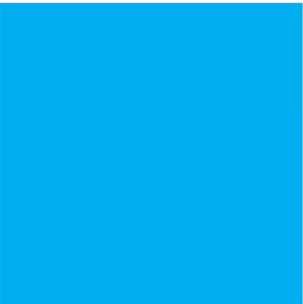
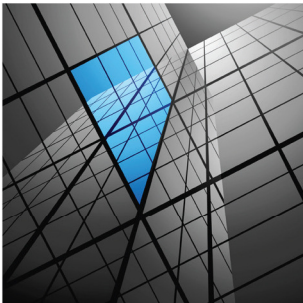




QFM Release Notes



What's New in QFM Web 1.34.00.10





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Version Log

Version #	Summary of Revision	Date	Author
1.0	First Issue	04/12/2015	MR



Release Notices

There are no notices for the QFM Web 1.34.00.10 release.

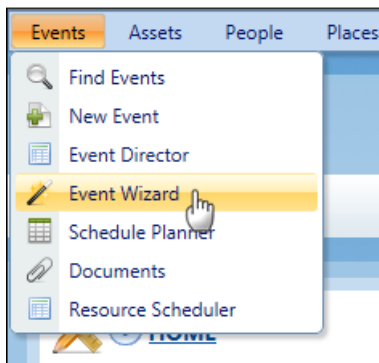


New Features

Service Works Group is pleased to release QFM Web version 1.34.00.10. This document describes the new features included in this version of the software.

Event Wizard - Quick Porterage Events

Quick Porterage Events are now added to the Event Wizard. The Event Wizard enables users (typically administrators) to create customised workflow templates for job logging and a range of other activities, which can be set up for each user profile.



The Event Type of Quick Porterage allows different Source and Destination geography to be defined for an Event.

Creating Quick Porterage Event Logging Templates

The Wizard screen has two modes; a Run mode which is the default and standard mode for users, and a Design mode for creating templates and workflows. You can switch between modes by selecting the icons in the top right corner of the screen.



Enter Design Mode

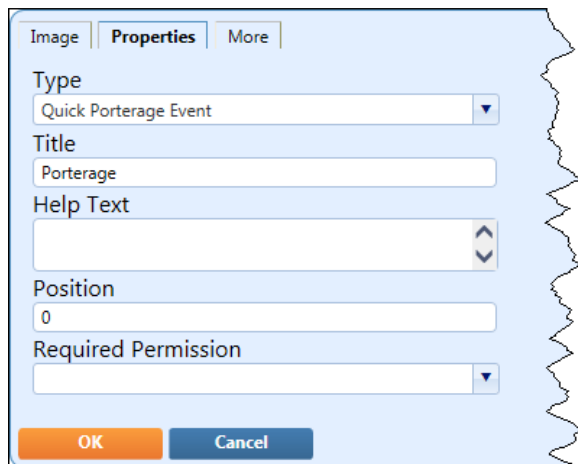


Exit Design Mode

To add and maintain templates you must enter Design Mode. Here, you can add a title and notes for the page.

To add a Quick Porterage Event Template select  [Add](#).

Properties Tab



- In the **Type** field select **Quick Portorage Event**.
- In the **Title** field add the text to appear on the event form and the Wizard button (e.g. Portorage).
- In the **Help Text** field add text to appear as a tool tip on the wizard button and as prominent text on the event form (next to the image).
- In the **Position** field you can assign an order of priority for the folder. If all folders are given a value of **0** then no order will exist.
- In the **Required Permission** field select a user class setting to restrict access to only those users who have the correct permission.

Image Tab



- Select an image to appear on the form from the drop down list, or tick the **Import Image** box to upload an image of your choice.

More Tab

The parameters in the More tab enable you to create a customised form for logging a Portorage Event. Select the parameters in each field as follows:



Note: A red asterisk * denotes that a field can be made mandatory for users, by ticking the adjacent box.

If the asterisk and tickbox * are disabled then the field is fixed as mandatory.

- **Event Type** field; select **Porterage**.
- **Workflow** field; select **FM Simple Porterage**.
- **Initial Event** field; select **Submit**.
- **Service Group** field; select **Porterage**.
- **Service** field; select the method of population (Default value or User Selects) or a pre-populated value. *(This field is fixed as mandatory for users *).*
- **Work Type** field; select the method of population (Default value or User Selects) or a pre-populated value. *(This field is fixed as mandatory for users *).*
- **Priority** field; allows you to define the label for this field.

- The **Get Default** link inserts the default label of **Priority**.
- In the field below, select the method of population (Default value, Priority Linked to Work Type or User Selects) or a pre-populated value. *(This field is fixed as mandatory for users *).*
- In the adjacent field to the right, configure the field to be **Hidden**, **Read Only** or **Updatable**.
- If the **Allow Ad-hoc Priorities** box is ticked, a Due Date/Time picker is displayed to the end user to select the Priority, if they select a Priority of 'Ad-hoc'. This box is only displayed if the Priority is set to 'User Selects' and/or the Display Mode is 'Updatable'
- **Submit Prompt** field; allows you to define the label for the 'Submit' button. The **Get Default** link inserts the default label of **Submit**.
- **Cancel Prompt** field; allows you to define the label for the 'Cancel' button. The **Get Default** link inserts the default label of **Cancel**.
- **Site** field; select the method of population or a pre-populated value. The adjacent field allows you to configure the field to be **Hidden**, **Read Only** or **Updatable**. *(The Site field is fixed as mandatory for users *).*



- **Location, Unit and Partition** fields; select an appropriate option to determine how these fields are to be populated. The adjacent fields allow you to configure the fields to be **Hidden, Read Only** or **Updatable**. Depending on the values selected, the option (tick box) to make these fields mandatory for users may be available *).
- **Add Destination Geography** box; is ticked by default.
- **Instructions** field; allows you to define the Instructions prompt text on the form.

- The **Get Default** link inserts generic prompt text.
- In the field below, specify any text to pre-populate the Instructions box.
- Tick the box * to make this field mandatory for users.
- **Reference** field; allows you to define the label for this field.

- The **Get Default** link inserts the default label of **Reference**.
- In the field below, select the method of population.
- In the adjacent field to the right, configure the field to be **Hidden, Read Only** or **Updatable**.
- Tick the box * to make this field mandatory for users.
- **Destination Site** field; select the method of population or a pre-populated value. The adjacent field allows you to configure the field to be **Hidden, Read Only** or **Updatable**. (*The Destination Site field is fixed as mandatory for users* *).
- **Destination Location, Destination Unit and Destination Partition** fields; select an appropriate option to determine how these fields are to be populated. The adjacent fields allow you to configure the fields to be **Hidden, Read Only** or **Updatable**. Depending on the values selected, the option (tick box) to make these fields mandatory for users may be available *).
- **On Behalf Of** field; select the method of population or a pre-populated value. Tick the box * to make this field mandatory for users.
- **Contractor** field; select the method of population or a pre-populated value.
- **Operative** field; allows you to define the label for this field.

- The **Get Default** link inserts the default label of **Operative**.
- In the field below, select the method of population.
- In the adjacent field to the right, configure the field to be **Hidden, Read Only** or **Updatable**.
- Tick the box * to make this field mandatory for users.
- **Show Link to Logged Event** box; tick to enable a link which takes the user to the event record in the main Event screen, once the job is reported in the Wizard.
- **Allow Attachments** box; tick to enable functionality to add attachments.
- **Allow Related Assets** box; tick to enable functionality to add linked assets.


Select **OK** then **Save**.



Quick Porterage Event User Form

An example of a Quick Porterage User form is shown below.

Porterage



Porterage

After reporting this issue, you will have the following additional option(s):

- Adding Attachments

Site

Location

Unit

Partition

Destination Site

Destination Location

Destination Unit

Destination Partition

Service

Work Type

On Behalf Of

Please enter description of problem (provide as much detail as possible to enable our engineers to quickly identify and remedy the issue):

The QFM Event Wizard enables users to log a porterage request and create a QFM Porterage Event. QFM Express Event functionality is used to allow users to enter the minimum data and save a new Porterage record, at which point, users with the appropriate permissions will be able to continue to the full suite of QFM Event functionality.



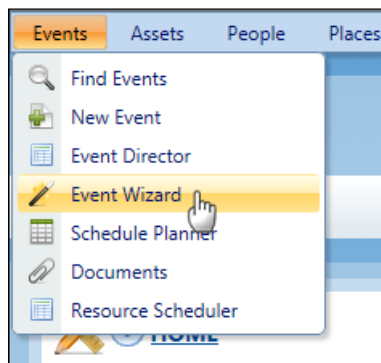
Specifying a Completion Time - Manually

As standard, the Due Date/Time for a Quick Porterage Event is determined by the Priority associated with the Service/Work Type which is specified on the Quick Porterage User form. This is calculated relative to the Reported Date of the Event.

If it is required that the user logging the request should specify the Due Date/Time, an Ad-hoc Priority should be created in QFM and then configured as an option for the Porterage Service/Work Type. The Ad-hoc Priority can then be set for Quick Porterage Events in the Wizard Design Mode (More tab) which will then expose the Due Date/Time field on the Quick Porterage User form.

Event Wizard - Quick Room Booking

A Quick Room Booking facility is now added to the Event Wizard. The Event Wizard enables users (typically administrators) to create customised workflow templates for job logging and a range of other activities, which can be set up for each user profile.



The Event Type of Quick Room Booking allows administrators to create access to a booking diary for a specific geography, which can then be accessed by users with a Self Service profile to make bookings, via the Wizard.

Creating Quick Room Booking Templates

The Wizard screen has two modes; a Run mode which is the default and standard mode for users, and a Design mode for creating templates and workflows. You can switch between modes by selecting the icons in the top right corner of the screen.



Enter Design Mode

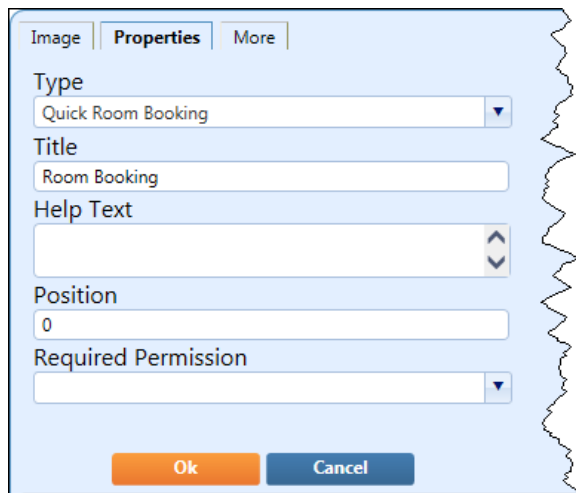


Exit Design Mode

To add and maintain templates you must enter Design Mode. Here, you can add a title and notes for the page.

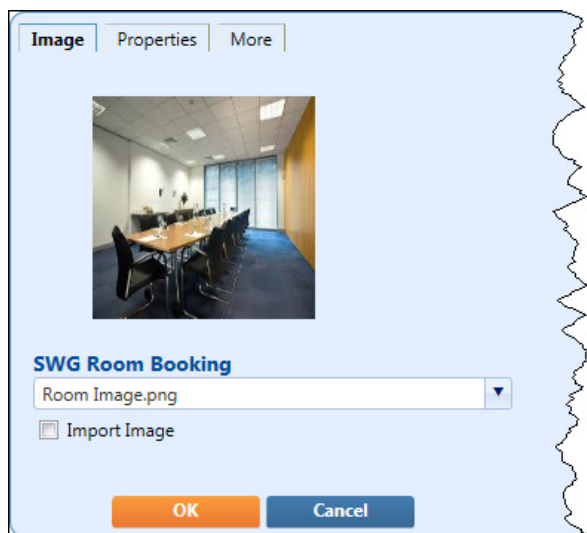
To add a Quick Room Booking Template select  [Add](#).

Properties Tab



- In the **Type** field select **Quick Room Booking**.
- In the **Title** field add the text to appear on the Wizard button and the booking diary.
- In the **Help Text** field add text to appear as a tool tip on the wizard button and as prominent text on the booking diary.
- In the **Position** field you can assign an order of priority for the Wizard button. If all buttons are given a value of **0** then no order will exist.
- In the **Required Permission** field select a user class setting to restrict access to only those users who have the correct permission.

Image Tab



- Select an image to appear on the form from the drop down list, or tick the **Import Image** box to upload an image of your choice.

More Tab

The parameters in the More tab enable you to specify the room booking diary to be displayed. Select the parameters in each field as follows:



- **Site, Location, Unit and Partition** fields; select the geography of the room to accept bookings.
Note: The room must be set up to accept bookings in the Room Details screen.
- **Booked By** field; select the method of population (User Selects) or a pre-populated value.
- **Host** field; select the method of population (User Selects, From Booked By) or a pre-populated value.
- **Agenda** field; allows you to define the label for this field ('Agenda' is the default).
- **Remarks** field; allows you to define the label for this field ('Remarks' is the default).
- **Diary View** field; select the default view for the Room Diary. (This can be changed by the user when making a booking).
- **Show Link to Logged Booking** box; if ticked, provides a link on the booking segment of the diary, which provides summary view-only booking details in a pop-up box (hover cursor over link) and displays a pop-up window with access to full booking details (select the link).

Select **OK** then **Save**.

Quick Room Booking Diary

The Quick Room Booking option is available to Self Service users.



Quick Room Booking Controls

The controls situated at the top of the diary are detailed below:

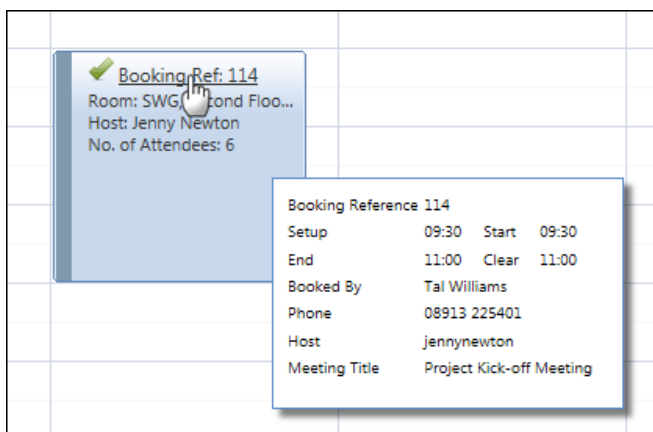


- **Only Own Meetings**
Tick the box to display only the meetings for which the current (logged in) user is the Booked By person.
- **Refresh icon**
Refreshed the diary data.
- **Book Now link**
Displays the Booking Details window with the Meeting From / To times automatically populated. (The Meeting From time is rounded forward to the nearest 15 minute slot, i.e. 15/30/45/00 and the Meeting To time is set ahead by the number of minutes in the adjoining numeric field (see below)).
Used in conjunction with the adjoining numeric field.
- Enables you to set the meeting length time in minutes.
- **Messages**
Displays any messages for the geography, added via the Room Details (Configuration) screen.
- **Attachments**
Displays any attachments for the geography, added via the Room Details (Configuration) screen.

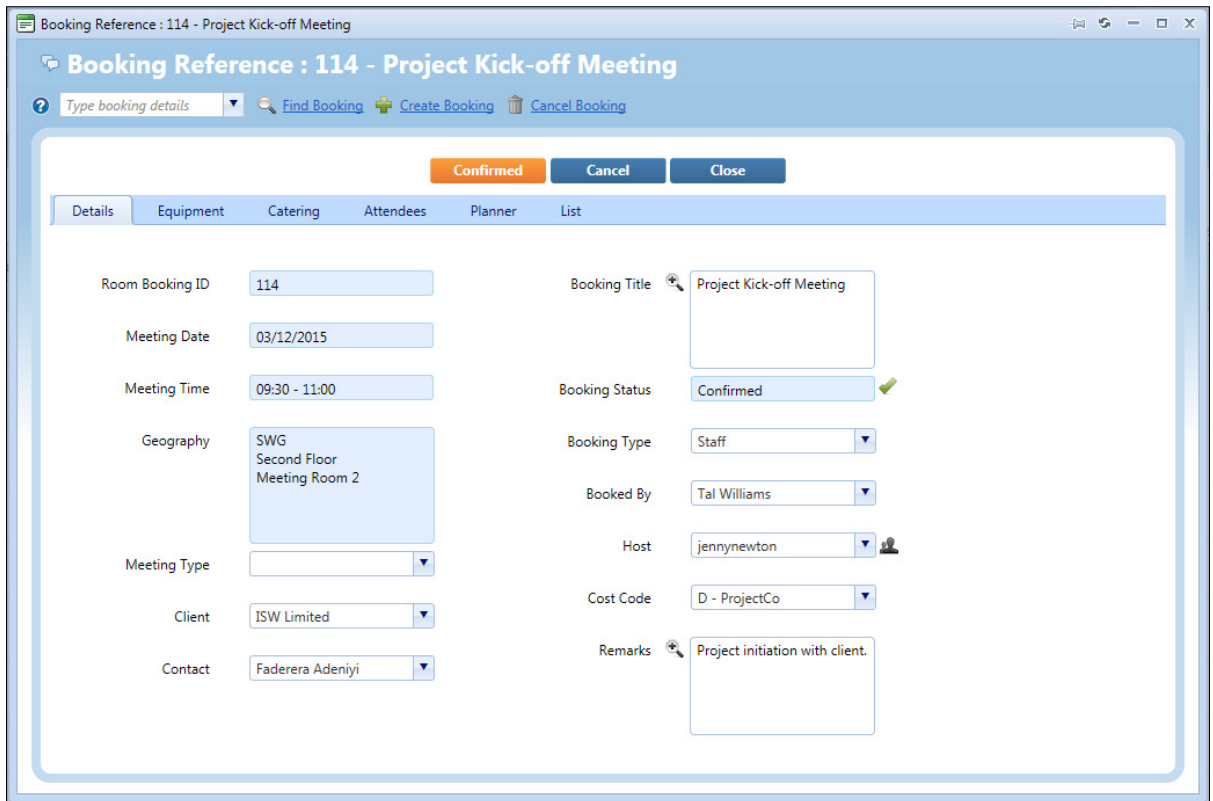
Viewing Existing Bookings

There are several ways to view the details of an existing booking shown in the diary.

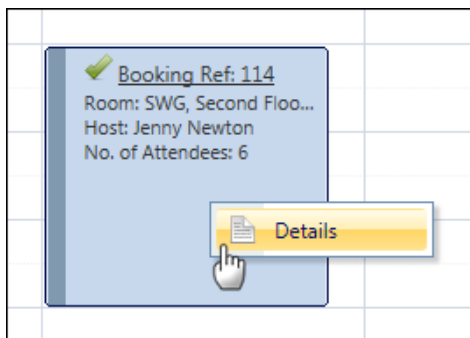
- Hover the cursor over the Booking Reference to display summary booking details.



- Click on the **Booking Ref: 123** link to display details of the booking in a pop-up window. (Creating a Booking Reference link is configurable in the Wizard Design Mode).



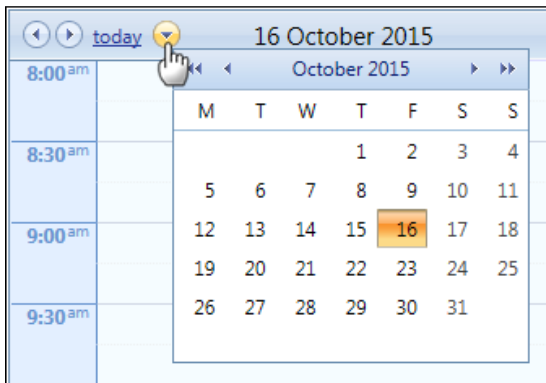
- Right-click on the booking then select **Details** to display details of the booking in a pop-up window.



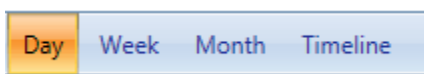
Making a Quick Room Booking

Standard Method

1. Use the calendar options to display the date on which the booking is required.



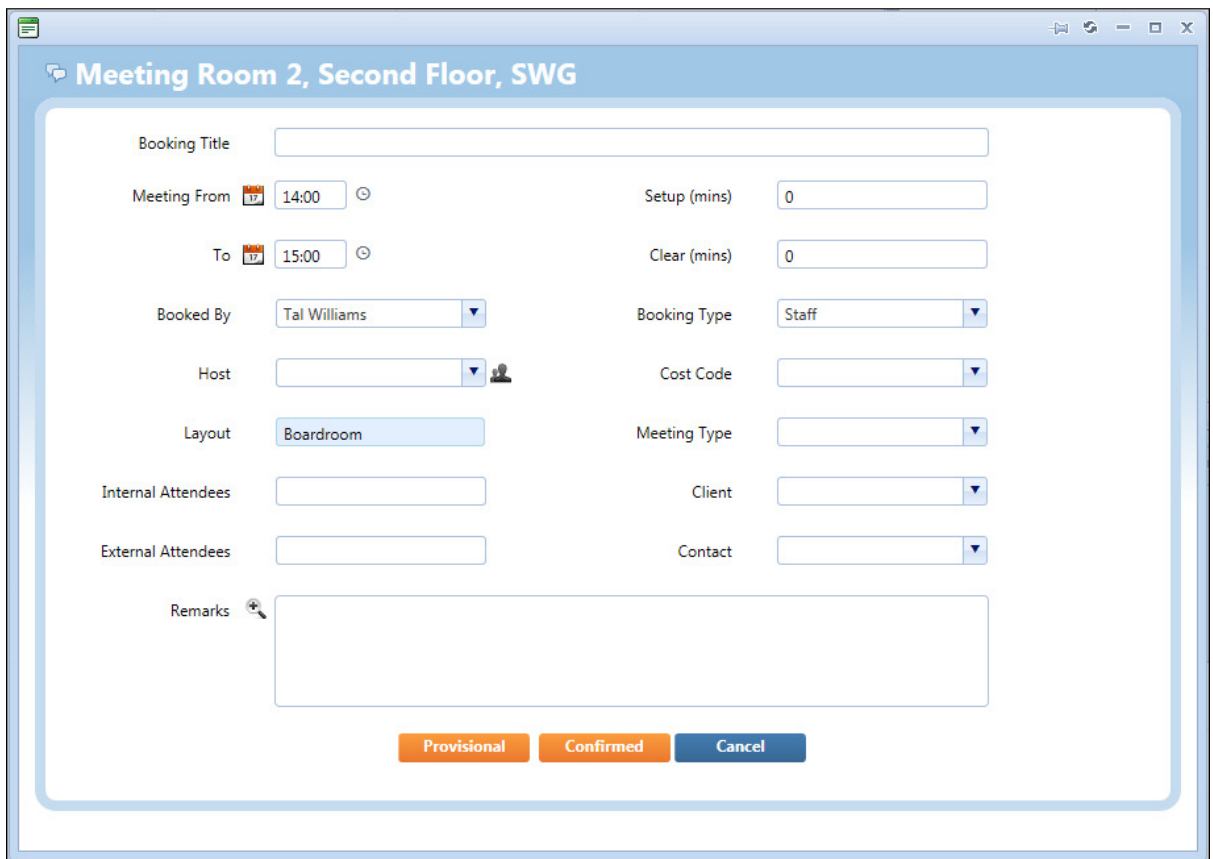
The Diary View can be used to change the diary layout.



2. Highlight the booking duration on the diary.
Right-click on the shaded segment/s then select **New Meeting**.



3. Enter the booking details in the pop-up window.



4. Configuration settings control the ability for users to make bookings which are either of a Provisional status or a Confirmed status (or both). Users can also be restricted to be able to Confirm their own bookings only, or all bookings. Depending on these configuration settings, either the **Provisional** button or the **Confirmed** button may not be present.

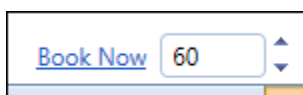
Either of these buttons must be selected to save the booking. The booking will then move to the status of either Provisional or Confirmed and it may not be necessary to make any further updates.

A Provisional booking may be updated to Confirmed.

Book Room for Immediate Start

This method is designed to be used when you require a meeting room for immediate use.

1. On the Diary header controls, specify the duration of the booking (in minutes) required, in the numeric field adjoining the Book Now link.



2. Select the **Book Now** link.
The Booking Details window is displayed with the Meeting From / To times automatically populated. (The Meeting From time is rounded forward to the nearest 15 minute slot, i.e. 15/30/45/00 and the Meeting To time is set ahead by the number of minutes specified in the diary.



Meeting Room 2, Second Floor, SWG

Booking Title	<input type="text"/>	Setup (mins)	<input type="text" value="0"/>
Meeting From	<input type="text" value="11:00"/>	Clear (mins)	<input type="text" value="0"/>
To	<input type="text" value="12:00"/>	Booking Type	<input type="text" value="Staff"/>
Booked By	<input type="text" value="Tal Williams"/>	Cost Code	<input type="text"/>
Host	<input type="text"/>	Meeting Type	<input type="text"/>
Layout	<input type="text" value="Boardroom"/>	Client	<input type="text"/>
Internal Attendees	<input type="text"/>	Contact	<input type="text"/>
External Attendees	<input type="text"/>		
Remarks	<input type="text"/>		

3. Complete the booking details then select the or button, as appropriate.



Event Costs

An enhanced Event Cost breakdown is now available. This allows you to record estimated costs, actual costs and related notes against events which are in progress (up to the point of completion).

The new Costs screen replaces the existing Costs screen, however it is possible to retain the existing screen only.

There are two fields for each field label; an Estimate and an Actual.

The following fields allow you to add a numeric value:

- **Services Cost**
- **Labour Cost**
- **Labour Minutes**
- **Parts Cost**
- **Materials Cost**
- **Travel Cost**
- **Other Cost**
- **Other Cost 2**
- **Other Cost 3**

If a value is added directly in the **Total Event Cost** field with no breakdown in the other fields, the amount is also added to the **Other Cost 3** field.

Additionally, if the value of the **Total Event Cost** field differs from the sum of the breakdown fields, any difference is added to the **Other Cost 3** field.

- **Total Event Cost**
Displays the total of the breakdown values.



The **Estimated Cost Comment** and **Actual Cost Comment** fields allow you to add free-format text relating to the costs.

System Configurations Required

General Settings

General Event Logging

The 'Allow to View Costs' setting must be set to 'On'

Allow to View Costs	<input type="text" value="On"/>
---------------------	---------------------------------

The following new settings are added to the General Event Logging tab.

- **Input/View**
 - **Use Legacy Costs**
When set to **On** the original Costs screen is used (not the enhanced Costs screen).
 - **Is Estimated Cost Required**
Controls the **Total Event Cost** field (Estimates column) in the Event Costs screen.
 - **Is Total Event Cost Required**
Controls the **Total Event Cost** field (Actuals column) in the Event Costs screen.
 - **Is Services Cost Required**
Controls the **Services Cost** field (Actuals column) in the Event Costs screen.
 - **Is Estimated Services Cost Required**
Controls the **Services Cost** field (Estimates column) in the Event Costs screen.
 - **Is Labour Cost Required**
Controls the **Labour Cost** field (Actuals column) in the Event Costs screen.
 - **Is Estimated Labour Cost Required**
Controls the **Labour Cost** field (Estimates column) in the Event Costs screen.
 - **Is Labour Mins Required**
Controls the **Labour Minutes** field (Actuals column) in the Event Costs screen.
 - **Is Estimated Labour Mins Required**
Controls the **Labour Minutes** field (Estimates column) in the Event Costs screen.
 - **Is Parts Cost Required**
Controls the **Parts Cost** field (Actuals column) in the Event Costs screen.
 - **Is Estimated Parts Cost Required**
Controls the **Parts Cost** field (Estimates column) in the Event Costs screen.



- **Is Materials Cost Required**
Controls the **Materials Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Materials Cost Required**
Controls the **Materials Cost** field (Estimates column) in the Event Costs screen.
- **Is Travel Cost Required**
Controls the **Travel Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Travel Cost Required**
Controls the **Travel Cost** field (Estimates column) in the Event Costs screen.
- **Is Other Cost Required**
Controls the **Other Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Other Cost Required**
Controls the **Other Cost** field (Estimates column) in the Event Costs screen.
- **Is Other Cost 2 Required**
Controls the **Other Cost 2** field (Actuals column) in the Event Costs screen.
- **Is Estimated Other Cost 2 Required**
Controls the **Other Cost 2** field (Estimates column) in the Event Costs screen.
- **Is Other Cost 3 Required**
Controls the **Other Cost 3** field (Actuals column) in the Event Costs screen.
- **Is Estimated Other Cost 3 Required**
Controls the **Other Cost 3** field (Estimates column) in the Event Costs screen.
- **Is Adhoc Note Required**
Controls the **Actual Cost Comment** field in the Event Costs screen.
- **Is Estimated Adhoc Note Required**
Controls the **Estimated Cost Comment** field in the Event Costs screen.



Quotes for Event Sub-tasks

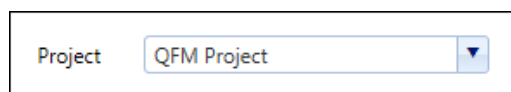
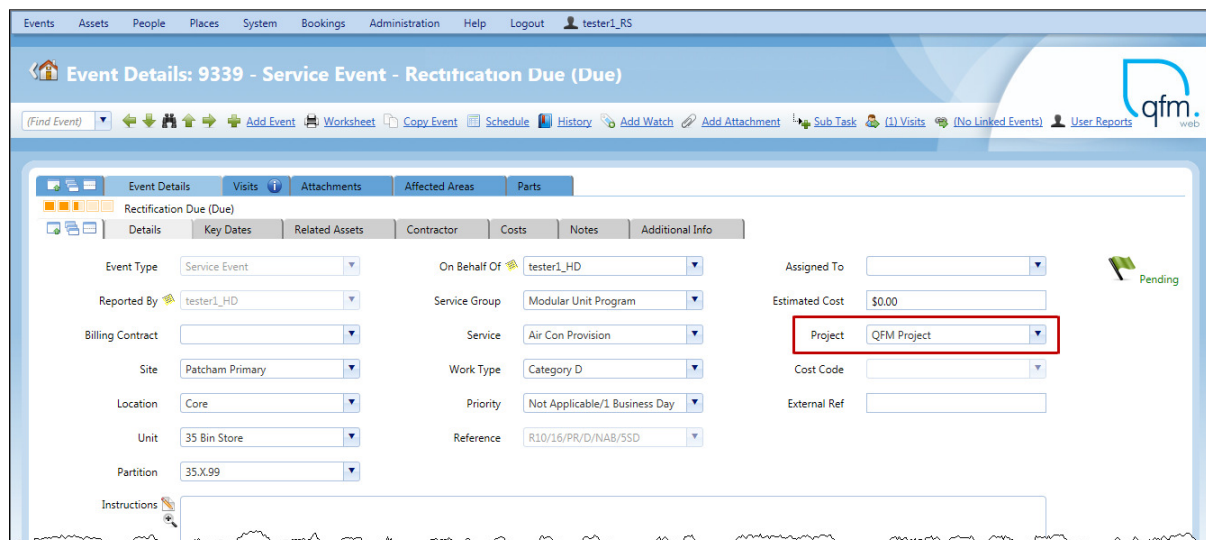
QFM Event Quotes processing is now enhanced to allow Quotes to be raised for Event Sub-tasks. Previously, Quotes could only be raised for Primary Events.

Quotes processing is only enabled if the appropriate Event Workflow is in use and the user has the required permissions set. (Quote processing is available if the **Add Quote** option is enabled in the Event screen).

Event Projects

QFM Web now enables Projects to be created and used to group together a number of Events. Typically, these would be the activities which, when bundled together constitute a Project.

Project records are initially created via the General Reference Data screen which then allows Event records to be linked together by selecting a Project in the Event screen.



Event Project details can be viewed via the Event Director and also List views in the Report Centre.

Report Centre - Lists

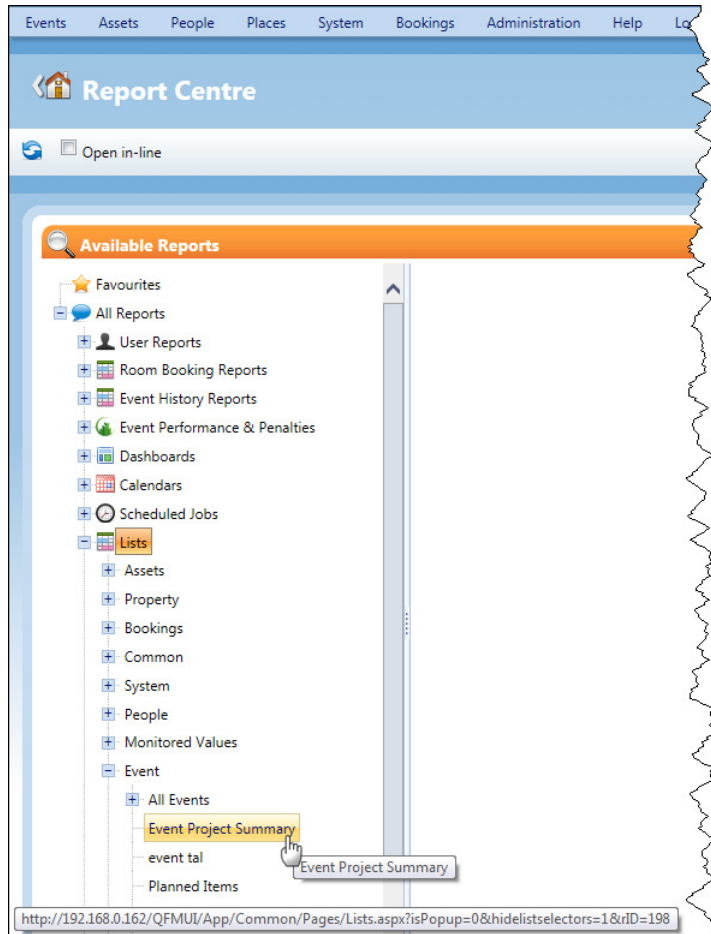
A new 'Event Project Summary' List is added to the Report Centre and the existing 'Default View - All Events' List is enhanced to include Project criteria.

The Lists facility brings together many of the data grids in the system into one place, providing ease of use. Lists provide a comprehensive set of attributes and filters which enable users to create configurable data grids and convert the information into a range of formats. Simply expand the tree levels and select a list view to display the data grid.

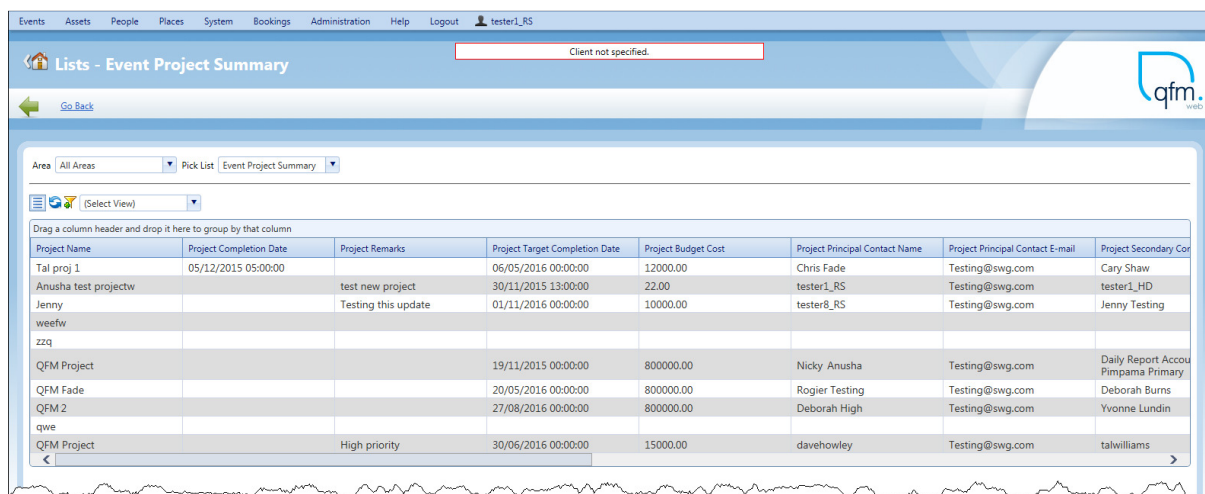


Event Project Summary List

The new Event Project Summary List is added to the Event List group.



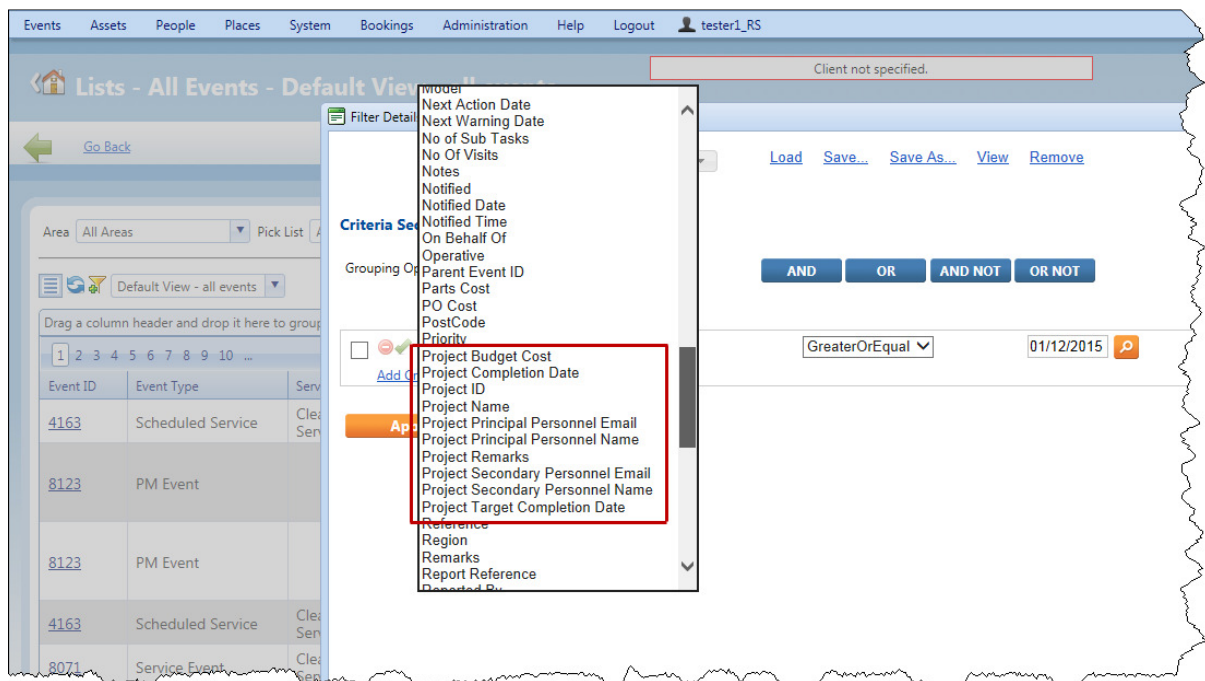
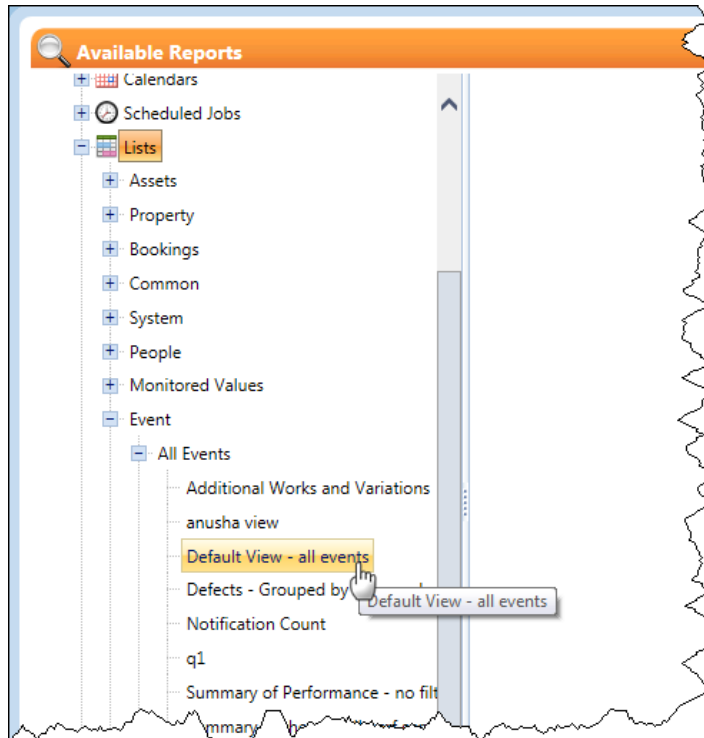
The Event Project Summary List provides a set of Event Project attributes and filters which enable users to create configurable data grids and convert the information into a range of formats.





Default View - All Events

The existing Default View - All Events List is enhanced to include Event Project attributes available for selection.





Event Director

The following new column headers are available to display in the grid.

Events Assets People Places System Bookings Administration Help Logout teste

Event Director - Event Status *

Select View **Event Status *** Remove View Save View.. ? Refresh Interval 10 Minut

Site like * and Contractor like * and Only show Events with escalations associated with them and Only show latest escalations and Operat Overdue, Due, Pending) and Max Days is 30

Monitor Summary By Contractor Summary By Site Summary By Status Watches

Event List

[Change Filter](#) Show in Site Time

Available Columns for display

Visible	Hidden
Project Name	Changed
Project Budget Cost	Action Due
Project Target Completion Date	Alert Level
Project Completion Date	Region
Project Remarks	Location
Project Principal Personnel Name	Unit
Project Principal Personnel Email	Partition
Project Secondary Personnel Name	Instructions
Project Secondary Personnel Email	Remarks
	Estimated Cost
	Reported Date Time
	Notified Date Time
	Started Date Time
	Completed Date Time
	RTS Date Time
	Notified
	Started

Use buttons to select the Columns you wish to display. After making your selection press **Refresh** button to apply changes.

Drag a column header and drop it here to group by that column

Event ID	Site	Status	Alert	Due Date Time
----------	------	--------	-------	---------------

- **Project Name**
- **Project Budget Cost**
- **Project Target Completion Date**
- **Project Completion Date**
- **Project Remarks**
- **Project Principle Personnel Name**
- **Project Principle Personnel Email**



- Project Secondary Personnel Name
- Project Secondary Personnel Email

System Configurations Required

General Reference Data

Event Project entities are created in the General Reference Data screen (Administration \ Manage \ General Reference Data).

General Reference Data (Projects)

Select the items you wish to update: Projects

Drag a column header and drop it here to group by that column

Client Contract	Project Name	Project Target Completion	Project Budget Value	Project Principle Contact	Project Secondary Contact	Project Completion Date	Project End Date
DEF	Anusha test projectw	30/11/2015 13:00:00	22.00	tester1_RS	tester1_HD		06/12/2015 00:00:00
DEF	Jenny	01/11/2016 00:00:00	10000.00	tester8_RS	Jenny Testing		
	Project 1		213.00				
	Project 2						
DEF	QFM Project	30/06/2016 00:00:00	15000.00	davehowley	talwilliams		30/06/2016 00:00:00
DEF	QFM Santander	19/11/2015 00:00:00	800000.00	Nicky Holmes	Daily Report Account - Pimpama Primary		
DEF	QFM Santander Fade	20/05/2016 00:00:00	800000.00	Rogier Waalder	Deborah Burns		
DEF	QFM Santander2	27/08/2016 00:00:00	800000.00	Deborah Burns	Yvonne Lundin		
DEF	qve						
DEF	Tal proj 1	06/05/2016 00:00:00	12000.00	Chris Clifton	Cary Shaw	05/12/2015 05:00:00	03/02/2016 11:00:00

Page size: 10 | 13 items in 2 pages

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Left side of screen

General Reference Data (Projects)

Select the items you wish to update: Projects


Drag a column header and drop it here to group by that column

Project Budget Value	Project Principle Contact	Project Secondary Contact	Project Completion Date	Project End Date	Remarks		
22.00	tester1_RS	tester1_HD		06/12/2015 00:00:00	test new project	Delete	Edit
10000.00	tester8_RS	Jenny Testing			Testing this update	Delete	Edit
213.00						Delete	Edit
15000.00	davehowley	talwilliams		30/06/2016 00:00:00	High priority	Delete	Edit
800000.00	Nicky Holmes	Daily Report Account - Pimpama Primary				Delete	Edit
800000.00	Rogier Waalder	Deborah Burns				Delete	Edit
800000.00	Deborah Burns	Yvonne Lundin				Delete	Edit
12000.00	Chris Clifton	Cary Shaw	05/12/2015 05:00:00	03/02/2016 11:00:00	note it to em jonny	Delete	Edit

Page size: 10 | 13 items in 2 pages

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Right side of screen

To add a new Project tick the  **Add Item(s)** box in the bottom left corner of the screen.



12000.00 Chris Clifton

<

Page size: 10

+ Add Item(s)..

Add New Events Project

Client Contract DEF

Project Name Enter Project Name

Project Target Completion (Enter Project Targe)

Project Budget Value Enter Budget Value

Project Principle Contact Select Personnel

Project Secondary Contact Select Personnel

Project Completion Date (Enter Project Comp)

Project Remarks Enter Remarks

Project End Date (Enter End Date)

Add

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Enter the details as follows:

- **Client Contract**
Select the Client Contract required. (This will be pre-set if Multi-contract databases are not in use).
- **Project Name**
Enter a unique Name for the Project
- **Project Target Completion**
Use the pop-up calendar and time picker to select the Target Completion.
- **Project Budget Value**
Enter a numeric Budget Value.
- **Project Principle Contact**
Select a Principle Contact from the list.
- **Project Secondary Contact**
Select a Secondary Contact from the list.



- **Project Completion Date**
The Project Completion Date is likely to be completed at a later date.
- **Project Remarks**
Enter any relevant Remarks text.
- **Project End Date**
Use the pop-up calendar and time picker to select the Project End Date.

Select **Add**.

General Settings

The following General Settings (Administration \ Users & Profiles \ General Settings) are added for Event Projects.

Parameter Filter

Select User Class to maintain settings for: Global User Class

Express Events

Parts

General Event Logging

Input/View

Allowed to Log New Events	On (def)	Copy
Allowed to Access Find Events	On (def)	Copy
Allowed to Access Event Director	On (def)	Copy
Allow to View Costs	Off	Copy
Use Other Cost 3 for Total Event Cost overflow	On	Copy
Use legacy Costs	Off	Copy
Enable Defaulting of Billing Contract	Hidden (def)	Copy
Is Site Required	Optional (def)	Copy
Is Project Required	View Only (def)	Copy
Allowed to Manage Projects	Off (def)	Copy

This setting will work out Other Cost 3 based on the Total Event Cost - Sum (Individual Costs).

General Event Logging

- **Input/View**
 - **Is Project Required**
Controls the characteristics of the **Project** field in event screens.



- **Allowed to Manage Projects**
When set to **On** allows access to the General Reference Data - Projects screen to manage Projects.

Asset Groups

QFM now provides the ability to create Asset Groups consisting of a Primary asset and any number of Subsidiary Assets attached. This is particularly useful for linking a number of related assets, for example when identifying the constituent parts of a large piece of machinery.

Asset Groups are created and maintained in the General Reference Data (Administration \ Manage \ General Reference Data) screen. Whilst a new tab in the Asset Viewer displays the Asset Group to which an asset belongs.

There are a number of aspects to be aware of:

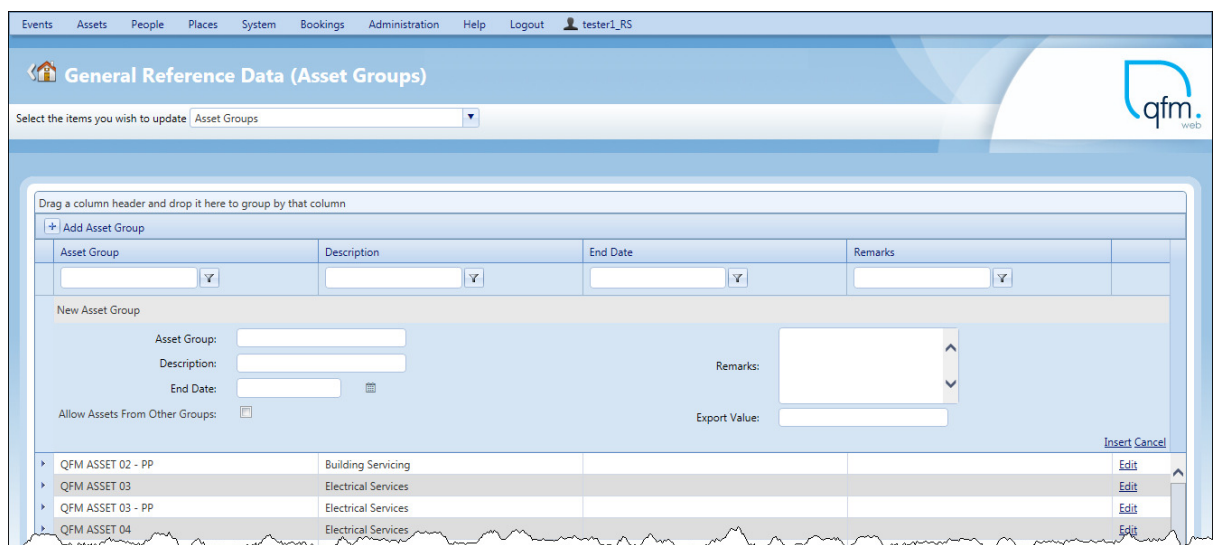
- An Asset can be the Primary Asset in any number of Asset Groups.
- Assets can be added as Subsidiary Assets to multiple Asset Groups (configuration option in the General Reference Data screen).
- Event Worksheets which include the Primary Asset will also display all Subsidiary Assets.

Adding Asset Groups

Asset Groups are created and maintained in the General Reference Data (Administration \ Manage \ General Reference Data) screen.

To add an Asset Group:

1. Select **+ Add Asset Group**.




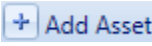
2. Enter an **Asset Group** name and **Description**.

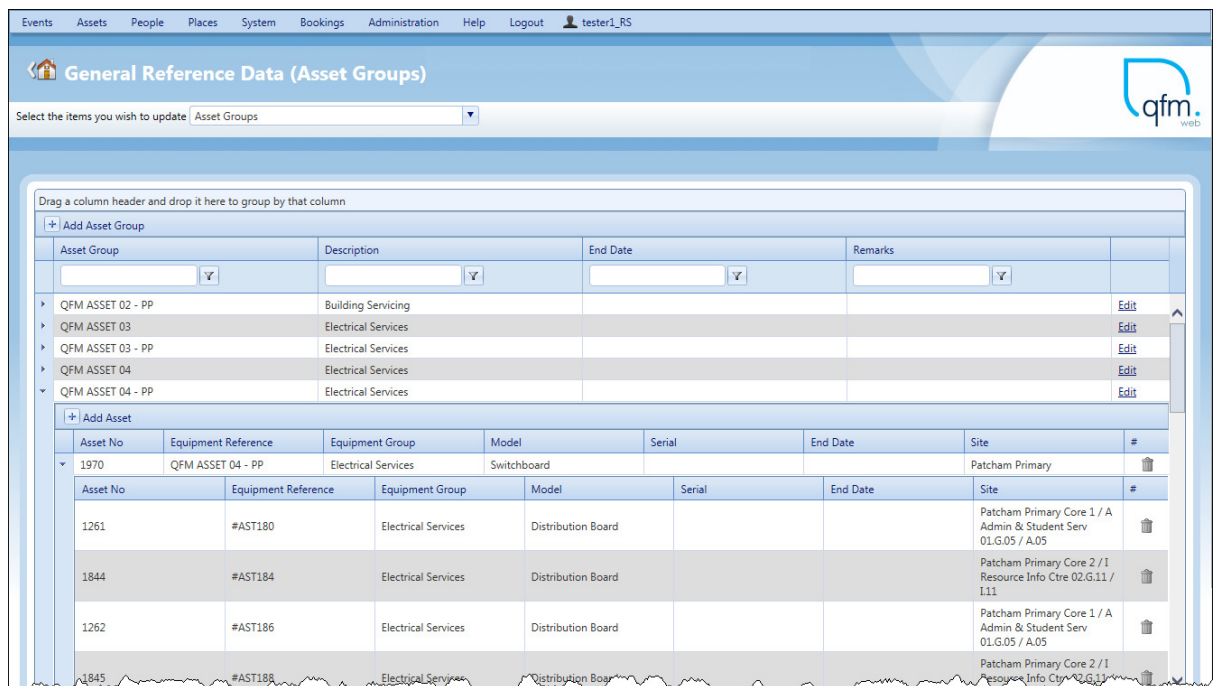


3. Use the pop-up calendar to add an **End Date**.
4. Add any relevant **Remarks** and an **Export Value** if required.
5. Tick the **Allow Assets From Other Groups** box if you wish to allow Assets to be associated with multiple groups.
6. Select **Insert**.
The new Asset Group is added.

Adding and Maintaining Primary and Subsidiary Assets

To add and maintain Primary and Subsidiary Assets:

1. Select the arrow ▶ to the left of the Asset Group row required, to expand the group. The group expands to display the Subsidiary Assets.
2. You can delete an existing Asset from the Group by selecting the  icon.
3. To add a new Subsidiary Asset select .



Asset Group	Description	End Date	Remarks	
QFM ASSET 02 - PP	Building Servicing			Edit
QFM ASSET 03	Electrical Services			Edit
QFM ASSET 03 - PP	Electrical Services			Edit
QFM ASSET 04	Electrical Services			Edit
QFM ASSET 04 - PP	Electrical Services			Edit

Asset No	Equipment Reference	Equipment Group	Model	Serial	End Date	Site	#
1970	QFM ASSET 04 - PP	Electrical Services	Switchboard			Patcham Primary	
1261	#AST180	Electrical Services	Distribution Board			Patcham Primary Core 1 / A Admin & Student Serv 01.G.05 / A.05	
1844	#AST184	Electrical Services	Distribution Board			Patcham Primary Core 2 / 1 Resource Info Ctre 02.G.11 / I.11	
1262	#AST186	Electrical Services	Distribution Board			Patcham Primary Core 1 / A Admin & Student Serv 01.G.05 / A.05	
1845	#AST188	Electrical Services	Distribution Board			Patcham Primary Core 2 / 1 Resource Info Ctre 02.G.11	

4. Select the Asset required in the **Load asset details** field. (The Asset details are displayed). Add any relevant text in the **Remarks** field.



Drag a column header and drop it here to group by that column

+ Add Asset Group

Asset Group	Description	End Date	Remarks
QFM ASSET 03	Electrical Services		Edit
QFM ASSET 03 - PP	Electrical Services		Edit
QFM ASSET 04	Electrical Services		Edit
QFM ASSET 04 - PP	Electrical Services		Edit

+ Add Asset

Asset No	Equipment Reference	Equipment Group	Model	Serial	End Date	Site	#
Load asset details (select asset)		Remarks		Cancel			
1970	QFM ASSET 04 - PP	Electrical Services	Switchboard			Patcham Primary	Delete
1261	#AST180	Electrical Services	Distribution Board			Patcham Primary Core 1 / A Admin & Student Serv 01.G.05 / A.05	Delete
1844	#AST184	Electrical Services	Distribution Board			Patcham Primary Core 2 / I Resource Info Ctre 02.G.11 / I.11	Delete
1262	#AST186	Electrical Services	Distribution Board			Patcham Primary Core 1 / A Admin & Student Serv 01.G.05 / A.05	Delete

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5. Select Insert.

+ Add Asset

Asset No	Equipment Reference	Equipment
Load asset details #AST7214 - Light Fitting Type F5		
7690	#AST7214	Electrical

[Insert](#) [Cancel](#)

The Asset is added to the Asset Group as a Subsidiary Asset.



Permit Exemption Notifications

QFM Watch and Notifications functionality is available for Permit Exemptions in the Property Viewer (Property Viewer \ Environment \ Exemptions).

This enables QFM Watches to be configured to generate email Notifications when Permit Exemptions are added, updated and are about to expire.

Details	Reference	Property Name	Exemption Type	Registered Date	Expiry Date	Remarks
Details	Compliance Exem	Tester House 4	Dispensation	05/11/2015 00:00:00	04/01/2016 11:38:00	



The General Reference Data (Watch Types) screen enables you to specify Watch attributes, via the 'Permit Exemption Date' Watch Type.

The screenshot shows the 'General Reference Data (Watch Types)' interface. At the top, there's a navigation bar with 'Events', 'Assets', 'People', 'Places', 'System', 'Bookings', 'Administration', 'Help', 'Logout', and a user profile 'tester5_RS'. The main title is 'General Reference Data (Watch Types)'. Below the title, there's a dropdown menu set to 'Watch Types'. A table lists watch types, with 'Permit Exemption Date' highlighted in yellow. Below the table, the configuration for the selected watch type is shown, including fields for Name, URL Tag, Caption, System Watch (checked), Can Share, Expiry Date, Watch Synchronisation Handler, Notifications Handler, UI Handler, Notifications Template - Updates, Notifications Template - Reminders, Notifications Template - Overdue, Default Text, Notification Event(s), Notice Period, and Audience. At the bottom, there are 'Save', 'Cancel', and 'Remove' buttons, along with links for 'Add new Watch Type', 'Link Watch Type with Entities', 'Notification Templates', and 'Export'.

The General Reference Data (Notification Types) screen is used to specify all notifications available in the system. It links subject and body 'configuretext' tags with a permission for each notification.

There are three templates available for Permit Exemptions:

- Watch Environment Exemptions Overdue
- Watch Environment Exemptions Reminder
- Watch Environment Exemptions Updated



Events Assets People Places System Bookings Administration Help Logout tester5_RS

General Reference Data (Notification Types)

Select the items you wish to update: Notification Types

Drag a column header and drop it here to group by that column

Name	Template	End Date	
Schedule Events Batching Email			Edit
Timesheet Authorised			Edit
Timesheet Notified			Edit
Timesheet Rejected			Edit
Timesheet Submitted			Edit
Watch Environment Exemptions Overdue			Edit
Watch Environment Exemptions Reminder			Edit
Watch Environment Exemptions Updated			Edit
Watch Event Reminder			Edit
Watch Event Updated			Edit

Page size: 10

21 items in 3 pages

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Notification Text

Subject

QFMWEB: {#WatchTypeCaption#} on Exemption {#ExemptionTypeName#} for Property {#PropertyName#} has been Changed

Body

Some details on watch have been changed by {#WatchUpdateUser#} on {#WatchUpdateStamp#}. The next reminder prompt has been set for {#WatchStartTimeStamp#}.

{#WatchMessage#}

Exemption Remarks:
{#ExemptionRemarks#}

To view this Property follow the link below :
{#PropertyLinkURL#}

Update Close



System Administration

General Reference Data - Service Work Type Maintenance



With the introduction of the new General Reference Data - Service Work Type screen, much of the functionality for maintaining Service Work Types is now migrated from the QFM desktop application to QFM Web. The General Reference Data (Service Work Type) screen allows a wide range of data values to be associated with a Service Work Type, so that when the SWT is selected on the Event screen the data values selected here will automatically populate the associated fields. Controls also enable linked sub-tasks to be automatically generated.

	Service Group	Service	Work Type	Priority	Export Value	KPI Reference	System Meta Data Tags	Cost Code	Estimated Cost	Potential Liability	Messages	Show Message
	Additional Works	Supervise Works	Category C	Not Applicable/Immediate		PM10/17/M/C/NAB/5						<input type="checkbox"/>
	Additional Works	Waste/Clean Extra	Category C	Not Applicable/Immediate		PM10/17/M/C/NAB/5						<input type="checkbox"/>
	Audit	Audit	Not Applicable	One Month								<input type="checkbox"/>
	Audit	Audit	As Agreed (3 Service Days)	1 Hour/3 Service Days (24Hr)								<input type="checkbox"/>
	Building Maintenance	Astro Turf 1	Emergency	30 Minutes/4 Hours		M30/114/PR/B/AB/4						<input type="checkbox"/>
	Building Maintenance	Astro Turf 1	Availability									<input type="checkbox"/>
	Building Maintenance	Astro Turf 2	Urgent	1 Hour/3 Service Days		M40/114/PR/C/AB/3						<input type="checkbox"/>
	Building			2 Hours/10 Service								<input type="checkbox"/>


The Service Work Type grid follows the standard QFM grid structure used throughout the system.

	Service Group	Service	Work Type	Priority	Export Value
	Additional Works	Supervise Works	Category C	Not Applicable/Immediate	
	Additional Works	Waste/Clean Extra	Category C	Not Applicable/Immediate	
	Audit	Audit	Not Applicable	One Month	
	Audit	Audit	As Agreed (3 Service Days)	1 Hour/3 Service Days (24Hr)	
	Building Maintenance	Astro Turf 1	Emergency	30 Minutes/4 Hours	
	Building Maintenance	Astro Turf 1	Availability		
	Building Maintenance	Astro Turf 2	Urgent	1 Hour/3 Service Days	
	Building			2 Hours/10 Service	

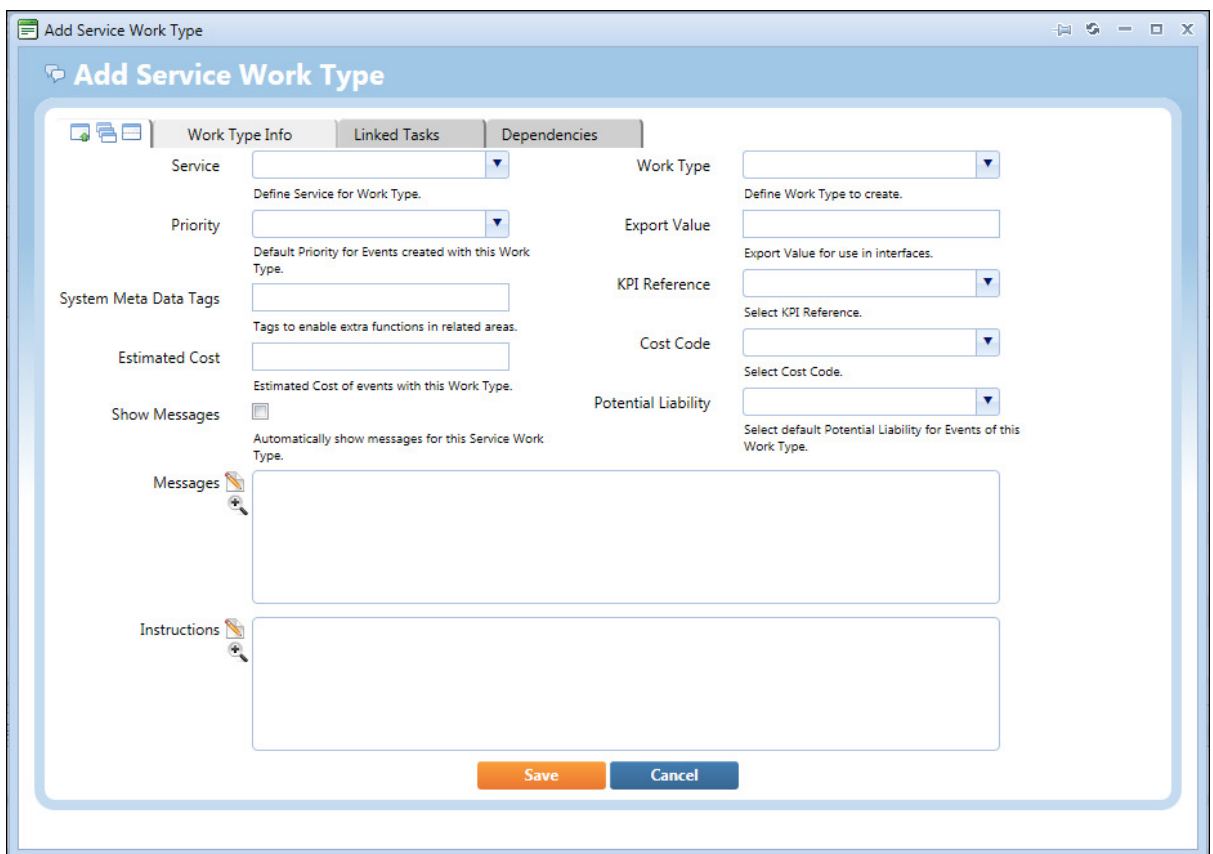


Select the Edit icon  to maintain the Work Type details.
Select the Delete icon  to remove the Work Type record.

Adding a Service Work Type

To add a new Service Work Type entry select the  [Add Service Work Type...](#) icon at the bottom of the grid. A pop-up window is displayed, with three tabs on which to enter data.

- **Work Type Info** tab.

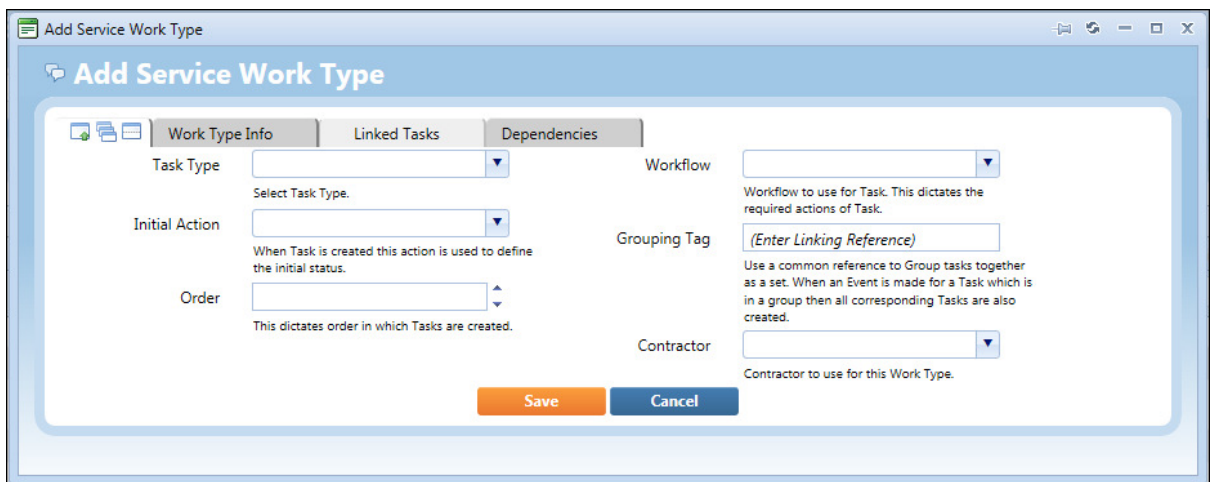


- **Service**
Select the default Service for Events with this Work Type.
- **Work Type**
Define the Work Type.
- **Priority**
Select the default Priority for events created with this Work Type.
- **Export Value**
Add a default value to export out of the system or to another system.
- **System Meta Data Tags**
Metadata Tags can be applied to QFM Web attachments. They provide categorisation and classification and can be used to apply further functionality. Meta Data Tags include the following areas Photo, Client / Operative Signature, Safety



Information, Operative Must Read, Include With Worksheet, etc.

- **KPI Reference**
Select a default KPI Reference for Events with this Work Type.
- **Estimated Cost**
Add a default cost estimation for Events with this Work Type.
- **Cost Code**
Select a default Cost Code for Events with this Work Type.
- **Show Messages**
Tick the box to automatically display Message text whenever the Work Type is selected.
- **Potential Liability**
Select a default Potential Liability value for Events with this Work Type.
- **Messages**
Add default Message text to be displayed in Events with this Work Type.
- **Instructions**
Add default Instructions text to be displayed in Events and Worksheets with this Work Type.
- **Linked Tasks** tab.
This tab enables you to create and link together Events which are related (i.e. project tasks) within this Service / Work Type combination. Tasks which use the same Grouping Tag can be linked to include a standard Event and a number of Sub-tasks.

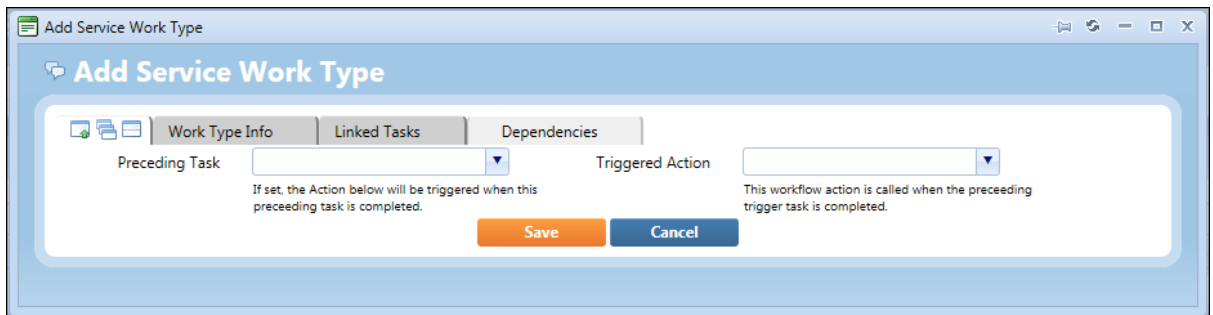


- **Task Type**
Select the default Task Type for the Event and Sub-tasks group.
- **Workflow**
Select the default Workflow to be used.
- **Initial Action**
Select an Initial Workflow Action. This will define the initial Event Status.
- **Grouping Tag**
Add a common reference to group tasks together. When an Event is created for a



task that in a group, then all corresponding tasks are created as Sub-Events.

- **Order**
This dictates the order in which Events for this Work Type (within the linked group) are created.
- Contractor
Add a default Contractor for Events with this Work Type.
- **Dependencies** tab.
This tab allows you to set a workflow action when a specific trigger task is completed.



- **Preceding Task**
Set a task which, once completed, will trigger an action (set in the Triggered Action field).
- **Triggered Action**
Set an action to be triggered once a preceding task is completed (set in the Preceding Task field).

Select **Save**.

Web Config File Setting - `AutoCreateProjectForMultiTaskTemplatedEvent` (QFMW-22635)

When creating Service Work Type Linked Tasks, these are grouped together and given an order with which tasks are created. If an event is logged with an order of 1 for example, then sub-tasks for 2, 3 etc. are automatically created.

These Events and sub-tasks can also be linked together by applying a Project (refer to the *Event Projects* section). If a Project is defined against the main Event then sub-tasks generated as Service Work Type Linked Tasks will also have the same Project applied.

The Web Config setting “AutoCreateProjectForMultiTaskTemplatedEvent” can be used for circumstances when the Project is left blank for the main Event. The setting can be set to either “true” or “false”, as follows:

True

```
<add key="AutoCreateProjectForMultiTaskTemplatedEvent" value="true" />
```

A value of “true” for this setting will create a completely new Project and assign this to the new Event logged and the Sub tasks.

False

```
<add key="AutoCreateProjectForMultiTaskTemplatedEvent" value="false" />
```

A value of “false” will leave the Project value for the new Event and Sub-tasks as blank.



General Reference Data - Projects


Event Project entities are created in the General Reference Data screen (Administration \ Manage \ General Reference Data).

Client Contract	Project Name	Project Target Completion	Project Budget Value	Project Principle Contact	Project Secondary Contact	Project Completion Date	Project
DEF	Anusha test projectw	30/11/2015 13:00:00	22.00	tester1_RS	tester1_HD		06/12/2015
DEF	Jenny	01/11/2016 00:00:00	10000.00	tester8_RS	Jenny Testing		
	Project 1		213.00				
	Project 2						
DEF	QFM Project	30/06/2016 00:00:00	15000.00	davehowley	talwilliams		30/06/2016
DEF	QFM Satander	19/11/2015 00:00:00	800000.00	Nicky Holmes	Daily Report Account - Pimpama Primary		
DEF	QFM Satander Fade	20/05/2016 00:00:00	800000.00	Rogier Waalder	Deborah Burns		
DEF	QFM Satander2	27/08/2016 00:00:00	800000.00	Deborah Burns	Yvonne Lundin		
DEF	qwe						
DEF	Tal proj 1	06/05/2016 00:00:00	12000.00	Chris Clifton	Cary Shaw	05/12/2015 05:00:00	03/02/2016

Left side of screen

Project Budget Value	Project Principle Contact	Project Secondary Contact	Project Completion Date	Project End Date	Remarks		
22.00	tester1_RS	tester1_HD		06/12/2015 00:00:00	test new project	Delete	Edit
10000.00	tester8_RS	Jenny Testing			Testing this update	Delete	Edit
213.00						Delete	Edit
15000.00	davehowley	talwilliams		30/06/2016 00:00:00	High priority	Delete	Edit
800000.00	Nicky Holmes	Daily Report Account - Pimpama Primary				Delete	Edit
800000.00	Rogier Waalder	Deborah Burns				Delete	Edit
800000.00	Deborah Burns	Yvonne Lundin				Delete	Edit
12000.00	Chris Clifton	Cary Shaw	05/12/2015 05:00:00	03/02/2016 11:00:00	note it to em jonny	Delete	Edit

Right side of screen

To add a new Project tick the  **Add Item(s)..** box in the bottom left corner of the screen.



12000.00 Chris Clifton

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Page size: 10

+ Add Item(s)..

Add New Events Project

Client Contract DEF

Project Name Enter Project Name

Project Target Completion (Enter Project Targe) [calendar icon]

Project Budget Value Enter Budget Value

Project Principle Contact Select Personnel

Project Secondary Contact Select Personnel

Project Completion Date (Enter Project Comp) [calendar icon]

Project Remarks Enter Remarks

Project End Date (Enter End Date) [calendar icon]

Add

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Enter the details as follows:

- **Client Contract**
Select the Client Contract required. (This will be pre-set if Multi-contract databases are not in use).
- **Project Name**
Enter a unique Name for the Project
- **Project Target Completion**
Use the pop-up calendar and time picker to select the Target Completion.
- **Project Budget Value**
Enter a numeric Budget Value.
- **Project Principle Contact**
Select a Principle Contact from the list.
- **Project Secondary Contact**
Select a Secondary Contact from the list.



- **Project Completion Date**
The Project Completion Date is likely to be completed at a later date.
- **Project Remarks**
Enter any relevant Remarks text.
- **Project End Date**
Use the pop-up calendar and time picker to select the Project End Date.

Select **Add**.

General Settings

General Event Logging

The following new settings are added to the General Event Logging tab.

- **Input/View**
 - **Allow to View Costs**
When set to **On** allows access to the Event Costs screen.
 - **Use Legacy Costs**
When set to **On** the original Costs screen is used (not the enhanced Costs screen).
 - **Is Project Required**
Controls the characteristics of the **Project** field in event screens.
 - **Allowed to Manage Projects**
When set to **On** allows access to the General Reference Data - Projects screen to manage Projects.
 - **Is Estimated Cost Required**
Controls the **Total Event Cost** field (Estimates column) in the Event Costs screen.
 - **Is Total Event Cost Required**
Controls the **Total Event Cost** field (Actuals column) in the Event Costs screen.
 - **Is Services Cost Required**
Controls the **Services Cost** field (Actuals column) in the Event Costs screen.
 - **Is Estimated Services Cost Required**
Controls the **Services Cost** field (Estimates column) in the Event Costs screen.
 - **Is Labour Cost Required**
Controls the **Labour Cost** field (Actuals column) in the Event Costs screen.
 - **Is Estimated Labour Cost Required**
Controls the **Labour Cost** field (Estimates column) in the Event Costs screen.
 - **Is Labour Mins Required**
Controls the **Labour Minutes** field (Actuals column) in the Event Costs screen.



- **Is Estimated Labour Mins Required**
Controls the **Labour Minutes** field (Estimates column) in the Event Costs screen.
- **Is Parts Cost Required**
Controls the **Parts Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Parts Cost Required**
Controls the **Parts Cost** field (Estimates column) in the Event Costs screen.
- **Is Materials Cost Required**
Controls the **Materials Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Materials Cost Required**
Controls the **Materials Cost** field (Estimates column) in the Event Costs screen.
- **Is Travel Cost Required**
Controls the **Travel Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Travel Cost Required**
Controls the **Travel Cost** field (Estimates column) in the Event Costs screen.
- **Is Other Cost Required**
Controls the **Other Cost** field (Actuals column) in the Event Costs screen.
- **Is Estimated Other Cost Required**
Controls the **Other Cost** field (Estimates column) in the Event Costs screen.
- **Is Other Cost 2 Required**
Controls the **Other Cost 2** field (Actuals column) in the Event Costs screen.
- **Is Estimated Other Cost 2 Required**
Controls the **Other Cost 2** field (Estimates column) in the Event Costs screen.
- **Is Other Cost 3 Required**
Controls the **Other Cost 3** field (Actuals column) in the Event Costs screen.
- **Is Estimated Other Cost 3 Required**
Controls the **Other Cost 3** field (Estimates column) in the Event Costs screen.
- **Is Adhoc Note Required**
Controls the **Actual Cost Comment** field in the Event Costs screen.
- **Is Estimated Adhoc Note Required**
Controls the **Estimated Cost Comment** field in the Event Costs screen.



The following General Settings (Administration \ Users & Profiles \ General Settings) are added for Event Projects.

- **Input/View**
 - **Is Project Required**
Controls the characteristics of the **Project** field in event screens.
 - **Allowed to Manage Projects**
When set to **On** allows access to the General Reference Data - Projects screen to manage Projects.



Known Issues

Service Works Group is currently aware of the following software issues in the QFM Web release 1.34.00.10. These will be rectified at the earliest opportunity.

Login

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

Events

Find Event

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

QFMW-20487 When using the 'Event Ref' field; if a filter string is entered and the arrows icon (display full unfiltered list) is selected, the message "Too many rows - please filter" is displayed, despite a filter string being entered.

Event

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

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

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

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

QFMW-16815 When adding file Attachments in the QFM Desktop application there are no additional controls to define an editor's group, so when these attachments are displayed in QFM Web (via the Event Documents window) the file name and path are always visible, which may not always be the preferred option.

QFMW-18202 When creating a new event, if the Notified date and time are manually completed before the 'Submit' button is selected, then the Notified date and time values are set to blank.



- QFMW-18382 When attempting to complete an Incident Event (Key Dates tab) by adding a date in the 'Completed' field then selecting the 'Update' button, a validation error may occur stating that the event "cannot be Completed before Started". The interim solution is to use the 'Completed' button.
- QFMW-18688 When two or more operatives, using QFM Mobile, have carried out work on an Event, the Worksheets generated from QFM Web display all signatures on the last page only and signatures may not relate to the operative shown on the worksheet.
- QFMW-20198 When opening the Event Extensions window a system error may occur.
- QFMW-20440 Event worksheets for events where the Event Type is inactive, cannot be generated.
- QFMW-21025 When logging an Asset Event, if you include an additional level of geography to the Event which is lower than the Asset geography, when saving the Event there is no validation warning that the asset is registered at a different geography.
- QFMW-22060 The cost of items added in the Event screen Parts tab are not currently picked up in the 'Parts Cost' Actual field in the Event screen Costs tab.
- QFMW-22393 Issues exist after default Instructions are set for a Work Type (in QFM desktop) and new Events are logged.
If Instructions or audit stamp are entered and the user then picks or changes the Work Type, the default Instructions text overwrites the text entered.
Additionally, if a user saves an Event at Reported stage and has locked-down read-only Instructions, then changes the Work Type, the default Instructions text will still overwrite the read-only text.
- QFMW-22643 Quotes are not currently supported on Asset Events.
- QFMW-22656 Portage Events - if Event Costs are configured as mandatory to complete, it is then not possible to save Portage Events as they do not display a Cost tab.
- QFMW-22657 When adding a Related Asset, if the Asset Advanced Search is used an error occurs if an attempt is made to sort the results grid by the 'Asset No' column.
- QFMW-22659 When adding Parts to an Event, the 'Req. Date' calendar default may set to the beginning of the year rather than the current date.

Event Director

- QFMW-20652 When viewing a saved View, if you click the 'Column filters are applied' link, the column filters are removed and the screen re-loads. At this point other functionality, e.g. the Include/Exclude columns link, may fail to work. The screen must be refreshed after clicking the 'Column filters are applied' link, to enable other links to work.

Resource Scheduler

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



QFMW-22103 When attempting to allocate multiple visits in advance to an operative, the Visit Start Date may be permanently set to the current date.

Timesheets

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

QFMW-22670 Free-text notes added to the Timesheets screen may be lost when the record is saved.

Assets

Schedule Planner

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

Places

Property Viewer

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

System

Options

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

Explorer

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

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

Report Centre

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

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



User Reports

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

Dashboard

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

System Diary

QFMW-20860 When using 'drag and drop' to move a diary item in the grid, the item may not correctly show as moved to the new position until a screen refresh is made.

Bookings

Book a Room

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

QFMW-22472 Room Diary feeds do not reflect the correct time zone.

Administration

General Settings

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

General Reference Data

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



QFM Installation Notices

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

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

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

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

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

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

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

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

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

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

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

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

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

- Priority
- Worktype
- Service
- Service Group

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

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