



QFM 1.12 RELEASE NOTES

What's New in QFM app v1.12.00.21

December 2017

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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 release 2.01.00.00.

QFM Compatibility

This release is compatible with the following:

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

In order for the QFM app v1.12.00.21 to perform at an optimum level, Service Works strongly recommends that client organisations upgrade to these software versions or later.

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

Installation

Existing installed versions of the QFM app can now be upgraded, which allows users to retain their current visits and other app data. Upgrades are available for users moving from version 1.10.07 or later. Users running an earlier version of the app (1.10.02 or earlier) will need to uninstall the previous version before installing the new app v1.12.00.21.

New Features Summary

The QFM app v1.12.00.21 release brings User Defined Forms to the mobile device. 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.

It 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.

New Features

The QFM app 1.12.00.21 release consists of some major enhancements to User Defined Forms functionality. A Feature Overview and detailed procedures 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

No Service 14:36 92%

Start Visit
Company 1

2. Details.
flue cleaned.

3. Clean heat exchanger, burners,
injectors and pilot assembly.
Yes

3. Details.
all cleaned and in order.

4. Check incoming gas pressure and
burner pressure.
Yes

4. Details.
pressures within tolerance.

Cancel Finish

No Service 16:28 100%

Operative Signature
Company 1

Signatory
tester4_HD

Signature
Clear

J Smith

Sign Here

Close Confirm

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

Note: The screen shots used in this section are from a device running the iOS operating system.

Introduction

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

The new QFM app 1.12 and QFM 2.01 releases build upon the first phase of UDF functionality by adding significant enhancements which deliver more options for customising the process of gathering data and completing forms.

Compatibility with the mobile app now provides the ability to execute forms on a mobile device. It is also now possible to integrate different forms at key stages of an Event by including these in Event 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. Questions validations and scoring thresholds can be incorporated so that if specific requirements aren't met then the Event Visit cannot be progressed further. Help text can be provided for each question and support is also provided for photos and attachments to be uploaded in support of a question response.

QFM UDF functionality now includes the following enhancements:

- Forms now compatible with QFM mobile app.
- Multiple Forms can be created within the same Event Type, based upon the Service Worktype and/or Geography for an Event.
- Different forms can be used for the same Event/Visit.
- Ability to execute forms on the QFM mobile app.
- Form scoring thresholds.
- Ability to use specific forms within key steps of Visit workflows.
- Support for extra Control Types.
- Support for pictures and attachments to be uploaded in support of a question response.

This document describes the QFM app related enhancements. Refer to the *QFM 2.01 Release Notes* for full details.

UDF Process on the QFM Mobile App

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

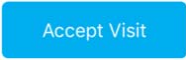

- Define new Form
- Publish Form to make available
- Map where the Form is to be used within the workflow
- Send the Form to QFM mobile app
- Fill in Form(s)
- Work with data collected

Forms on the Mobile App

Administration users can build and integrate different forms (via the main QFM system) at key stages of Event Visit workflows. The examples shown in this section are for a form which is presented for completion after a Visit is Started.

Completing a Form

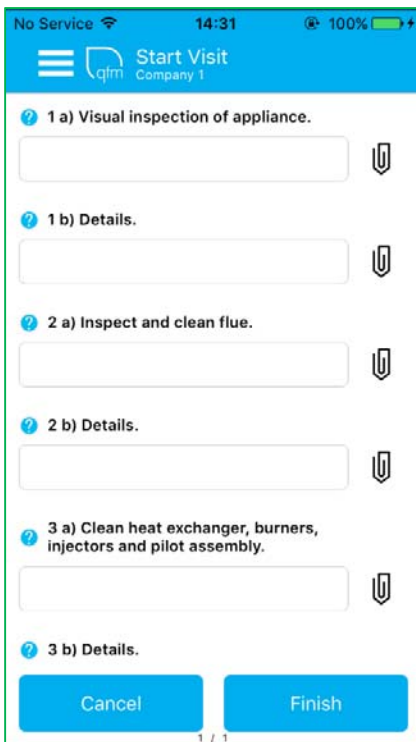
A QFM app user will select a Visit in the normal way from Visits screen (Active tab).

The Visit is Accepted  then Started .

The User Defined Form is then presented on the mobile device (example shown below).


Note: The questions and data contained in the various graphics below are shown as examples only.

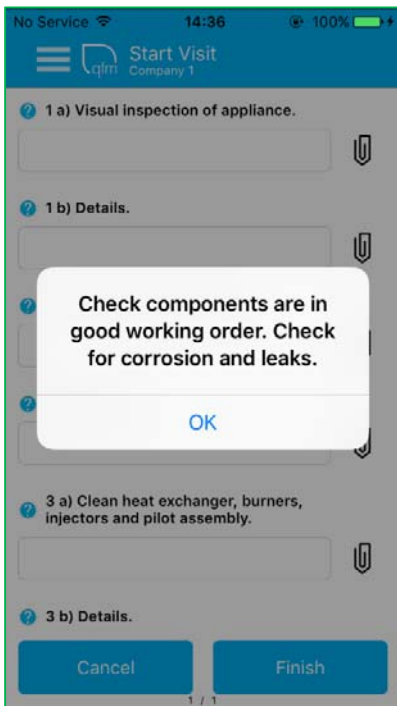
There are many different question formats (Panel Controls) which can be used. Those used in this example are 'Lookup' (selection from a list) with a Yes/No response, free format 'Textbox' and 'Signature'.



The screenshot shows a mobile application interface for a 'Start Visit' form. The header includes a menu icon, the 'qfm' logo, and the text 'Start Visit Company 1'. The status bar at the top shows 'No Service', '14:31', and '100%' battery. The form consists of several sections, each with a question number and a text input field. Each input field has a signature icon to its right. The sections are: '1 a) Visual inspection of appliance.', '1 b) Details.', '2 a) Inspect and clean flue.', '2 b) Details.', '3 a) Clean heat exchanger, burners, injectors and pilot assembly.', and '3 b) Details.'. At the bottom of the form are two buttons: 'Cancel' and 'Finish'. The page number '1 / 1' is visible at the bottom center.

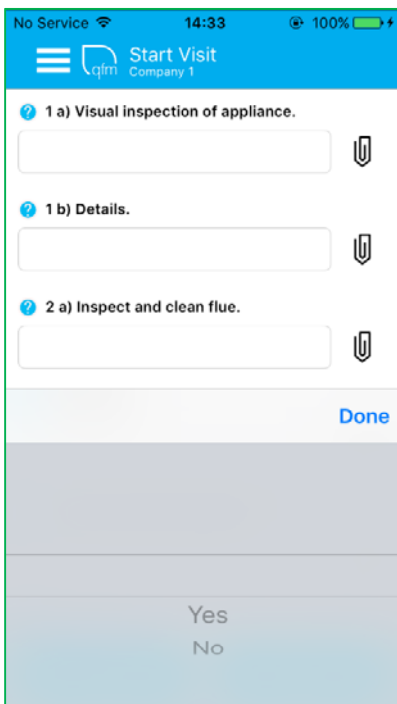
Example form.

Tapping the Help icon  on a particular question (question 1a in the example below) provides related information in addition to the question, (subject to configuration).

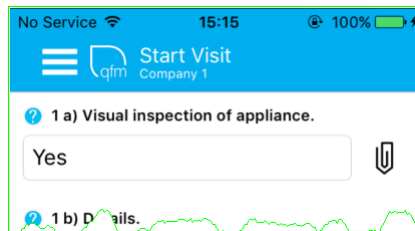


Help text.

Question 1a is a 'Lookup' format, so the user will tap into the field then select a response from the list presented, (example below).



Select response.




Question 1b is a free format 'Textbox', so the user will tap into the field then enter text.

Adding an Attachment

Photos can be attached to a particular question, typically in support of a response.



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

To add a photo, tap the attachment icon  next to the relevant question. Next, tap the camera icon, shown below.

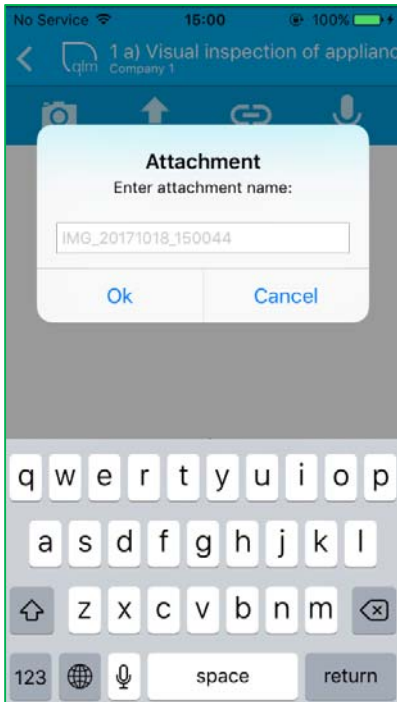


Add a photo.

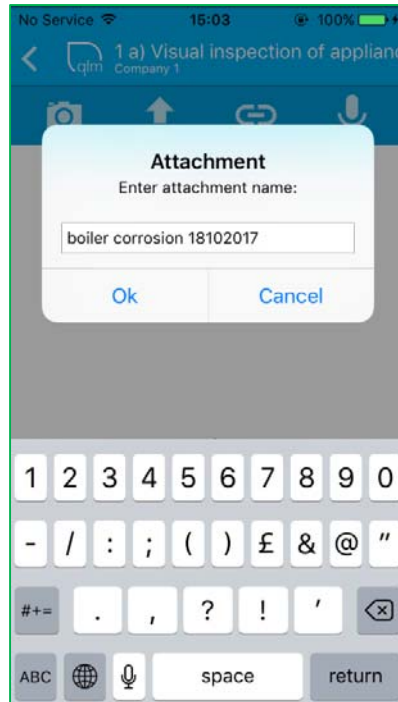
Take the photo with the device, as appropriate.

(To add an attachment already stored on the device, tap the attachment icon  then tap the upload  icon.)

The attachment is given a default name, (below left) which can be overwritten, (below right).



Default attachment name.



Overwrite attachment name.

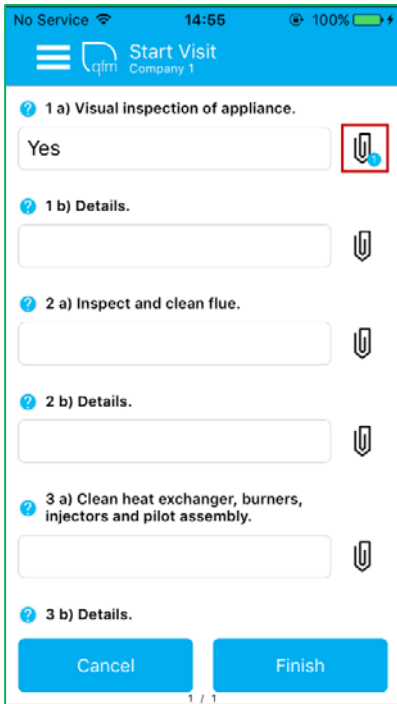
After **OK** is selected, the attachment is added, (example below).



Attachment added.

The back arrow returns to the form screen.

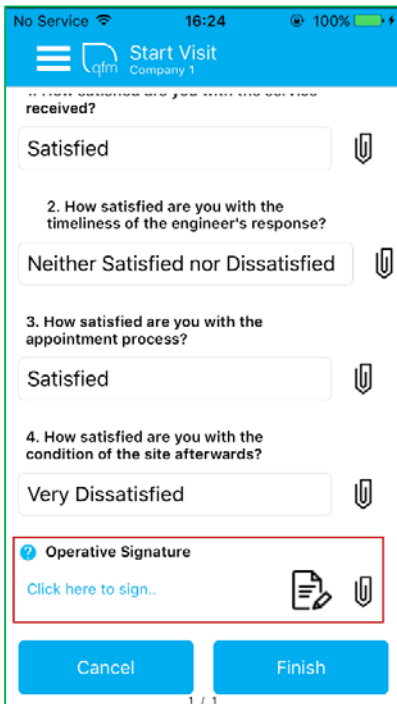
The attachment icon now indicates that one file attachment is added, (example below).



Attachment added indicator.

Adding a Signature

The 'Signature' Panel Control is designed to capture an operative's signature. Tap the  icon.



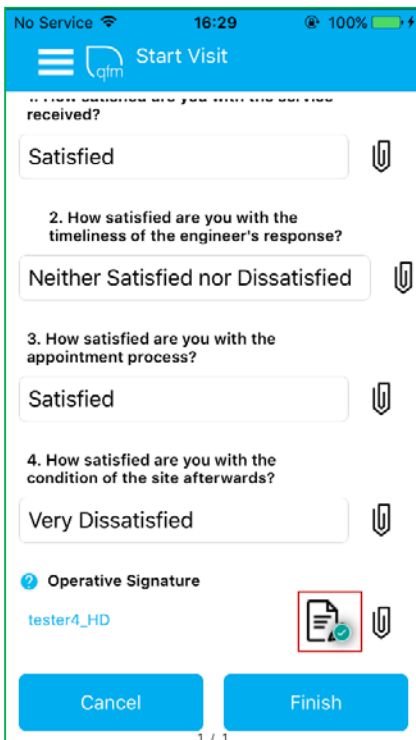
Open signature box.

Sign in the Signature box then select **Confirm**.



Adding signature.

The signature icon now indicates that a signature is attached, (example below).



Signature added indicator.

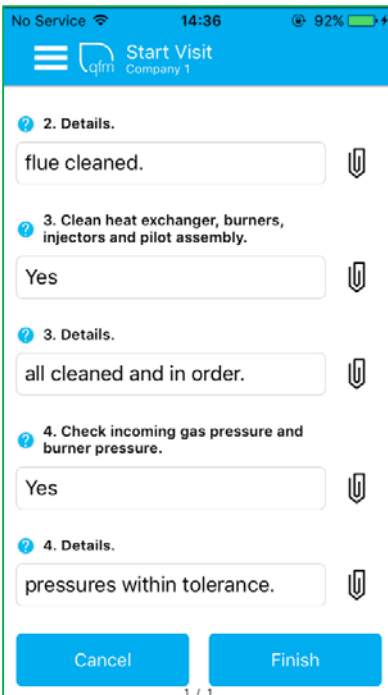
The signature can be viewed (but not changed) by tapping the  icon (example below).



View signature.

Finishing a Form

Once the form questions are completed and are in accordance with any validation requirements and scoring thresholds, the **Finish** button will transition to the next stage in the Visit workflow.



Completed form.

Question Validation

Validation rules can be applied to each question so that, for example, responding to a particular question can be made mandatory, the maximum number of characters can be specified for a response, or the minimum number of attachments uploaded. (Validations are configured in the QFM UDF system).

In the example shown below, question 4a has validation applied to make it a required field. A response has not been entered and the **Finish** button has been selected. As a result, the system has not allowed the form to be completed and has highlighted the question with a validation message (configurable).

The screenshot shows a mobile application interface for 'Start Visit' by 'Company 1'. The status bar at the top indicates 'No Service', '15:19', and '100%' battery. The form contains several questions:

- 2 b) Details. (Empty text input)
- 3 a) Clean heat exchanger, burners, injectors and pilot assembly. (Text input containing 'Yes')
- 3 b) Details. (Empty text input)
- 4 a) Check incoming gas pressure and burner pressure. (Empty text input, highlighted in red with a red border and a red message below it: 'Please provide an answer.')
- 4 b) Details. (Empty text input)

At the bottom, there are two buttons: 'Cancel' and 'Finish'. The 'Finish' button is disabled (greyed out). At the very bottom, there is a page indicator '1 / 1'.

Question validation message.

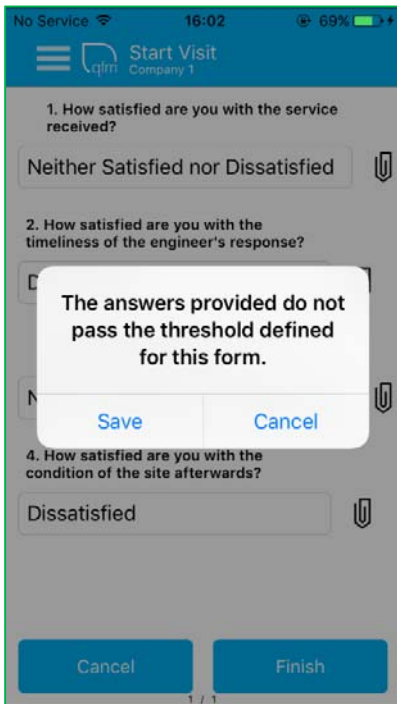
Score Validation

The UDF system enables administrators to apply a score to the different question responses selected from a list and to other types of answers entered. Forms may also 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 without the form being amended. 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.

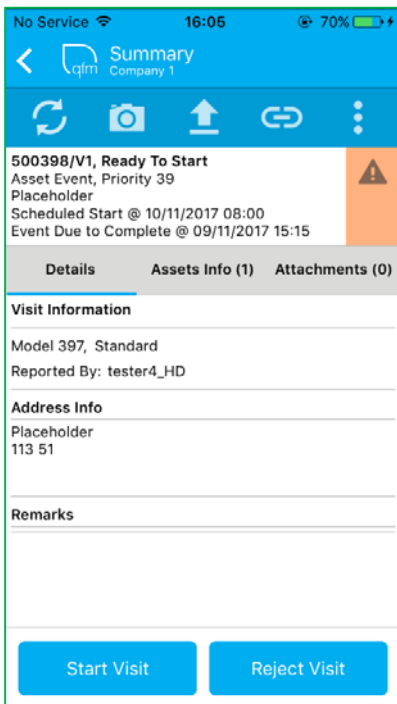
In the example shown below the UDF has failed to pass the score threshold. Question responses have been entered and the **Finish** button has been selected. As a result, a validation message is displayed and the system does not allow the form to be completed and therefore, the Visit cannot move to the next stage.



Score validation message.

The message provides the options to either:

- **Save** the form in its current state. The Visit is moved back to its previous stage; in this example back to 'Ready To Start' (below). The answer values are retained and the form can be continued at a later date.
- **Cancel** the message so that the form can be amended in order to continue.



Visit at Ready To Start stage.

Known Issues

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

Assets

12932 (iOS & Android) - Following a new QFM app installation, asset records are sorted by site on the Assets screen. After clearing application data and downloading new assets, records are no longer sorted by site.