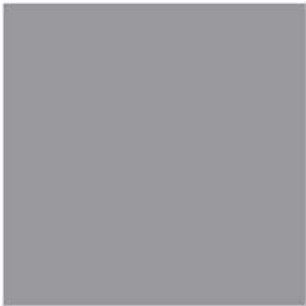




# Service Works Client Portal





## Self Service Support Case Management

To complement the help desk support provided by our Client Support team, Service Works' Client Portal includes online self-service support, offering the ability to log, track and update QFM and P3rform support requests, at any time, from any location. This ensures optimum levels of communication between you and Service Works' Support Centre.

Provided below is guidance for logging, viewing and managing your support cases via the portal.

### Accessing the Client Portal

Service Works' client portal can be found at <http://www.swg.com/customer-area/>

To access the portal, log in using using the unique username and password that you have been provided with via e-mail. Please note, these are your own personal login details and should not be shared with anyone else.

If you have forgotten your access details, you can request a password reset via the link provided on the login screen.

All users will be required to reset their passwords every 3 months to ensure data security.

Service Works' Client Portal provides a comprehensive range of online resources to help supplement your understanding of the QFM and P3rform product suites.

Please log in below using your unique login and password.

[New User? Sign Up](#)

You are now logged out.

Username  
johnxjones

Password  
.....

Remember Me

[Lost your password?](#)

[← Back to SWG](#)

If you have not been set up with access to the portal, you can request this by e-mailing [info@swg.com](mailto:info@swg.com) or speaking with your Account Manager.



## Finding a Resolution to Your Support Query

The resolution to your query may be found within the FAQ (Frequently Asked Questions) library within the portal. This can be accessed via the menu to the left of the screen. The FAQ library is fully searchable by keyword; alternatively the FAQs can be quickly categorised by product, using the buttons to the right.

Client Portal

FAQs

Providing Solutions to Frequently Asked Questions about QFM and P3rform

Search for a FAQ

Search FAQs...

You can use the search above to find a FAQ you are looking for or you can filter using the filter options below.

Filter

All P3rform QFM QFM Desktop QFM Web

Log a support request

PPP Penalty Payment Calculation - The penalty deduction report does not appear to include the holiday dates when calculating deduction days. The dates in the QFM calendar are correct, so why does the report show the wrong data?

I am unable to run existing reports held on the User Reports screen, as the execute (E) button is not enabled.

I am unable to create a new report in the QFM User Reports screen, as the 'Add' button is disabled.

Unwanted duplicate events are automatically created, each with a different Work Type.

Error Message "Overflow Error 6" when adding data in the Event screen.

Error Message in Crystal Reports "Failed to open the connection. Details: ADO Error Code:

Links to individual FAQs can be easily shared with colleagues by clicking on the 'Link to this FAQ' button at the foot of the FAQ. This will open a new window which displays a unique URL for the FAQ and its accompanying resolution, which can be copied and shared via e-mail.

Error Message "Error 13 Type Mismatch" when logging on or navigating to a screen.

**Problem**

When logging on to QFM or navigating to a particular screen, you may receive an error message that is similar to the following:

"Error 13 Type Mismatch".

**Cause**

This is caused by the expected column types (on the client machine installation) and the actual column types (on the database) being different. The screen being loaded issues the error, rather than an actual comparison between the client and database versions.

For this reason the error is *sometimes* caused when attempting to use a client and database whose versions don't match.

**Resolution**

Check that the version of QFM installed on the client machine and the database version are the same.

[Link to this FAQ](#)



## Logging a Support Case

You can quickly and easily log a support request or licence renewal from the Dashboard.

Simply fill in all the required fields (indicated with a \*). Please provide any relevant supporting details about your query, such as reference numbers or the steps needed to replicate an issue. You can also add attachments (up to 4MB in size), using the button at the foot of the form.

Once you have added all of the required information, click Send. Your request is immediately sent to Service Works' Support Centre, who will respond to the request promptly and within the terms of your Support and Maintenance Agreement.

### Log a support request [View all support requests](#)

**New case**

**First Name \***

**Last Name \***

**Email \***

**Phone \***

**QFM system type \*** ?

**Support request summary \***

**Support request description \*** ?

Please find attached screen shot of message displayed

Please provide details of the request and outline the steps needed to replicate the issue. Please add any other supporting information which may be relevant, such as reference numbers.

**Support request description \*** ?

Please find attached screen shot of message displayed

Please provide details of the request and outline the steps needed to replicate the issue. Please add any other supporting information which may be relevant, such as reference numbers.

**Add attachment** QFM login error message.png ?

**Send** >

\* = Required fields



## Viewing, Updating and Managing Support Cases via the Portal

You can view cases that you have logged via the portal by clicking on 'Your Support Requests' from the left-hand menu. Each case is assigned with a unique case reference which should be quoted when e-mailing or telephoning Service Works' Support Centre.

- All open cases are displayed in addition to cases **closed or cancelled within the past 6 months**. Cases which were closed or cancelled over 6 months ago are not shown within the portal.
- You can select whether to view Active, Closed or Cancelled cases from the drop down to the top of the screen.
- Cases with updates that have not yet been viewed by the user are highlighted in yellow.
- You have the ability to sort by any of the column headings on the 'Your Support Requests' by simply clicking on them.
- Please note that **information is displayed in real time, in the UTC time zone** (as opposed to the local time on your computer).
- A search feature enables search by keyword or case number.
- A maximum of 10 cases per are displayed per page. To move between pages, use the page numbers and "Next" link at the foot of the page.

Support request summary	Case reference	Latest update	Status	Priority	Support executive
Case: SWG-24257-XSB2 - Cannot log into QFM Bookings	SWG-24257-XSB2	12th September 2017 @ 11:11am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24205-KBK3 - Auditing PPM events	SWG-24205-KBK3	12th September 2017 @ 10:49am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24237-HSK8 - Adding new web users	SWG-24237-HSK8	12th September 2017 @ 10:47am	Open with Support	3 - Normal	Martin Halton
Case: SWG-24242-J2N5 - Room booking - catering costs allocation	SWG-24242-J2N5	12th September 2017 @ 10:47am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24243-P258 - Applying filters to reports	SWG-24243-P258	12th September 2017 @ 10:46am	Open with Support	3 - Normal	Martin Halton
Case: SWG-24252-W4C4 - Report centre query	SWG-24252-W4C4	12th September 2017 @ 10:45am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24253-M0H5 - Error message 123b	SWG-24253-M0H5	12th September 2017 @ 10:43am	Open with Support	3 - Normal	Martin Halton
Case: SWG-24256-B0W6 - Upcoming licence expiry	SWG-24256-B0W6	12th September 2017 @ 10:41am	Open with Support	2 - High	Gordon Rozario
Case: SWG-24255-P8Z1 - Problems logging events	SWG-24255-P8Z1	12th September 2017 @ 10:40am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24254-N0M4 - Can't select work type	SWG-24254-N0M4	12th September 2017 @ 10:38am	Open with Support	3 - Normal	Martin Halton



By clicking on the case name, you are able to drill down to view details of the case, including:



- Status
- Details logged by you and any attachments submitted
- Support agent responsible for managing your case
- Case type
- Priority
- The latest updates from Service Works' Support Team

Updates from SWG's Support Team are shown to the right hand side of the case, with the time (in UTC) and date of the update:

Case: SWG-24257-X5B2 - Cannot log into QFM Bookings SWG-24257-X5B2  
12th September 2017 @ 11:04am

Open with Support

---

Name	John Jones	<h3>Latest updates</h3> <hr/> <p> Gordon Rozario 12th September 2017 @ 11:04am</p> <p>Customer was using outdated unsupported browser; advised to update and retry logging in</p> <hr/> <p>Message</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"><p> </p></div> <p>Send </p>
Email	johnjones@abc.com	
Phone	02071234567	
Contract name	ABC Company	
QFM system type	QFMWeb	
Case type	General Query	
Priority	3 - Normal	
Support Agent	Gordon Rozario	
Support request description	Please find attached screen shot of message displayed	

Attachments

QFM login error message.png



You can add further updates to open cases via the Message box. Simply type the details and click Send. The update will appear to the right hand side of the case screen:

Case: SWG-24257-X5B2 - Cannot log into QFM Bookings SWG-24257-X5B2  
12th September 2017 @ 11:04am

Open with Support

---

Name	John Jones
Email	johnjones@abc.com
Phone	02071234567
Contract name	ABC Company
QFM system type	QFMWeb
Case type	General Query
Priority	3 - Normal
Support Agent	Gordon Rozario

Support request description  
Please find attached screen shot of message displayed

Attachments  
QFM login error message.png

Add new attachments  
**Add attachment**

Send

### Latest updates

John Jones  
12th September 2017 @ 11:08am  
I can now login but licence error message is appearing when I try to run room booking report - please see attached. Thanks.

Gordon Rozario  
12th September 2017 @ 11:04am  
Customer was using outdated unsupported browser; advised to update and retry logging in

Message

Send

You can also add further attachments to open cases via the "Add new attachments" link. Simply click on this button; locate the file from your computer that you wish to attach and click Send.

Add new attachments

**Add attachment** QFM bookings screen.png

Send



The new attachment will then be listed in the Attachments for that case.

Case: SWG-24257-X5B2 - Cannot log into QFM Bookings SWG-24257-X5B2  
12th September 2017 @ 11:10am

Open with Support

---

Name	John Jones
Email	johnjones@abc.com
Phone	02071234567
Contract name	ABC Company
QFM system type	QFMWeb
Case type	General Query
Priority	3 - Normal
Support Agent	Gordon Rozario

Support request description

Please find attached screen shot of message displayed

Attachments

- QFM login error message.png
- QFM bookings screen.png

Add new attachments

**Add attachment**

Send

### Latest updates

---

John Jones  
12th September 2017 @ 11:08am

I can now login but licence error message is appearing when I try to run room booking report - please see attached. Thanks.

---

Gordon Rozario  
12th September 2017 @ 11:04am

Customer was using outdated unsupported browser; advised to update and retry logging in

---

Message

Send





## Exporting Support Case Reports

From the “Your Support Requests” screen, you can also export lists of cases with their latest updates to Excel, to aid internal reporting and communication.

Select whether you wish to report upon Active, Cancelled or Closed cases from the drop down list.

Then click the “Export support requests” button. This will produce a report which displays all cases for the selection, with the most recent 3 updates for each case. The Excel report can be saved locally and distributed as required.

**Your Support Requests**  
Self-Service Case Management

Please click on any case to view progress and the latest updates.

Find a Support Request

Search...

Active

Log a new case

Book training

Export support requests

Support request summary	Case reference	Latest update	Status	Priority	Support executive
Case: SWG-24257-X5B2 - Cannot log into QFM Bookings	SWG-24257-X5B2	12th September 2017 @ 11:11am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24205-K8K3 - Auditing PPM events	SWG-24205-K8K3	12th September 2017 @ 10:49am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24237-H5K8 - Adding new web users	SWG-24237-H5K8	12th September 2017 @ 10:47am	Open with Support	3 - Normal	Martin Halton
Case: SWG-24242-J2N5 - Room booking - catering costs allocation	SWG-24242-J2N5	12th September 2017 @ 10:47am	Open with Support	3 - Normal	Gordon Rozario
Case: SWG-24243-P2S8 - Applying filters to reports	SWG-24243-P2S8	12th September 2017 @ 10:46am	Open with Support	3 - Normal	Martin Halton
Case: SWG-24252-W4C4 - Report centre query	SWG-24252-W4C4	12th September 2017 @ 10:45am	Open with Support	3 - Normal	Gordon Rozario

Reference	Summary	Status Code	Priority	Support Executive	Latest Update	Created On	Last 3 Notes
2	Case: SWG-24258-H6C5 - Customer sign off issues	Open with Support	3 - Normal	Martin Halton	21/09/2017 12:56:35	21/09/2017 12:47:14	Please note - this is only happening on Android handsets, not iOS. Upgrade to handset is required - customer advised that he is liaising with his internal IT team.
3	Case: SWG-24259-K4J1 - Satisfaction scoring on mobile	Open with Support	3 - Normal	Gordon Rozario	21/09/2017 12:51:45	21/09/2017 12:49:13	Customer to send through user names
4	Case: SWG-24237-H5K8 - Adding new web users	Open with Support	3 - Normal	Martin Halton	13/09/2017 09:27:04	22/06/2017 13:43:01	Patch applied - awaiting customer response
5	Case: SWG-24205-K8K3 - Auditing PPM events	Open with Support	3 - Normal	Gordon Rozario	13/09/2017 09:22:39	22/02/2017 13:35:27	Trying to select unavailable work type - advised customer accordingly.
6	Case: SWG-24255-P8Z1 - Problem logging events	Open with Support	3 - Normal	Gordon Rozario	12/09/2017 11:21:24	26/07/2017 14:53:12	I can now login but licence error message is appearing when I try to run room booking report - please see attached. Thanks. Customer was using outdated unsupported browser; advised to update and retry logging in.
7	Case: SWG-24257-X5B2 - Cannot log into QFM Bookings	Open with Support	3 - Normal	Gordon Rozario	12/09/2017 11:11:04	12/09/2017 10:56:00	Cost code corrected: awaiting customer response before closing case.
8	Case: SWG-24242-J2N5 - Room booking - catering costs allocation	Open with Support	3 - Normal	Gordon Rozario	12/09/2017 10:47:18	05/07/2017 10:38:09	Training issue - passed to Account Manager to discuss training options. Advised customer correct process in interim.
9	Case: SWG-24243-P2S8 - Applying filters to reports	Open with Support	3 - Normal	Martin Halton	12/09/2017 10:46:28	05/07/2017 10:53:17	Report filters not being correctly applied; customer re-running reports with filters as advised and will advise progress once this is done.
10	Case: SWG-24252-W4C4 - Report centre query	Open with Support	3 - Normal	Gordon Rozario	12/09/2017 10:45:33	19/07/2017 14:52:28	Have asked customer to send details of error / screen shot
11	Case: SWG-24253-M0H5 - Error message appearing	Open with Support	3 - Normal	Martin Halton	12/09/2017 10:43:47	19/07/2017 14:59:03	Forwarded to Account Manager to discuss upgrade
12	Case: SWG-24256-B0W6 - Upcoming licence expiry	Open with Support	2 - High	Gordon Rozario	12/09/2017 10:41:16	16/08/2017 10:11:16	Passed to Development
13	Case: SWG-24254-N0M4 - Can't select work type	Open with Support	3 - Normal	Martin Halton	12/09/2017 10:38:53	26/07/2017 11:46:42	



## Other Useful Resources Within the Portal

The client portal also offers a range of resources designed to support and enhance your usage of QFM and P3rform. These include:

- A resources library, containing:
  - Information about new software releases
  - Videos which showcase the latest features
  - Training videos to assist new users in utilising QFM
  - Functional overviews
  - Technical documentation
- Details about Service Works' range of client tailored and online training
- Information about upcoming events, such as user groups and webinars, with links to presentations from recent events
- The latest news from Service Works
- Industry research and white papers published by Service Works

**Client Portal**

- > Dashboard
- > Your Support Requests
- > News
- > FAQs
- > Training & Events
- > **Resources**
- > Contact Us

**Resources**  
Comprehensive Library of Product Resources and Technical Documentation

Search for a resource

Search Resources...

You can use the search above to find a resource you are looking for or you can filter using the filter options below.

**Filter**

All Functional Overviews & Product Guides  
Release Notes Surveys  
System Requirement Documents Videos  
White paper

**Request upgrade**

In addition to the comprehensive help desk support provided by Service Works' Client Support team, this page provides an extensive library of online QFM and P3rform product resources. Using the **filter or search functions to the right**, you can access product documentation including details about previous QFM product releases, Functional Overviews and technical information to assist with QFM and P3rform software installations. In addition, you can review Service Works' complimentary white papers designed to educate industry professionals in an ever-changing and evolving marketplace.


- Video: QFM Asset Lifecycle**  
The new QFM Asset Lifecycle module optimises and extends the life of assets and equipment by:  
...  
Videos
- What's New in QFM app 1.10.02.18**  
This document highlights functionality for the new QFM (cross platform) app 1.10.02.18  
Release Notes
- QFM v1.36 - User Defined Forms**  
QFM now gives users the ability to create forms in order to collect information exactly as required,...
- QFM Mobile App - Latest Features**  
The latest QFM Mobile app operates on Android and IOS devices to streamline remote task management, ...

Log out



You can search Resources by keyword using the search feature or filter by Resource category:

### Search for a resource



You can use the search above to find a resource you are looking for or you can filter using the filter options below.

### Filter

- All
- Functional Overviews & Product Guides
- Release Notes
- Surveys
- System Requirement Documents
- Videos
- White paper

We welcome your feedback on the portal, and any suggestions that you may have for how it could be improved.

Please e-mail your feedback and comments to [info@swg.com](mailto:info@swg.com).