



QFM 1.17 Release Notes

What's New in QFM app v1.17.00.46

April 2020

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Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition v1.17.00.46	21/04/2020	MR

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Release Notices

QFM Compatibility

The v1.17.00.46 release is compatible with the following:

- QFM Mobile Server v2.08.00.05 (recommended), v2.07.00.00, v2.05.02.00, v2.04.01.00, v2.03.00.16, v2.02.00.07, v2.01.00.01.
(Use QFM Mobile Server 2.08.00.05 for access to updated workflows including Survey and Audit).
- QFM v2.01 and above.
- QFM Workflow Scheduler v2.05.01.00
- 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.

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 v1.17.

Scanner Hardware Notice for iOS Users

Users of Apple devices with an iOS operating system must only use scanning devices which are included in the Apple MFi program. These include the Socket Mobile scanning devices listed below.

- 102806-0002 (for the DuraScan™ D750, CHS 7Xi, 7Qi, S850(8Qi))
- 102806-0003 (for the DuraScan™ D700, D730, CHS 7Ci, 7Di, 7Mi, 7Pi and S800(8Ci))

If you would like to use an alternative scanning device, please contact your SWG Account Manager.

Users of devices running an Android operating system are unaffected by this process.



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Security - Encrypted Connection

As part of Service Works Global's ongoing improvements to security and adherence to GDPR, the QFM app now requires an encrypted connection.

The majority of our users already use a secure HTTPS connection but please be aware that Apple and Google discourage insecure connections when using their iOS and Android devices. iOS and Android 9.0 Pie users will be unable to access insecure HTTP QFM services until the connection is secured.

Those hosted through SWG have already been upgraded to a secure server and no action is required.

If you would like any more information about SWG's security policy or require assistance with the QFM app, please contact us on 020 8877 4080 or info@swg.com.



New Features Summary

The QFM app 1.17.00.46 release consists of a range of new features. A summary is provided below, with a detailed breakdown starting on the following pages.

[Support for QFM Dynamic Forms and Event Audit Features](#)

The QFM app supports the enhancements to Dynamic Forms and the new Event Audit feature, released in QFM v2.06.

[Contact Details Added to QFM App Visit Summary](#)

Event Visits viewed on the QFM app now show the Personnel details of the person who reported the Event. Phone numbers and email addresses now support the ability to make calls and send mail directly from these links.

[Enhanced Options for Creating Event Sub-tasks](#)

Event Sub-tasks can now be raised on the QFM app with Event Types which differ from the parent Event.

[Workflow Enhancements for New Events Raised on the QFM App](#)

Configuration enhancements provide the option for new Events raised on the QFM app, to bypass the standard 'Express Event' workflow and instead be automatically set to other initial Event Statuses, e.g. Reported, Notified etc.

[Pre-selection of Contractor/Operative for New Events Raised on the QFM App](#)

New Events raised by on-site operatives using the QFM app, can now be automatically assigned to a default Contractor/Operative.

[Visit Remarks Enhancement](#)

Visit Remarks can now be added and edited at any Visit state; from before a Visit is Accepted through to Completion, Providing greater flexibility to add and edit job related narrative.

[Enhanced Geography Selection for Linked Events](#)

New Events created in the QFM app as Sub-tasks of existing Events, can now be assigned to geography which is different to the parent Event geography.

[Miscellaneous Enhancements](#)

Minor enhancements or enhancements added to the QFM web-enabled product and supported in the QFM app.



New Features

The QFM app v1.17.00.46 release includes a range of new features.

An overview and detailed procedures for each new feature are provided in this section.

Support for QFM Dynamic Forms and Event Audit Features

Overview

The QFM app supports the enhancements to Dynamic Forms and the new Event Audit feature, released in QFM v2.06.

Dynamic Forms

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.

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.

Event Audits

The new 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 using the QFM app; with the results consolidated for easy analysis.

Refer to QFM 2.06.01.02 Release Notes for more information about these features.



Contact Details Added to Mobile App Visit Summary

Overview

Event Visits viewed on the QFM Mobile app now show the Personnel details of the contact person for the Event. Phone numbers and email addresses now support the ability to make calls and send mail directly from these links.

No SIM 10:14

< Summary
QFM Company 1000

506682/V001, Ready To Start
Asset Event, Priority 38
S3572_96CC7, L 2274
U 10344, P 16238
Scheduled Start at 03/10/2019 16:02
Event Due to Complete at 08/10/2019 16:02

Details Assets Info (1) Attachments (0)

Visit Information
Standard
Reported By: Ghansham tiwari
Home Phone [989899898#1234](tel:989899898#1234)
Phone [676767999#1234](tel:676767999#1234)
Email Ghan@gmail.com

Address Information
S3572_96CC7
L 2274 (S3572_96CC7)
U 10344 (S3572_96CC7 | L 2274)
P 16238 (S3572_96CC7 | L 2274 | U 10344)

Remarks

Start Visit Reject Visit

Benefits include:

- Improved Visit information and contact details, for QFM Mobile app users.
- Easier to make calls and send mail directly via the links.



Introduction

Event Visits viewed on the QFM Mobile app now show the Personnel details of the contact person for the Event.

Details displayed are:

- Name
- Home Phone
- Phone
- Email

The screenshot shows the 'Summary' screen for 'QFM Company 1000'. At the top, it says 'No SIM' and '10:14'. Below the header, there's a toolbar with icons for refresh, camera, upload, share, and a menu. The main content area displays event details: '506682/V001, Ready To Start', 'Asset Event, Priority 38', 'S3572_96CC7, L 2274', 'U 10344, P 16238', 'Scheduled Start at 03/10/2019 16:02', and 'Event Due to Complete at 08/10/2019 16:02'. A red warning icon is on the right. Below this is a tabbed interface with 'Details', 'Assets Info (1)', and 'Attachments (0)'. The 'Details' tab is active, showing 'Visit Information' (Standard, Reported By: Ghansham tiwari) and 'Address Information' (S3572_96CC7, L 2274, U 10344, P 16238). The 'Reported By' section includes links for Home Phone (989899898#1234), Phone (676767999#1234), and Email (Ghan@gmail.com). At the bottom, there's a 'Remarks' field and two buttons: 'Start Visit' and 'Reject Visit'.

Phone numbers and email addresses now provide the ability to make a call and send mail by tapping the link.

A hierarchy is used to determine which Personnel details are shown. If 'Contact Name' is present on the Event then this is used; if not then 'On Behalf Of' details are used; if neither of these details are present then 'Reported By' details are used.

'On Behalf Of' and 'Reported By' details are taken from the QFM Personnel record, as shown in the example below.



[Events](#) [Assets](#) [People](#) [Places](#) [Stock](#) [System](#) [Bookings](#) [Service Audits](#) [Event Audits](#) [Administration](#) [Help](#) [Logout](#) [Mark_R](#)

Personnel Details

[Add Personnel](#) [Delete Personnel](#) [Add \(1\)](#)

Personnel Details

Shift Type Subscriptions

Main

Details

Remarks

Messages

Types

Address

Workgroups

Name

Job Title

Geography

Phone

Extension

Home Phone

Reports To

Reference

Ghansham tiwari

EqRef.103812

676767999

1234

989899898

Mark Ransome

434

Title

Initials

Personnel Reference

E-mail

Mobile

Fax

Post Box

Car Reg.

Service Even

GT

abc

Ghan@gmail.com

98989898987666

PO009998

PO065667

FFR009

Change

Powered by QFM Technology

Licence Information

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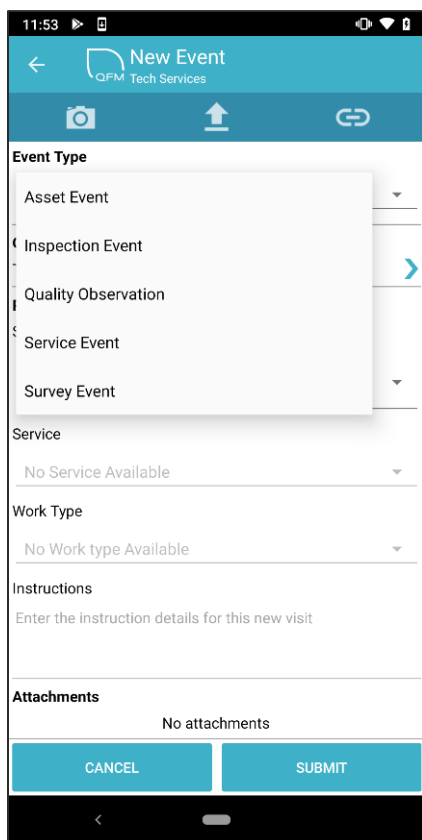


Create New Event Sub-tasks of Different Event Types on QFM App

Overview

Whilst carrying out a maintenance task, it may be necessary to raise an additional job request which is linked to the original Event as a Sub-task. This can be quickly and easily actioned directly from the QFM app.

QFM now allows these Sub-tasks to be created with Event Types which differ from the parent Event, so tasks of different types can now be linked together.



Benefits include:

- Able to link tasks of different types together.
- Makes it easier to raise job requests via the QFM app and manage tasks which accurately reflect the nature of the issue.



Introduction

You can now raise Event Sub-tasks on the QFM app with Event Types which differ from the parent Event, so tasks of different types can now be linked together.

When you have selected an Event Visit on the QFM app, you are able to raise a new Event via the Visit being viewed. The new Event will be a Sub-task of the selected Visit/Event and is able to be of a different Event Type to that of the parent Event.

11:53

New Event
QFM Tech Services

Event Type

- Asset Event
- Inspection Event
- Quality Observation
- Service Event
- Survey Event

Service

No Service Available

Work Type

No Work type Available

Instructions

Enter the instruction details for this new visit

Attachments

No attachments

CANCEL SUBMIT

The Event Types available to select depend on Event Workflow configuration, (refer to *Enhancements to Event Sub-task Workflows*).

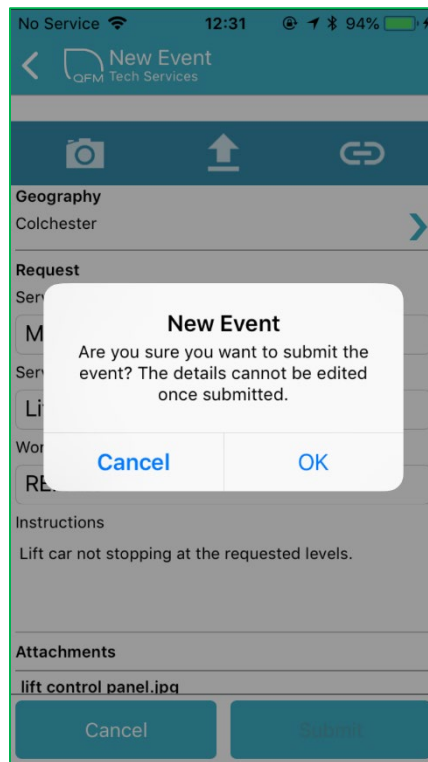


Configuration Option to Raise Events on QFM App to Statuses Other than Express Event

Overview

The standard workflow for new Events logged by on-site operatives via the QFM app creates these as 'Express Events'. These then require intervention from other QFM users (typically the helpdesk) to be assigned back to the appropriate operatives.

A new configuration capability now provides the option for Events raised by on-site operatives via the QFM app, to be automatically set to other Event status, e.g. Reported, Notified etc.



Benefits include:

- Greater operational flexibility for the Event logging workflow on the QFM app.



Introduction

New configuration options are available which provide a method for jobs raised by on-site operatives via the QFM app, to bypass the standard 'Express Event' workflow and instead be automatically set to other Event Statuses, e.g. Reported, Notified etc.

Given that the QFM app only supports a sub-set of Event information, this option only suits some simpler scenarios.

For this feature to be implemented successfully, the system must be set up in a way that the Contractor may be derived from the service matrix, otherwise the system is unable to progress the Event to 'Notified' or beyond.

If the Event status is set to move to 'Reported', then no Contractor/Operative association with the Service Group / Asset Group is required.

The ability to raise Events to different statuses provides greater flexibility for the Event logging workflow on the QFM app.

Configuration

Refer to your SWG Account Manager for implementing the changes to workflows required.

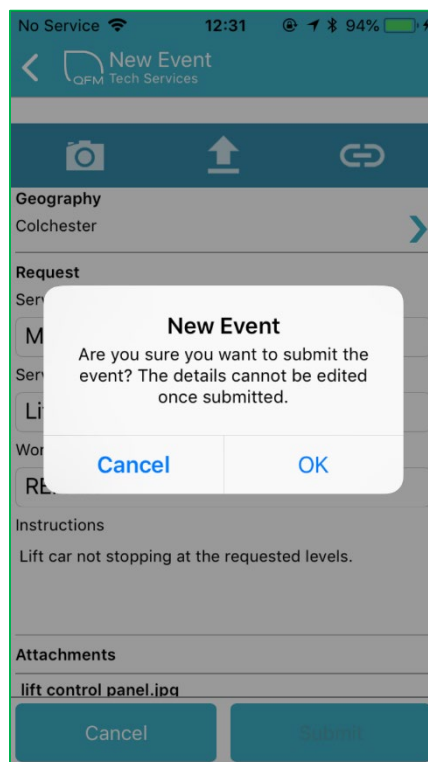


Pre-select Contractor/Operative for Events Raised on QFM App

Overview

On-site operatives can now raise Events via the QFM app which are automatically assigned to a default Contractor/Operative.

If a workflow is in use which supports Events moving straight to a status of 'Notified', a default Contractor/Operative will be assigned to the job if a Service Group or Asset Group with a pre-assigned Contractor/Operative is used.



Benefits include:

- A more automated and efficient method for the notification of specific types of job to pre-assigned contractors.



Introduction

This feature is linked to the new workflow configuration options allowing Events raised by on-site operatives via the QFM app, to move straight to Reported or Notified status. It provides the ability to utilise pre-assigned Contractor/Operatives in QFM app Event workflows.

If a workflow is in use which supports Events moving straight to a status of 'Notified' (rather than Express Event), a default Contractor/Operative will be assigned to the job if a Service Group or Asset Group with a pre-assigned Contractor/Operative is used.

Configuration

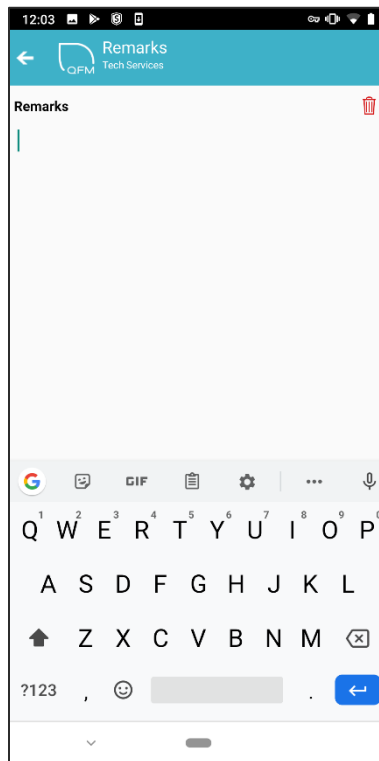
Refer to your SWG Account Manager for implementing the changes to workflows required.



Visit Remarks Enhancement

Overview

Visit Remarks can now be added and edited at any Visit state; from before a Visit is Accepted through to Completion.



Benefits include:

- Provides greater flexibility to add and edit job related narrative.

Introduction

Visit Remarks can now be added and edited at any Visit state; form before a Visit is Accepted through to Completion. Tapping the **Remarks** area provides access to an expanded screen for text entry; refer to the examples below.

(Previously, Remarks could only be added when a Visit was being completed).

12:03

Summary

Tech Services

7985/V005, Started

Inspection Event, 1 Week Turnaround

Tunbridge Wells, Ground Floor

Scheduled Start at 04/03/2020 14:15

Event Due to Complete at 07/03/2020 16:31

Details	Assets Info (0)	Attachments (3)
<div>Reference Visit</div> <div>7734,</div> <div>Asset Event, Priority 2 - Urgent 12 Hours</div>		

Visit Information

Inspect, Initial Survey

Reported By: Event Audit Inspection

Remarks

Address Information

[RelatedEvent] [en-GB] Resource not found. 7734

Asset Event PUMP NOT CALLING

Tunbridge Wells

Ground Floor

Albert Road


Bristol


BS99 7JZ



ON HOLD

START SURVEY

12:03







Remarks
Tech Services

7985/V005, Started

Inspection Event, 1 Week Turnaround

Tunbridge Wells, Ground Floor

Scheduled Start at 04/03/2020 14:15

Event Due to Complete at 07/03/2020 16:31

Remarks

Remarks

DISCARD

SAVE

12:03

QFM Remarks
Tech Services

Remarks

Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M



Enhanced Geography Selection for Linked Events

Overview

New Events created in the QFM app as Sub-tasks of existing Events, can now be assigned to geography which is different to the parent Event geography.

15:22

New Event
QFM Tech Services

Visit Reference
7990/V001

Event Type
Service Event

Geography
Colchester, Ground Floor

Request
Service Group
Select Service Group

Service
No Service Available

Work Type
No Work type Available

Instructions
Enter the instruction details for this new visit

CANCEL SUBMIT

Benefits include:

- The ability to accurately record the different geographies of two linked Events.



Introduction

When creating a new Event as a Sub-task of an existing Event in the QFM app, you now have the ability to assign it to a different geography to the geography of the parent Event.

The **Geography** field opens the Select Geography screen, where you can make your selection.

15:22

New Event
QFM Tech Services

Visit Reference
7990/V001

Event Type
Service Event

Geography
Colchester, Ground Floor

Request
Service Group
Select Service Group

Service
No Service Available

Work Type
No Work type Available

Instructions
Enter the instruction details for this new visit

CANCEL SUBMIT

15:23

Select Geography
QFM Tech Services

Site

B
Banbury

Blanchardstown

Bournemouth

C
Cheddar

Colchester

E
Edinburgh

H
Halsall

M



Miscellaneous Enhancements

The following are minor enhancements or enhancements added to the QFM web-enabled product and supported in the QFM app.

- **Dynamic Forms - Hide/Show Controls Based on Condition of Another Control (21201)**
Dynamic Form Validation Rules can be specified for particular Panel Controls, in the QFM Dynamic Form editor. This 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 (the answer given to a question). This allows administrators to design specific pathways through the form, dependent on particular answers.
- **Dynamic Forms Validator for 'Lookup' Question Types (21285)**
A new validator for 'Lookup' Question Types is added to the QFM Dynamic Form editor. This allows administrators to specify that a particular question response must be supplied, otherwise the user is not able to continue completing the form.
- **Support for Default Values in Dynamic Forms (22393)**
Using the QFM Dynamic Form editor, it is now possible to define default values for Question types of 'Numeric', 'Text' and 'Lookup'.
- **Dynamic Forms to be Saved when Placed On Hold (21602)**
A user can now place a Visit 'On Hold' when part way through completing a survey form. The form is not returned to the QFM server until it is resumed and set to 'Completed' status.
- **Assets Sorted by 'Equipment ID' (21366)**
On the Visits Summary page, Assets Info tab, Assets are now sorted based on 'Equipment ID' and in ascending order.
- **GPS Location Coordinates Recorded with Visit Updates (21419)**
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.
- **Highlight of Last Viewed Asset on Visit Summary (22549)**
When viewing the Asset details for a Visit's linked Assets, upon return to the Visit Summary page, the last visited Asset remains highlighted.

For SWG Use Only:

- **Support for Conditional Transitions Dependent on Dynamic Form Passing Threshold Check**
For SWG Use Only - refer to PBI 22717.
- **Enable Mobile Logs to be Sent on Demand to SWG by Email**
For SWG Use Only - refer to PBI 23484.
- **Preferences can be Controlled and Locked Server Side for all Operatives**
For SWG Use Only - refer to PBI 20654.



Known Issues

This section details system issues which remain open in v1.17.00.46. These will be rectified at the earliest opportunity.

- 17797 In the Visits screen, not all Assets may be shown when tapping the 'Link Assets' button.
- 23093 In the Visits screen, when the user taps into the 'Remark' section, the screen may automatically scroll up. This issue has been known to occur in the iOS operating system only.
- 23299 When completing a form for an Inspection Visit, a value selected in the 'Reason' field may be cleared when switching between the 'Pass/Fail' button.
- 23662 Device Logs are being cleared each time the user restarts the app.
This issue has been known to occur in the iOS operating system only.
- 23918 On a Survey Event form, the data displayed under Samples Controls should be center aligned.
- 24305 Changing server settings via the 'Connection Settings' link on the login page may leave the mobile device database in an uncertain state. If server settings need to be changed, the QFM app should be uninstalled then reinstalled with the new server settings.
- 24318 Express Events are showing as different Event Types in the mobile app and QFM (web-based). The type of the Express Event (Service or Asset) should be shown, rather than the descriptive name of the Event (e.g. Inspection Event, PM Event etc.).
- 24332 The Geography selector may not work if a geography name contains non-alphanumeric characters.



QFM Installation Notices

The QFM desktop minimum version requirement for this release is QFM 164.08.11.01.
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) to understand the full strengths and capabilities of the product. SWG will make best endeavours to help support and resolve any issues that arise in this environment but as it is a third party product SWG does not provide any warranties over its abilities or functionality. SWG will aim to implement new patches to this software as they become available and are viewed as stable. It is the client's responsibility to ensure that any bespoke user reports work within the environment provided. Furthermore, extensive concurrent use of reporting within QFM can negatively impact the performance experienced by interactive users. This should be monitored and controlled accordingly.

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

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

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

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

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

- Priority
- Worktype
- Service
- Service Group



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

Users who use Self Service express event logging should validate that the process is unaffected. If any issues are