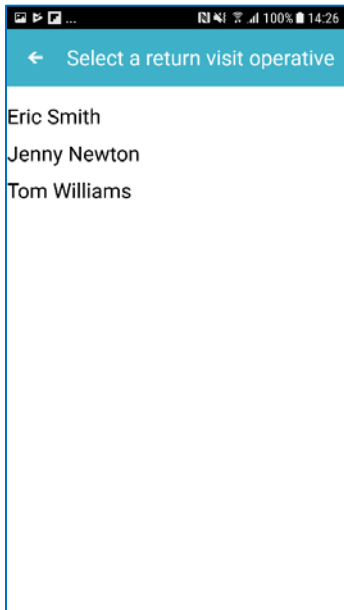
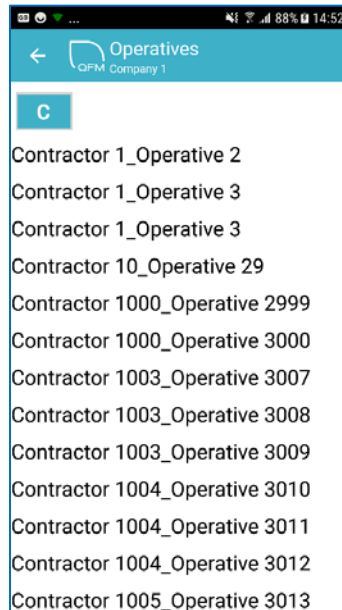4. If selecting Another operative, tap the screen (as shown below) to select the operative.

Selecting another operative.

5. If the operative list exceeds one page in length, it is divided into alphabetical sections (as shown in the examples below).
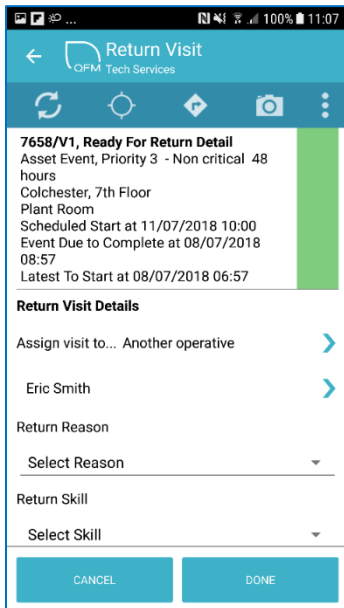

Small list of operatives.   *Large list of operatives.*

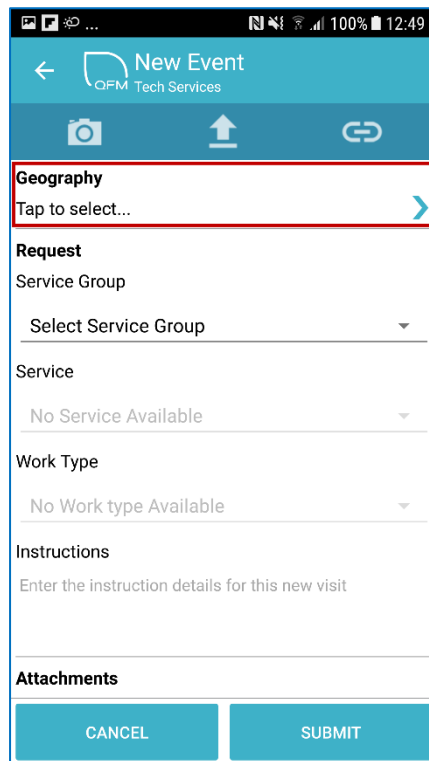**6.** Select the operative for the Return Visit then continue adding the remaining details.

Return visit operative selected.

Improved Geography Selection Feature

Feature Overview

Features

- The method of selecting the location for a new Event is enhanced.

Picking locations is now made easier with an upgraded method of selection.

Benefits

- The improved selector makes it quicker and easier to select a location when creating a new Event.

Introduction

When creating a new Event, selecting geography is now made easier with an upgraded method of selection. This makes it quicker to select the appropriate level of geography.
New full screen geography lists replace the previous four selection lists for Site, Location, Unit and Partition. The new lists are sorted alphabetically, making it quicker and easier to make a selection.

Note: The new geography selector is available when creating new Events from both Visit and Asset screens.
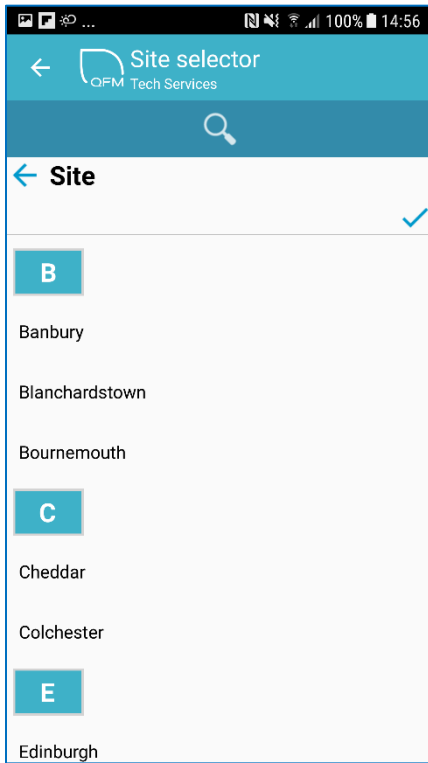
Geography Selection

The steps below describe the method for selecting geography for a new Event.

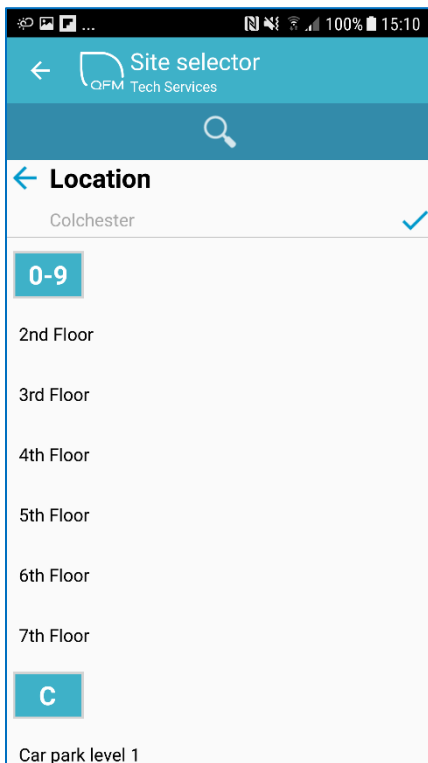1. In the **Geography** field tap to make a selection.

Select geography for a new Event.

2. The Site Selector displays Sites in alphabetical order, allowing you to scroll through the list. Tap a Site to select it.

List of Sites.

3. Once you have selected a Site, options for the level below (i.e. Location) are presented.


List of Locations.

This method of selection enables you to pick from the four hierarchical levels of geography; Site, Location, Unit and Partition. The levels you have already selected are displayed at the top of the screen, which you can select at any time if you do not wish to select any of the lower level geographies available.

If you select from all four levels available, once you have selected at the lowest (Partition) level you are returned to the New Event screen and where your selection is entered.

If you select a geography level which has no further levels below, e.g. the Unit level you pick is the lowest level available, you are returned to the New Event screen and where your selection is entered.

If you do not wish to select one of the lower levels of geography presented, then simply tap the geography you have already picked, at the top of the screen, to return to the New Event screen. For example, there may be four levels available but you only wish to select Site and Location. In this instance you would not select at the Unit level but instead tap the Site and Location already selected at the top of the Unit screen, as shown in the example below.
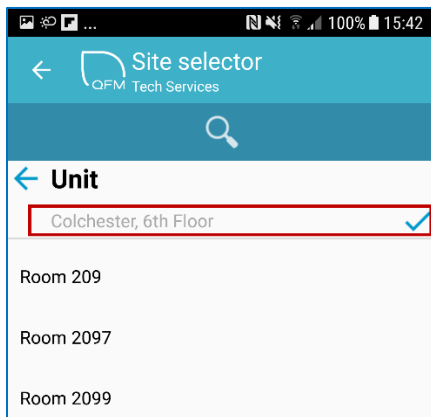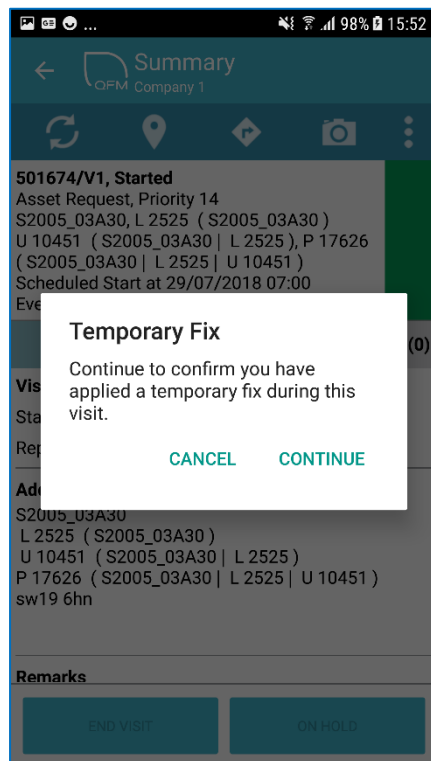

Geography levels currently selected.

Made Safe and Temporary Fix Statuses

Feature Overview

Features

- Visit workflows now include new intermediate Visit statuses for 'Made Safe' and 'Temporary Fix'.
- Statuses are available between Starting a Visit and Ending a Visit.

Visit workflows now allow new 'Made Safe' and 'Temporary Fix' statuses to be applied.

Benefits

- Enables accurate compliance with contracts which include Service Level Agreements for the time taken to complete various stages of a task.
- Provides a more detailed record of Visit activities therefore enabling improved analysis of job rectification and contractor performance.

Introduction

Many FM contracts (particularly those which include a payment mechanism) often include Service Level Agreements which measure the time taken to complete critical tasks. An example of this may be the time taken to 'make the fault safe', make a 'temporary fix' and finally the time to complete a 'permanent fix', for some types of jobs. Not all Events, however, may require these intermediate stages between 'Started' and 'Completed'.

The QFM app is improved to support these requirements by including new Visit statuses for 'Made Safe' and 'Temporary Fix'. Once a Visit is Started, the options for 'Made Safe' and 'Temporary Fix' are available in the overflow menu. The workflow allows a Visit to move from 'Made Safe' status to 'Temporary Fix', or to move directly to 'Temporary Fix'. A visit at 'Temporary Fix' status cannot be moved back to 'Made Safe' status. A date and time when a Visit was set to either of these intermediate statuses in displayed in the Key Dates tab on the Event screen in the main QFM system.

Note: These additional statuses are made available according to the particular workflow in use. (Workflows are set up by QFM administrators and define the way the system is to be used).
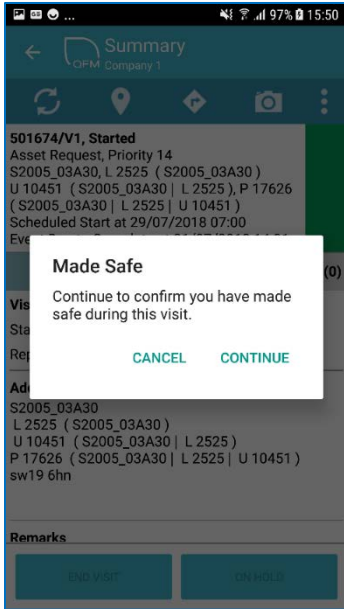
Applying 'Made Safe' and 'Temporary Fix' Statuses

1. Once you have Accepted then Started a new Visit the options to set the Visit status to 'Made Safe' or 'Temporary Fix' are available in the overflow menu , refer to the example below.
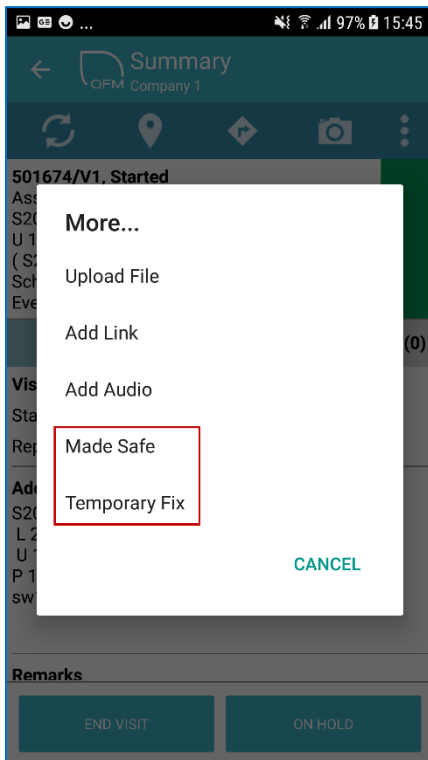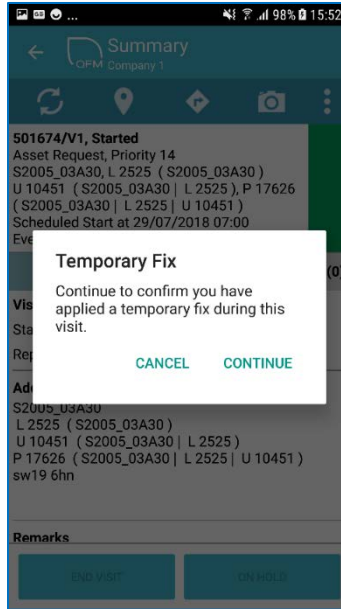

Overflow menu options.

2. The workflow allows you to move through the statuses as follows:
   - 'Made Safe' then 'End Visit'.
   - 'Made Safe' then 'Temporary Fix' then End Visit.
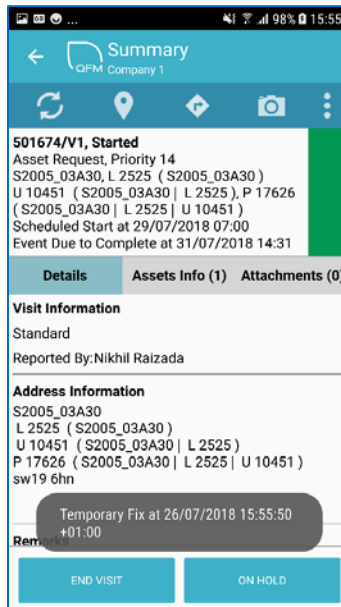   - 'Temporary Fix' then End Visit.

Confirm Made Safe status.

Confirm Temporary fix status.

3. Once you have selected a status a confirmation message is displayed, as shown in the examples below.

Made Safe confirmation message.

Temporary Fix confirmation message.

A date and time when a Visit was set to either of these intermediate statuses in displayed in the Key Dates tab on the Event screen in the main QFM system.

Main QFM system Event screen.
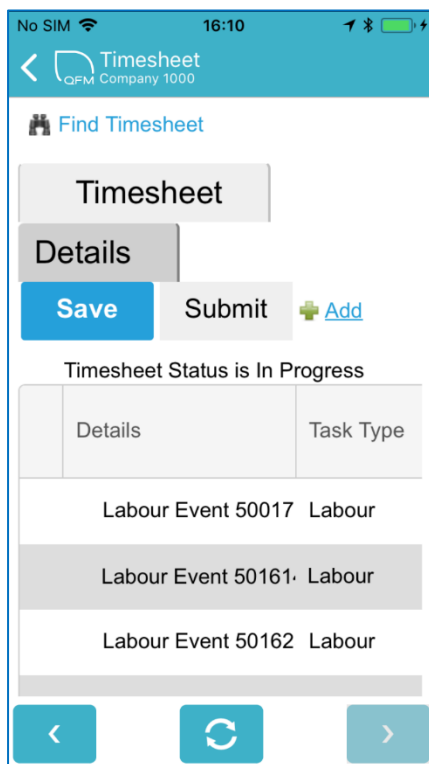
Link to QFM Timesheets

Feature Overview

Features

- A direct link to Timesheets is now available in the QFM app, enabling users to submit their work timesheets from their mobile.

Access to QFM Timesheets is now available from the QFM app.

Benefits

- Saves time and brings greater efficiency by enabling operatives to complete their timesheets directly from the QFM app.

Introduction

The QFM app now provides a direct link to Timesheets, enabling you to submit work timesheets from within the QFM app.

Accessing QFM Timesheets

1. Select **Timesheet** from the Main Menu.
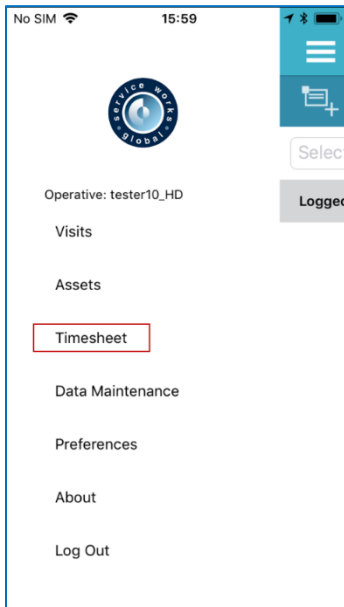
Timesheet option on Main Menu.

2. You are provided with access to the main QFM browser view. Enter your user details and login.
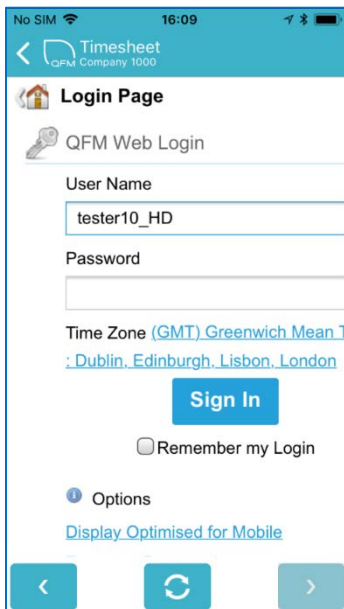
QFM login page.

3. Timesheets functionality is displayed. Here you can select and submit your timesheets.
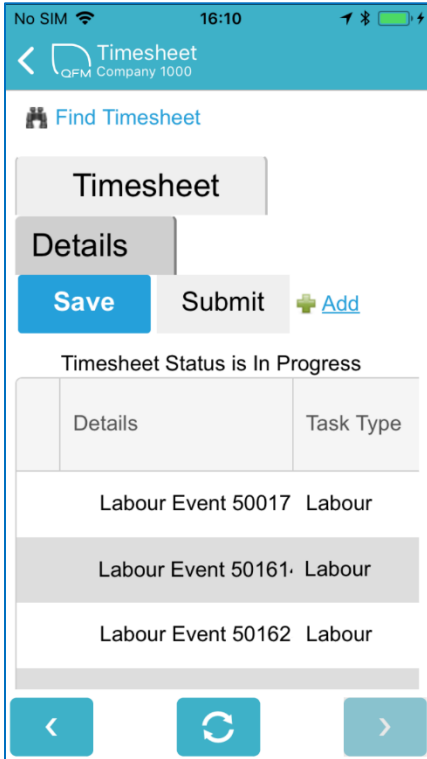
Timesheet page.

Dynamic Forms Enhancement

Feature Overview

Features

- Dynamic Forms questions with up to three pre-defined response options, now show these response options as buttons in the QFM app rather than a drop down list.

Dynamic Form questions with response selection via buttons.

Benefits

- Quicker and easier to submit a response when completing a form.

Introduction

Dynamic Forms questions which prompt you to select a response from up to three pre-defined answers, now enable you to simply tap a button instead of opening a drop down list to select a response. This makes forms quicker and easier to complete.
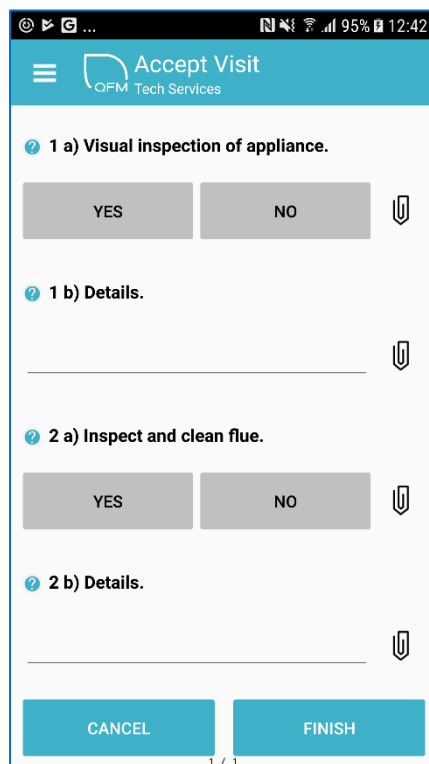
Response buttons are applied to form Control Types of 'Lookup Question' with a 'Lookup Type' containing up to three 'Lookup Items'. (Forms are created in the Dynamic Forms editor in QFM).
An example of the new response buttons is shown below.
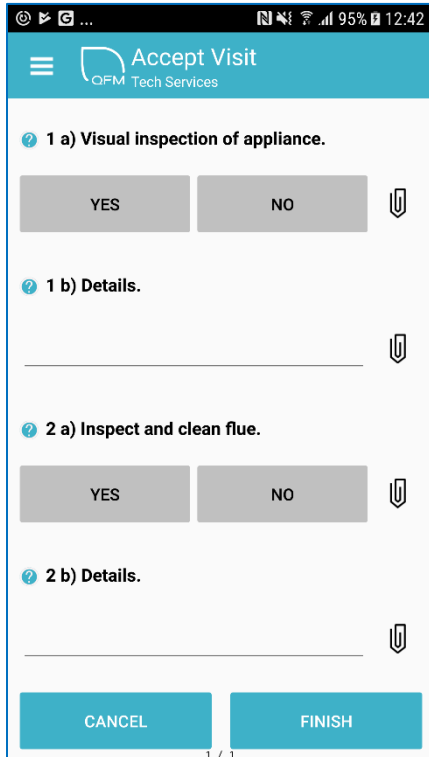
Response buttons example.

Known Issues

This section details new system issues which have occurred since the 1.13 release and remain open. These will be rectified at the earliest opportunity.

General

17839   When Clearing Application Data (from the Data Maintenance option from the Main Menu) this may cause the QFM application to fail. In this scenario, the user should re-start QFM and check to see whether application data has been cleared.

Note: This control applies a factory re-set of QFM by clearing all data. It should not be used without a full understanding of the outcome.

QFM Installation Notices

The QFM desktop minimum version requirement for this release is QFM 164.08.09.
This release is compatible with QFM Desktop 164 versions only.

Service Works Global (SWG) does not recommend QFM 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 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 Global 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 includes SAP Crystal Reports runtime environment to enable users to benefit from integrated 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 can negatively impact the performance experienced by interactive users. This should be monitored and controlled accordingly.

QFM 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 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 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 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'.