QFM 2.01 RELEASE NOTES

What's New in QFM v2.01

December 2017

Contents

Version Log

Version #	Summary of Revision	Date	Author
1.0	First Issue	02/01/2018	MR
2.0	Changes to document template	11/01/2018	MR

Statement of Confidentiality

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Release Notices

This release is issued in conjunction with the QFM app release 1.12.00.21.

QFM Compatibility

This release is compatible with the following:

- **QFM app v1.12.00.21**
- **QFM Workflow Scheduler v2.01.00.00**
- **QFM Mobile Server v2.03.00.16** (recommended), **v2.02.00.07**, **2.01.00.01**
- **QFM Desktop v164.08.09**

In order for QFM v2.01 to perform at an optimum level, Service Works strongly recommends that client organisations upgrade to these software versions or later.

New Features Summary

The QFM 2.01 release consists of some major enhancements to User Defined Forms and changes to the Visitor Booking process.

A summary of the new features is provided below, with a detailed breakdown starting on the following page.

- **User Defined Forms**
  QFM UDF functionality allows customisable forms to be created with a template of questions for pre-defined tasks, such as **completing surveys** and **obtaining feedback**. This feature is significantly enhanced to provide **greater flexibility and customisation** in both the design and completion of forms.

  UDF now provides **compatibility with the mobile app**, so operatives can complete forms on a mobile device.

  It is also now possible to **integrate different forms at key stages of a QFM Event** by including these in Visit workflows. This enables, for example, an operative to be presented with a Health & Safety form prior to starting a job, before moving on to a different form designed for a survey or inspection.

  Question validations and **scoring thresholds** can be incorporated so that if specific requirements aren't met then a job cannot be progressed further without amendment to the form.

  Help text can now be attached to each question and support is also provided for operatives to **upload photos and attachments** in support of a question response, e.g. as evidence of the condition of a piece of equipment.

- **Visitor Bookings**
  Improvements are made to the Visitor Booking process which provide the ability for **visitors to add their own badge number at check in**, so that reception staff don't have to enter this information on their behalf.

  A Badge Number can also now be added to new Visitor records (outside of the Check In Wizard process) with Badge Number available as Advanced Search filter criteria.

New Features

The QFM 2.01 release consists of some major enhancements to User Defined Forms and changes to the Visitor Booking process. A Feature Overview and detailed procedures for each are provided in this section.

User Defined Forms

Feature Overview

Key Features

- Customisable forms for a variety of field based tasks such as surveys, inspections, audits etc.
- Optimised for use on iOS and Android smartphones and tablets
- Range of question styles and formats
- Different forms can be integrated into key workflow stages

Benefits

- One-stop solution for bespoke data gathering requirements

- Provides automated and comprehensive reporting for each survey completed, including a full breakdown of results

- Supports investment strategies by providing accurate data for maintenance and replacement decisions

- Supports service delivery improvement by enabling the acquisition of vital feedback

Existing Functionality

Existing UDF functionality allows customisable forms to be created with a template of questions for pre-defined tasks, such as completing surveys and obtaining feedback. These are incorporated into Event workflows so that they can be presented to an operative or customer on-screen whilst on site.

The initial phase of UDF functionality included some limitations as follows:

- UDFs unavailable on the QFM mobile app
- limiting one form only to be used per Event/Visit
- limiting the same form to be used for all Events/Visits of the same Event Type (e.g. Asset, Service etc.)

Gathering Survey Data

UDFs are most effective when the correct form is used in the required context, for example there may be a requirement for several Health & Safety forms to be made available for different types of asset as the same checks do not apply to all. QFM typically manages different types of Asset jobs and Service based jobs, each with variable workflows. In the same way, the data that needs to be collected will also vary.

Whilst different types of job will fall into a small number of different operational workflows, the information required may differ because of context (e.g. location, schedule activity, asset type).

Latest Enhancements

In order to meet these requirements for greater flexibility and customisation, the existing functionality has been significantly enhanced in this latest release.

UDF functionality now includes the following features:

- Multiple forms can be used for the same Event/Visit.
- Ability to use specific forms within key steps of Visit workflows.
- Forms can now be pushed to the QFM mobile app.
- Forms can be completed on the QFM mobile app then uploaded to the database.
- Form scoring thresholds give the ability to apply acceptance criteria and validations.
- Ability to provide help text for each question
- Support for attaching photos to support a question response

Details of the initial UDF release are contained in version 1.36.04.04 Release Notes.

| Note:	Although there is no physical limitation to the number of questions that can be defined on a single UDF, Service Works Group recommends up to 100.

UDFs on QFM Mobile App

The steps required to use UDFs on the QFM mobile app are as follows:

- Define new Form
- Publish Form to make available
- Map where the Form is to be used within the workflow
- Send the Form to QFM mobile app
- Fill in Form(s)
- Work with data collected

Setting Up Visits to Use the New UDF Workflow

It is necessary to use a Mobile Workflow which allows UDFs to be used. A default Visit Workflow is already provided for this purpose. This allows UDFs to be included before the Visit may be 'Accepted' (VisitPreAcceptForm), before it can be 'Started' (VisitPreStartForm) and before the Visit can be 'Completed' (VisitPreCompleteForm). Refer to the examples below.

Note: The Event Types and Workflow Maintenance screens are only available to users with Developer rights.
Any changes that involve editing the workflow and not just applying an alias will require SWG assistance or SWG to conduct the changes.
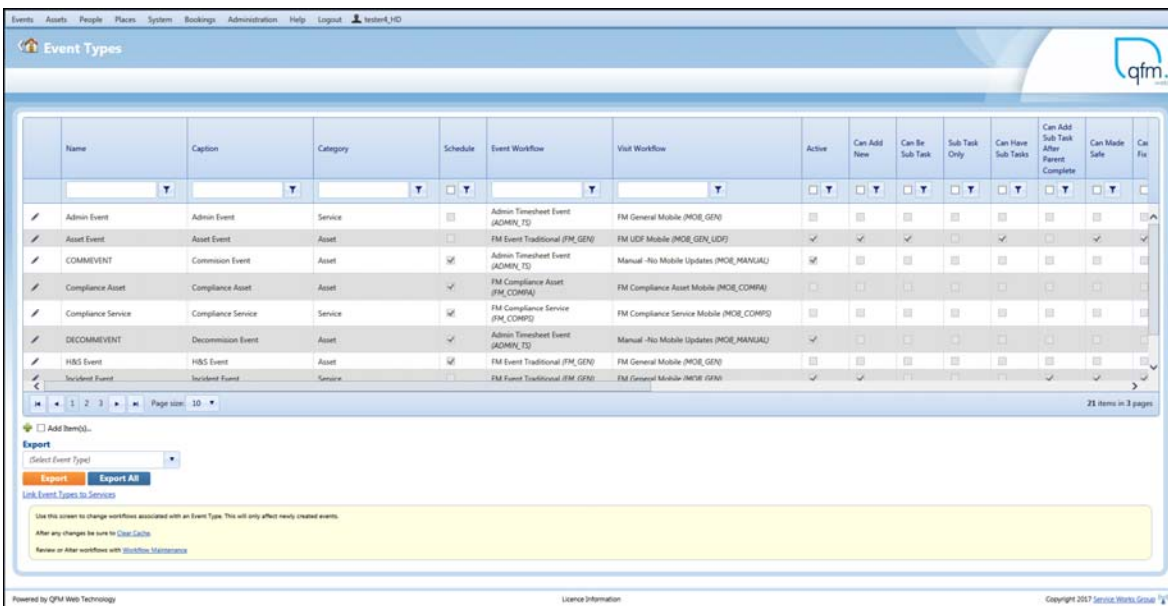
Event Types screen.
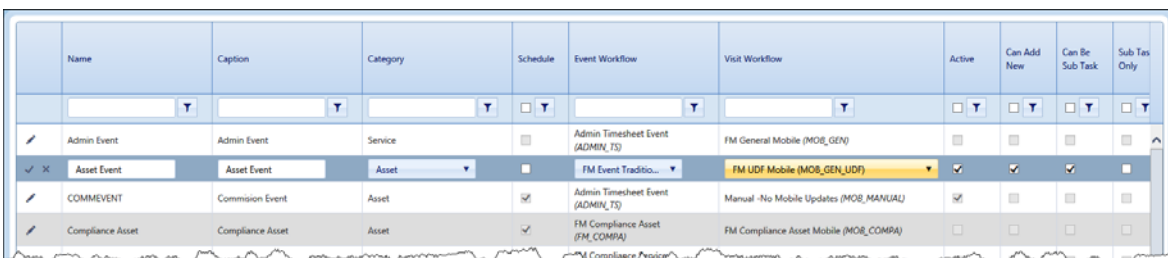
Event Types screen.

FM UDF Mobile (MOB_GEN_UDF) ▼

This workflow is set up to support transitions form one stage to another which incorporate UDFs. The 'VisitPreAcceptForm' and 'VisitPreStartForm' are shown below.
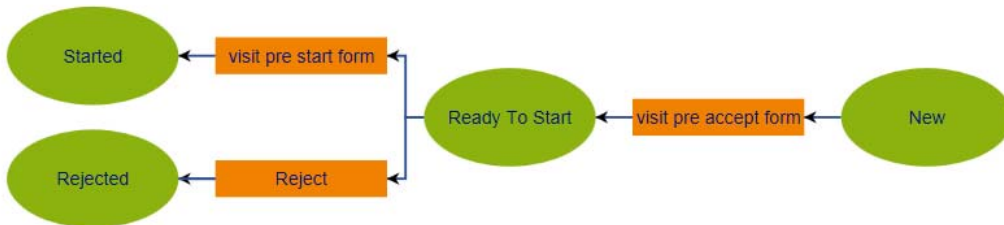
Workflow Transitions

Defining New (Mobile App Compatible) Forms for Visits

Form are created from the Administration menu. The **User Defined Forms** menu has two screens; **Survey Forms** and **All Forms**.
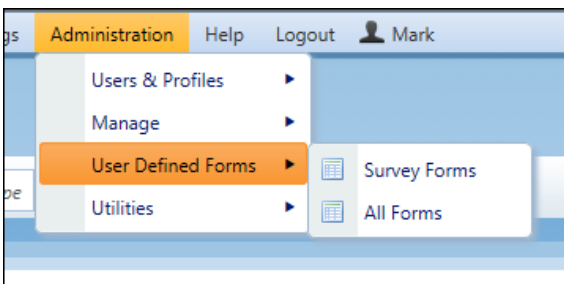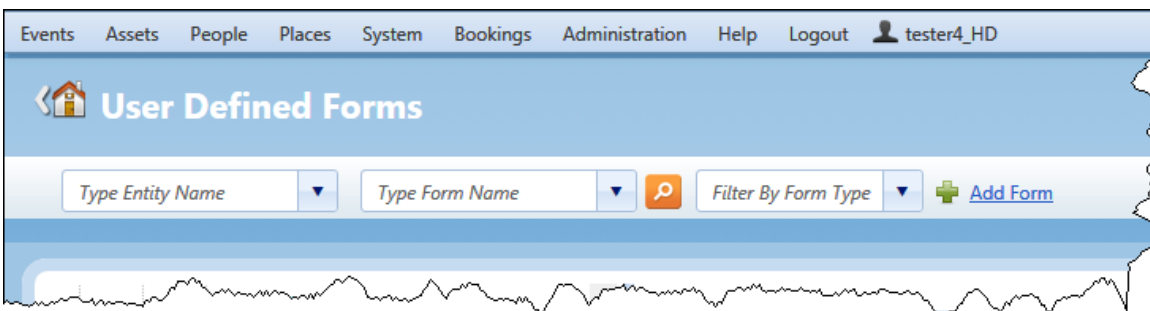

Administration Menu.

The **Survey Forms** screen holds only Forms with a **Type** of **Survey**.
The **All Forms** screen holds Forms with a **Type** of **Survey** and **Form**.

Both screens operate in a similar way.

Select the ✚ Add Form link.

User Defined Forms screen.

Panel Properties

A Panel is the basic form structure from which a range of controls can be added (Layouts, Sections, Groups).

When defining a new form for Event Visits, make sure to include the following Panel Properties:

- In the **Based On** field select **Visits**.
  This ensures that the results are collected and linked to the appropriate Visit record.

- In the **Panel Type** field (*new*) select **Mobile**.
  This restricts the available controls ('Control Type' field in the Panel Controls tab) to those supported by the mobile device, (refer to the table below).

- In the **Data Source Type** field select **[Dynamic]**.
  This creates and manages a new table to store the results. 'Dynamic' has no limitations for questions (unlike 'Legacy') and is recommended for new Forms.

- In the **Context** field (*new*) select the appropriate value. This control automatically inserts a tag into the Survey 'URL' to allow multiple results for each Event/Visit to be recorded correctly (i.e. not overwritten). You can choose the following options:
  - {#dd#}   Day
  - {#mm#}   Month
  - {#now#}   Time
  - {#today#}   dd/mm/yyyy
  - {#User#}   User Name
  - {#yyyy#}   Year

Panel Properties tab.

Control Types

Control Types define the format of a question, e.g. lookup list, star rating, text box etc.
The following Control Types have been re-designed for use on QFM mobile app forms.

Note: Some Control Types are designed for app (Mobile) use only, some for QFM (Web) use only and some are compatible with both. If the Panel Type is subsequently changed, making an existing Control Type incompatible, the system will prevent you from saving the record and a validation message will be displayed. (Refer to *Panel Control Compatibility* below).

Control Type	Purpose
Image	Send an image to render on QFM mobile app
Label	Label control (read only)
Lookup Question	Question with set of scored answers
Signature	Allows recording of signature on QFM mobile app
Textbox	Standard text box
Numbers	Number box
Date	Date Entry
Date Time	Date and time entry
Time	Time entry
Textbox with Multiple Lines	Multiple line text area
Web Address	Web address

The following Control Types are available by Panel Type of **Mobile** and/or **Web**.

Available for Both Mobile and Web	Available for Mobile Only	Available for Web Only
Characteristic 1	Image	Bar Code
Characteristic 2	Signature	Check Box
Characteristic 3		Currency
Characteristic 4		List of Addresses
Label		List of Geographies
List of Active Contractors		List of Properties
List of Active Operatives		Question with Free Answer
List of Asset Status		Rating with Stars
List of Asset Type		Textbox for Password
List of Asset Unit of Measure		
List of Categories		
List of Certificate Statuses		
List of Certificates		
List of Contractor Notifications		
List of Contractor Types		
List of Contractors		

Available for Both Mobile and Web	Available for Mobile Only	Available for Web Only
List of Cost Codes		
List of Cover		
List of Criticality Consequence		
List of Criticality Safety		
List of Departments		
List of Divisions		
List of Equipment Groups		
List of Estate Type 1		
List of Estate Type 2		
List of Feeder Definitions		
List of KPI Reference		
List of Location Status		
List of Make Model		
List of Monitored Values		
List of Operative Notifications		
List of Personnel		
List of Priorities		
List of Reference		
List of Skills		
List of Trades		
List of Work Types		
Lookup Question		
Section		
Textbox		
Textbox for Numbers		
Textbox for Date		
Textbox for Date Time		
Textbox for Time		
Textbox with Multiple Lines		
Web Address		

Note: Changes to data relating to 'List of' Control Types will not be reflected in Mobile UDFs which use the list, unless the form is re-published then re-pushed to the mobile device.
For example, Personnel data updated to reflect staff changes.

Panel Controls

The Panel Controls tab is where Form questions and response types are defined.

A new **Allow Attachments** control is added.
Questions may be configured for one or more attachments to be supported.

This control allows users to upload photos or attachments to provide evidence in support of an individual question response.

Panel Properties.

Panel Controls.

Panel Control Compatibility

Some Control Types (Panel Controls tab) are designed for QFM app (Mobile) use only, some for QFM (Web) use only and some are compatible with both. If the Panel Type (Panel Properties tab) is subsequently changed, making an existing Control Type incompatible, the system will prevent you from saving the record. The Panel Control will be highlighted and a validation message will be displayed (as shown in the example below).

Panel Properties tab with validation message.

Creating a New Lookup List

There may be a requirement to create a specific list of response options for a particular question. Each answer in the list may have specific scoring. The **Lookup Type** facility allows users to create new lists whilst in process and to define the display order and score associated with each answer.

Lookup Type.

The **Lookup Type** drop down list is enabled when **Lookup Question** is selected in the **Control Type** field.

Select an existing value from the list or select [+] to create a new Lookup Type (refer to the examples below).

Creating a New Lookup Type

1. In the Lookup Type tab select **Add New Lookup Type**. The **Type** field opens. This is where you define the type of question, e.g. Rating, Yes/No, Condition etc.
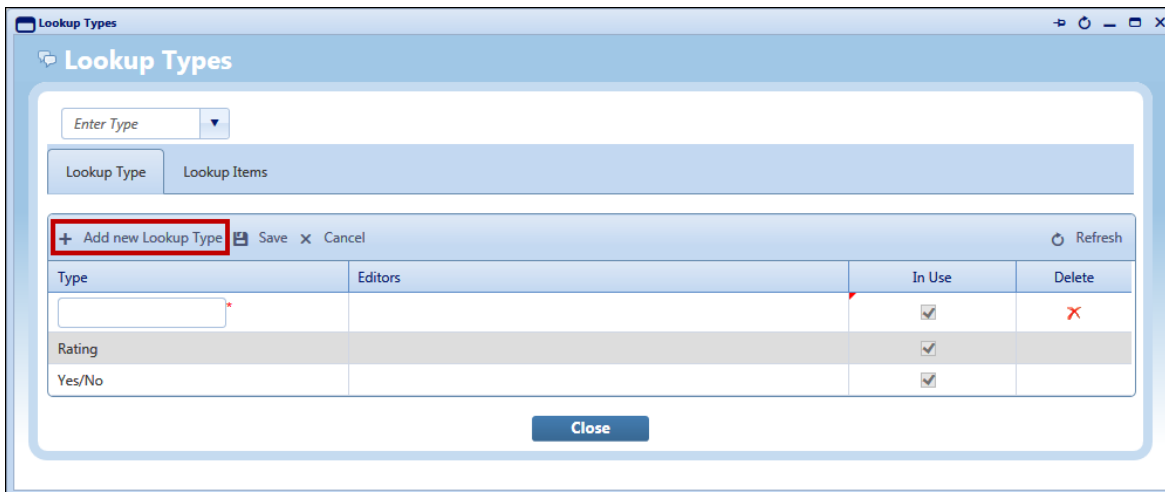
Add new Lookup Type.

2. Enter a name in the **Type** field, then select a group in the **Editors** field. Editors are people who are authorised to make changes to Lookup Type.
The **In Use** field is ticked by default.
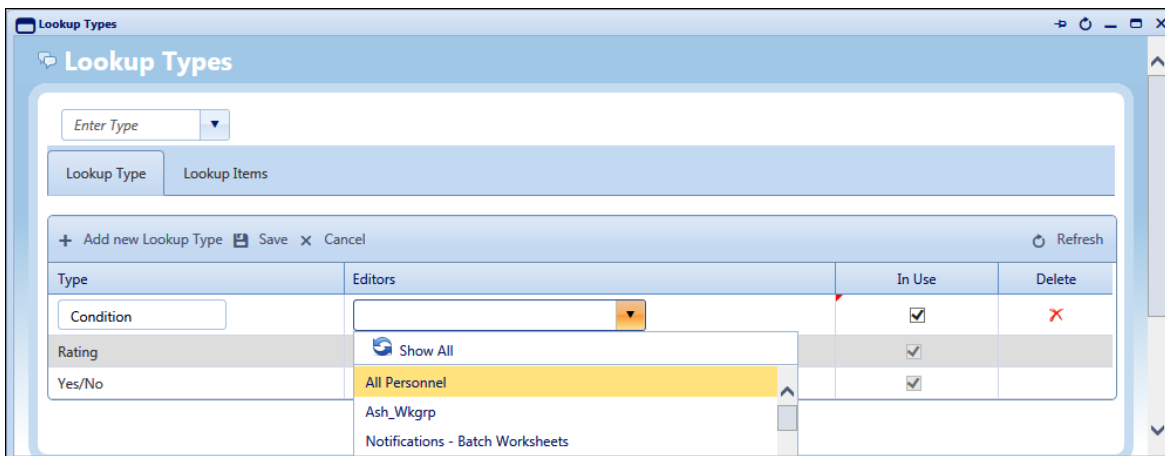
Select Editors.

3. Select **Save**.

4. Select the **Lookup Items** tab. This tab enables you to create the response options which appear in the drop down when the form question is being completed.
For example, a Lookup Item of 'Condition' could have three Lookup Items of 'Good', 'Fair' and 'Poor'.
Each Lookup Item can have its own score and order in the drop down list.

5. Select **Add New Items**.
A new row of blank fields open.

Add new Lookup Item.

6. In the **Type** drop down list select the Lookup Type previously created.
   Enter a Lookup Item name in the **Caption** field. This is the caption that will appear in the lookup list on the form.

7. Enter a numeric value in the **Lookup Order** field. This determines the position of this item in the lookup list. '1' will be top, '2' below '1' etc.

8. Enter a numeric score for the item in the **Score** field.
   The **In Use** field is ticked by default.

9. Select **Save**.

10. Repeat steps **5** - **9** for each new Lookup Item to be added to the Lookup Type.

11. **Close** the window.

Validation Rules

You can add Validation Rules to particular Panel Controls. This enables you to define the type of response required or whether a response is mandatory.

A typical way in which this can be used would be to apply a 'Required Field' validation to a question with a Warning Level of 'Exception'. This would require the field to be completed and would not allow the form to be submitted without a response. A warning message to this effect can be specified. (Refer to the examples below).

In order to define a Validation Rule, the Panel Control must have a 'Control Type' and 'Data Field' defined.

Validation rules.

Validation rules.

The full list of Validator Types is shown below. There are five new options available in this release, (these are available according to the Control Type):

- Required Field
- Regular Expression
- Range
- Compare
- **Minimum Length - NEW**
- Maximum Length
- **Minimum Value - NEW**
- **Maximum Value - NEW**
- **Minimum Attachments - NEW**
- **Maximum Attachments - NEW**

You can add additional properties to each Validator except 'Required Field'. Default properties for each Validator can be changed via the [icon] icon.

- **Minimum Length**
  The **Minimum Length** Validator Type allows you to set the minimum number of characters required for a response. Enter a number in the **Minimum Length** field.
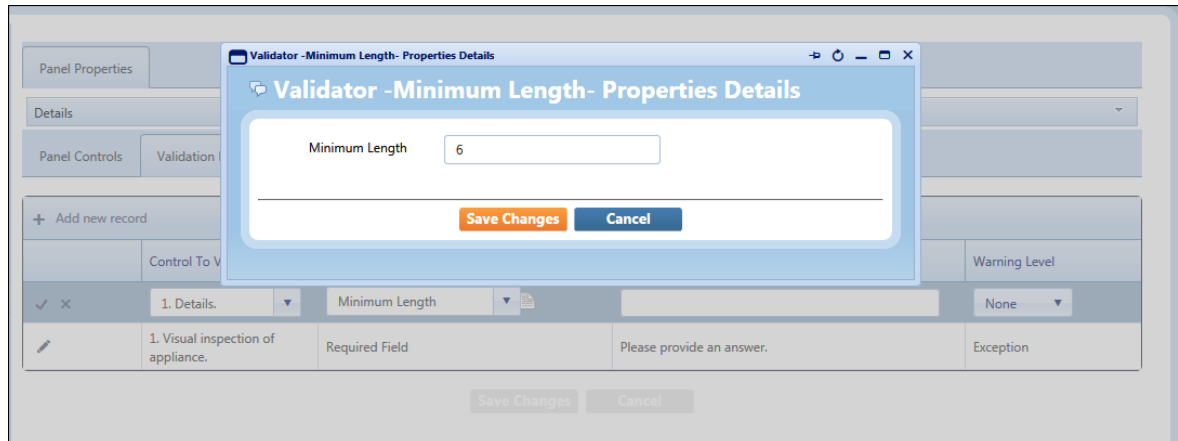
Validator Minimum Length.

- **Minimum Value**
  The **Minimum Value** Validator Type allows you to set the minimum numeric value required for a response.
  Tick the box to allow forms to pass this validation if no value is entered for this form question.
  Enter a number in the **Value To Compare** field.
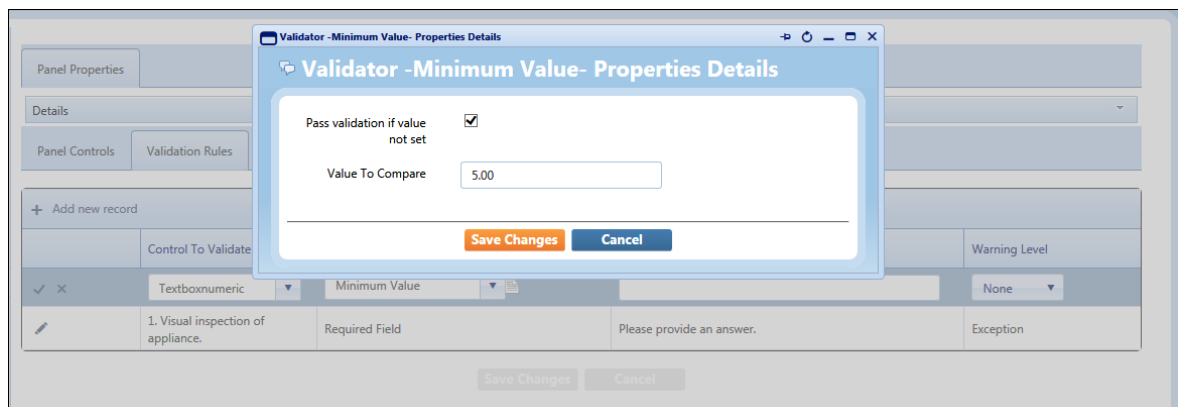
Validator Minimum Value.

- **Maximum Value**
  The **Maximum Value** Validator Type allows you to set the maximum numeric value allowed for a response.
  Tick the box to allow forms to pass this validation if no value is entered for this form question.
  Enter a number in the **Value To Compare** field.
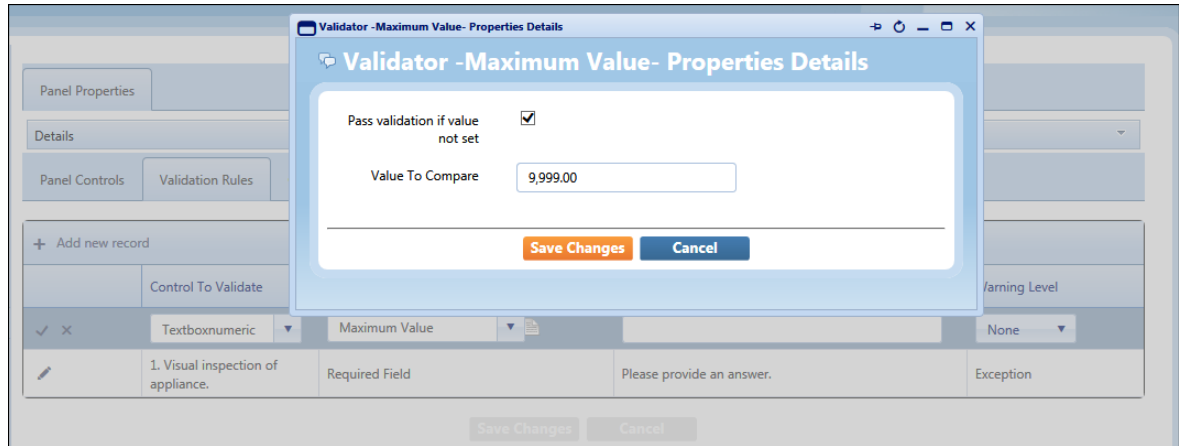
Validator Maximum Value.

- **Minimum Attachments**
  The **Minimum Attachments** Validator Type allows you to set the minimum number of file attachments required to accompany a response.
  Tick the box to allow forms to pass this validation if no value is entered for this form question.
  Enter a number in the **Minimum Attachments** field.
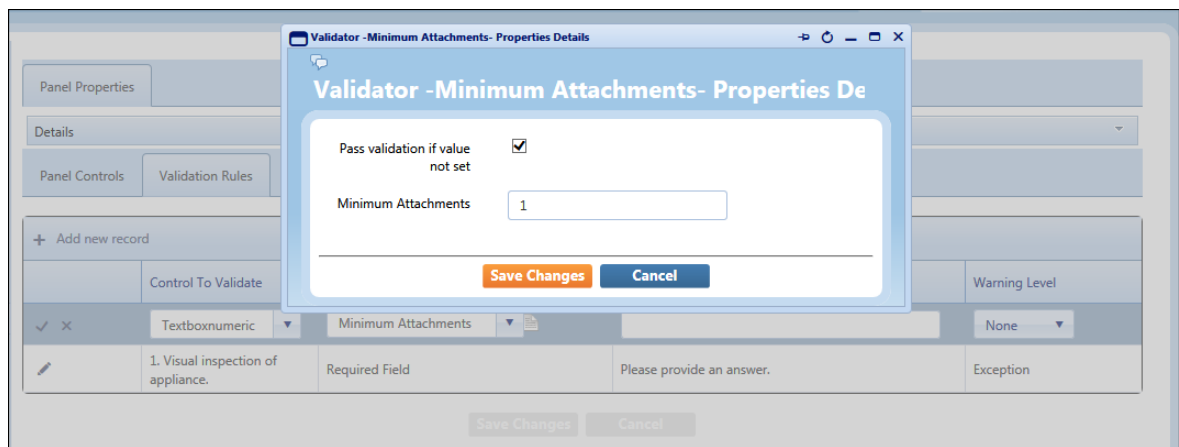
Validator Minimum Attachments.

- **Maximum Attachments**
  The **Maximum Attachments** Validator Type allows you to set the maximum number of file attachments allowed with a response.
  Tick the box to allow forms to pass this validation if no value is entered for this form question.
  Enter a number in the **Maximum Attachments** field.
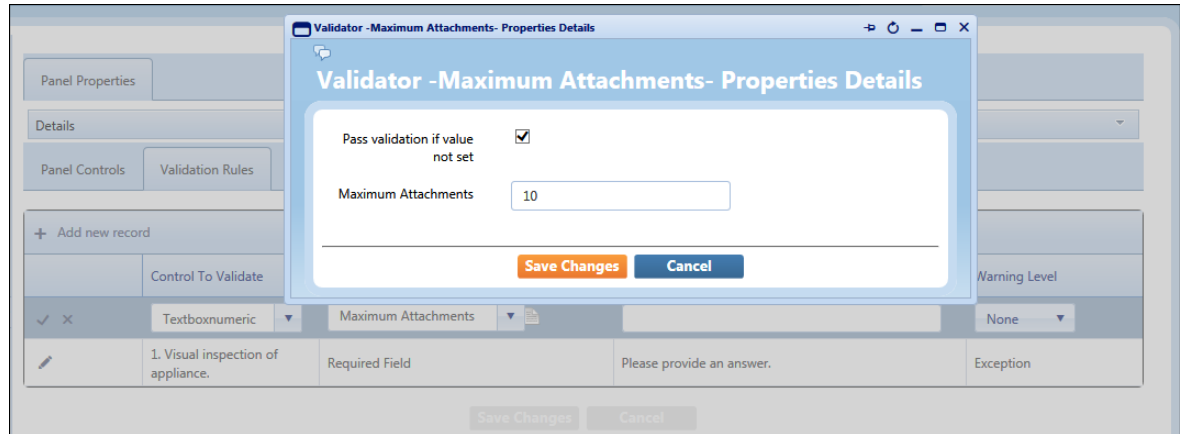
Validator Maximum Attachments.

Score Threshold - Conditional Transitions

A new **Conditions** tab is added.

Forms may be defined with a Score Threshold at which they are considered to pass. This may be used to control how Visits progress through their lifecycle. A conditional transition is one where the workflow only transitions to a new status if the UDF is completed and the UDF passes the required condition score. (Refer to the *About UDF Scoring* section).
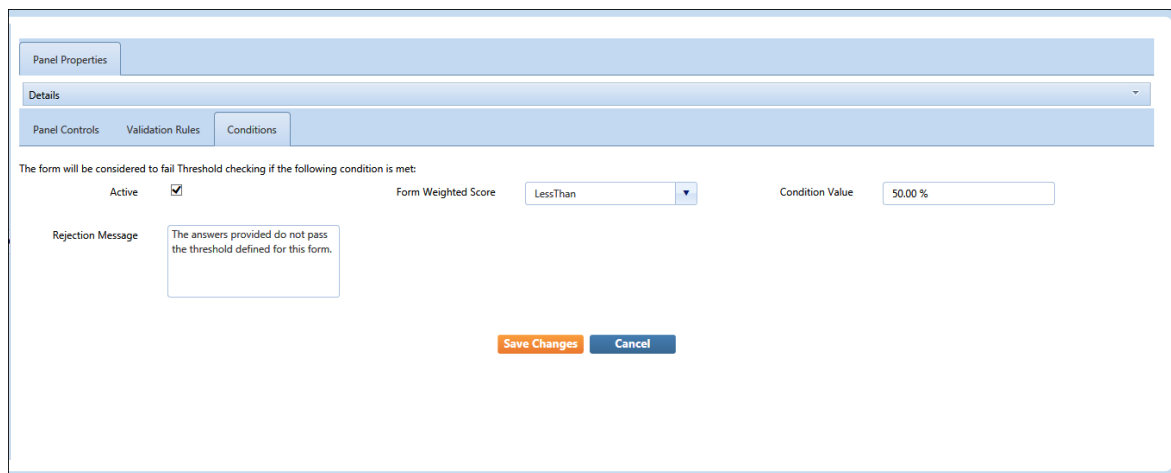
Conditions tab.

For example, the standard Visit workflow contains a conditional transition for the 'Accept' workflow action. In this case the Form associated with 'VisitPreAccept' step must pass the threshold set in order for the workflow to transition to 'Accepted' status. If the Form is completed and the score is less than the required threshold, then the workflow remains at 'New' status and the Visit is not progressed.

- The **Active** tick box activates the condition.

- Select a value in the **From Weighted Score** field to create the condition.

- In the **Condition Value** field enter a numeric value which will, as a percentage, complete the condition when linked with the 'From Weighted Score' value.

- In the **Rejection Message** field add a message which will be presented to the user if the condition is met, i.e. UDF is rejected.

Note: The Conditions feature is designed to reject a Visit if a condition IS MET.

About UDF Scoring

The UDF system now provides the ability to associate a score with each question response, so that performance can be measured by the answers provided.

Scoring can be linked with Conditions (refer to the *Score Threshold - Conditional Transitions* section) to create a pass/fail threshold.

Scoring is handled in two ways:

- Assigning a unique Score to each prescribed Lookup Question option (i.e. each response option available from a drop down list).

- Assigning a Score Weighting to a Panel Control (question), which applies the score if a response to the question is given.
  Note: This is for non-Lookup Items only.

Lookup Question Scoring

When a user completing a form selects an answer from a lookup list, the score associated with that answer is multiplied by the Score Weighting (Panel Controls tab) to calculate a Weighted Score. The Weighted Scores for all questions are added to establish a Total Weighted Score for the form, which is then converted to a percentage of the maximum possible score that could be attained.

Example:

A form has four Lookup questions. Each question can be answered with a Pass or Fail. Pass has a score of 1 and Fail has a score of 0. Each question has its own Score Weighting. The Lookup Item score is multiplied by the Score Weighting for the Lookup question to establish the Weighted Score. All Weighted scores are added together then expressed as a percentage of the maximum possible score for the form.

Lookup Question	Item Score	Score Weighting	Weighted Score	Score %
Q1	0	4	0	0
Q2	1	3	3	30
Q3	1	2	2	20
Q4	1	1	1	10
			Total Score %	60

In this example, failing one of the Lookup questions brings the Total Score % for the form down to 60.

Scoring for Non-Lookup Control Types
The Score Weighting (Panel Controls tab) is used to score all non-Lookup questions (e.g. textbox, signature etc.). If a question has any type of value entered as a response, then the Score Weighting is applied. If a question has no value entered, then a score is NOT applied.
All question scores for a form are added together and expressed as a percentage of the maximum possible score for the form.
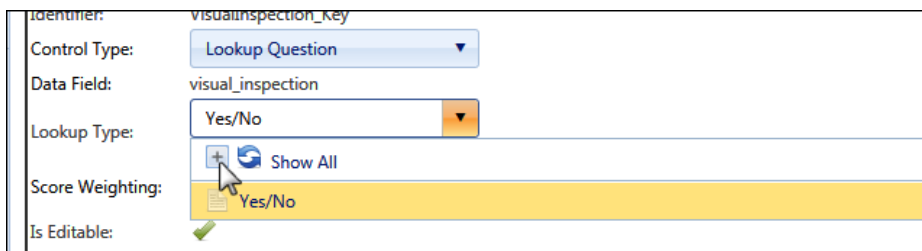
Applying Scores
The following procedures describe how to add scores to existing Panel Controls.

Lookup Item Scoring

1. Go to the Panel Controls tab and select **Change**.

2. Select the Edit ✏ icon next to the appropriate question record row.

3. Ensure that **Lookup Question** is selected in the **Control Type** field, then open the **Lookup Type** drop down list. Select ⊞ to open the Lookup Types window.

Lookup Type field.

4. Select the **Lookup Items** tab and locate the appropriate Lookup Item Type.
   In the example below, a score of '5' is added for the 'Yes' answer to the 'Yes/No' Lookup Type.
   Click into the **Score** field and add a numeric value.
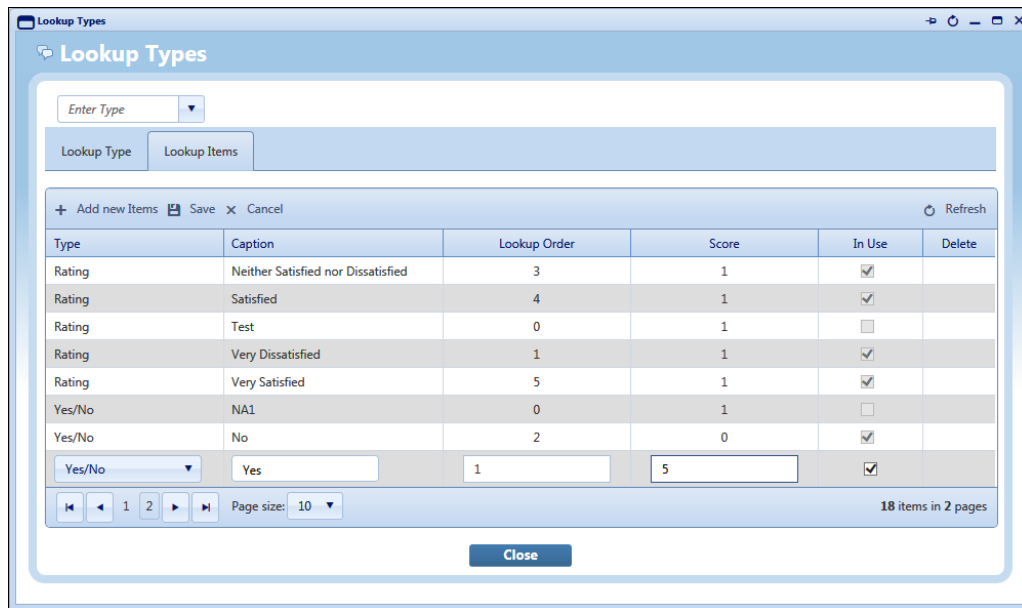
Lookup Items tab.

5. Select **Save** then **Close**.

6. Select **Save Changes** in the Panel Controls tab.

Non - Lookup Item Scoring
The Score Weighting (Panel Controls tab) is used to score all non-Lookup questions (e.g. textbox, signature etc.).

Panel Controls - Score Weighting.

If a question has any type of value entered as a response, then the Score Weighting is applied. If a question has no value entered, then a score is NOT applied.

All question scores for a form are added together and expressed as a percentage of the maximum possible score for the form.

Publishing Forms

Once the Form has been defined it is necessary to create the database objects that will be used to save and report on the collected data.
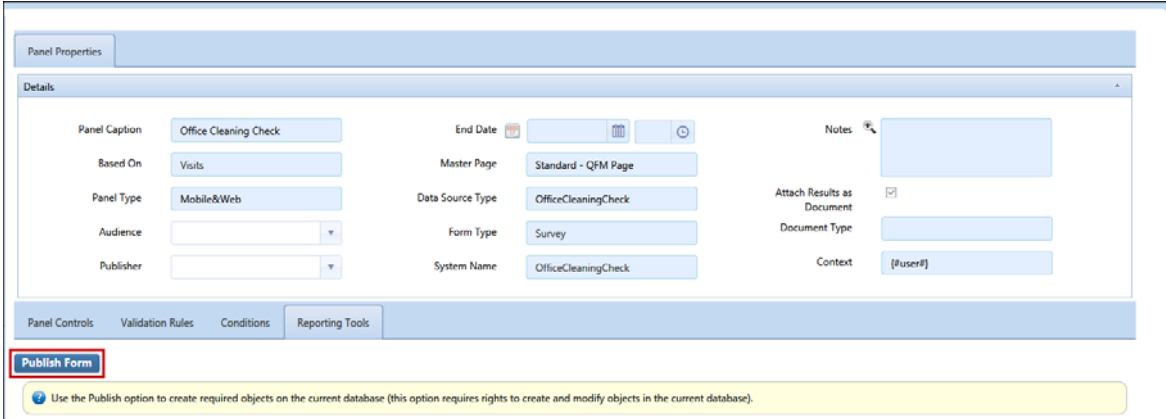
Panel Properties - Publish Form

Publishing the Form generates an entry in the Report Centre which contains the List to hold the data collected (see below).
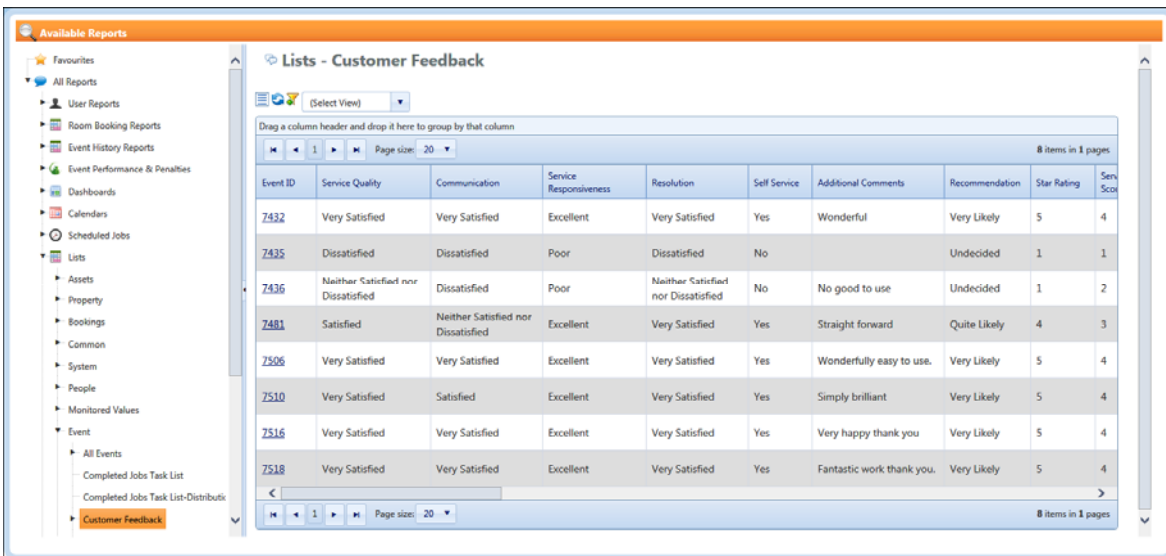
List Report

This facility is used to filter/ sort/group the collected data according to requirements. The data may be exported to Excel, PDF and Word from here.

As consistent across QFM, any view defined against the UDF results may be used to generate notifications or be distributed to interested parties via the 'Scheduled Jobs' facility.

Pushing Mobile UDFs to the Mobile Server

This option copies the UDF together with all associated data to the Mobile Server. Once at the Mobile Server the UDF will be synchronised to handheld devices.
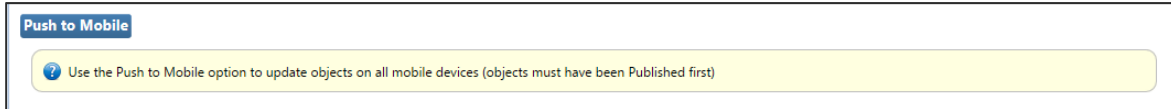
Push to Mobile function.

Setting Up UDFs to be Used in a Workflow

Different Events or Visits may require different UDFs to be entered at different stages of their lifecycle. QFM is able to be configured to use the appropriate UDF for the relevant context. A single workflow might have a requirement for several UDFs to be completed.
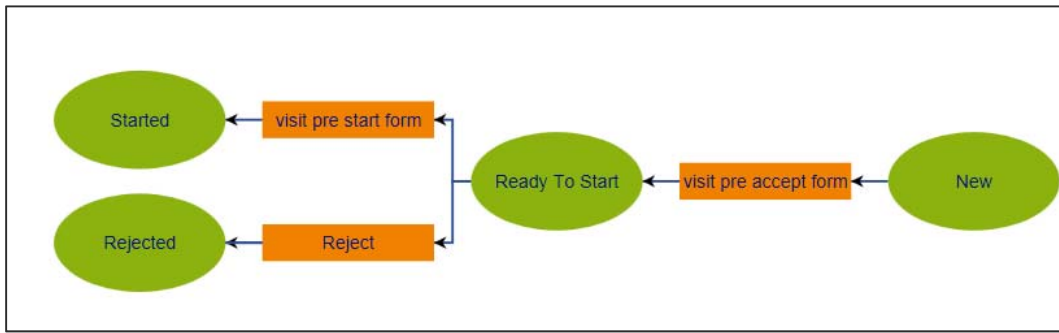
UDF Workflow

To help configure which UDF is used in which context QFM has extended its workflows so that forms may be referenced within certain workflow steps, such as when moving from 'New' status to 'Accepted' status when the user presses the 'Accept' button. UDFs are included within in the workflow as 'Workflow Transitions'. Typically, a 'Transition' is mapped to a button on the screen.

Rather than creating numerous different workflows with slightly different forms referenced, the workflow system supports the concept of specifying workflows with generic 'UDF Form Aliases' for key transitions. The 'Alias' is simply a reference to a Form which will be provided at run time depending on how the Form Aliases have been mapped to physical Forms. The name used for the 'Alias' in the workflow step (e.g. 'VisitPreStartForm') is key. This Alias may be mapped to a specific form based on a key data attribute within QFM such as 'Asset'. In this way, different Assets may have different forms associated with them. In the case of the 'VisitPreStartForm', a user may have a different Form presented to them depending on the Asset to which it relates.
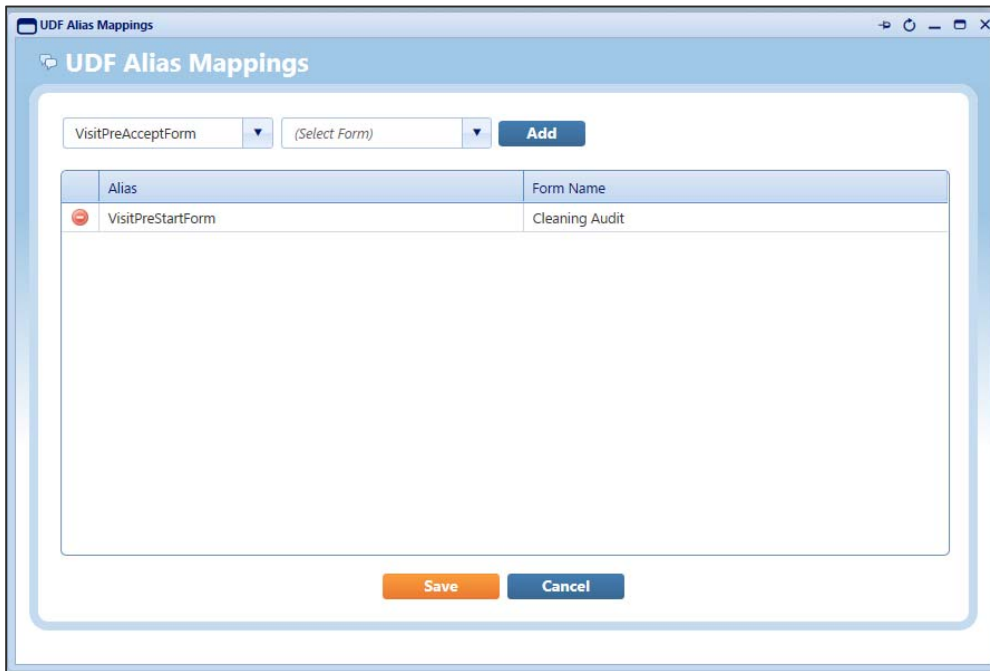
UDF Alias Mappings screen.

The key new functionality for workflows is summarised as follows:

- Ability to create a workflow that references UDF
- Ability to create multiple UDFs which are referenced within a single workflow
- Ability to make a UDF compulsory to complete, at a particular stage in the workflow
- Ability to set an Event to transition to the next state upon valid completion of a UDF

Note: If a UDF (*Form X*) is added to a Visit workflow, it can be aliased in more than one place in the workflow, e.g.
- 'visitpreacceptform' alias to *Form X*
- 'visitprestartform' alias to *Form X*
- 'visitprecompleteform' alias to *Form X*

When a Visit is completed, only the last set of results are sent back to QFM; in this case those answers completed in the 'visitprestartform' step. Also, the answers provided on *Form X* made in the step associated with the 'visitpreacceptform' alias will appear when the UDF form is shown in later steps.

This can be useful in the following scenarios:
- When a workflow step is required to show a previously entered form in read only mode (refer to SWG).
- When an operative is required to complete different elements of the same form as the Visit continues through its states.

Mapping Required Forms to the Workflow

Different forms may be required to be filled in depending on the type of Visit being managed. The system allows mapping of specific forms to a particular workflow step and also by association with a particular QFM entity.

Amongst the places UDFs may be associated with data are 'Asset', 'Model', 'Schedule Activity' 'Geography', 'Service' and 'Service Group'.

The Form 'Alias' Mappings are defined to indicate which form is to be used for a given 'Alias' that may be referenced in a Visit workflow. All three entities require an 'Alias' and a 'Form' to be mapped, (see below).

Hierarchies which dictate the order of precedence over which UDFs are used for a given context, are shown below. There are separate hierarchies for Asset Events and Service Events.

Asset Events	
Entity	**Precedence Level** (6 = highest)
Workflow	6
Schedule Activity	5
Schedule	4
Asset	3
Model	2
*Geography	1

Service Events	
Entity	**Precedence Level** (6 = highest)
Workflow	6
Schedule Activity	5
Schedule	4
*Service	3
*Service Group	2
*Geography	1

* Functionality available via a separate v2.01 add-in. Refer to your SWG Account Manager for details.

Setting Form Mappings Against Models

The General Reference Data (Models) screen allows the mapping of forms at Model level.

Setting mappings at this level means the forms apply to all underlying Assets (unless replaced with mappings of a higher importance, i.e. specific Asset level mappings).
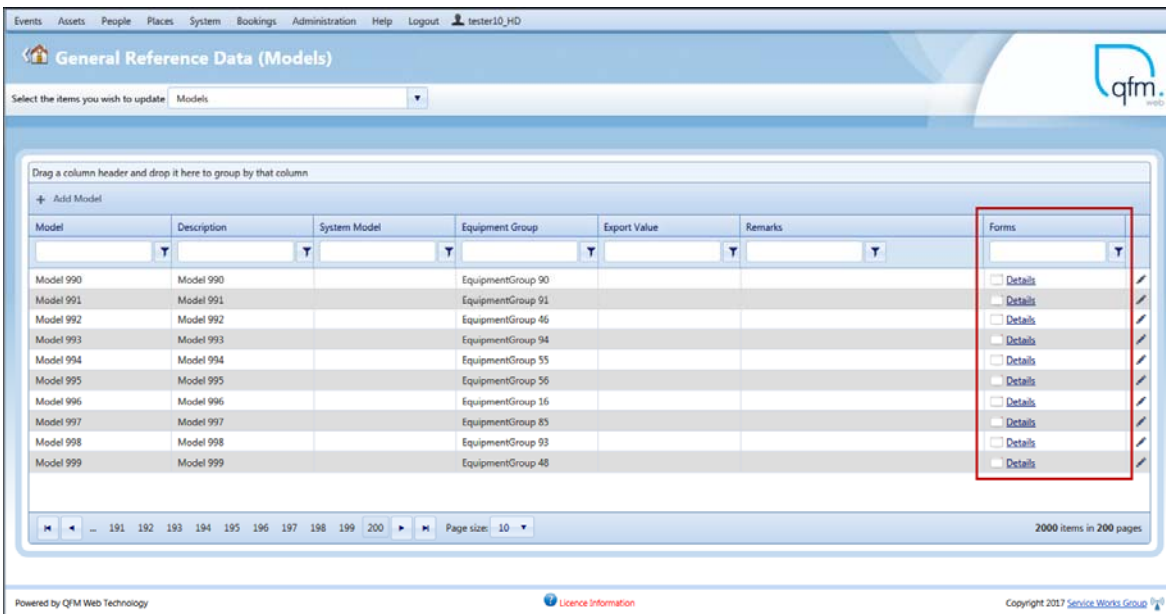
General Reference Data - Models.
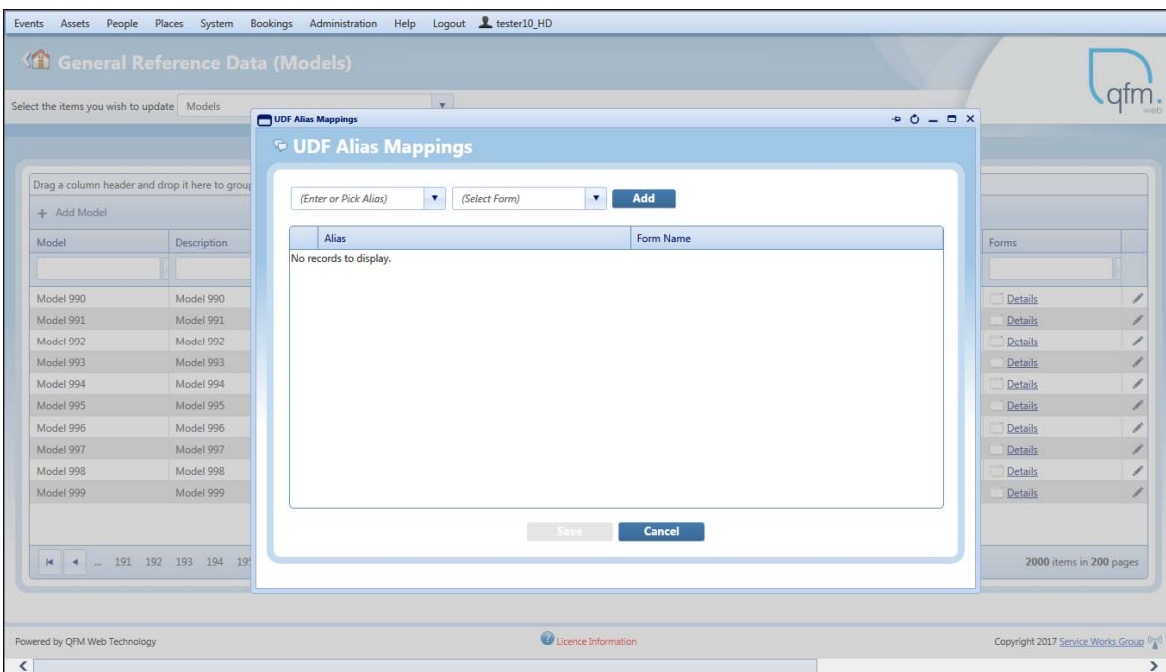
UDF Alias Mappings

Setting Form Mappings Against Assets

The Asset Viewer allows the mapping of forms at individual Asset level. Setting mappings at this level means the forms apply to this Asset only. Assets sit below Model and above Schedule Activity in the precedence hierarchy.

Asset Viewer - Forms tab.

Setting Form Mappings Against Schedules

Specific UDFs may be mapped to a Schedule of Activities. The required Form is simply matched to an 'Aliased' form used by the workflow.

Schedule Activities - Alias Mappings

Setting Bulk Form Mappings Against Geography, Services, Service Groups, Assets, Models

A facility is provided for the bulk uploading of Alias Mappings for Geography, Services, Service Groups, Assets and Models. This is done via the General Reference Data Import/Export facility. Data can be imported into QFM (from an Excel file) and the exported out (to Excel).

Refer to the precedence level hierarchies at the beginning of this section. These dictate the order of precedence over which UDFs are used for a given context.

This feature is available via a separate v2.01 add-in. Refer to your SWG Account Manager for details.

Note: On the spreadsheet, you can map multiple aliases to the entity (e.g. Service) by simply including new lines with the entity replicated and a different form alias.
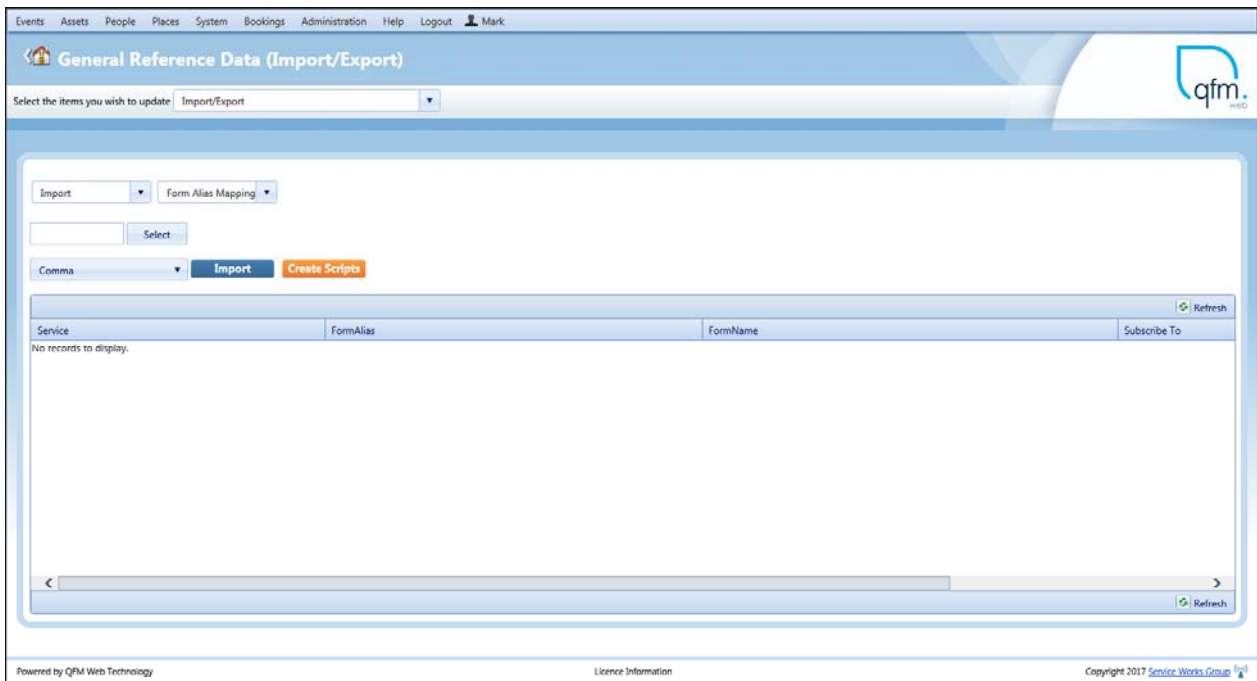
General Reference Data - Import/Export

Importing Data

Follow the steps below to import UDF Alias data into QFM from an Excel spreadsheet.

1. In General Reference Data select the **Import/Export** screen.

2. Select **Import** from the *(Select Transfer Option)* drop-down list.
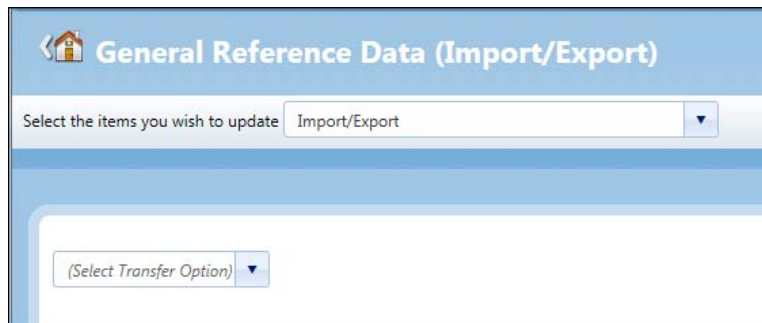
Select Import

3. Select the type of data to be imported in the adjacent drop-down list:

    ● Form Alias Mappings - Geography
    ● Form Alias Mappings - Services
    ● Form Alias Mappings - Service Groups
    ● Form Alias Mappings - Assets (Inventory)
    ● Form Alias Mappings - Models
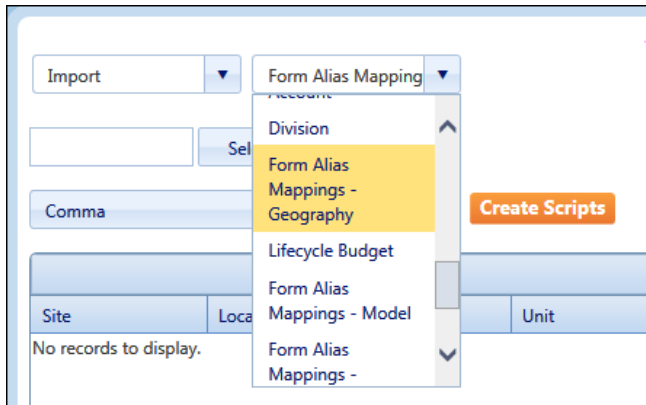
Select Data Type.

4. Click the **Select** button to pick the file to upload.

5. When the file is ready to import you will see a green dot next to the file name.

File ready to import.

Select the file delimiter from the drop-down list below, either:

Tab for a **Unicode Text** file type
or,
Comma for a **CSV (Comma delimited)** file type.

   Note: If the delimiter is not correct, the import may fail.

6. Select **Import**. A Download File message confirms the import is being prepared.

7. You can open or save the imported file if you wish to make further changes. If not, select **Cancel** to close the dialog.

Exporting Data

Follow the steps below to export UDF Alias data from QFM to an Excel spreadsheet.

1. In General Reference Data select the **Import/Export** screen.

2. Select **Export** from the *(Select Transfer Option)* drop-down list.
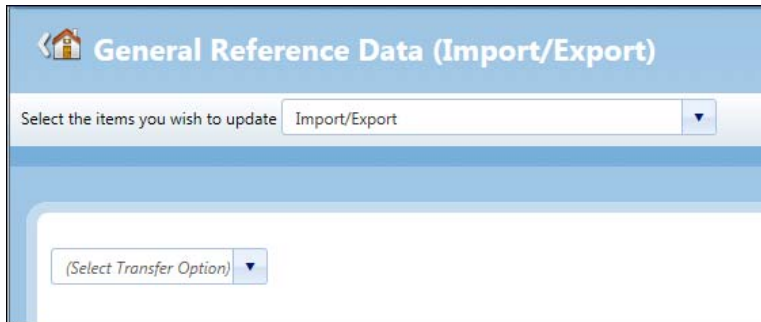
Select Export

3. Select the type of data to be exported in the adjacent drop-down list:

   ● Form Alias Mappings - Geography
   ● Form Alias Mappings - Services
   ● Form Alias Mappings - Service Groups
   ● Form Alias Mappings - Assets (Inventory)
   ● Form Alias Mappings - Models
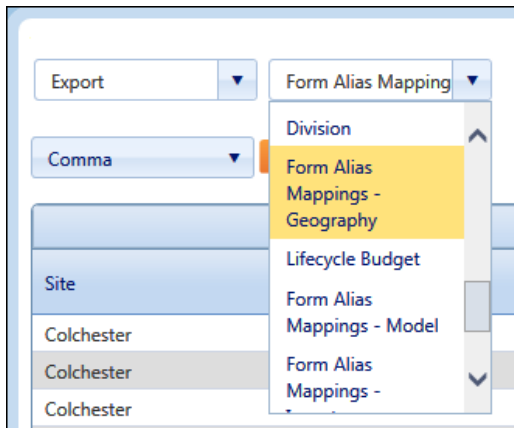
Select Data Type

4. Select a file delimiter from the drop-down list below, either:

   Tab for a **Unicode Text** file type
   or,
   Comma for a **CSV (Comma delimited)** file type.

5. Select **Export**. A Download File message confirms the export is being prepared.

6. Open or save the export file, as appropriate.

Mobile Forms on the QFM App

Included below are some typical screen shots from a Mobile UDF configured for a typical cleaning audit. Different aspects are introduced to illustrate how the configuration maps to the implementation of the Form on the mobile app.

Example form.

The Form name is 'Cleaning Audit'.

Group or Section name is 'Offices'. Each page is one Group.
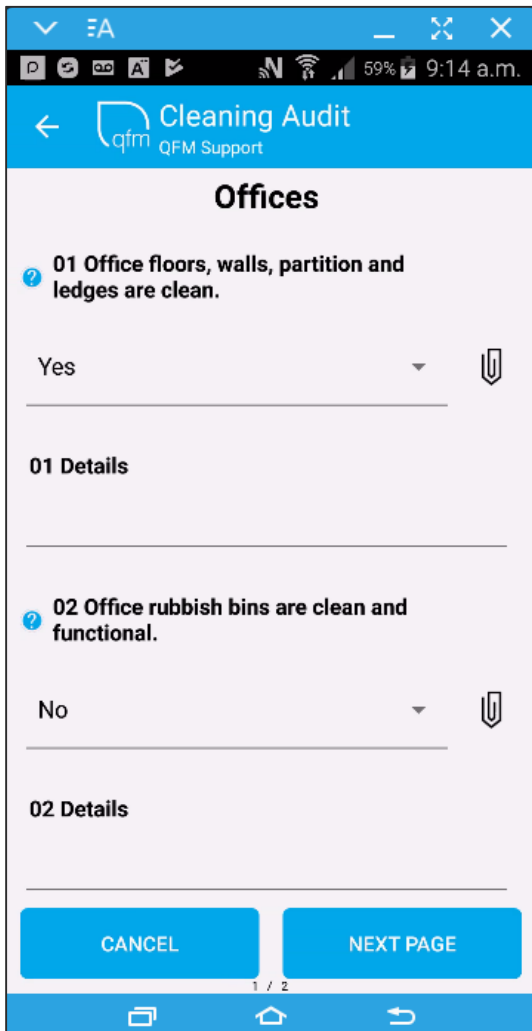
A help text option is available for each Control Caption (question); in this example the help text enables a more detailed explanation to be provided.
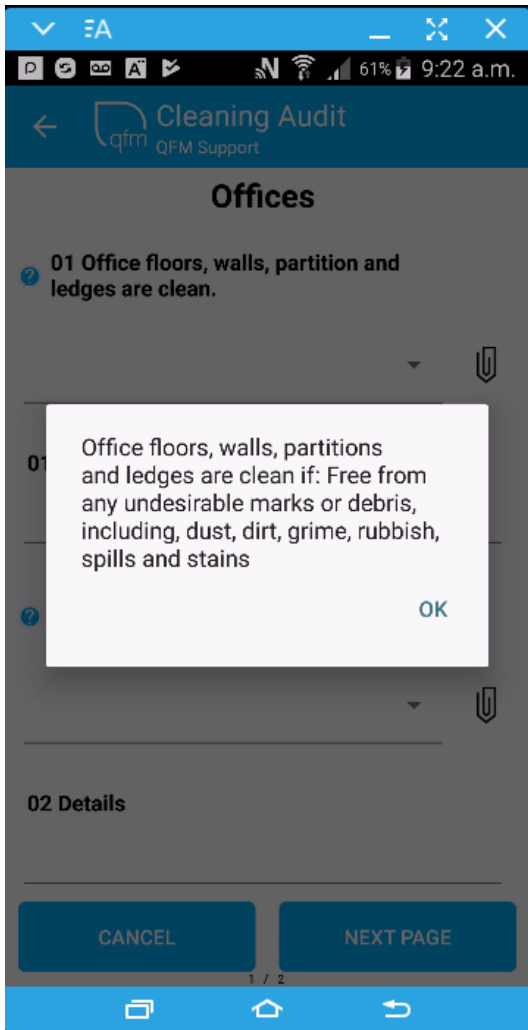
Help Text

Question 2 has a response of 'No'. The user can support this with a photo or attachment by selecting the attachment icon 🔖.

Note: Attachments can also be uploaded to a particular section, (if sections are in use).

Example Form.

The attachment can be re-named.
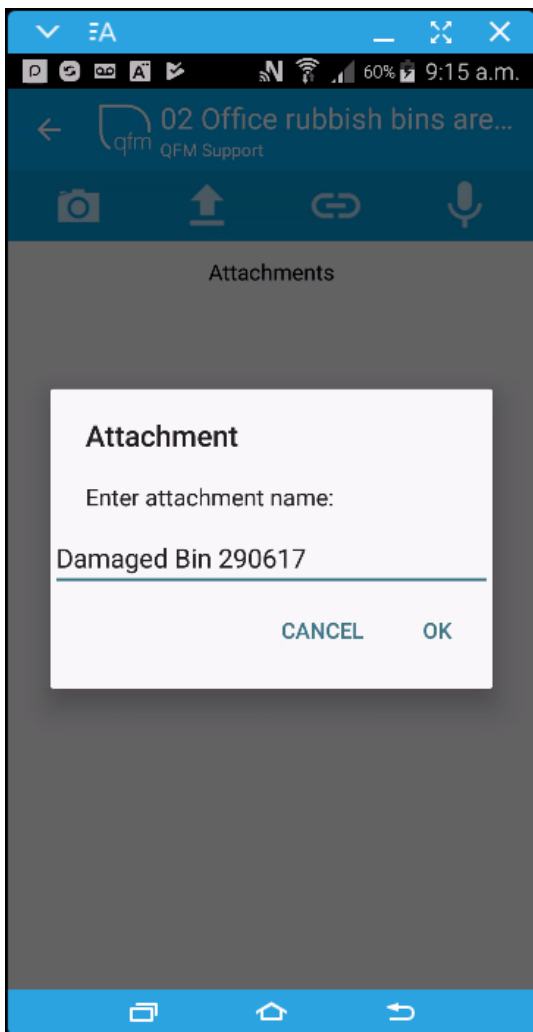
Re-name attachment.

Question 2 now indicates one attachment is present.
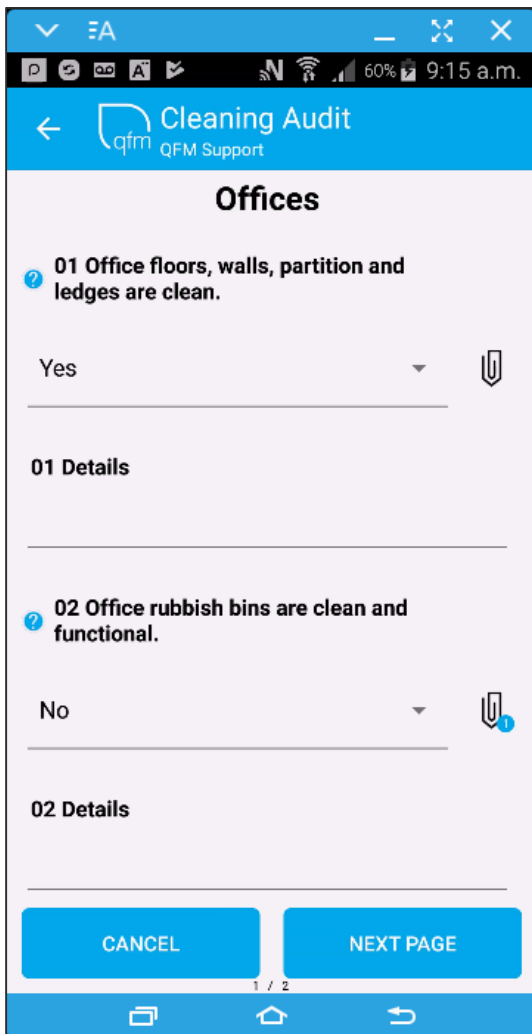
Attachment added.

Controls can be subject to validation. In this example, it is not possible to proceed to the next page until all questions are answered.
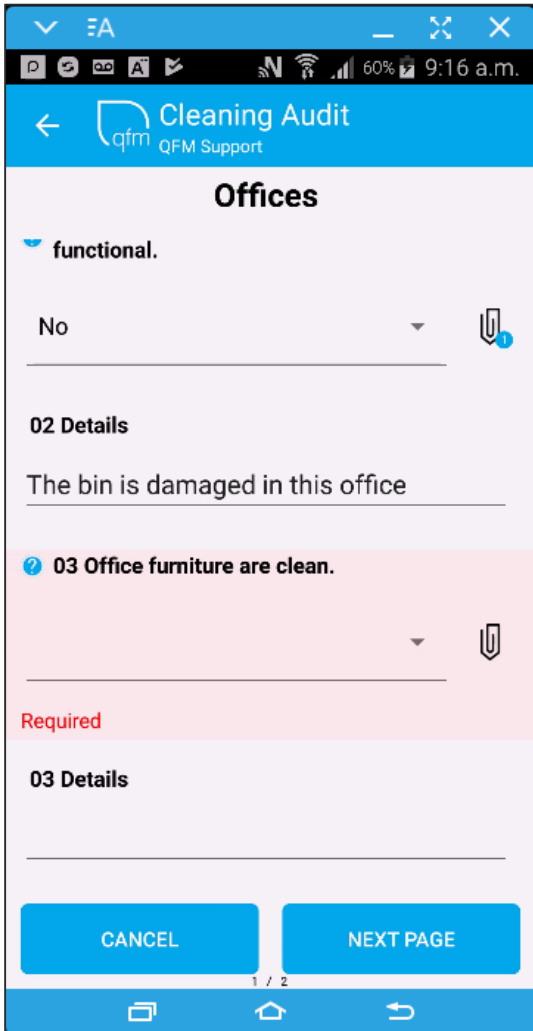
Validation.

Form Lookup controls enable responses to be confined to selection from a list of acceptable values.

It is possible to apply a score to the different question responses selected from a list and also to other types of answers entered. Forms can be defined with a score threshold at which they are considered to pass. If the scores derived from the answers given, do not pass the threshold then the Visit cannot transition to the next stage with the form in its current state. A validation message (configurable) is displayed and the options to save the Visit at its current status or amend the form, are provided.
If the scores derived from the answers given, pass the threshold then the Visit transitions to the next stage seamlessly.
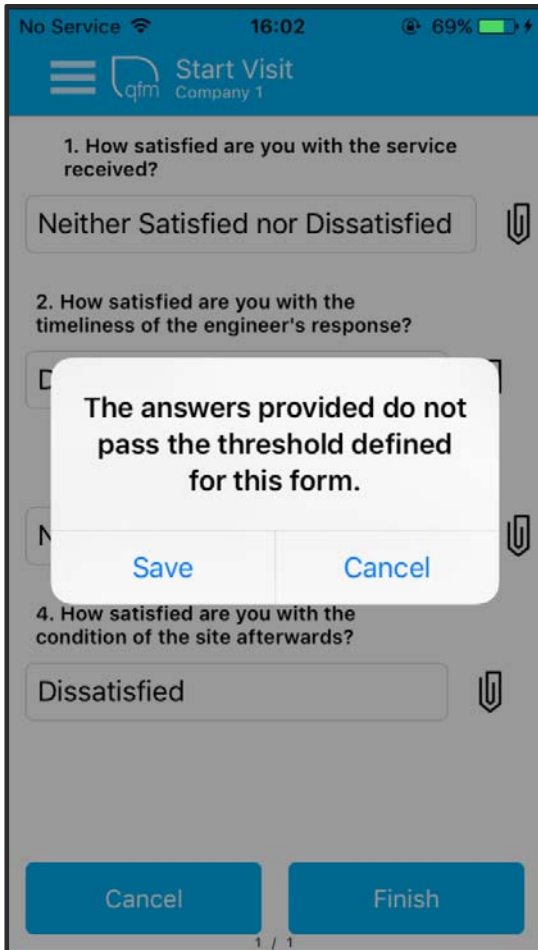
Validation Message.

Configuration

There are a number of administrative processes which need to be correctly configured in order to activate UDF functionality in QFM.

Software License

UDF functionality is available under a separate QFM software license.
(Refer to the example below).

Licence screen.

User Profile

In order to use the QFM UDF functionality the (**FM) User Defined Forms** Role must be added to the Profile to which users are attached.
(Refer to the example below).

Manage Profiles screen.

General Settings

Two new General Settings are added to the existing settings (Administration \ Users & Profiles \ General Settings \ User Defined Forms):

- **User Defined Forms**
    - o **Allowed to View UDF Alias Mappings**
      When set to **On** allows users to View UDF Alias Mapping functionality only.
    - o **Allowed to Change UDF Alias Mappings**
      When set to **On** allows users to Edit UDF Alias Mapping functionality.

General Settings.

General Reference Data

The General Reference Data - (UDF Form Type) screen enables Form Types to be added and maintained.
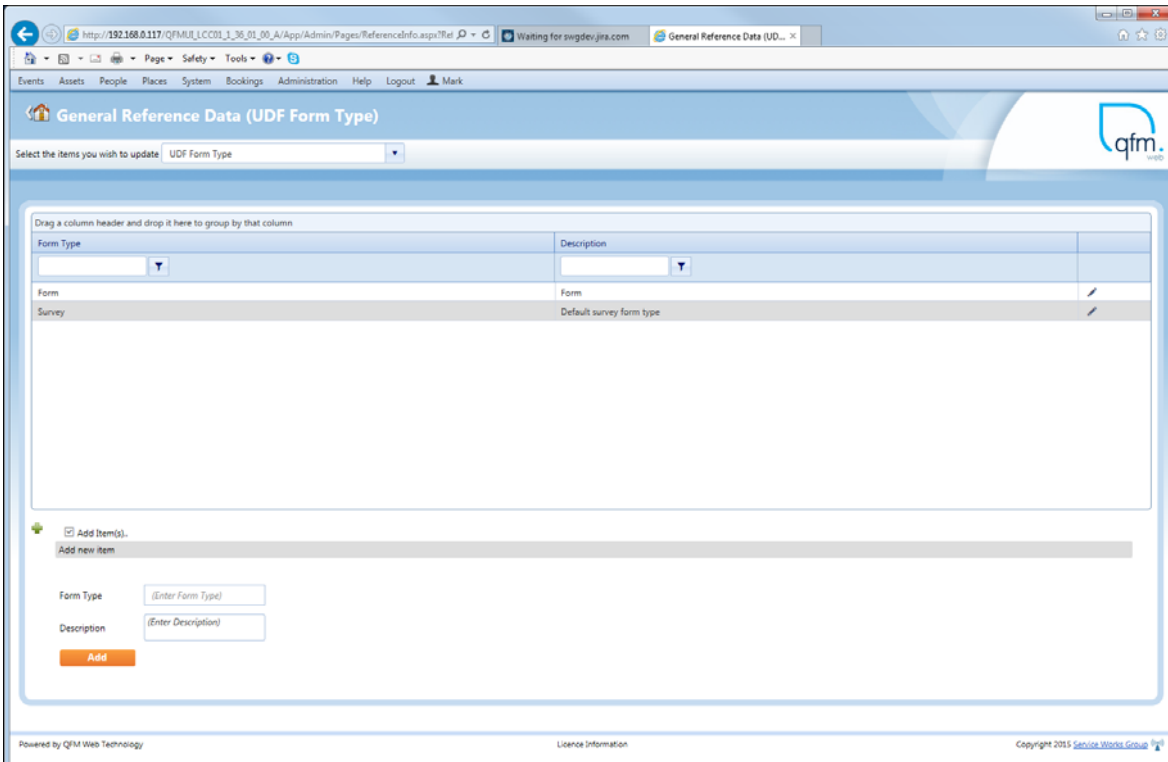
General Reference Data - UDF Form Type.

Form Types are selectable when creating new forms (below).
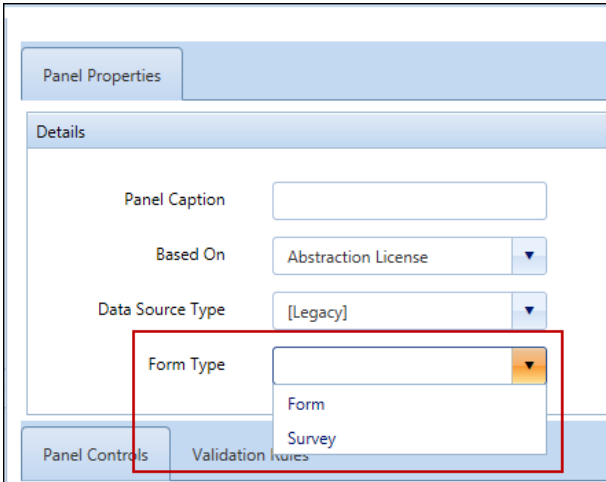
Form Type selection.

The General Reference Data - (UDF Surveys) screen provides the ability to delete a completed survey for an Entity ID.

Delete a survey.

To delete a survey select the ✖ icon on the survey row.

Delete a survey.

A new General Reference Data (UDF Compatibility Type) screen is added. This enables administrators to specify whether UDF functionality is compatible for use with the QFM application or with the QFM mobile app (or both), so that only compatible Controls are used.
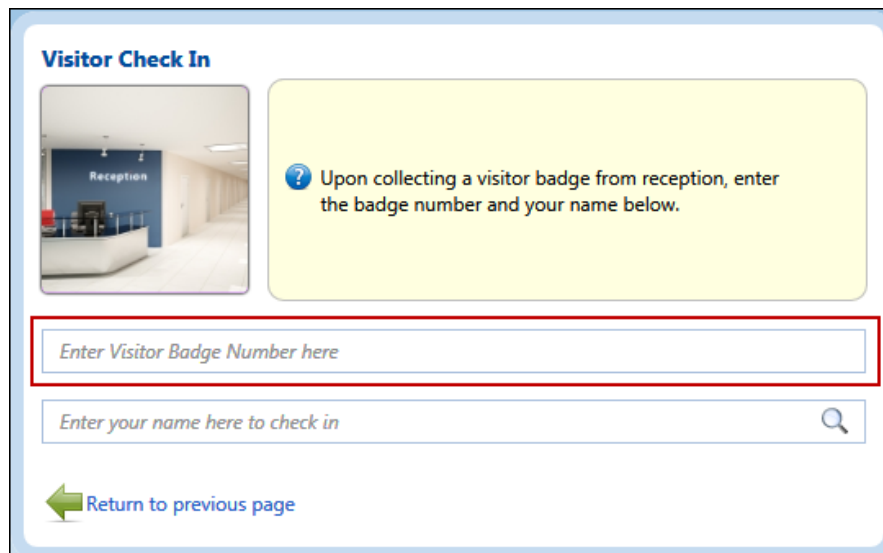

General Reference Data - UDF Compatibility Type.

Visitor Booking

Feature Overview

Key Features

- Visitor Badge number can be recorded on the QFM booking record
- Visitor Check In Wizard provides the ability for visitors to add their own Badge Number
- Configuration options allow administrations to control whether Badge Number entry is mandatory or optional

Benefits

- Streamlines the Visitor Check-in process by alleviating the need for reception staff to input Visitor Badge details

Introduction

Improvements are made to the Visitor Booking process which provide the ability for visitors to add their own badge number at check in, so that reception staff don't have to enter this information on their behalf. Changes are made to the Manage Visitors, Wizard Check In and General Settings screens.

The Visitor Check In Wizard now provides a configurable Visitor Badge Number field to enable Visitors to add their own Badge Number during check in.

A Badge Number can also now be added to new Visitor records (outside of the Check In Wizard process). Badge Number is also now available as filter criteria on the Advanced Search facility.

Manage Visitors

The Manage Visitors screen includes a new **Badge No** field for use when adding a new Visitor record. The search results grid also displays this field (both below).

Manage Visitors screen.

Add a Visitor.

The Advanced Search tab allows you to add a Badge Number as search criteria (below).

Search by Badge Number.

Search by Badge Number.

Wizard Check In

Design Mode Controls

Wizard Design Mode controls enable administrators to set the values for the Visitor Badge Number field on the Check In screen.

Wizard Check in screen - Design Mode.
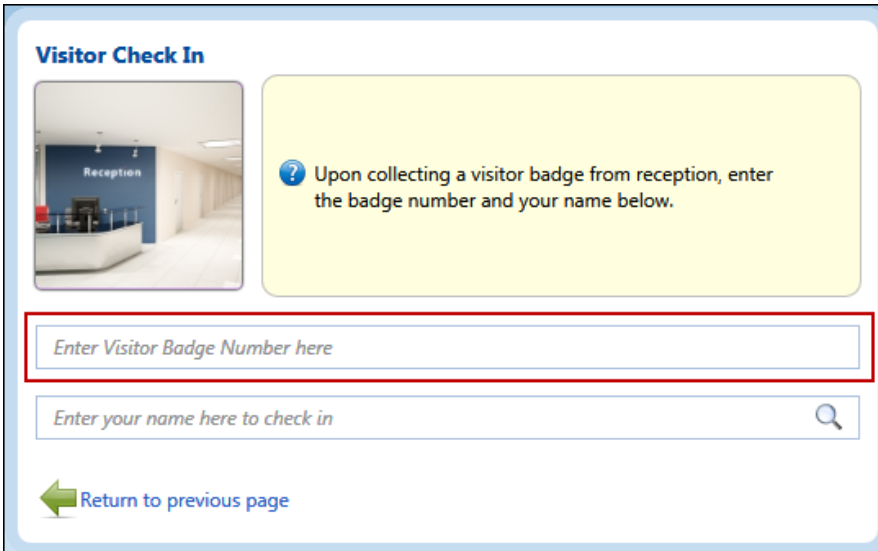
Visitor Badge Number controls are as follows (left to right):

- **User Selects** is the default population method. This means that this field on the Wizard Check In screen must be populated by the user.

- The field may be set to **Updatable** (default) or **Hidden** (not used).

- Tick the box to make this field mandatory (i.e. the user must enter a value).

Visitor Check In Screen

A new field is added to the initial Visitor Check In screen for visitors to add their badge number (shown in the example below).
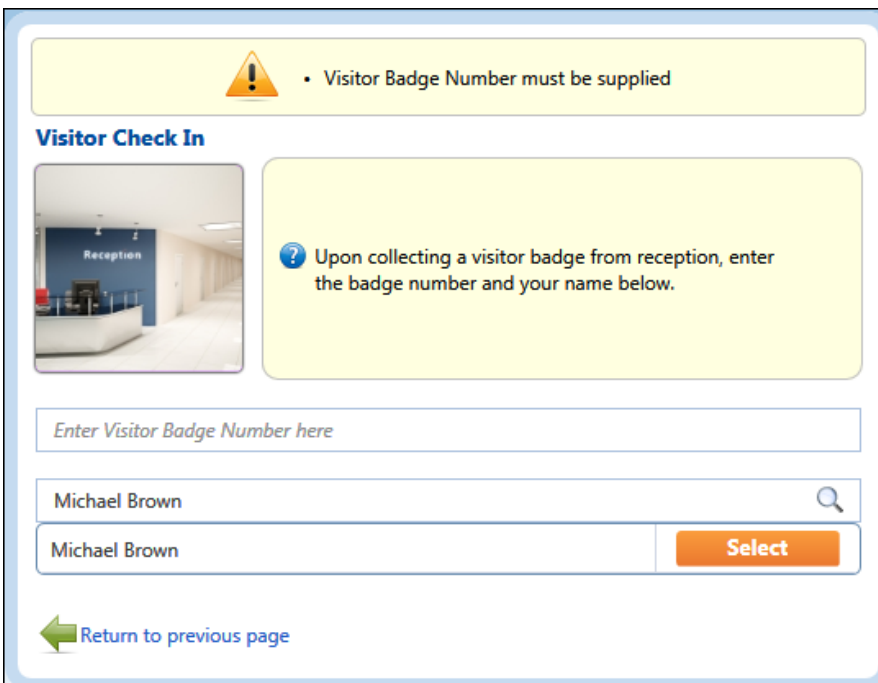
Wizard Check In screen.

The maximum character length is 40 and the field can contain letters, numbers, spaces and special characters.

If the Visitor Badge Number field is set as mandatory and a value is not entered, a validation message is displayed and the visitor can only continue the check in process once a badge number is entered (example below).

Validation message.

Configuration

General Settings

A new General Setting is added to the existing settings (Administration \ Users & Profiles \ General Settings \ Bookings - Visitors):

- **General**
  - o **Visitor Badge Number**
    Controls the **Badge No** field in the Add Visitor screen.

General Settings.

Known Issues

This section details new system issues which remain open. These will be rectified at the earliest opportunity.

General

N/A   If users have saved any previous filters/views against older versions of Visit/Event data views in QFM and re-publish these, some may fail to load. This is due to system refactoring which has resulted in the removal of some data fields. The Alarm Log will indicate which fields cannot be reconciled.

12508   Not all details on the 'About QFM Web' page may be displayed for users with a profile of 'Super Admin'.

Events

11511   Related Assets added against Express Events while logging via the Event Wizard may not be retained when the Event is viewed in the main Events screen.

13115   For Self Service Events configured via the Wizard; when logging an Event, system validation requires that a value is entered in the 'Contact Email' field, despite Wizard configuration for the field being set to user-updatable and non-mandatory.

13358   When updating existing Event Instructions and saving the record, it has been found that the worksheet which should accompany the email notification, is not being generated on an intermittent basis.

Event Director

13122   When adding column headers to a View via the Include\Exclude Columns feature, the 'Event Type' entry may be duplicated in the Visible list.

Schedule Planner

12804   When applying a geography filter in the Schedule Planner, the system may not return the correct schedules according to the geography filter.

Resource Scheduler

12389   Where an operative is assigned to more than one QFM user, Visits have been found to be automatically Dispatched instead of remaining at Confirmed status. QFM no longer allows an operative to be assigned to more than one QFM user, so this should not be an issue in the future.

Assets

11558   When using the Search facility in the Asset Viewer, the Advanced Search 'Equipment Group' filter may return invalid results.

System

Report Centre

Dashboards

11731   Following testing, it was found that after a Dashboard is loaded, if widgets are moved from one column to another the system may freeze for a short period before becoming accessible again.

Lists

12126   Visits - after a new View (including filters) is added to a UDF List, when attempting to load the List the message "*The search request timed out. Please narrow your search and try again*" may be displayed, regardless of the number of records included.

13134   Events - the 'Event Cost' and 'Total Event Cost' fields have been found to display incorrect amounts.

System Diary

13121   When adding a new item to a Diary View, the item is not displayed on the Diary grid until the screen is manually refreshed.

Bookings

Room Bookings

12920   In the Book a Room screen, the Layout sort function on the Summary tab may not correctly sort results according to the room layout.

Administration

General Reference Data

Shift Calendar

12831   When using the Chrome browser, attempting to add multiple shifts in Details View causes the screen to appear/behave differently when selecting shifts on the calendar.

Stock

11480 & 13375

When adding a Stock Part requisition to an Event, the corresponding Part record in the General Reference data Stock screen may not be updated correctly. In tests, the 'Quantity' amount has not reduced by the requisition amount, instead it has been set to zero.

User Defined Forms

12749 After creating and publishing a new form without a question, attempting to then add a question to the form may cause a system error.

12915 Any forms created with names which match the default alias names in the MOB_GEN_UDF workflow (i.e. visitprestartform, visitpreacceptform and visitprecompleteform) will be automatically used in the workflow as default, i.e. the forms will always be presented on a mobile device even if new forms are mapped to these aliases. There is currently no way to delete or restrict forms with default workflow forms.

Workflow Maintenance

12722 In the Workflow Maintenance screen (available to users with System Config Access) the 'Import XML' function may cause a system error.

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 Group (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 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 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 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'.