

QFM 3.01.02.34 Release Notes

What's New in QFM v3.01.02.34

March 2021

Confidentiality Statement:

The information contained within this document is strictly confidential and contains proprietary and privileged information which is the intellectual property of Service Works Global. It is intended for use by the recipient for evaluation purposes only and may not be reproduced or disclosed under any circumstances without the express written permission of an authorised authority of Service Works Global in confidence.

Contents

Contents	1
Version Log	2
Release Notices	3
QFM Compatibility	3
Security	3
Crystal Reports	3
New Features Summary	4
Triggered Events from Dynamic Form Data	5
Overview	5
Introduction	6
Features	6
Process Example	7
Configuration	12
Import/Export Utility for Dynamic Form Controls	13
Overview	13
Introduction	14
Exporting Form Data	15
Formatting Data in a Spreadsheet	16
Importing Form Data	17
Points of Note	19
Validation for Maximum Number of Dynamic Form Controls	20
Overview	20
Dynamic Forms - General Enhancements	23
Overview	23
Updated Captions for 'Control Type' Dropdown Options	23
Updated Captions for 'Styling Class' Dropdown Options	24
Panel Control Fields Re-ordered	25
End Dated Forms	26
Minor Enhancements and Changes	28
Known Issues	29
QFM Installation Notices	30

Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition	19/03/2021	MR

Release Notices

QFM Compatibility

The QFM v3.01.02.34 release is compatible with the following QFM software:

- **Workflow Scheduler: 3.01.02.02**
- **Mobile App: 3.01, 3.00.01**
- **Mobile server 3.01.02.01**
- **Desktop Version: 164.08.09**

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.

Security

Maintaining high levels of software security continues to be a high priority for us and we've been able to further enhance the security built into QFM 3.1. This, combined with our ISO27001 information security management accreditation provides our clients and service partners with the confidence that their data will be managed securely.

Therefore, it is a requirement that QFM versions 3.1 or higher must use an SSL certified environment (this includes the Web, Workflow Scheduler, Mobile Server). In addition, support for non-SSL from the QFM Mobile app will be depreciated in future app release versions.

Crystal Reports

Please note that clients wishing to upgrade to v3.00.01.37 and above will be required to upgrade Crystal Runtime to 13.0.27. For users with multiple installations on the same machine, all instances will require an upgrade to v3.00.01.37. Please speak to your SWG Account Manager to discuss specific requirements or to raise any concerns.

Additionally, clients who wish to upgrade to 64bit will also require all custom Crystal Reports to be updated. SWG will upgrade all standard reports within the core product and provide clear directions to users who have additional custom reports not maintained by SWG.

Furthermore, whilst 32bit does not currently require Crystal Reports to be upgraded, it is recommended that Crystal Reports which use TTX are upgraded, as these are no longer supported by SAP and SWG cannot guarantee future 32bit runtimes will be backward compatible.

New Features Summary

The QFM v3.01.02.34 release includes several new features. A summary is provided below, with further details on the following page.

[Triggered Events from Dynamic Form Data](#)

A new QFM Workflow Scheduler (WFS) feature enables the automatic generation of remedial work requests in response to surveys, audits or inspections, carried out using Dynamic Forms and which are deemed to have failed a particular pre-determined standard.

[Import/Export Utility for Dynamic Form Controls](#)

Dynamic Form data can now be Exported out of QFM and Imported back in, via a new utility. This enables forms to be maintained in bulk rather than updating each control separately in QFM, and is of particular benefit to organisations who utilise a large number of forms in the database. The Import/Export utility is available to maintain existing forms by exporting the data, updating it then importing, and also to import data when creating new forms.

The system validates the data in each import and will only accept controls which are in an acceptable format. A Results file in .csv format is produced for each import which gives details of any specific validation failures, so that these can be easily corrected and re-imported.

[Validation for Maximum Number of Dynamic Form Controls](#)

QFM sets a recommended maximum number of Form Controls (questions) for each Dynamic Form, to avoid any potential processing issues. It is now possible to update forms and exceed the Controls limit, with system messages and validations providing appropriate warnings.

This change is required to support the Import/Export utility, and Service Works maintains its advice that the recommended Panel Controls limit should not be exceeded.

[Dynamic Forms - General Enhancements](#)

A number of general enhancements are made to Dynamic Forms.

Triggered Events from Dynamic Form Data

Overview

A new QFM Workflow Scheduler (WFS) feature enables the automatic generation of remedial work requests in response to survey, audit or inspection data, carried out using Dynamic Forms and which are deemed to have failed a particular pre-determined standard.

The screenshot shows a mobile application interface for 'Accept Visit' by 'QFM Company 1'. The form contains the following fields and options:

- Any Additional Comments:** A text input field containing 'Testing'.
- How do you Rate this job:** A dropdown menu with 'Text one' selected.
- Was the Issue fixed to your satisfaction?:** Three radio button options: 'NA', 'NO' (selected), and 'YES'.
- Do you want to raise a new Job for further resolution:** Two radio button options: 'YES' (selected and highlighted with a red box) and 'NO'.

At the bottom of the form are two large buttons: 'CANCEL' and 'NEXT'.

Features and benefits include:

- Automatic generation of remedial work requests without the need to manually create a QFM Event.
- Provides an alternative mechanism to trigger remedial Events from Dynamic Form questions that are deemed as 'failures', without the requirement to set up reference Monitored Values and associated validators for each form.
- Can be set up against individual question failures or overall form failures.
- Remedial Events are linked to the original Event containing the survey/audit/inspection Form.

Introduction

A new QFM Workflow Scheduler (WFS) feature provides an alternative mechanism to trigger remedial Events from Dynamic Form questions that are deemed as 'failures', without the requirement to set up reference Monitored Values and associated validators for each form. This enables organisations to carry out inspections, surveys or audits using forms on the QFM app, which automatically generate remedial work requests when pre-specified responses are captured, e.g. a failed quality check.

The current QFM Monitored Values framework is well suited to managing equipment readings within an allowed range and triggering Events where readings are presented which fall outside a range. For those organisations who have a large volume of forms and a large number of controls on those forms, this can present a significant amount of effort to set up the required Dynamic Forms and associated Monitored Values, Schedule Templates and Assets.

The new WFS feature allows much simpler Dynamic Form design by reducing the need to use Monitored Values to trigger associated Events from questions that require a simple Pass/Fail/NA answer. The Monitored Values framework will be required for those questions that require answers which incorporate a range reference.

There are no changes made to the QFM User Interface as a result of this new feature. Set up and configuration should be carried out by Service Works' personnel only. Please refer to your SWG Account Manager for further details.

Features

- Triggered Events from Dynamic Forms can be incorporated into QFM Workflows for any type of inspection, survey or audit.
- Configurations are added to the QFM 'featureconfig' file which specify which Dynamic Forms to include.
- The new feature examines the QFM 'featureconfig' file, where the rules are set, to check which forms the feature will be applied, and so limiting the types of form to be interrogated.
- The new feature can be set to only apply to specific Dynamic Form 'Types' or Form 'Names'.
 - It looks only at the forms specified in the QFM 'featureconfig' file.
 - Triggers can be set at Question level or Form level, i.e. a failed question or an overall form failure.
 - For a specified form, the feature scans for any question failures or overall form failures, and can be set to generate a specific type of remedial Event.
 - It can be set to generate remedial events upon the entry of a particular question response, (e.g. a failure). If a completed form is then found to contain such a response, an Event is generated.

- Various data values can be taken from the original failed form and entered onto the new remedial Event (e.g. added to Event instructions). These include:

Tags	Details
{#Question.ShortCaption#}	Column Caption associated with the question which generated the Event
{#Question.Caption#}	Full Question
{#Question.Value#}	Value Captured for Question
{#Form.Caption#}	Title of form
{#Form.FormType#}	Form Type
{#Form.EventID#}	Event ID of event against which form was filled in
{#Results.<col caption>#}	Valid column caption from the Dynamic Form Results view (replace any spaces with '_').

- Templates which determine the characteristics for the remedial Events are created in Schedule Activity Maintenance.
- Remedial Events are created as Sub-Events to the original Event which generated the Dynamic Form.
- Remedial Events use relevant data from the original Event, e.g. asset, geography etc.

Process Example

The WFS feature commands are set up in the QFM 'FeatureConfig' file (shown in the examples below). This instructs the system to check for particular responses on specific forms and create remedial Events if the criteria is met.

```

<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <appSettings>
    <add key="Summary" value="Dynamic Forms Triggered Events"/>
    <add key="JobAutoStart" value="True"/>
    <add key="JobScheduleTimeStart" value="00:00"/>
    <add key="JobScheduleTimeStop" value="23:59"/>
    <add key="JobScheduleRelativeToEnd" value="True"/>
    <add key="JobScheduleStart" value="2010-01-01"/>
    <add key="JobScheduleEnd" value="2109-01-31"/>
    <add key="JobScheduleFrequencyType" value="2"/>
    <add key="JobFrequencyPeriod" value="60"/>
    <add key="JobDynamicActivity.ClassName" value="QFM.WFS.UDF.TriggeredEventActivity"/>
    <add key="JobDynamicActivity.AssemblyName" value="QFM.WFS.TriggeredActivities.DLL"/>
    <!-- First indicate which Dynamic Forms to include and how to process them -->
    <add key="DynamicFormTypes" value="Adhoc Survey"/> <!-- List of Dynamic Form Types to include, leave blank for all -->
    <add key="DynamicFormNamesLike" value="TriggeredShall"/> <!-- can have '|' delimited list of Form System Names/Part names with standard SQL matching 'like' conditions e.g. "SIITHealth%|SAT%" -->
    <add key="DynamicFormProcessMode" value="0"/> <!-- 0 = Question Level, 1 = Form Level Processing (but those forms must have condition) -->
    <add key="Trigger_0" value="Test Three Schedule Triggering|Test Activity Form|Raise Event|Yes"/>
    <add key="Mapping_0" value="Event|Characteristic1|Question|ShortCaption"/>
    <add key="Mapping_1" value="Event|Characteristic2|Form|Caption"/>
    <add key="Mapping_2" value="Event|Characteristic3|Question|Value"/>
  </appSettings>
</configuration>

```

The command below specifies the Dynamic Form Type and Form Name to be examined.


```
<add key="JobDynamicActivity.ClassName" value="QFM.WFS.UDF.TriggeredEventActivity"/>
<add key="JobDynamicActivity.AssemblyName" value="QFM.WFS.TriggeredActivities.DLL"/>

    <!-- First indicate which Dynamic Forms to include and how to process them -->
<add key="DynamicFormTypes" value="Adhoc Survey"/> <!-- List of Dynamic form Types to include, leave blank -->
<add key="DynamicFormNamesLike" value="triggeredSham1"/> <!-- can have '|' delimited list of Form System Names -->
<add key="DynamicFormProcessMode" value="0"/> <!-- 0 = Question Level, 1 = Form Level Processing (but then you need to specify the Form Level) -->

<add key="Trigger_0" value="Test three Schedule Triggering Test Activity Four Raise Event Yes"/>

<add key="Mapping_0" value="Event|Characteristic1|Question|ShortCaption"/>
<add key="Mapping_1" value="Event|Characteristic2|Form|Caption"/>
<add key="Mapping_2" value="Event|Characteristic3|Question|Value"/>

</appSettings>
</configuration>
```

The long command specifies that if the dynamic Form Lookup Type (question) **Raise Event** is set to **Yes** on the form then an Event should be created from the Schedule **Test three Schedule Triggering** Activity **Test Activity Four**.

The Lookup Type question **Raise Event** is shown below, on the Dynamic Form set up screen.

Panel Properties										
Details										
Panel Controls Validation Rules Conditions Publishing Tools										
Caption	Help Text	Column Caption	Include in List	Field Grouping	Display Order	Identifier	Control Type	Data Field	Lookup Type	Filter Control
Any Additional Comments		Details	✓		5	Details_Key	Textbox with multiple lines.	Details		
How do you Rate this job?		Lookup One	✓		6	LookupOne_Key	Lookup Question	lookup_one	Rating	
Was the Issue fixed to your satisfaction?		Test One	✓		7	TestOne_Key	Lookup Question	test_one	Test One	
Do you want to raise a new Job for further resolution		Raise event	✓		8	TestTwo_Key	Lookup Question	test_two	Raise Event	
Enter your name		Name	✓	Group One	1	Name_Key	Textbox	name		
Last Name		Last Name	✓	Group One	2	LastName_Key	Textbox	last_name		
Date		Date	✓	Group Two	3	Date_Key	Textbox for Date	Date		

Details of the remedial Events are established in QFM schedules, (refer to the example below).

Schedule Activity Maintenance

Previous **Next** [Return To Schedule](#)

Description: Test Activity Four

Activity Category: 10W
This is used to determine how these items are displayed on the Planner

Start Date: 05/02/2021 15:58 End Date:

Template Scheduling Attachments Advanced Other Forms

Main

Event Type: Scheduled Service

Service Group: ServiceGroup 1

Service: Service 4

Work Type: Survey

Priority: 1 Month Turnaround

Contract: (Default)

Trade: (Default)

Resourcing

☐ Get Contractor from Contract ☒ Specify Contractor ☐ None

Contractor: Contractor 1(Company 1.)

Operative	Skill	Effort (H:m)
Contractor 1_Operative 2		0:0

Total Effort (H:m) 1 : + 0:0

Instructions/Remarks

Instructions: [#Question.ShortCaption#]
[#Question.Caption#]

Note: No Recurrence Profile should be set for the remedial Events.

Schedule Maintenance

Schedule Activity Maintenance

Previous

Next

Return To Schedule

Description

Test Activity Four

Activity Category

10W

This is used to determine how these items are displayed on the Planner

Start Date

05/02/2021 15:58

End Date

Template

Scheduling

Attachments

Advanced

Other

Forms

Recurrence Profile

Use Custom Definition

Use Shared Definition

No recurrence selected

Scheduling Options

Planned Date

Adjusted Date (moved)

Using Adjusted Date, if a planned item moves then future planned items are rescheduled relative to it. Using Planned Date, the move will have no affect and future planned items will retain their original Planned Date. Planned items can move either when manually adjusted via the Planner or if the system has to automatically move the item into a valid working period.

Calendar

(Default)

Cover

(Default)

Close

The Dynamic Form, as used on the QFM App, is shown in this example. The question caption '*Do you want to raise a new job for further resolution*' is linked to the Lookup Type of **Raise Event**. Therefore, if the reponse of **Yes** is selected, then a remedial Event will be generated according to the Schedule.

In the Event screen example below, the remedial Event 507806 is linked as a Sub-Event to the original Event 507805 which generated the Visit with the Dynamic Form.

azuretest.swgasp.com/QFMUI_3.1.0.90/App/Events/Pages/Events.aspx?src=find&IsPopup=0&e=507805

Events Assets People Places Stock System Bookings Service Audits Event Audits Room Audits Administration Logout Help tester6_HD

Event Details: 507805 - Asset Event - Completed

(Find Event) [Icons] Add Event Worksheet Copy Event Schedule History Add Watch Add Attachment (1) Visits (No Linked Events)

Sub Tasks(1) Event Details Visits Attachments Affected Areas Parts

	Status	Event Type	Event Group	Event Name	Work Type	Priority	Instruc	Contractor	Estimated Cost	Geography	Alert	Due	Started	Completed
507805	Completed (Completed)	Asset Event	EquipmentGr 45	Model 1370	Standard	Priority 19		Contractor 1	£0.00	S3986_EDFCC, L 2577, U 13171, P 20103	OK	15/02/2021 21:14	10/02/2021 21:16	10/02/2021 21:16
507806	Due (Notified)	Scheduled Service	ServiceGroup 1	Service 4	Survey	1 Month Turnaround	Raise ev...	Contractor 1		S3986_EDFCC, L 2577, U 13171, P 20103	Pending (4 Weeks)	10/03/2021 21:17		

Reference	Operative	Skill	Status	Started	Completed	Return	Remarks
507805/V001	Contractor 1_Operative 2		Completed	10/02/2021 21:16	10/02/2021 21:16		

Configuration

Set up and configuration of this feature should be carried out by Service Works' personnel only. Please refer to your SWG Account Manager for further details.

SWG Use Only

Further details on configuration are contained in the separate *Dynamic Forms Triggered Workflow - Configuration* document.

Import/Export Utility for Dynamic Form Controls

Overview

Dynamic Form data can now be Exported out of QFM and Imported back in, via a new utility. This enables forms to be maintained in bulk rather than updating each control separately in QFM, and is of particular benefit to organisations who utilise a large number of forms in the database. The Import/Export utility is available to maintain existing forms by exporting the data, updating it then importing, and also to import data when creating new forms.

The system validates the data in each import and will only accept controls which are in an acceptable format. A Results file in .csv format is produced for each import which gives details of any specific validation failures, so that these can be easily corrected and re-imported.

The screenshot shows a web-based interface for managing Dynamic Form Controls. At the top, there's a 'Panel Properties' tab. Below it, a 'Details' section contains four sub-tabs: 'Panel Controls', 'Validation Rules', 'Conditions', and 'Import'. The 'Import' tab is currently selected. In the 'Import' tab, there are two main actions: 'Export' and 'Import'. The 'Export' button is blue and is followed by a yellow button labeled '? Export Panel Controls to file'. Below these, there's a list of files, currently showing 'MRForm1.csv' with a green dot icon. To the right of the file name is a red 'X Remove' button and an orange 'Import' button. To the right of the 'Import' button is another yellow button labeled '? Import Panel Controls from file.'. At the bottom right of the interface, there are three buttons: a magnifying glass icon followed by 'Preview', an orange 'Save Changes' button, and a blue 'Cancel' button.

Features and benefits include:

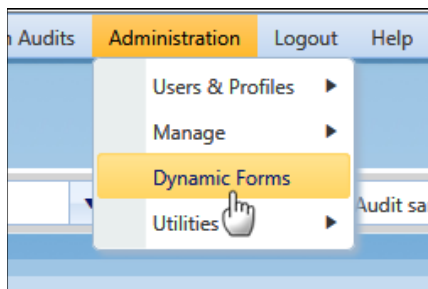
- Greater efficiency when maintaining Dynamic Forms, with the ability to export Panel Control data for a whole form out of QFM and into a .csv file where it can be easily maintained, before being imported back into QFM.
- Data accuracy is ensured with validation controls which check the format of imported data, giving the opportunity to correct any errors and re-import.

Introduction

QFM Dynamic Forms now includes a utility to Export and Import form controls. This enables forms to be maintained in bulk rather than updating each control separately in QFM, and is of particular benefit to organisations who utilise a large number of forms in the database. The Import/Export utility is available to maintain existing forms by exporting the data, updating it then importing, and also to import data when creating new forms.

The system validates the data in each import and will only accept controls which are in an acceptable format. A Results file in .csv format is produced for each import which gives details of any specific validation failures, so that these can be easily corrected and re-imported.

Dynamic Form screens are available from the Administration menu.



The ability to Import/Export data is available on the Import tab, which is only enabled once the **Change** button is selected.

A screenshot of the 'Dynamic Forms' configuration interface. At the top, there are tabs for 'Panel Properties', 'Details', 'Panel Controls', 'Validation Rules', 'Conditions', and 'Publishing Tools'. The 'Details' tab is active. Below the tabs is a table with the following columns: Caption, Help Text, Column Caption, Include in List, Field Grouping, Display Order, Identifier, Control Type, and Data. The table contains four rows of form controls. At the bottom of the interface, there are two buttons: 'Preview' and 'Change'. The 'Change' button is circled in red.

Caption	Help Text	Column Caption	Include in List	Field Grouping	Display Order	Identifier	Control Type	Data
Audit Section	Audit Section	AuditSection	✓	2Audit	1	AuditSection_Key	Section	
CAFAM works order paperwork/ system records available confirming maintenance task Completed and Date of Completion		CAFAM works order	✓	2Audit	2	CAFAMworksorder_Key	Lookup Question	cafam_
WAF documentation completed for relevant WafDoc2	WAF documentation completed for relevant WafDoc2	WAF documentation	✓	2Audit	4	WAFdocumentation_Key	Lookup Question	waf_d

Panel Properties

Details

Panel Controls Validation Rules Conditions **Import**

Export ? Export Panel Controls to file

Import ? Import Panel Controls from file.

[Preview](#) **Save Changes** **Cancel**

Exporting Form Data

Follow the steps below to Export form control data:

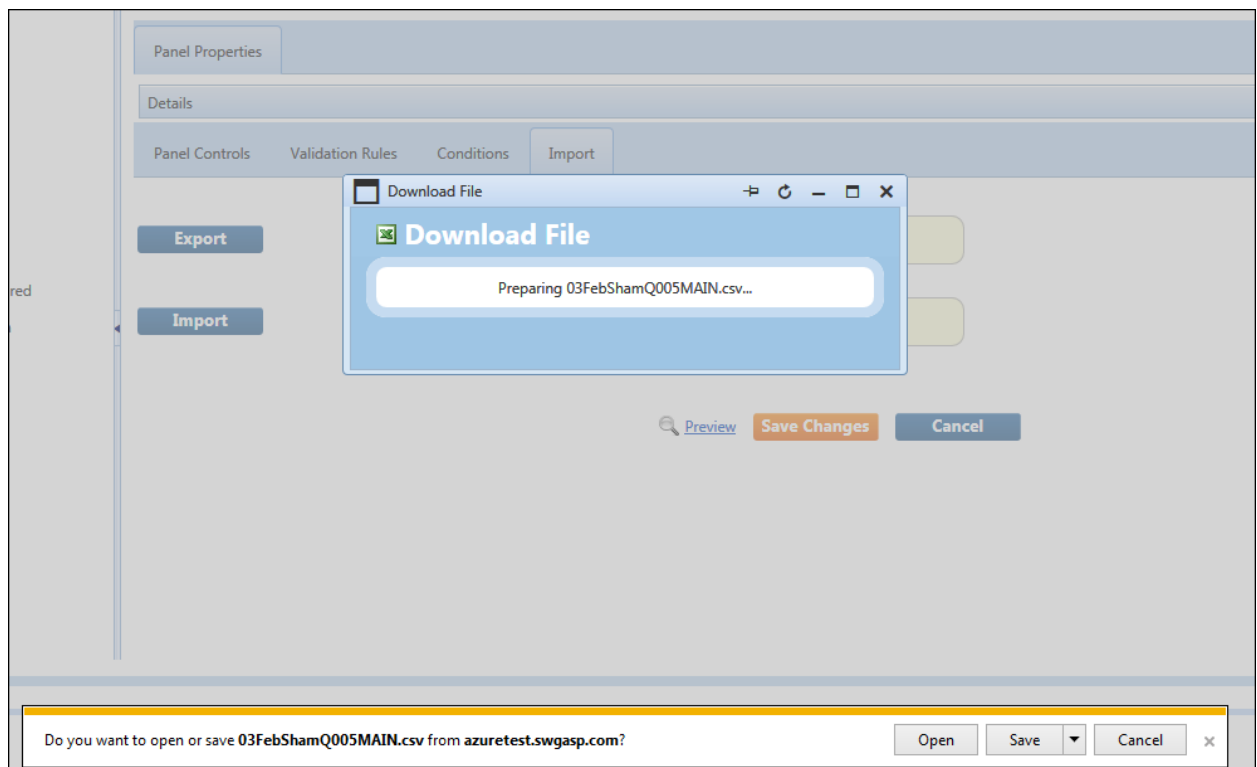
1. Locate the required form.

In the Panel Properties tab, select **Change**.

2. Select the **Import** tab.

3. Select **Export**.

The .csv file will download, as shown in the example below.



4. Save the file to a location of your choice.
You can update the file data; update existing controls and add new controls.
An example of the file format is shown below.

1	Identifier	Caption	Help Text	Column Caption	Include In List	Field Grouping	Control Type	Lookup Type	Required	Value	Increment Step	Decimal Precision	Min Value	Max Value	Synchron
2	Question_Key	MAIN	TEST	Question	TRUE		Section								
3	TotalSamplesRequired_Key	Total Samples Required		Total Samples Required	TRUE		Number		FALSE		1 0	0			FALS
4	TotalSamplesTaken_Key	Samples Taken		Total Samples Taken	TRUE		Number		FALSE		1 0	0			FALS
5	TotalFails_Key	No Fails		Total Fails	TRUE		Number		FALSE		1 0	0			FALS
6	Reason_Code_Key	Reason		Reason_Code	FALSE		Lookup Question	SampleSurveyReasons	FALSE						
7	Other_Comments_Key	Comment		Other Comment	TRUE		Text Multi-Line		FALSE						
8	Action_Code_Key	Recommended Action		Action Code	TRUE		Lookup Question	SampleSurveyActions	FALSE						
9	ActionComment_Key	Remarks		Action Comment	TRUE		Text Multi-Line		FALSE						

Formatting Data in a Spreadsheet

- The sequence of the Dynamic Form display is determined by the order in the spreadsheet, making it possible to re-order existing controls by re-ordering the rows.
- UI captions can be used to populate the spreadsheet.
- For the On/Off switches, accepted values are **True/False**, **Yes/No** and **1/0**.
- The **Identifier** column must be unique. It can be left blank or specified for new controls but when updating existing controls the Identifier is required.
- When supplying a Monitored Values variable, the user conducting the import must be licensed to use QFM Monitored Values.

- Monitored Values Variables are identified by a # so you are required to add a prefix # to the variable for import. Existing variables will be exported with a # prefix, as shown in the example below.

L	M	N	O
Min Precision	Min Value	Max Value	Synchronize Va
1	#Avg Temperature in 30 Days-Exists	#Avg Temperature in 30 Days-Upper Limit	FALSE
1	#Range RC-Lower Limit	#Range RC-Upper Limit	FALSE

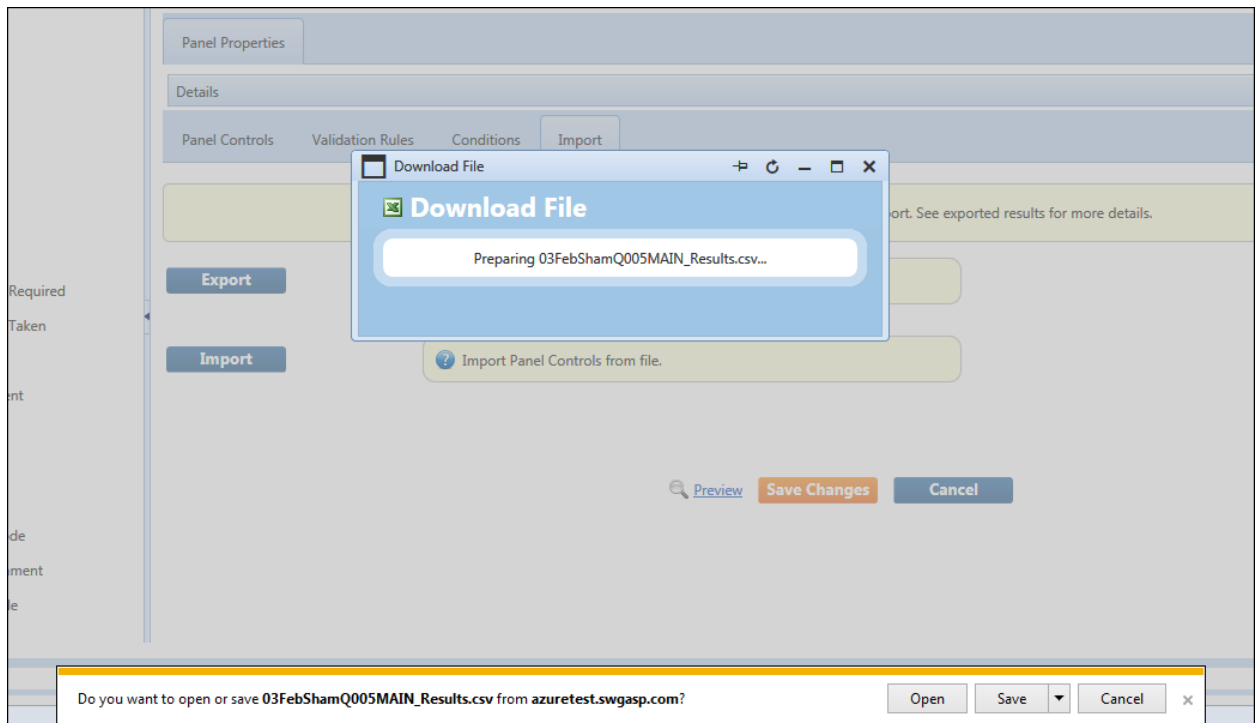
Importing Form Data

Once you have made the required data changes to the exported .csv file, you can Import the file to update the Dynamic Form.

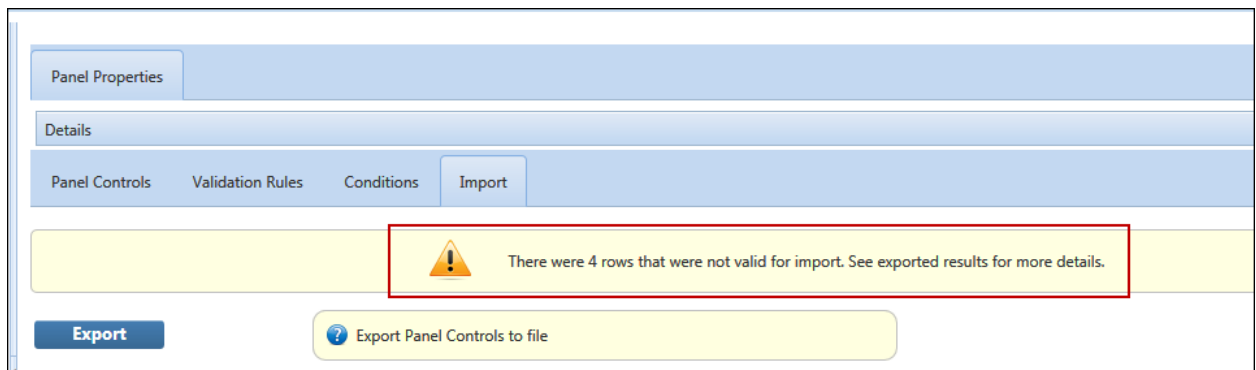
- Locate the form and go to the **Import** tab (in Change mode).
- Select **Import**.
- Locate and select the .csv file to be imported.
- The file is selected. A green dot will be displayed next to the file name if the file format is correct, as shown in the example below. A red dot indicates the file cannot be imported.

The screenshot shows the 'Panel Properties' window with the 'Import' tab selected. The 'Export' button is on the left. Below it, a file named 'MRForm1.csv' is listed with a green dot next to it, indicating it is a valid CSV file. The 'Import' button is next to the file name. The interface also shows 'Export' and 'Remove' buttons, and a 'Preview' link. At the bottom, there are 'Save Changes' and 'Cancel' buttons.

- If the file displays a green dot then select **Import**.
- QFM imports the file and validates the data. It then produces a Results.csv file, based upon the uploaded Panel Controls file.



7. If there are data rows which have failed the validation, an on-screen message will provide the number of data row which have failed, as shown in the example below.



8. The Results.csv file includes an **Import Status** column, which provides details of the validation failure reason for each row, as shown in the example below.

	S	T	U	V
Only Visible	Allow Att	Active	ImportStatus	
TRUE	FALSE	TRUE	Invalid format for Score Weighting, please use a numeric value.	
TRUE	FALSE	TRUE	Invalid format for Min Value, please use a numeric value.	
TRUE	FALSE	TRUE	Invalid format for Min Value, please use a numeric value.	
TRUE	FALSE	TRUE	Invalid format for Min Value, please use a numeric value.	
TRUE	TRUE	FALSE	ok	
TRUE	TRUE	TRUE	ok	
TRUE	FALSE	FALSE	ok	
TRUE	TRUE	FALSE	ok	

This information allows you to correct each particular Panel Control row, then re-import the file.

If the file imports successfully, without any validation failures, the **Import Status** column will show **ok** for each row.

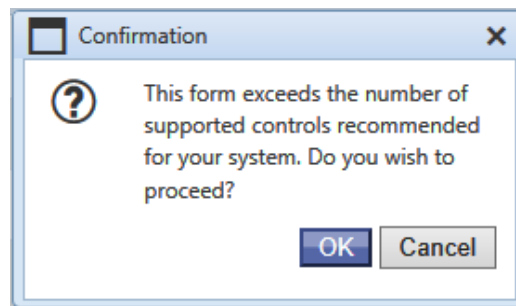
Points of Note

- A successful import is when the Import sheet is accepted by QFM without any validation errors, and the system displays the successfully imported form on the Panel Controls tab. From here, existing Form Validations will then apply.
- Any Controls that existed in QFM that are not present in the latest import sheet (deleted rows) will be marked as 'Not Active' and pushed to the bottom of the form in the display order. Users can then permanently delete these if they wish, or leave them deactivated to retain existing results data.
- When importing Panel Controls for a new form, you will first need to create the form Panel Properties directly in QFM, before importing the Panel Controls.

Validation for Maximum Number of Dynamic Form Controls

Overview

QFM sets a recommended maximum number of Form Controls (questions) for each Dynamic Form, to avoid any potential processing issues, (this may be the system default of 100, or a customised limit). It is now possible to update forms and exceed the Controls limit, with system messages and validations providing appropriate warnings.



Features and benefits include:

- Allows the recommended limit for Panel Controls to be overridden, supporting situations where the use of large forms cannot be avoided.

QFM sets a recommended maximum number of Form Controls (questions) for each Dynamic Form, to avoid any potential processing issues. The system default number is 100, and previously users could not exceed this number (or a customised limit). To support situations where the use of large forms cannot be avoided, QFM now allows this maximum limit to be exceeded, but provides warning messages and validations.

Important: This change is required to support the Import/Export utility, and Service Works maintains its advice that the recommended Panel Controls limit should not be exceeded. If you choose to proceed, your form and associated functionality may not function correctly and cannot be supported.

Manually Adding Controls into QFM

If the number of Controls exceeds the limit, the user is presented with a validation message and can choose to continue (Yes/No).

Importing Controls into QFM

If the number of Controls exceeds the limit, a system message warns that the limit is exceeded, but does not stop the form from being saved.

In both scenarios, once the Controls have been added, upon saving the form a validation message will again warn that the number of Controls exceed the limit. The user has the choice to continue and save the form.

Manually Adding Controls

When you select **+ Add new record**, if the new record will exceed the Control limit then a validation message is displayed.

The screenshot shows the 'Panel Properties' dialog box with the 'Details' tab selected. The 'Panel Controls' sub-tab is active, displaying a table of controls. A confirmation dialog box is overlaid on the table, asking if the user wants to proceed because the form exceeds the recommended number of supported controls.

		Caption			Include in List	Field Grouping
		Date				
		Date Time		Date Time		
		Test Multi - line		Text ML		
		list of cost code		Brick1		
		number		number		
		Text		Brick2		

Confirmation dialog box text:
 This form exceeds the number of supported controls recommended for your system. Do you wish to proceed?

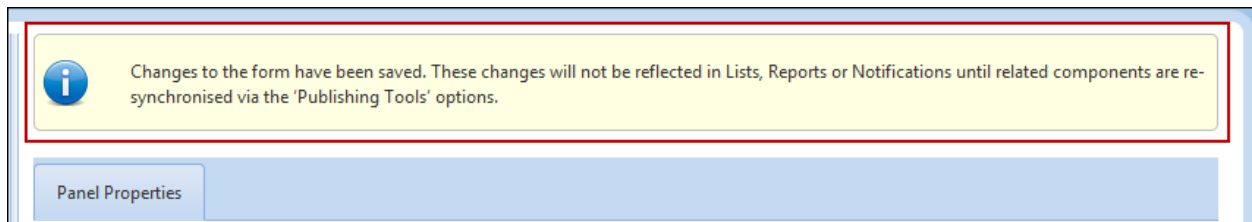
At the bottom of the dialog box are buttons for [Preview](#), **Save Changes**, and **Cancel**.

The same message is displayed after the Control is added, when the form changes are saved

Save Changes

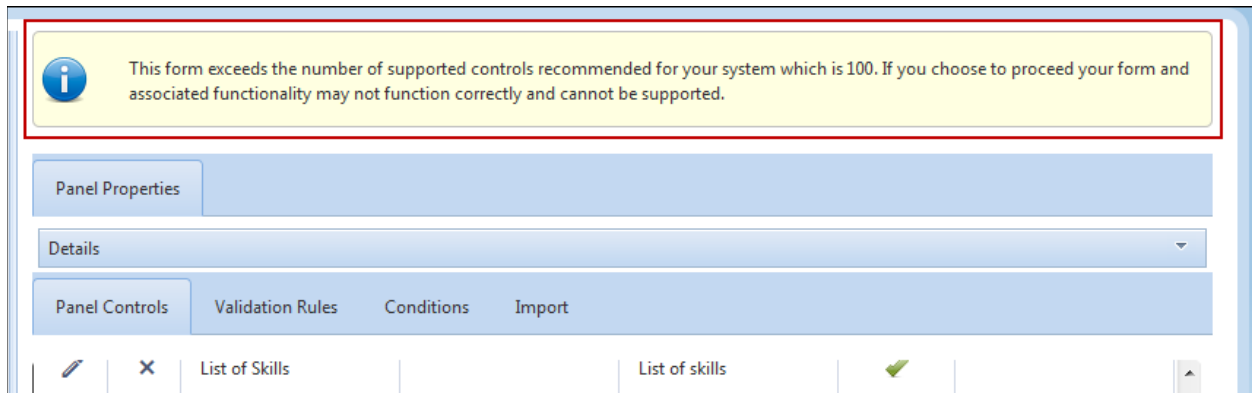
Confirmation dialog box text:
 This form exceeds the number of supported controls recommended for your system. Do you wish to proceed?

Once you select **OK**, a message confirms the changes have been accepted.

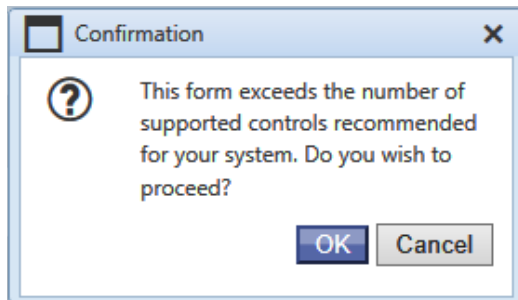


Importing Controls

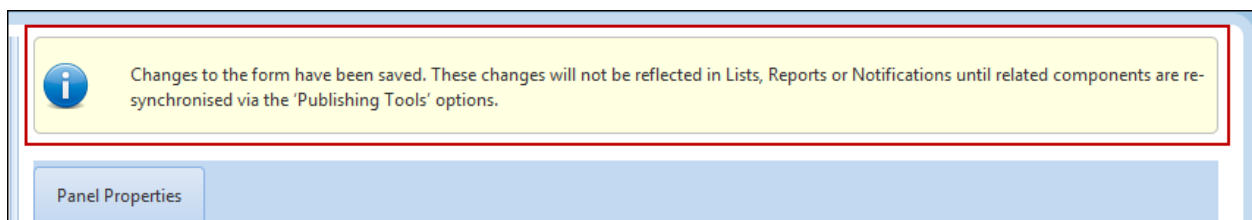
When you import a .csv file, if the number of records will exceed the Control limit then a warning message is displayed.



If you go ahead and save the changes **Save Changes** then a further validation message is displayed.



Once you select **OK**, a message confirms the changes have been accepted.



Dynamic Forms - General Enhancements

Overview

A number of general enhancements are made to Dynamic Forms, as detailed in this section.

Features and benefits include:

- Updated Captions for 'Control Type' and 'Styling Class' dropdown options.
- Panel Control fields are re-ordered.
- The Tree View Panel now clearly differentiates active and end dated forms.

Updated Captions for 'Control Type' Dropdown Options

Captions for the 'Control Type' field dropdown options are updated with more clear and consistent labels, as detailed below. These are also beneficial to the new Import/Export Utility.

Existing Caption	New Caption
Characteristic 1	Asset Characteristic 1
Characteristic 2	Asset Characteristic 2
Characteristic 3	Asset Characteristic 3
Characteristic 4	Asset Characteristic 4
Rating with Stars	Star Rating
Textbox for numbers	Number
Textbox for Date	Date
Textbox for Date Time	DateTime
Textbox for Password	Password
Textbox for Time	Time
Textbox with multiple lines	Text Multi-Line
Web Address	Web URL

The screenshot shows the 'Panel Properties' dialog box with the 'Details' tab selected. The 'Control Type' dropdown is highlighted with a red circle. The dropdown menu is open, showing 'Lookup Question' as the selected option. Other options in the dropdown include 'Asset Characteristic 1', 'Asset Characteristic 2', 'Asset Characteristic 3', 'Asset Characteristic 4', 'Date', 'Date Time', 'Label', and 'List of Active Contractors'. Below the dropdown, there are checkboxes for 'Is Visible', 'Allow Attachments', and 'Active', all of which are checked. At the bottom are 'Insert' and 'Cancel' buttons.

Updated Captions for 'Styling Class' Dropdown Options

Captions for the 'Styling Class' field dropdown options are updated with more clear and consistent labels, as detailed below. These are also beneficial to the new Import/Export Utility.

Existing Caption	New Caption
(Default)	(Default)
Section Header Style	Header
Question Style (Left Align)	Left Align
Question Style (Left Align)	Right Align

The screenshot shows the 'Panel Properties' dialog box with the 'Details' tab selected. Under the 'Panel Controls' sub-tab, the 'Styling Class' dropdown menu is open, displaying the following options: (Default), Header, Left Align, and Right Align. The 'Styling Class' label is circled in red. Other visible fields include Identifier, Control Type (Lookup Question), Lookup Type ((Lookup Type)), Filter Control, Value ((Default Value)), Score Weighting (1.00), Read Only, Is Visible, Allow Attachments, and Active (checked). Buttons for 'Insert' and 'Cancel' are at the bottom.

Panel Control Fields Re-ordered

Panel Control fields are re-ordered to provide an improved flow when adding new Dynamic form Controls, as shown in the example below.

Panel Properties

Details

Panel Controls Validation Rules Conditions Import

+ Add new record

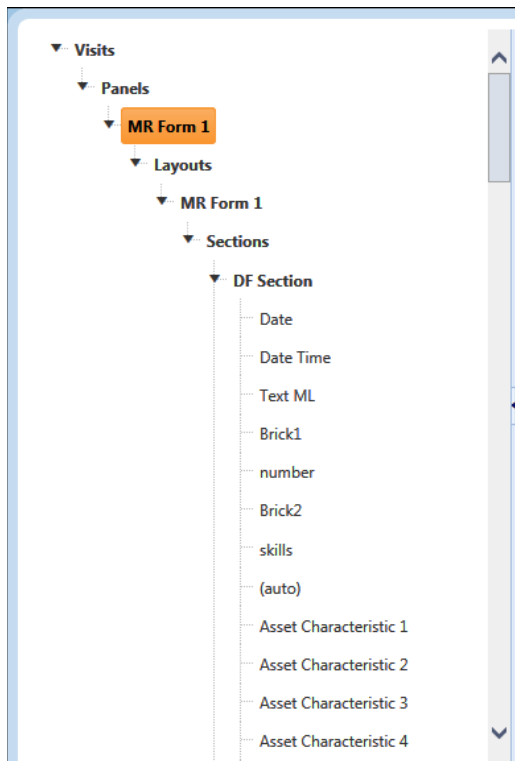
	Caption	Help Text	Column Caption	Include in List	Field Grouping	Display Order	Identifier	Control Type
Caption:								
Help Text:								
Column Caption:								
Include in List:	✓							
Field Grouping:	(default)							
Display Order:	(auto)							
Identifier:								
Control Type:	Lookup Question							
Lookup Type:	(Lookup Type)							
Filter Control:								
Value:	(Default Value)							
Score Weighting:	1.00							
Styling Class:								
Read Only:	✗							
Is Visible:	✓							
Allow Attachments:	✓							
Active:	✓							

Insert Cancel

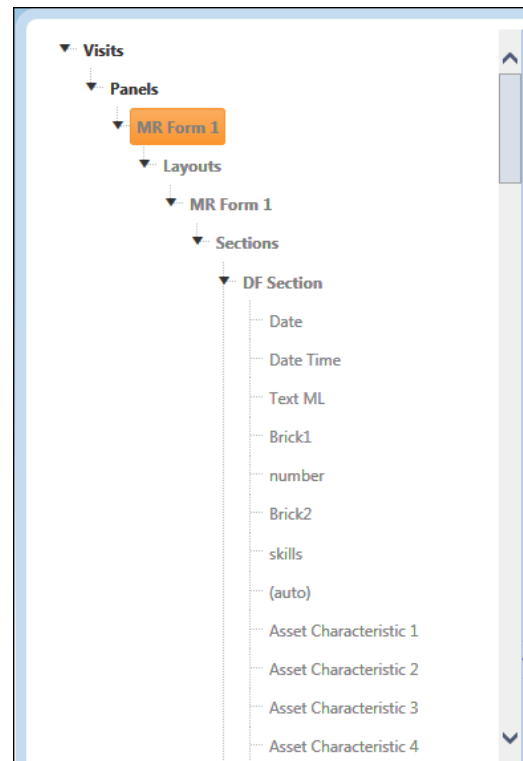
Two additional fields; **Show In This Layout** and **Design Permission** are added (beneath 'Active') for users in Developer Mode only.

End Dated Forms

The Tree View Panel now clearly differentiates active and end dated forms. Forms which are end dated are now displayed with grey text and active forms are displayed with black text, as shown in the examples below.



Enabled Form.



End Dated Form.

Minor Enhancements and Changes

The v3.01.02.34 release addresses issues highlighted in the product. Details are as follows:

SWG Reference	Description
29632	Import/Export - When generating a blank template, the exported .csv file now shows column headers without error.
30059	Event Wizard: Images that have a space in the file name are now being displayed in tiles.
30207	Dynamic Forms - for forms based on Events, results in List reports are now correctly displayed for completed forms, for Events which are in progress (i.e. not yet at Completed status). This is for new forms only; there is no impact to existing forms.
30218	Once an asset is tagged via a barcode scan, using the QFM app, the barcode details now correctly synchronise back to the asset record on the QFM web-based application. This applies to the 3.1.2 Mobile Server and Workflow Scheduler upgrades only.
30232	Schedule Planner - errors no longer occur when attempting to filter the data using Contractor as the criteria.
30677	The QFM Mobile Server 3.1.2 will now verify that users have the Role '(FM) Mobile Handheld Access' assigned to their mobile User Profiles.

Known Issues

This section details system issues which are identified in v3.01.02.34. These will be rectified at the earliest opportunity.

Please contact your SWG Account Manager for further details.

SWG Reference	Description
29898	Workflow Scheduler - The 'Dispatch Visits' process has slowed down slightly in some scenarios due to increased security in the QFM Mobile Server.
31298	Dynamic Forms - List Control dropdown menus (i.e. lists of QFM data, e.g. 'List of Asset Types', 'List of Skills' etc.), may not contain data when accessed on Mobile forms.
31555	Asset Wizard Tiles - Default images are missing from the QFM Web installation.

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.

It is requirement for any versions of QFM that are 3.1 or higher must use an SSL certified environment (this includes the Web, Workflow Scheduler, Mobile Server). In addition support for non-SSL from the QFM Mobile app will be depreciated in future app release versions.

From version 3.0.3 onward the secure flag for cookies will be enabled by default. Please be aware that if your system uses HTTP rather than HTTPS this setting may need to be disabled.

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.

Please note that clients wishing to upgrade to v3.00.01.37 and above will be required to upgrade Crystal Runtime to 13.0.27. For users with multiple installations on the same machine, all instances will require an upgrade to v3.00.01.37. Please speak to your SWG Account Manager to discuss specific requirements or to raise any concerns. Additionally, clients who wish to upgrade to 64bit will also require all custom Crystal Reports to be updated. SWG will upgrade all standard reports within the core product and provide clear directions to users who have additional custom reports not maintained by SWG.

Furthermore, whilst 32bit does not currently require Crystal Reports to be upgraded, it is recommended that Crystal Reports which use TTX are upgraded, as these are no longer supported by SAP and SWG cannot guarantee future 32bit runtimes will be backward compatible.

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 encountered, users simply need to check the aforementioned settings and replace any values of '0'.