



# QFM 2.6.1 Release Notes

## What's New in QFM v2.06.01.21

April 2020

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## Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition v2.06.01.21	17/04/2020	MR



## Release Notices

### QFM Compatibility

The QFM 2.06.01.21 release is compatible with the following QFM software:

- QFM App v1.17 (Compatible with QFM version 1.36 and above, QFM Mobile Server version 2.02 and above. Use QFM 2.06.00.02 and QFM Mobile Server 2.08.00.05 to gain access to latest features).
- QFM Workflow Scheduler v2.06.01.21.
- QFM Mobile Server v2.08.00.05.
- QFM Desktop v164.08.11.01.

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



## New Features Summary

The QFM v2.06.01.21 release includes a range of new features. A summary is provided below, with further details on the following page.

### [Event Audits Module](#)

The QFM Event Audits module provides facilities managers with the ability to monitor the quality and effectiveness of work previously carried out, through a series of inspection audits. The module allows survey specifications to be set up, scheduled and carried out via physical location visits; with the results consolidated for easy assimilation and analysis.

### [Bulk Link Assets to Events](#)

The facility which allows Assets to be linked to Events, is now enhanced to include two additional sources; Assets from List Reports and Assets from Asset Groups. When selected, these options allow Assets to be linked to Events in bulk.

### [Dynamic Forms - Dependencies Between Controls](#)

Dynamic Form Validation Rules are enhanced to allow a greater range of options for designing the flow of question sets, used for carrying out surveys in the field. This allows the design of specific pathways through a form, dependent on the answers given for particular survey questions.

### [Dynamic Forms - Filtered Lookup List Controls](#)

Dynamic Forms can now be designed so that questions which utilise lookup selection lists can have the list of options filtered specifically from a response given to a previous (linked) question.

### [GPS Tracking of Visits and Events](#)

The GPS location of a mobile device running the QFM app is now recorded in the QFM Visit Log. Coordinates are recorded for key transactions and the data is available for custom reports.

### [Timestamp Audit Entries](#)

The QFM app allows users to change Visit Started and Completed dates and times from the values which are automatically recorded. The system now retains the actual Visit Started and Completed dates and times, with timestamps for these stages recorded in the QFM Visit Log.

### [Equipment Group Attachments](#)

QFM now supports the adding of attachments to Equipment Groups, to support a range of document types. This also supports the new feature in this release for logging Asset Events via the Wizard.

### [Self-Service Asset Event Logging](#)

The Event Wizard is enhanced so that self-service users can log requests for service against assets by making on-screen selections from sets of images for the Equipment Group, Model and Asset.

This provides a contemporary, easy-to-use method for reporting faults or problems.

Administrators can apply customised images to Equipment Groups, Models and Assets.

### [File Attachments Metadata for QFM Wizard](#)

Images appended to QFM records as file attachments, are now able to be selected for use on Wizard Tiles. This is available to administrators when configuring Event logging workflows in the QFM Wizard.



## New Features

Details of QFM v2.06.01.21 enhancements are provided in this section.

### Event Audits Module

#### Overview

Quality monitoring is an important part of many facilities management contracts. The QFM Event Audits module provides facilities managers with the ability to monitor the quality and effectiveness of work previously carried out, through a series of inspection audits. The module allows survey specifications to be set up, scheduled and carried out via physical location visits; with the results consolidated for easy assimilation and analysis.

A Survey Definition and Schedule are used to generate Inspection Tours during a defined Audit Period. Once an Inspection Tour is generated, it allows individual Inspection Visits to be conducted by auditors using a mobile device running the QFM app. The auditor receives the Inspection Visits on their device together with key information for the work to be inspected. Following this, the work is deemed to either 'pass' or 'fail' the inspection, according to the criteria set.

QFM Event Audits leverages the existing Dynamic Forms functionality, making it highly configurable. As a result, the QFM mobile app can be set up to prompt the auditor for additional information. It also supports the auditor in attaching photographs as evidence of inspection results.

Audit results can be rolled up into management reporting and dashboards, delivering significant business value and giving facilities managers statistical evidence of service and performance trends. It can highlight any inconsistencies or fundamental changes in performance over past periods, signalling that investigation or corrective management action is required.



The image displays three sequential screenshots of the QFM mobile application interface. The first screenshot, titled 'Start Visit', shows a 'Scan Capability' section with 'CAN SCAN' and 'CANNOT SCAN' buttons, a 'Device Camera' section with a camera icon, and a 'Remarks' section. The second screenshot, titled 'Start Survey', shows an 'Audit Section' with four questions: 'CAFAM works order paperwork/ system records available confirming maintenance task Completed and Date of Completion', 'WAF documentation completed for relevant Works Order?', 'Task completed by required date?', and 'RA Available?'. Each question has 'YES', 'NO', and 'N/A' buttons. The third screenshot, titled 'Start Survey', shows a 'Status' section with 'PASS' and 'FAIL' buttons. All three screenshots have a blue header bar with the QFM logo and a back arrow.

Features and benefits include:

- Schedulable inspection tours carried out using QFM mobile application
- Tour inspections of work carried out selected on a randomised basis
- Define audit question sets and templates
- Clean, clear user interface for use 'in the field' by auditors
- Ability to raise Remedial Events from mobile application
- Link quality monitoring results into PFI/P3 payment mechanism performance calculations
- Provide management with dashboards for monitoring of performance quality
- Increase visibility of non-compliance so managers can proactively improve performance
- Ensure complete transparency of inspection audits between service provider and customer

Refer to the separate *QFM Event Audit Guide* for full details of Event Inspection processing.





## Bulk Link Assets to Events

### Overview

Improvements have been made to help users bulk link Assets to an Event much more effectively. Support has been added to be able to use pre-saved Queries and saved Asset Groupings to provide the Assets which are to be linked, rather than forcing the user to go and find and link each Asset separately.

An example of the benefit this can provide would be where an Asset Grouping is defined to contain Fire Extinguishers that require inspection. With this development, users can simply refer to the required Asset Grouping and select one/more/all of the returned results to link to the current Event. Using pre-saved Queries gives users considerable flexibility to define a sub-set of Assets they may wish to quickly bulk link.

Equipment Group	Model	Equipment ID	Asset No	Description	Asset Relation	Start Date	End Date
EquipmentGroup 1	Model 1111	EqRef.554	554	554-EqRef.554	Affected by		
EquipmentGroup 1	Model 296	EqRef.62	62	62-EqRef.62	Affected by		
EquipmentGroup 1	Model 230	EqRef.5219	5219	5219-EqRef.5219	Affected by		
EquipmentGroup 1	Model 904	EqRef.5369	5369	5369-EqRef.5369	Affected by		
EquipmentGroup 91	Model 1578	EqRef.37000	37000	37000-EqRef.37000	Affected by		

Benefits include:

- Greater efficiency to the process of linking Assets to Events, by utilising bulk processing rather than having to find and link Assets one by one.
- More choice over the types of Asset which can be linked to Events.



- This method offers more flexibility than the traditional 'Primary/Subsidiary Asset' method traditionally used (where raising a job against a Primary Asset will result in Subsidiary Assets being automatically referenced in the Visit on the QFM app) as it is possible to have multiple groupings, not just a fixed association with a single set of child Assets.

## Introduction

The facility which allows you to link Assets to an Event, where a relationship exists, is now enhanced. The Add Related Asset screen (available via the 'Event' screen, 'Related Assets' tab) now allows two additional methods for linking Assets to Events. These enable Assets to be linked in bulk from List Reports and Asset Groups.

### From List

This option allows you to add the Assets associated with a List Report, to an Event.

Check the **From List** option to select Assets included in List Reports.

**Note:** Only Asset List Reports are available to select.

**Add Related Asset**

☐ At Location ☐ Between Locations ☒ From List ☐ From Group ☐ Selected

☐ Recently Viewed

Select List: Asset Report Filter: Colchester Assets

☐ Filter assets by Event location ☐ Include assets from sub-locations **Load**

Equipment Group	Model	Equipment ID	Asset No	Description	Asset Relation	Start Date	End Date
A.C. and Ventilation	AHU-7015	AH001	1	1-AH001 Air Handling Unit			
A.C. and Ventilation	AHU-7015	AH002	2	2-AH002 Air Handling Unit			
A.C. and Ventilation	AHU-7015	AH002	2	2-AH002 Air Handling Unit			
A.C. and Ventilation	AHU-7015	AH003	5	5-AH003 Air Handling Unit			
HEATING	PT 2000	B002	11	11-B002 Boiler			
Photocopiers	SH-101E	MF002	15	15-MF002			

Specify asset relationship with event

**Save** **Cancel**

Select an Asset List Report from the **Select List** drop-down list. You can also specify any **Filters** applied to the report.

Select List

Asset Report

Filter

Colchester Assets

☐ Filter assets by Event location

☐ Include assets from sub-locations

Load

The **Filter assets by Event location** filter enables you to select only those assets at the geographic location of the Event.

The **Include assets from sub-locations** filter enables you to select assets at the geographic sub-levels below the location of the Event. (This control is only enabled if 'Filter assets by Event location' is selected).

Select **Load** to display the Assets.

### From Group

This option allows you to add the Assets associated with an Asset Group, to an Event.

Check the **From Group** option to select Assets included in Asset Groups.

Add Related Asset

Add Related Asset

At Location

Between Locations

From List

From Group

Selected

Recently Viewed

Select Group

AG1

Update

Equipment Group	Model	Equipment ID	Asset No	Description	Asset Relation	Start Date	End Date
EquipmentGroup 1	Model 230	EqRef.5219	5219	5219-EqRef.5219			
EquipmentGroup 1	Model 904	EqRef.5369	5369	5369-EqRef.5369			
EquipmentGroup 91	Model 1578	EqRef.37000	37000	37000-EqRef.37000			

Specify asset relationship with event

Affected by

Start Date

End Date

Save

Cancel

Select an Asset Group from the **Select Group** drop-down list. Select **Update** to add the Asset Group.



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Select Group

▼

Update



## Dynamic Forms - Dependencies Between Controls

### Overview

Dynamic Form Validation Rules are now enhanced to allow a greater range of options for designing the flow of question sets, used for carrying out surveys in the field. This allows you to design specific pathways through the form, dependent on the answers given for particular survey questions.

So, for example, you can specify a condition that says;

If the answer to question 4 is 'X', hide question 5 and continue from question 6. (Therefore, if the answer is anything other than 'X', question 5 is presented).

It is possible to hide and show whole sections based on the state of another control.

Using these new controls, you can build forms which can efficiently cover a range of different scenarios. This feature is only available for Dynamic Forms used on the QFM mobile app.

Benefits include:

- Saves time by making forms more efficient to complete, i.e skipping those questions which are not relevant.
- Forms can be made more interactive with the addition of specific routes for the user, dependent on the responses they provide.

### Introduction

Dynamic Form Validation Rules can be specified for particular Panel Controls. Previously, this enabled you to define the type of response required when a survey was being completed, or whether a response was mandatory. You could add a Warning Level which determined the level of enforcement when a validation failed. You could also add a Message to be displayed if the validation was breached when the form was being completed.

You can now specify an Action instead of a Warning Message, which can change the properties of other controls (questions) on the form to be either visible or hidden (or enabled/disabled) based on the Validation outcome. This allows you to design specific pathways through the form, dependent on particular answers.

For example, Control 4 on a form may be "Is any remedial work required?"

You can create a Validation which only enables Control 5 "Describe the remedial work required" to be visible if the answer to Control 4 is "Yes". If the answer given is "No" then the operative carrying out the survey will only see, and continue from, Control 6, the next question.



This feature applies to Section level controls as well as individual controls so it is possible to hide or show a whole section based on the value selected.

**Note:** There are some limitations with the current implementation. As a result, these features:

1. Cannot be used for Web Based Forms.
2. If using dependant actions to 'hide/show' and/or 'enable/disable' controls, then Form Scoring should not be used.

## Validation Rule Controls

Validation Rule controls are available in the Dynamic Forms screen (Administration > Dynamic Forms).

The screenshot shows the QFM Dynamic Forms interface. The 'Administration' menu is open, and 'Dynamic Forms' is selected. The 'Validation Rules' tab is highlighted in the 'Details' section. The 'Control To Validate' table is visible, showing rules for 'Status Code(Status\_Code\_Key)' and 'CAFAM works order (CAFAMworksorder\_Key)'. The 'Triggered Action' column shows warnings and actions for these controls.

Control To Validate	Validator Type	Triggered Action
Status Code(Status_Code_Key)	Required Field	Warning: ⚠ Problem, *
CAFAM works order (CAFAMworksorder_Key)	Required Field	Warning: ⚠ Problem, *
CAFAM works order (CAFAMworksorder_Key)	Compare	Warning: None, Actions: For the control CAFMComments_Key, the Visibility is Visible on pass, or Hidden on fail.
Status Code(Status_Code_Key)	Compare	Warning: None, Actions: For the control Reason_code_Key, the Visibility is Visible on pass, or Hidden on fail. For the control Other_Comments_Key, the Visibility is Visible on pass, or Hidden on fail.

The screenshot shows the QFM Dynamic Forms interface. The 'Administration' menu is open, and 'Dynamic Forms' is selected. The 'Validation Rules' tab is highlighted in the 'Details' section. The 'Control To Validate' table is visible, showing rules for 'Status Code(Status\_Code\_Key)' and 'CAFAM works order (CAFAMworksorder\_Key)'. The 'Triggered Action' column shows warnings and actions for these controls.

Control To Validate	Validator Type
Status Code(Status_Code_Key)	Required Field


The Validation Rules grid has the following columns:

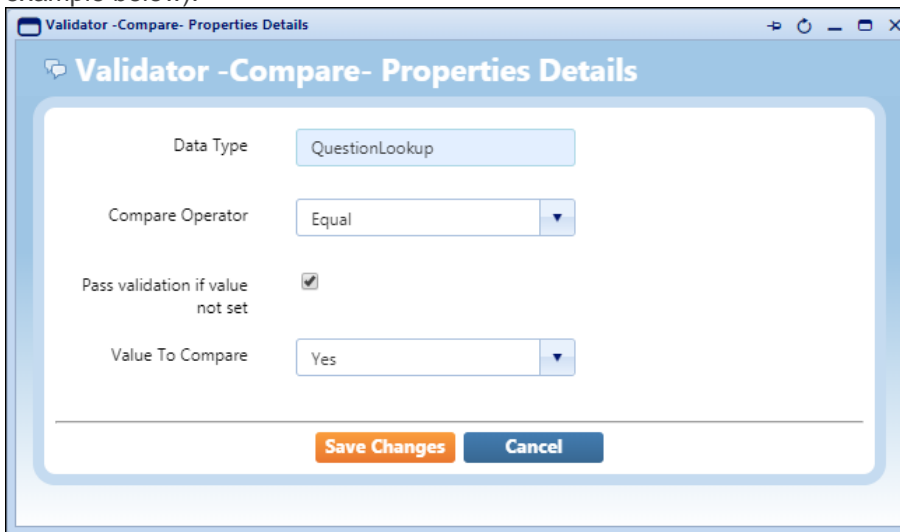


- **Control to Validate** (giving the name of the control against which the validation is made - as currently implemented).
- **Validator Type** (giving the type of validation that is made - as currently implemented).
- **Triggered Action** (giving a textual description of the Validation or Action - this replaces the existing columns of "Validation Message" and "Warning Level").

To add Validation Rules:

1. In the Validation Rules tab, select **Change**.
2. Select **+ Add new record**.
3. In the **Control To Validate** field select the control against which the validation is to be made, from the drop down list.
4. In the **Validator Type** field select the type of validation from the drop down list.

You can change the default properties for each Validator via the  icon (as shown in the example below).



5. In the **Triggered Action** field select the  icon.  
There are two parts to the Action Specifications window.  
The top section allows you to specify a **Warning Level** and a **Warning Message** displayed if the Validation check fails.



**Action Specifications**

Warning Level (for Fail) None

Warning Message (for Fail)

Action None

Save Close

In the lower section select **Set Control Property** in the **Action** field, to enable a set of field controls below.

**Action Specifications**

Warning Level (for Fail) None

Warning Message (for Fail)

Action Set Control Property

Target Control Default Empty

Control Attribute Visibility

Setting for Pass Hidden

Setting for Fail Visible

Save Cancel

In the **Target Control** field select the Control which is the target of the action.

In the **Control Attribute** field select **Visibility** or **Edit Ability**.

*Visibility* allows you to hide or show the control in the event of a pass/fail, via the fields below.





*Edit Ability* allows you to make the control read-only or editable in the event of a pass/fail, via the fields below.

In the **Setting for Pass** field select either **Hidden** / **Visible** or **Read-only** / **Editable**, as above.

In the **Setting for Fail** field select either **Hidden** / **Visible** or **Read-only** / **Editable**, as above.

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

6. Select ☒ then **Save Changes**.



## Dynamic Forms - Filtered Lookup List Controls

### Overview

QFM Dynamic Forms can now be designed so that form questions with selection list values are filtered specifically by a response given to a previous (linked) question.

For example, question 4 on a survey form asks the user to confirm which building Floor they are on; the user selects “Ground Floor” from the Lookup List. Question 5 asks the user to select the Room they are inspecting. Only Rooms on the Ground Floor are shown in the Lookup List, as the filter configuration links Control 5 with the response given to Control 4.

The screenshot shows a preview of a form titled "Preview Sample". It contains two questions. Question 4, "4. Select Building Floors", has a dropdown menu with "Ground" selected. Question 5, "5. Select Room", has a dropdown menu that is open, showing a filtered list of rooms: "Room G001", "Room G002", "Room G003", and "Room G004". The filter is applied based on the selection in question 4. At the bottom of the form, there are two buttons: "Close" and "Test Validation".

Benefits include:

- Lookup list options become more precise, making it easier to select the values required.
- Lookup lists will in most cases become smaller, again making them easier to use.
- Helps to reduce the margin for error when selecting from a Lookup list.

### Introduction

QFM Dynamic Forms now allows you to design form questions with selection list values which are filtered and specific to a response given to a previous (linked) question.

This feature is available for controls with a Control Type of Lookup Question. You can configure the form question to show the user a lookup list containing only values which are relevant to an answer they have given against a previous form question. This can make lookup lists much more specific and dramatically reduce their size, making it easier to select the values required.



The set up of this feature requires at least two Lookup Lists to be created in a hierarchical manner. The higher level list should be at 'Group' level and the Lookup items on the lower level list should be linked to an item at 'Group' level. This creates a relationship so that when the user selects a Lookup List item at 'Group' level, from a form question *A*; when they open the Lookup List in form question *B*, they only see the Lookup Items which have a link to the 'Group' level item (selected in question *A*).

#### Example:

A user is completing a survey form. Question 4 asks the user to confirm which building Floor they are on; the user selects "Second Floor" from the Lookup List. Question 5 asks the user to select the Room they are inspecting. Only Rooms on the Second Floor are shown in the Lookup List, as the filter configuration links Control 5 with the response given to Control 4.

## Lookup Lists

Before you can create filter links between controls, you must create the Lookup Lists to be filtered. These are created in the Dynamic Forms system and are not allocated to individual Controls at this stage. Using the example illustrated above, you would first add a Lookup List (Lookup Type) of "Building Floors" with Lookup Items of "Ground", "First", "Second" etc., (as shown in the example below).

The screenshot shows a 'Lookup Types' dialog box with a dropdown menu set to 'Building Floors'. Below this, there are two tabs: 'Lookup Type' and 'Lookup Items'. The 'Lookup Items' tab is active, displaying a table with three columns: 'Caption', 'Group', and 'Lookup Order'. The table contains three rows: 'First', 'Ground', and 'Second', each with a '0' in the 'Lookup Order' column. Above the table are buttons for '+ Add new Items', 'Save', and 'Cancel'. A 'Close' button is located at the bottom right of the dialog.

Caption	Group	Lookup Order
First		0
Ground		0
Second		0

You would then add another Lookup Type of "Building Rooms" with Lookup Items for each Room in the building. Each Room is also assigned to a "Group", which in this example is one of the Floors; "Ground", "First", "Second" etc., (as shown in the example below).




Caption	Group	Lookup Order
Room 001	Ground	0
Room 002	Ground	0
Room 003	Ground	0
Room 004	Ground	0
Room 101	First	0
Room 102	First	0
Room 103	First	0
Room 201	Second	0
Room 202	Second	0
Room 203	Second	0

By linking each Room to a Floor, the form is able to present a filtered list of Rooms according to the Floor specified previously.

## Creating Lookup Lists

To create new Lookup Lists, follow the steps below.

**Note:** You will be either creating new Panel Controls or editing existing Controls.

1. In the Dynamic Forms screen, Panel Controls tab, ensure that **Lookup Question** is selected in the **Control Type** field.
2. Open the drop down list in the **Lookup Type** field. Select the  icon to add new Lookup Types, (as shown in the example below).



Control Type: **Lookup Question**

Data Field: **floor**

Lookup Type: **Building Floors**

Filter Control: **+ Show All**

Default Value: **▼ Items 1-1 out of 1**

Score Weighting: **1.00**

ReadOnly: **⊖**

3. In the **Lookup Type** tab select **+ Add new Lookup Type**.  
This first Lookup List will be the top level in the hierarchy.

**Lookup Types**

**Lookup Types**

**Lookup Type** **Lookup Items**

**+ Add new Lookup Type** **Save** **Cancel**

Type	Editors
<input type="text"/>	

4. Enter the new Lookup Type name in the **Type** field.  
Select **Save**.
5. Go to the **Lookup Items** tab.  
Select the Lookup Type name from the lookup list at the top of the screen
6. Select **+ Add new Items**.



Caption	Group	Lookup Order
		0

7. Add each item for the Lookup List; once you have added one item, select **+ Add new Items** to add the next, etc. Once all items are added, select **Save** then **Close**.

**Note:** To create the environment for Filtered Lookup Lists, your first (top level) list will not need to have Group values assigned to the items, as the items in this list will become the Groups for the lower level Lookup Lists.

8. Continue from Step 3 to add your next Lookup List. If this is at a lower level in the hierarchy, e.g. this is a list of Rooms and the previous (higher level) list was building Floors, then each item must be assigned to a 'Group'.  
For example, each Room would be assigned to a 'Group' which would be the building Floor. In this scenario the Lookup Items could be as follows:



Caption	Group	Lookup Order
Room 001	Ground	0
Room 002	Ground	0
Room 003	Ground	0
Room 004	Ground	0
Room 101	First	0
Room 102	First	0
Room 103	First	0
Room 201	Second	0
Room 202	Second	0
Room 203	Second	0

9. Continue until you have added all the Lookup Types and Lookup Items required.

## Creating Filtered Lookup Lists

Once you have created a set of hierarchical Lookup Lists, you can configure the Panel Controls to make the filter link between Lookup Lists.

**Note:** You will be either creating new Panel Controls or editing existing Controls. The Panel Control to be updated is the lower level Lookup List, as it references the higher level Lookup List acting as the 'Group'.

1. In the Dynamic Forms screen, Panel Controls tab, ensure that **Lookup Question** is selected in the **Control Type** field.  
Select the Lookup List to be used in the form question, in the **Lookup Type** field.
2. In the **Filter Controls** field, select the Lookup List on which you wish this list to be filtered by.  
For example, if the Lookup List in this Control is a list of Rooms, then you would enter the name of the Floors Lookup List. This would ensure that only the list of Rooms which are Grouped to the Floor selected by the user in a previous question, will be displayed.  
Refer to the example below.



Panel Controls	Validation Rules	Conditions
Column Caption:	Rooms	
Field Grouping:	(default)	
Display Order:	0	
Identifier:	Rooms_Key	
Control Type:	Lookup Question	
Data Field:	rooms	
Lookup Type:	Building Rooms	
Filter Control:	Floor	
Default Value:	Floor	
Score Weighting:	Floor	
ReadOnly:	-	

3. **Save** the Panel Controls.

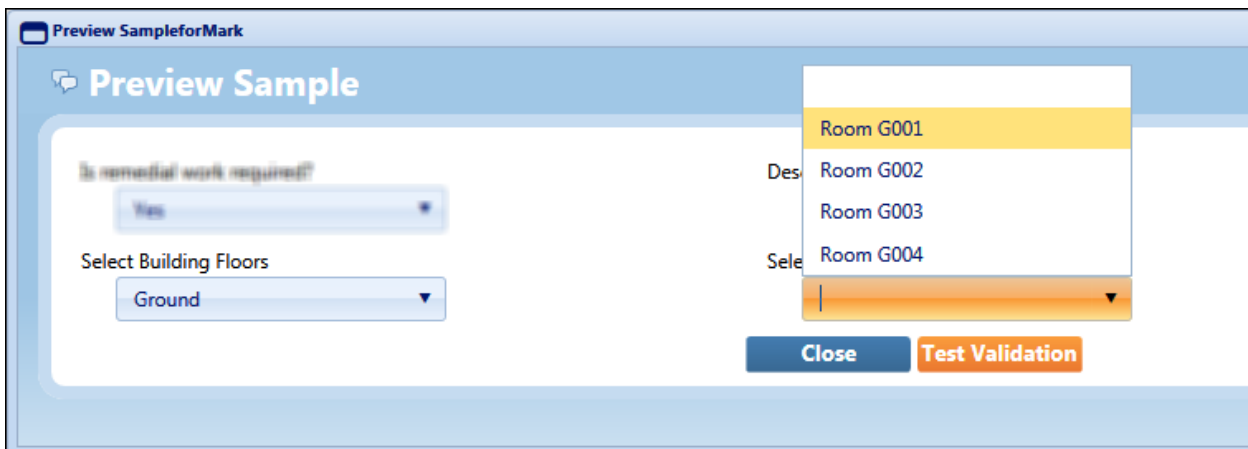
You can test the Controls to check that the Lookup List Filtering is correctly configured, by selecting  [Preview](#)

The example below shows two Controls; 'Floors' and 'Rooms'.

The 'Floors' Control includes a higher level Lookup List of building Floors.

The 'Rooms' Control includes a lower level Lookup List of Rooms, which references the 'Floors' list upon which to filter.

In this example, the 'Ground' floor has been selected on the 'Select Building Floors' question. This means that only those Rooms on the Ground Floor will be present in the Lookup List on the 'Select Building Rooms' question.



Preview Sample for Mark

Preview Sample

Is remedial work required?

Yes

Select Building Floors

Ground

Room G001

Room G002

Room G003

Room G004

Close Test Validation





## GPS Tracking of Visits and Events

### Overview

The GPS location of a mobile device running the QFM app is now recorded in the QFM Visit Log. Coordinates are recorded for key transactions and the data is available for custom reports. Please refer to Service Works for further details.

Benefits include:

- Greater ability to audit mobile operative activities.

### Introduction

QFM now records the GPS location coordinates of a mobile device running the QFM app. Data is recorded for key transactions and saved in the QFM Visit Log.

This information is intended for future use, however it can be provided in custom reporting.

Please refer to Service Works for further details.



## Timestamp Audit Entries

### Overview

The QFM mobile app allows users to change Visit Started and Completed dates and times from the values which are automatically recorded. The system now retains the actual Visit Started and Completed dates and times, with timestamps for these stages recorded in the QFM Visit Log.

Benefits include:

- Administrators now have the ability to identify the actual Started and Completed dates and times for Visits, regardless of whether these details have been changed by the user.

### Introduction

The QFM mobile app allows users to manually change Visit Started and Completed dates and times from the values which are automatically recorded. The system now retains the actual Visit Started and Completed dates and times, with timestamps for these stages recorded in the QFM Visit Log.

The timestamps are identified as:

- **VisitStartedTS** - set to UtcNow when the Visit is Started.
- **VisitCompletedTS** - set to UtcNow when the Visit Completed is page is finalised.

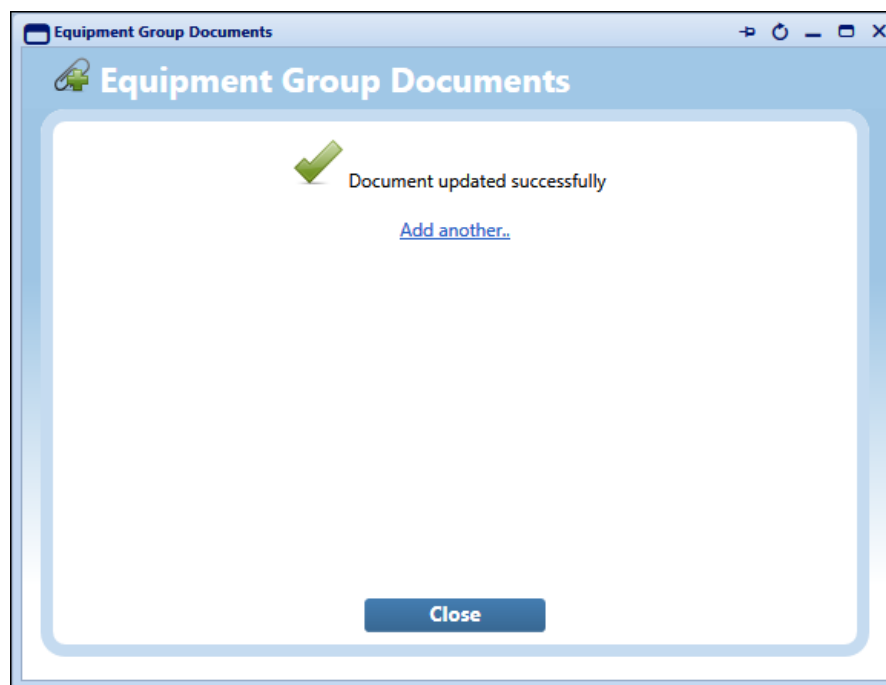
This data is available for custom reports.



## Equipment Group Attachments

### Overview

QFM now supports the adding of file attachments to Equipment Group records. This is available in the Administration area of QFM and provides the ability to add images.



Features and benefits include:

- Allows images to be added to Equipment Groups, supporting the new feature enabling Asset Events to be logged via the QFM Wizard, using a hierarchical selection of picture tiles.

### Introduction

QFM now supports the adding of attachments to Equipment Groups, providing the ability to add images. This supports the new feature in this release for logging Asset Events via the Wizard.



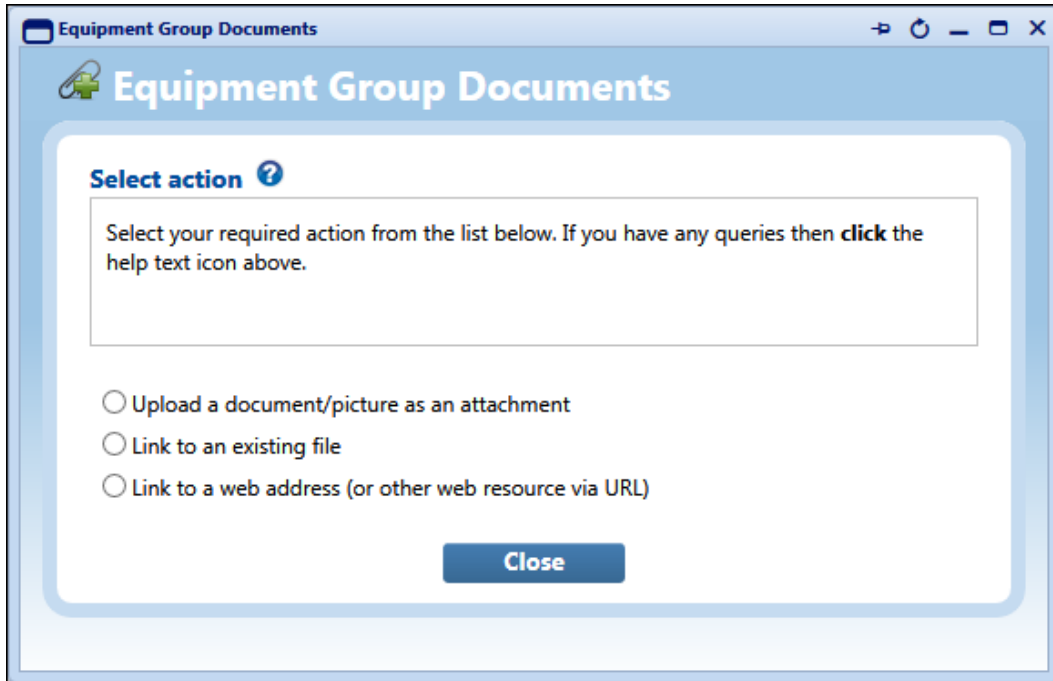
## Adding Attachments to Equipment Groups

The General Reference Data screen (Administration \ Manage \ General Reference Data (Equipment Group)) now includes an additional **Attachments** column, allowing the attachments to be added, as shown below. In order to access this, the user must have appropriate privileges for **Add Attachments**.

The screenshot shows the 'General Reference Data (Equipment Group)' screen. At the top, there is a navigation bar with tabs: Events, Assets, People, Places, Stock, System, Bookings, Service Audits, Administration, Logout, and Help. The user is logged in as 'tester9\_HD'. Below the navigation bar, there is a header section with a home icon and the title 'General Reference Data (Equipment Group)'. A dropdown menu shows 'Equipment Group'. The main content area features a table with the following columns: Equipment Group, Description, Cost Allocation, Cost Code, Summary Group, Attachments, and remarks. The 'Attachments' column is highlighted with a red box. The table contains 16 rows of data, each with an 'Add' link in the Attachments column. The first row has a value '9999999999' in the remarks column. At the bottom of the table, there is a pagination bar showing '101 items in 11 pages' and a page size of 10.

Equipment Group	Description	Cost Allocation	Cost Code	Summary Group	Attachments	remarks
Equipment Group 2	Equipment Group 2	Allocation 11	CostCode 14		<a href="#">Add (5)</a>	9999999999
EquipmentGroup 1	EquipmentGroup 1				<a href="#">Add (1)</a>	
EquipmentGroup 10	EquipmentGroup 10				<a href="#">Add</a>	
EquipmentGroup 100	EquipmentGroup 100				<a href="#">Add</a>	
EquipmentGroup 11	EquipmentGroup 11				<a href="#">Add</a>	
EquipmentGroup 12	EquipmentGroup 12				<a href="#">Add</a>	
EquipmentGroup 13	EquipmentGroup 13				<a href="#">Add</a>	
EquipmentGroup 14	EquipmentGroup 14				<a href="#">Add</a>	
EquipmentGroup 15	EquipmentGroup 15				<a href="#">Add</a>	
EquipmentGroup 16	EquipmentGroup 16				<a href="#">Add</a>	

When the user clicks the **Add** link in the Attachments column, the below pop-up window below is displayed.



**Equipment Group Documents**

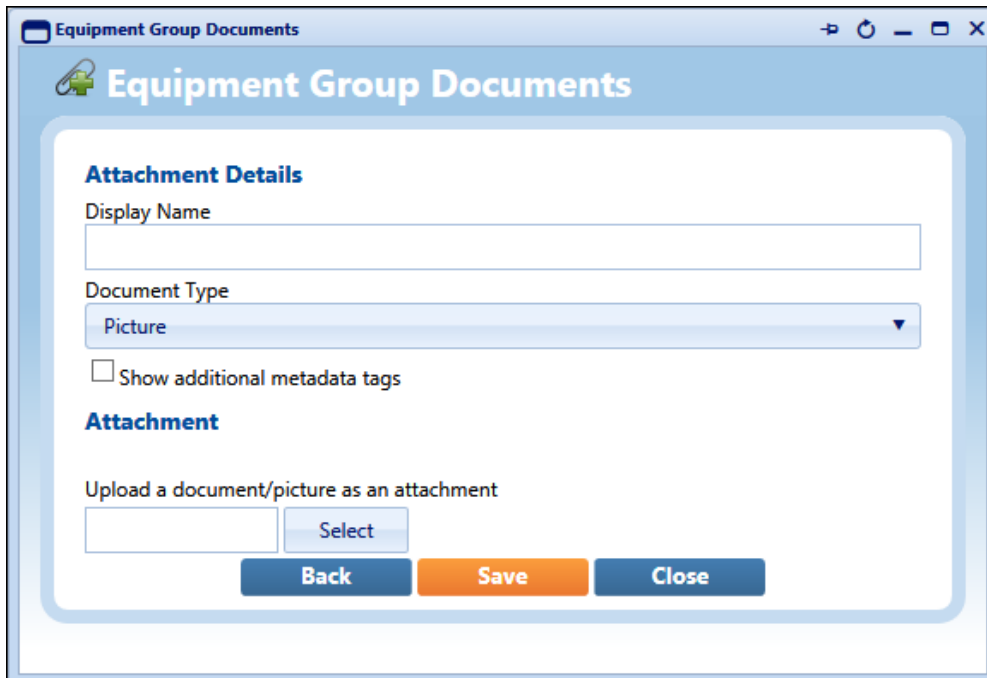
**Select action ?**

Select your required action from the list below. If you have any queries then **click** the help text icon above.

- ☐ Upload a document/picture as an attachment
- ☐ Link to an existing file
- ☐ Link to a web address (or other web resource via URL)

**Close**

In the example below, the user has selected the first option, **Upload a document / picture as an attachment**.



**Equipment Group Documents**

**Attachment Details**

Display Name

Document Type  
 Picture ▼

☐ Show additional metadata tags

**Attachment**

Upload a document/picture as an attachment  
 **Select**

**Back Save Close**

The name of the attachment to be displayed in QFM should be entered into the **Display Name** field, as a description.



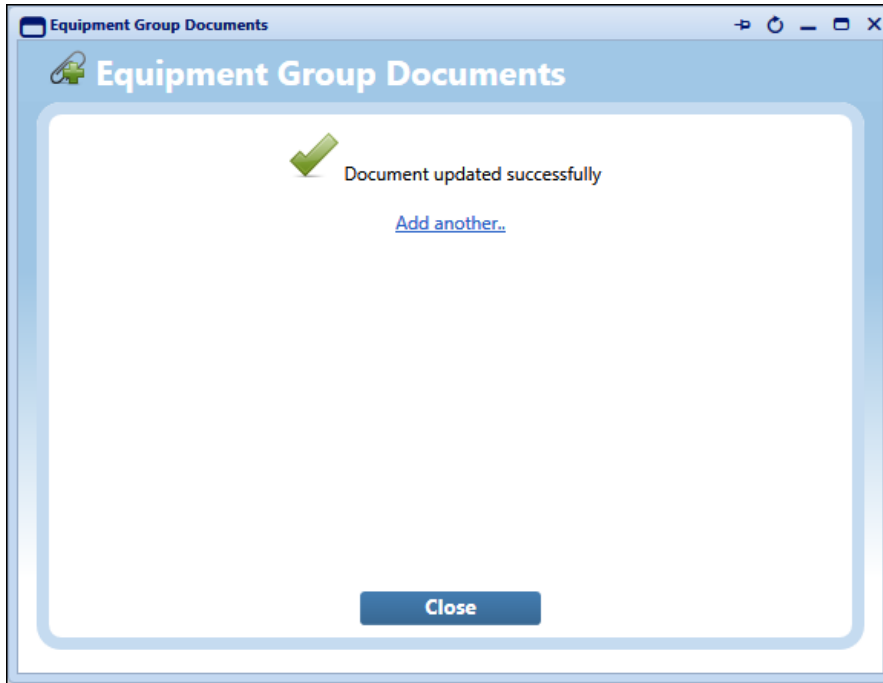
Select the **Document Type** and apply a Metadata Tag by ticking the **Show additional metadata tags** box, if appropriate.

Click the **Select** button to locate and select the file to be uploaded. Click **Save** to upload the attachment.

The screenshot shows a web application window titled "Equipment Group Documents". Inside, there's a section titled "Attachment Details" with a "Display Name" field containing "Equipment Group 10 Image", a "Document Type" dropdown menu set to "Picture", and an unchecked checkbox for "Show additional metadata tags". Below this is an "Attachment" section with the instruction "Upload a document/picture as an attachment". It shows a single file "Equipment Group 10 Image.png" with a green circular icon and a red "X Remove" link. At the bottom are three buttons: "Back", "Save", and "Close".

Once the attachment is uploaded, a confirmation pop-up message, which reads '*Document updated successfully*' will appear. The pop-up includes the option to add another file or close.

Clicking on **Add another** will open the first popup window to repeat the above process.



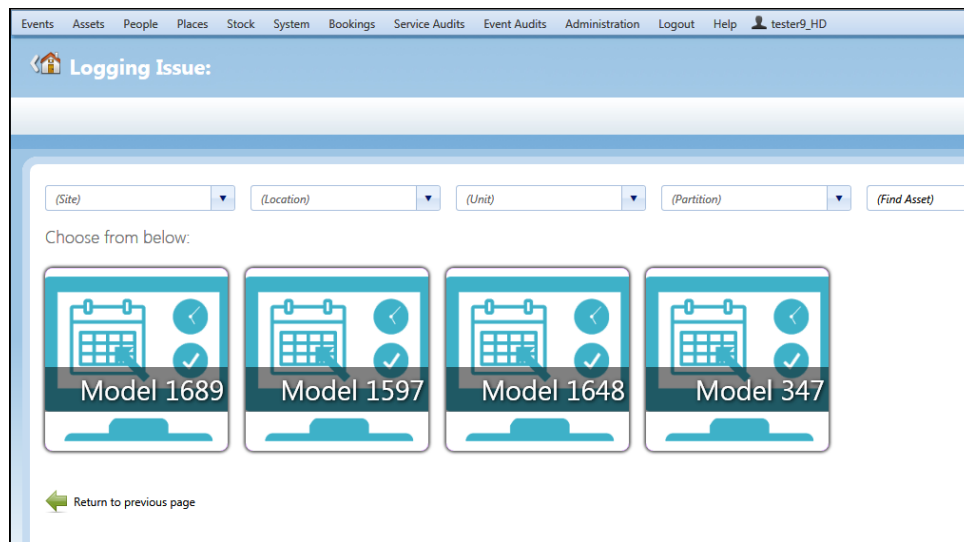
When attachments have been added, the number of attachments is shown in brackets next to the corresponding item in the **Attachments** column.

	Attachments	rer
	<a href="#">Add (5)</a>	
	<a href="#">Add (1)</a>	
	<a href="#">Add (1)</a>	
	<a href="#">Add</a>	

## Asset Event Logging on the Wizard

### Overview

The Event Wizard is enhanced so that self-service users can log requests for service against assets by making on-screen selections from sets of images for the Equipment Group, Model and Asset. This provides a contemporary, easy-to-use method for reporting faults or problems. Administrators can apply customised images to Equipment Groups, Models and Assets.



Benefits include:

- Provides an enhanced user experience for reporting faults or problems against assets.

### Introduction

The Event Wizard is enhanced so that in 'Design' mode, administrative users can configure the system to enable self-service users to log Asset Events (report faults or problems) by making selections from sets of images. This is achieved by enabling the user to make selections for the relevant QFM Equipment Group, Model and Asset, in a hierarchical manner and in a similar way in which they would select the geography for a Service Event.

When this feature is used in conjunction with the new feature for adding Picture attachments to Equipment Groups, it allows a Wizard tile hierarchy structure to be created for Equipment Groups, Models and Assets. This allows users to select (at the top level) from a collection of picture tiles, each depicting an Equipment Group. Once a selection is made, the next level down will show picture tiles for all the





Models attached to the Equipment Group. Finally, a list of all Assets belonging to the Model selected will be displayed.

Events Assets People Places Stock System Bookings Service Audits Event Audits Administration Logout Help tester9\_HD

**Logging Issue:**

(Site) (Location) (Unit) (Partition) (Find Asset) ☒ Include Sub-locations **Search**

Choose from below:

Equipment Reference	Asset Description	Equipment Group	Model	Site	Location	Unit	Partition
EqRef.59(59)		EquipmentGroup 3	Model 1689	A11	test 100		
EqRef.25135(25135)		EquipmentGroup 3	Model 1689	S3435_6C8BC	L 2361	U 15091	P 28286
EqRef.10595(10595)		EquipmentGroup 3	Model 1689	A11	test 100		
EqRef.25135(25135)		EquipmentGroup 3	Model 1689	S3435_6C8BC	L 2361	U 15091	P 28286
EqRef.59(59)		EquipmentGroup 3	Model 1689	A11	test 100		
EqRef.25135(25135)		EquipmentGroup 3	Model 1689	S3435_6C8BC	L 2361	U 15091	P 28286

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## Images Assigned to Equipment Groups and Models

QFM uses an order of preference for the method of applying images to Equipment groups and Models. The system checks for images in the following order:

**1st General Reference Data**

Images added via system Administration.

**2nd Custom Resources Folder**

Client specific images specified in the QFM Custom Resources Folder.

**3rd Resources Folder**

SWG default images added to the QFM Resources Folder.

## Maintaining Workflows in Design Mode

This section describes the changes to the Event Wizard (available from the 'Events' menu) in 'Design' mode for:

- Type of 'Quick FM Event' (Properties tab)
- Event Type of 'Asset Event' (More tab)



Wizard Properties Tab

Wizard More Tab

New fields are added to the 'More' tab, as follows.

- **Equipment Group**

This control defines the method of Equipment Group selection in 'Run Time' mode. If you select **(User Selects)** then the user will be presented with the choice of all Equipment Groups (restricted by List or Asset Group - see below).



If you select a specific Equipment Group then the tile will represent that Equipment Group only.

- **Model**

This control defines the method of Model selection in 'Run Time' mode.

If the Equipment Group was set to '(User Selects)' then the Model must also be set to **(User Selects)**.

If a specific Equipment Group was selected then you have the choice to specify either a specific Model or **(User Selects)** which will enable the user to select from all Models attached to the Equipment Group.

- **Restrict by List**

Allows you to restrict the Equipment Groups, Models and Assets to those specified in a List Report. You must select either **Restrict by List** or **Restrict by Asset Group**.

Select the **List** required. You may also select a List **Filter** if required.

☒ Restrict by List ☐ Restrict by Asset Group

List

Filter

- **Restrict by Asset Group**

Allows you to restrict the Equipment Groups, Models and Assets to those specified in an Asset Group. You must select either **Restrict by Asset Group** or **Restrict by List**.

Select the **Asset Group** required.

☐ Restrict by List ☒ Restrict by Asset Group

Asset Group

- **Find Asset Option**

If ticked, displays a 'Find Asset' search filter on the screen in 'Run Time' mode.

- **Include sub-locations**

If ticked, displays the option to include geography sub-locations in a filtered search, on the screen in 'Run Time' mode.

In the adjacent field to the right, configure the field to be **Hidden**, **Read Only** or **Updatable**.

Two additional Data Scoping options are added to the Wizard Design mode controls. All four Geography fields (Site, Location, Unit, Partition) now provide the ability to restrict the options available to the user as follows:

- **(Checked-In Geography)**

Applies a restriction so that only the geography where the User is checked-in, is made available for selection.

- **(User Geography)**

Applies a restriction so that only the geography which is applied to the user's Personnel record, is made available for selection.



These are shown in the example below.

Image		Properties		More	
<b>Event Type</b>					
Asset Event					
<b>Workflow</b>					
FM Event Traditional					
<b>Initial Event</b>					
Create Mobile Express (with Contractor)					
<b>On Behalf Of</b>					
Ade Giwa		Hidden			
<b>Contractor</b>					
(None)					
<b>Site</b>					
(User Selects)		Updatable		<input checked="" type="checkbox"/> *	
<b>Location</b>					
(User Selects)		Updatable		<input type="checkbox"/> *	
(Checked-In Geography)					
(None)		Updatable		<input type="checkbox"/> *	
(Supplied in URL)					
(User Geography)		Updatable		<input type="checkbox"/> *	
(User Selects)					
<b>Project</b>					
(None)		Hidden			



## Self Service Asset Event Logging

The Wizard in 'Run Time' mode provides users with a 'self-service' style interface which they can use for logging jobs, requesting services, making bookings etc. This new feature enhances the method for logging Asset Events.

The system does not show a Hierarchy Level if there is only one item available for selection. In this scenario, the system assumes that that item is required and it is automatically selected.

For example, if a filtered Asset list has Assets with 5 Models, with all Models belonging to same Equipment Group - 'Vending Machines', then the system will automatically select 'Vending Machines' and display the Model selection level, showing the 5 available Models.

Asset Event logging in the Wizard uses the standard User Class Data Scoping that is implemented throughout QFM. For example; if a User Class is set up to restrict by Site 'A' and 'B' then users attached to the class will only see Assets within those Sites. If a User Class does not have any restrictions set up then users should have no site restrictions on the Assets they can access.

Users are able to go 'back' at any stage in order to reach the previous level of the hierarchy.



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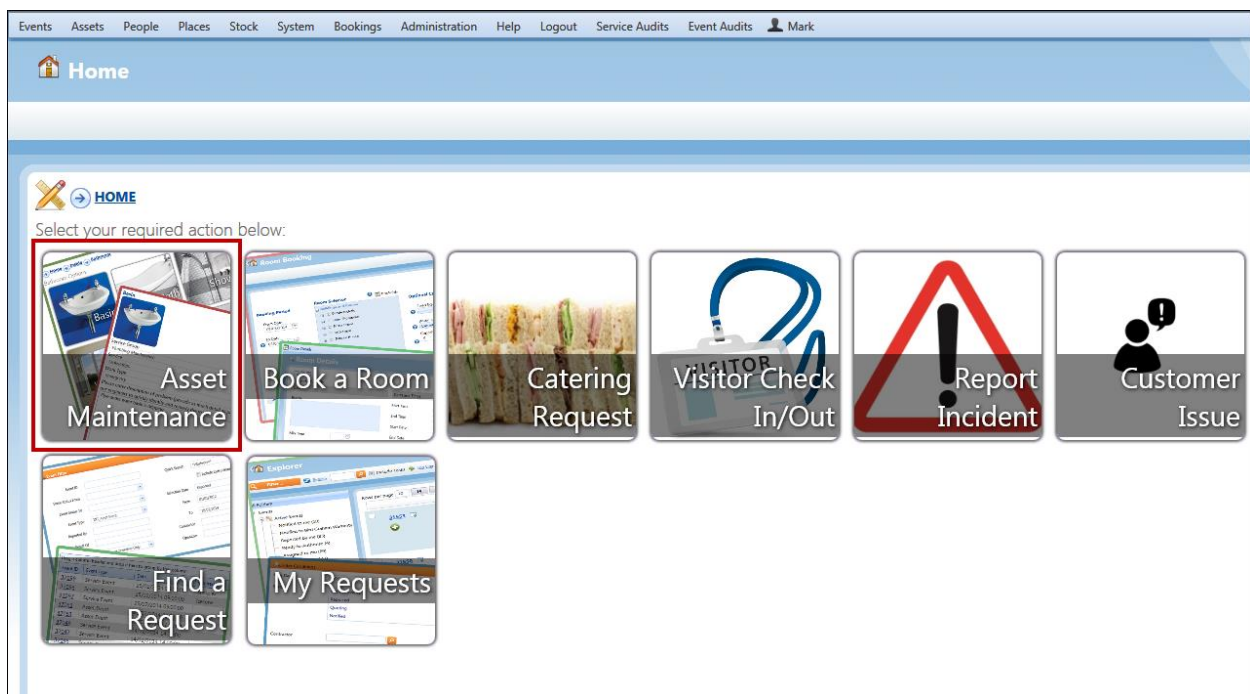
## Workflow Screens

In this example, screens are shown for the new workflow.

The graphics shown on the Equipment Group and Model tiles are the default options. Custom graphics can be applied to each Equipment Group, Model and Asset.

### Home Screen

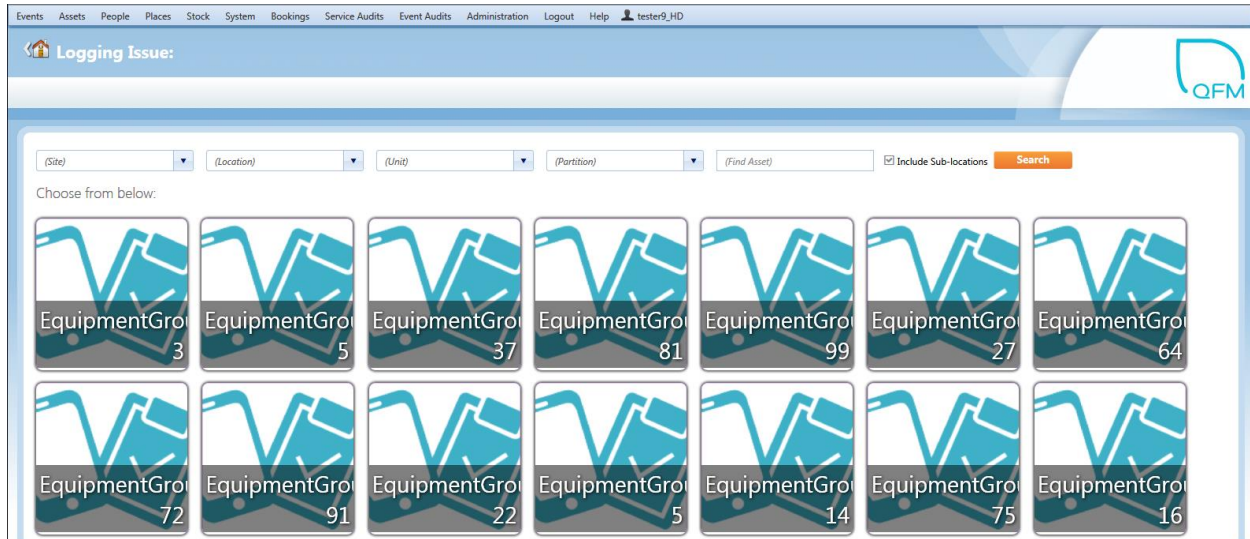
In this example, the Wizard 'Home' screen displays a tile for logging 'Asset Maintenance'.





## Equipment Group Tiles

Once the 'Asset Maintenance' tile is selected, the Equipment Group tiles are displayed.



Additional filters are displayed along the top of the screen. The four Geography filters (**Site**, **Location**, **Unit**, **Partition**) and the **Include Sub-locations** box allow the Equipment Groups displayed to be narrowed to requirements.



The Find Asset filter enables an Asset search. If an exact match is found, the Asset record is displayed.

The user selects the appropriate tile. (If there is only one Equipment Group then the Wizard skips this page and shows the Models at the next level down).

## Model Tiles

Once the Equipment Group tile is selected, the Model tiles are displayed.

The four Geography filters can be used to narrow the Models displayed.

The user selects the appropriate tile. (If there is only one Model for the Equipment Group selected, then the Wizard skips this page and shows the list of Assets at the next level down).



Events Assets People Places Stock System Bookings Service Audits Event Audits Administration Logout Help tester9\_HD

Logging Issue: QFM

(Site) (Location) (Unit) (Partition) (Find Asset) ☒ Include Sub-locations Search

Choose from below:

Model 1689

Model 1597

Model 1648

Model 347

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## Asset List

Once the Model tile is selected, the Asset list is displayed. An image is shown for each Asset, where available.

The four Geography filters can be used to narrow the Assets displayed.







The user selects the appropriate Asset row from the list.

Events Assets People Places Stock System Bookings Service Audits Event Audits Administration Logout Help tester9\_HD

Logging Issue: QFM

(Site) (Location) (Unit) (Partition) (Find Asset) ☒ Include Sub-locations Search

Choose from below:

Equipment Reference	Asset Description	Equipment Group	Model	Site	Location	Unit	Partition
 EqRef.59(59)		EquipmentGroup 3	Model 1689	A11	test 100		
 EqRef.25135(25135)		EquipmentGroup 3	Model 1689	S3435_6C8BC	L 2361	U 15091	P 28286
 EqRef.10595(10595)		EquipmentGroup 3	Model 1689	A11	test 100		
 EqRef.25135(25135)		EquipmentGroup 3	Model 1689	S3435_6C8BC	L 2361	U 15091	P 28286
 EqRef.59(59)		EquipmentGroup 3	Model 1689	A11	test 100		
 EqRef.25135(25135)		EquipmentGroup 3	Model 1689	S3435_6C8BC	L 2361	U 15091	P 28286

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## Details Page

Once the Asset is selected from the list, the Asset Event details page is displayed. Here, the user can check and amend any details from the drop down lists, add a description of the fault/problem, then Submit the Request.

**Asset event**



**Equipment Group**  
EquipmentGroup 3

**Model**  
Model 1689

**Description**  
EqRef.25135 (Serial.25135)


**Work Type**

**Priority**  
(Use linked Priority)

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

Submit Request

Cancel

 Return to previous page





## File Attachments Metadata for QFM Wizard

### Overview

Images appended to QFM records as file attachments, are now able to be selected for use on Wizard Tiles. This is available to administrators when configuring Event logging workflows in the QFM Wizard.

The screenshot shows a window titled "Equipment Group Documents". It contains a list of checkboxes for metadata tags: "Safety Information", "Operative Must Read", "Photo", "Include with Worksheet", "Include as Link on Notification", "Push to device", and "Can Use For Wizard Tile". The "Can Use For Wizard Tile" checkbox is checked and highlighted with a yellow background. Below this list is a dropdown menu currently showing "Can Use For Wizard Tile". Under the heading "Attachment", there is a text prompt "Upload a document/picture as an attachment" followed by a text input field and a "Select" button. At the bottom of the window are three buttons: "Back", "Save", and "Close".

Benefits include:

- Supports the new feature enabling Asset Events to be logged via the QFM Wizard, using a hierarchical selection of picture tiles.

### Introduction

A new Metadata Tag is available when adding attachments with a Document Type of 'Picture', in QFM. The 'Can Use For Wizard Tile' tag enables the attachment to be selected and used when creating a Wizard Tile.

When adding an attachment, Metadata Tags are made available by selecting the **Show additional metadata tags** box, as shown in the examples below.



**Equipment Group Documents**

### Equipment Group Documents

#### Attachment Details

Display Name

Document Type  
Picture ▼

☒ Show additional metadata tags  
▼

#### Attachment

Upload a document/picture as an attachment

**Equipment Group Documents**

- ☐ Safety Information
- ☐ Operative Must Read
- ☐ Photo
- ☐ Include with Worksheet
- ☐ Include as Link on Notification
- ☐ Push to device
- ☒ Can Use For Wizard Tile

Can Use For Wizard Tile ▼

#### Attachment

Upload a document/picture as an attachment



## Known Issues

This section details system issues which remain open in v2.06.01.21. These will be rectified at the earliest opportunity.

### Property

11572 In the Environment / Exemption tab, the 'Property' field should be mandatory, but is currently not.

### Report Centre

#### User Reports

11582 When using page navigation through on-screen User Reports, a system error may occur.

11584 User Reports are only supported with 'In Process' session management configurations. They will not run within a web farm environment. Where this is required an alternative QFM must be configured to run the Reports.

#### Survey Reports

23903 Survey Report details should not be editable.

### Event Wizard

11692 System performance may be slower than expected when selecting values from drop down fields.

### Site Explorer

11723 When creating a new booking via the Room Calendar, values may be blank in the 'Layout' field. Users are allowed to make a booking but the Layout is not visible until after the booking is saved.

### Dashboard

11731 The 'Move Widget' function may cause the system to temporarily freeze, before becoming accessible again.

11732 When saving new Widgets, the screen does not indicate that the data is being processed.



## Administration

12831 General Reference Data - In the Shift Calendar, Details View some elements of the page may become distorted. This issue has only occurred when using the Chrome browser.

## Events

22668 The Event 'Start Date' is set to be the earliest time a Visit is updated by an operative, OR by the earliest Visit 'Start Date' provided by an operative (which ever is the earlier). In some cases, where operatives have set the 'Start Date' after the time they began the work then the Event 'Start Date' may not match.

## Dynamic Forms

23919 The data-source should be preserved as "SurveyTourResult" for form type "Sample Survey Fragment".



## QFM Installation Notices

This release is compatible with QFM Desktop 164 versions only.

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

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

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

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

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

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

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

QFM utilises some 3<sup>rd</sup> 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 3<sup>rd</sup> party components is not covered under the QFM licensing agreement with SWG. It is the client's responsibility to ensure that they have up to date licensing for these specific 3<sup>rd</sup> party products before they are used within the QFM product.

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

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

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

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

- Priority
- Worktype
- Service
- Service Group

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



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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'.