

QFM App 3.01.00.10 Release Notes

What's New in QFM app v3.01.00.10

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
Installation	3
Security	3
Scanner Hardware Notice for iOS Users	3
Security - Encrypted Connection	4
User Profile Configuration	4
New Features Summary	5
New Features	6
Operative Selection Handling	6
Overview	6
Assigning New Events/Visits to Own or Different Team	7
Selection Filters for Assignment to a Different Team	8
Selection Filters for Assignment to a 'My Team'	9
Improved Mobile Server Access Security	11
Overview	11
Minor Enhancements and Changes	13
Known Issues	14
QFM Installation Notices	15

Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition v3.01.00.10	10/03/2021	MR

Statement of Confidentiality

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.

Release Notices

QFM Compatibility

The v3.01.00.10 release is compatible with the following:

- **QFM Mobile Server v2.02 and higher (recommended 2.7, 3.01.00.06, and 3.1.2)**
- **QFM v1.36 and higher**

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 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 v3.01.00.10.

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. In addition, support for non-SSL from the QFM Mobile app will be depreciated in future app release versions.

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.

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.

User Profile Configuration

Organisations installing the QFM app v3.01.00.10 onwards, should note that it is mandatory to have the Role '(FM) Mobile Handheld Access' assigned to their mobile User Profiles.

New Features Summary

The QFM app 3.01.00.10 release consists of a range of new features. A summary is provided below, with a detailed breakdown starting on the following pages.

[Operative Selection Handling](#)

Users logging a New Event or a Return Visit now have a greater choice of options for assigning an Operative. These allow assignment to an Operative within the user's own team, or in a different team. For assignment of an Operative to a different team, new search facilities are added which include filtered search options for Contractor and Operative.

[Improved Mobile Server Access Security](#)

Functionality for configuring Session Timeout (the 'Auto Sign-In Interval' app preference) is now relocated to the QFM Mobile Server, enabling this feature to be configured and controlled centrally.

New Features

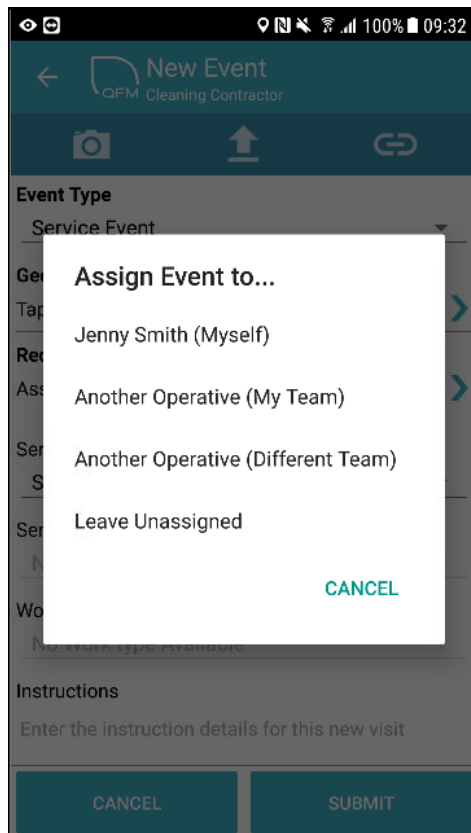
The QFM app v3.01.00.10 release includes a range of new features.

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

Operative Selection Handling

Overview

Users logging a New Event or a Return Visit now have a greater choice of options for assigning an Operative. These allow assignment to an Operative within the user's own team, or in a different team. For assignment of an Operative to a different team, new search facilities are added which include filtered search options for Contractor and Operative.



Features and benefits include:

- Event/Visits assignment can be split by selecting another Operative in the user's own team or from within a different team.
- Greater efficiency and of particular benefit to those organisations that have a large number of Operatives and/or multiple teams.
- When assigning an Event/Visit to a different team, new search facilities are added which include filtered search options for Contractor and Operative.
- Saves time, particularly for those organisations which hold a large number of Contractors and Operatives.

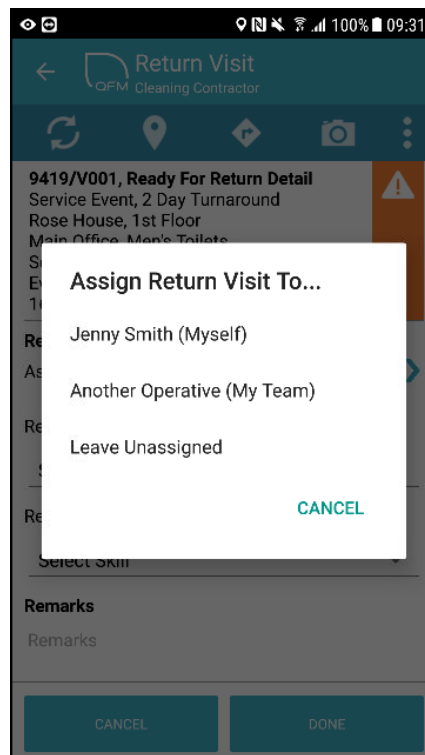
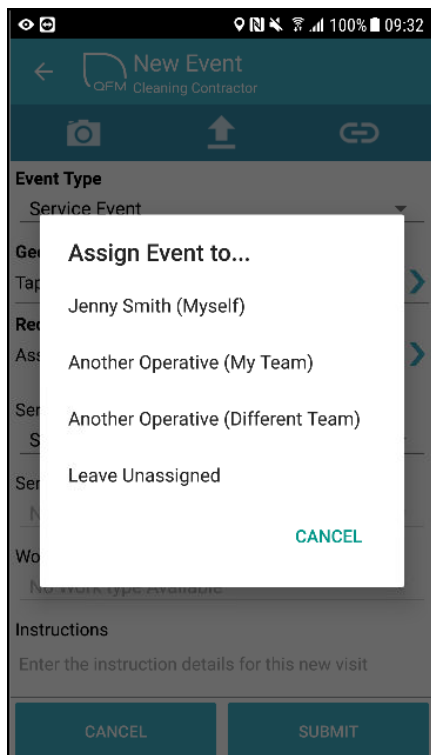
Assigning New Events/Visits to Own or Different Team

When Operatives are logging a New Event or a Return Visit, they now have a greater choice of options for Operative assignment. There are now four possible options; to assign the Event/Visit:

- To themselves
- Leave unassigned
- To another operative within their team
- To another operative in a different team

The new options now allow assignment to an Operative within the user's own team, or in a different team. This will particularly benefit organisations that have a large number of Operatives and/or multiple teams, (e.g. Maintenance Team, Portering Team etc.), making the assignment process more efficient.

This feature is configurable, so the option is available to leave the assignment options as they were previously (themselves, unassigned, another operative).



Another Operative (My Team)

Once this option is selected, the operative is presented with a pre-filtered list of other Operatives belonging to the same Contractor as the logged in user; (the Contractor filter is pre-selected).


Another Operative (Different Team)

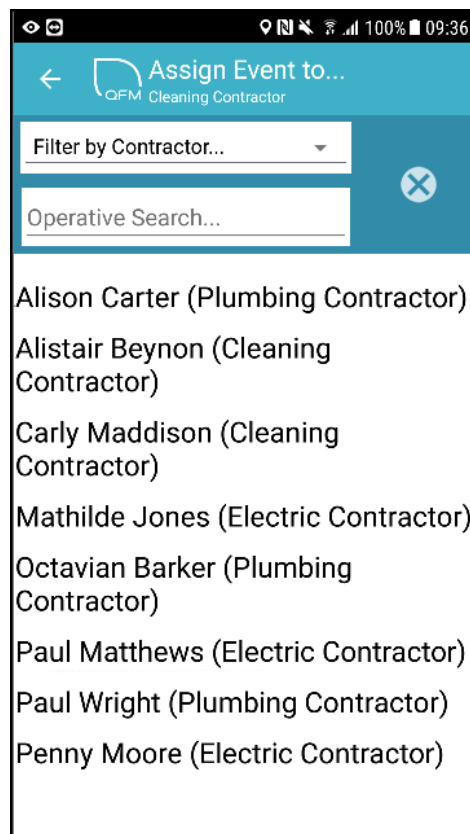
Once this option is selected, the operative is presented with an unfiltered list of all Operatives, across all Contractors.

Note: For Return Visits, the option to assign to an Operative in a different team is configurable, however the default is to assign within own team only.

Selection Filters for Assignment to a Different Team

When assigning a New Event or a Return Visit to **Another Operative (Different Team)**, new search facilities are added which include filtered search options for Contractor and Operative. This can save time, particularly for those organisations which hold a large number of Contractors and Operatives.

Initially, the screen displays a list of Operatives in alphabetical order. The search options are available by tapping the  icon, (as shown in the examples below).



Details of the two new search fields are as follows:

- **Filter by Contractor**

A drop-down filter which allows the list to be restricted by a Contractor (or Team, depending on the way in which your organisation uses the QFM Contractor structure). The drop-down list of Contractors is displayed in alphabetical order and only includes records which have Operatives assigned.

Once a Contractor is selected, the list of Operatives is reduced to show only relevant records, with results shown in alphabetical order by name.

- **Operative Search**

A free-text search facility which uses a 'contains' filter and allows a 'free format' name to be entered.

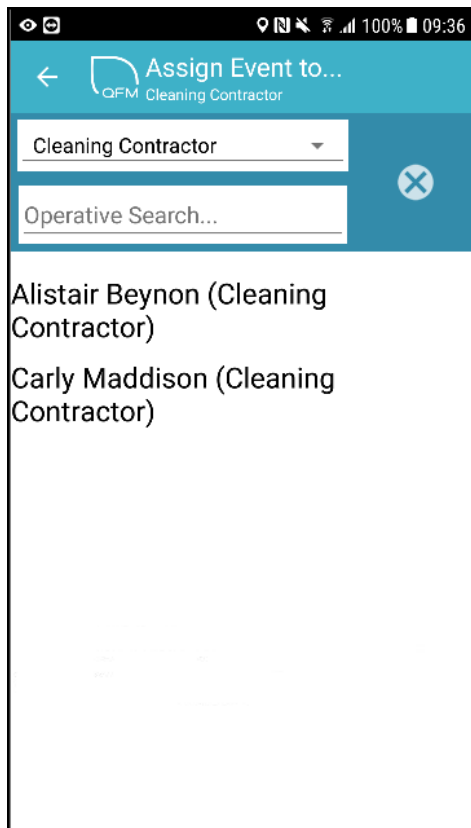
For example, a search for "John" would return results such as "Johnathan", "Johnny", "Johnson" or "Johnston".

Once a name is entered and the Search option is selected, the list of Operatives is reduced to show only relevant records, with results shown in alphabetical order by name.

Selection Filters for Assignment to a 'My Team'

When assigning a New Event or a Return Visit to **Another Operative (My Team)**, new search facilities are added which include filtered search options for Contractor and Operative.

Initially, the screen displays a list of Operatives belonging to the Contractor of the user logged in, (as shown in the example below).



Details of the two new search fields are as follows:

- **Filter by Contractor**

This is pre-populated with the Contractor to which the logged in user belongs.

- **Operative Search**

A free-text search facility which uses a 'contains' filter and allows a 'free format' name to be entered.

For example, a search for "John" would return results such as "Johnathan", "Johnny", "Johnson" or "Johnston".

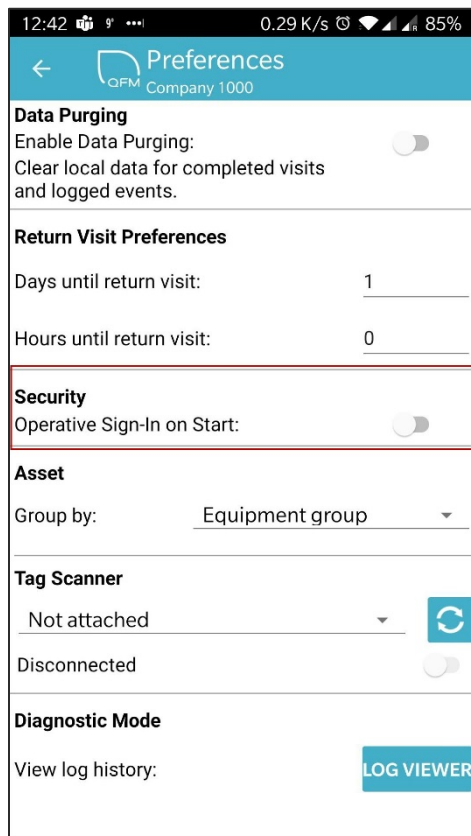
Once a name is entered and the Search option is selected, the list of Operatives is reduced to show only relevant records, with results shown in alphabetical order by name.

Improved Mobile Server Access Security

Overview

Functionality for configuring Session Timeout (the 'Auto Sign-In Interval' app preference) is now relocated to the QFM Mobile Server, enabling this feature to be configured and controlled centrally.

The 'Auto Sign-In Interval' app preference is now replaced with the 'Operative Sign-In on start' preference (as shown in the example below). When enabled, this new setting forces entry of login credentials when the QFM app is opened and upon expiry of the current session.



This setting is only displayed in v3.01.00.10 of the QFM app and Mobile Server. If your organisation has installed these latest versions but do not see this new app preference, please contact your SWG Account Manager.

Features and benefits include:

- Improved security for the process of authentication and access between the QFM app and the Mobile Server.
- The new central setting provides the ability to set the 'Operative Sign-In on Start' setting by default for all users, without changing the manual setting in each device.

Minor Enhancements and Changes

The v3.01.00.10 release addresses an issues highlighted in the product. Details are as follows:

SWG Reference	Description
15486	Support for Line break characters used in captions and display text for Dynamic Forms. Captions and text that contain [crlf] or [br] will introduce a new line in to the text.
22931	After a linked Asset relationship is changed (via the Visit Summary screen, Assets Info tab), the last Asset selected is now correctly highlighted on the Visit Summary screen.
26991	In the Visit Summary screen, the option to Link an Asset to the Event is now provided when the 'Scan for Asset' button is selected from the Assets Info tab. A 'Link Asset' button is now provided.
29168	iPad - when opening the QFM app, an issue no longer occurs whereby the QFM logo screen would appear but then return to the device home screen.
27579	iOS - when typing text in the Remarks field on a Visit, the predictive text facility now behaves correctly.
29950	The http toggle button which is available in Android only and used to connect to the Mobile server, now defaults to https. Support is still provided for http, however support for non-SSL from the QFM Mobile app will be depreciated in future app release versions.

Known Issues

This section details system issues which are identified in v3.01.00.10. These will be rectified at the earliest opportunity.

Please contact your SWG Account Manager for further details.

SWG Reference	Description
29158	iPhone 12 - the QFM app may not render correctly on the device, creating black borders at the top and bottom of the screen.
29825	Saving updates to a Dynamic Form may take longer than normal if the GPS position is unavailable.
29652	Android - Issues may occur when attempting to create Express Events with photo attachments, (device memory issues may be affected when using the highest resolution camera image). After the user has taken a photo and tapped the 'OK' button, the Visits screen is displayed, instead of the New Event screen. SWG recommends the default picture quality is reduced. Alternatively, a maximum resolution image can be taken independently of the app then attached from device files.
30218	Once an asset is tagged via a barcode scan, using the QFM app, the barcode details may not synchronise back to the asset record on the QFM web-based application.
31283	Dynamic Forms - users may not be able to re-open a partially completed form if it includes a date and time control.
31288	Users may be unable to add an audio attachment to an Event Visit. This has been found to occur in the Android O/S 10 and 11, when installing the app v3.01.00.10 onto a mobile device. (If users upgrade to v3.01.00.10 from the previous v3.00.01.14 then there is no issue with adding audio attachments).

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) 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'.

Organisations installing the QFM app v3.01.00.00 onwards, must ensure that users wishing to use the app have the Role '(FM) Mobile Handheld Access' assigned to their User Profile.