

QFM App 3.02.00.24 Release Notes

What's New in QFM app v3.02.00.24

June 2021

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Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition v3.02.00.24	28/06/2021	MR

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Release Notices

QFM Compatibility

The v3.02.00.24 release is compatible with the following:

- **QFM Mobile Server v2.02 and higher, (recommended 2.7, 3.1.2, and 3.2.0.4)**
- **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 v3.02.00.24.

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

[Refactoring of Attachments Handling Between QFM Web and Mobile](#)

The handling and communication of attachments between the QFM web-based application and the QFM mobile app is improved, making it now possible to send a large number of attachments of varying sizes without impacting performance/integrity.

[URL Prefix Removal on Barcode Tags](#)

A new setting is added which removes any barcode/QR Code prefixes when applying the barcode to an asset, when a code is scanned using the QFM app. This enables the successful processing of existing QR Codes/barcodes which would normally be too long to be used in QFM.

[Default Settings for Operative Selection](#)

Configuration changes are made which enable operative assignment defaults to be set for New Events and Return Visits. These can be set to disable the default 'Leave Unassigned' and use a different option.

[Key Event Changes - Updates to Mobile](#)

QFM now provides the ability to update key Event and Visit changes to Visits already dispatched to an Operative on the QFM mobile app. If a Visit record has been changed since it was last read on the QFM app by a user, then it shows a graphical alert in the status bar on the Visits list screen.

[New Event Screen - Improved Aesthetics](#)

A number of general aesthetic improvements are made to the New Event screen.

New Features

The QFM app v3.02.00.24 release includes a range of new features.

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

Refactoring of Attachments Handling Between QFM Web and Mobile

Overview

The handling and communication of attachments between the QFM web-based application and the QFM mobile app is improved, making it now possible to send a larger number of attachments of varying sizes without impacting performance/integrity.

Features and benefits include:

- Improved system performance, allowing a larger number of attachments to be used.

Introduction

The handling and communication of attachments between the QFM web-based application and the QFM mobile app is improved, making it now possible to send a larger number of attachments of varying sizes without impacting performance/integrity.

This new feature applies changes to the system architecture and affects how the QFM mobile app stores and communicates attachments back to the Mobile Server and how the QFM Workflow Scheduler picks up the attachments from Mobile Server and links these to the correct Events and Visits. It also affects how images are stored/linked/reported from User Defined Forms.

Attachment files are now pulled from the Mobile Server on-demand (not downloaded to the mobile app). They are either pushed to the device held on the server. This removes any previous load issues and gives improved system performance, allowing a larger number of attachments to be used.

Trusted connections are maintained between web-based QFM, the QFM app and the Mobile Server, ensuring that data remains secure.

Note: Attachments Handling improvements are only available to clients who upgrade to the latest 3.2 versions of the QFM app, QFM web, Mobile Server and Workflow Scheduler, (refer to *QFM Compatibility* in the *Release Notices* section).

URL Prefix Removal on Barcode Tags

Overview

A new setting is added which removes any barcode/QR Code prefixes when applying the barcode to an asset, when a code is scanned using the QFM app.

Features and benefits include:

- Enables the successful processing of existing QR Codes/barcodes which would normally be too long to be used in QFM.

Introduction

The QFM app has a QR/Barcode scanning capability which enables a range of activities including:

- Assets to be identified by scanning a code
- Assets to be linked to an Event by scanning a code
- Asset Tagging; adding codes to Assets and creating a link in QFM

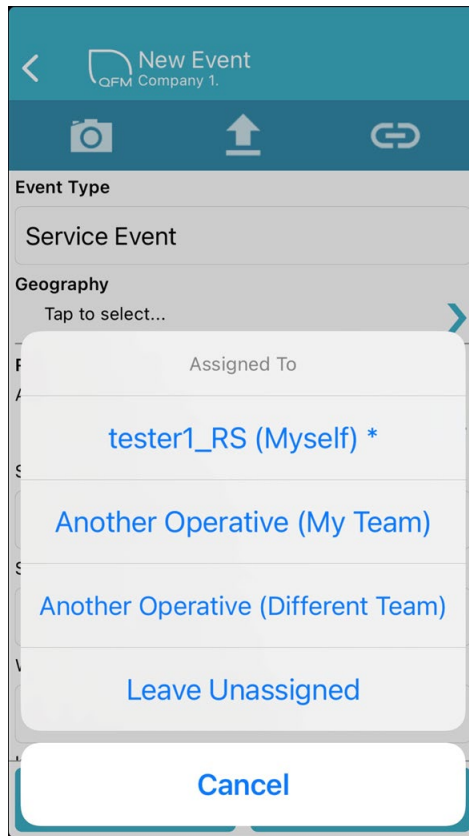
A filter is added to QFM which removes any URL prefixes during the scanning process enabling only the trailing ID to be used.

This feature is set in the application settings file for the Mobile Server.

Default Settings for Operative Selection

Overview

Configuration changes are made which enable operative assignment defaults to be set for New Events and Return Visits. These can be set to disable the default 'Leave Unassigned' option.



Features and benefits include:

- Allows a default to be set for ease-of-use, according to requirements.

Introduction

Changes are made to the Mobile Server application settings, which enable operative assignment defaults to be set for New Events and Return Visits. The setting allows users to disable the default 'Leave Unassigned' option. QFM will then use the first option in the 'Assigned To' list as the default, typically 'Myself'.

< New Event
QFM Company 1.

Service Event

Geography
Tap to select...

Request
Assigned To
Leave Unassigned

Service Group
Select Service Group

Service
No Service Available

Work Type
No Work type Available

Instructions

Cancel Submit

< New Event
QFM Company 1.

Event Type
Service Event

Geography
Tap to select...

Assigned To

tester1_RS (Myself) *

Another Operative (My Team)

Another Operative (Different Team)

Leave Unassigned

Cancel

< New Event
QFM Company 1.

Event Type
Service Event

Geography
Tap to select...

Request
Assigned To
tester1_RS (Myself)

Service Group
Select Service Group

Service
No Service Available

Work Type
No Work type Available

Instructions

Cancel Submit

Defaults are configurable in the 'QFMMobile.config' file with separate controls for New Events and Return Visits, as follows:

- **New Event Setting**
 <newevent>
 <IsDefaultOperativeLeaveUnassigned>
- **Return Visit Setting**
 <returnvisit>
 <IsDefaultOperativeLeaveUnassigned>

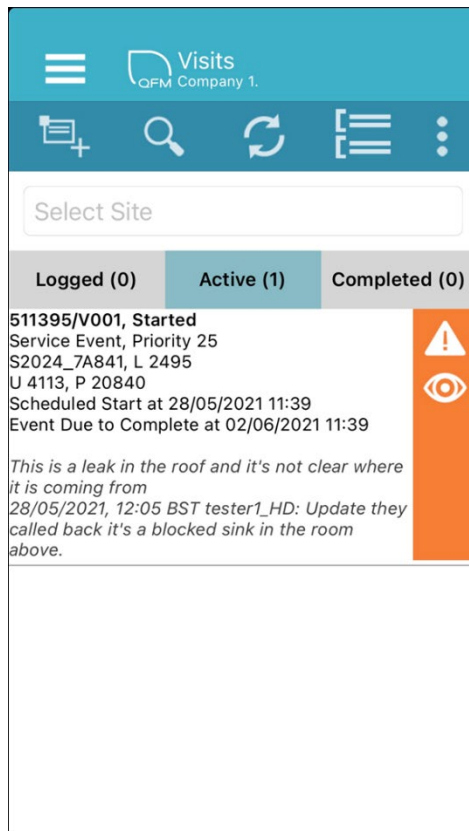
Values for these settings are **True/False**.

- **True**
 A value of 'True' sets the default to **Leave Unassigned**.
- **False**
 A value of 'False' sets the default to use the first option in the 'Assigned To' list as the default.

Key Event Changes - Updates to Mobile

Overview

QFM now provides the ability to update key Event and Visit changes to Visits already dispatched to an Operative on the QFM mobile app. If a Visit record has been changed since it was last read on the QFM app by a user, then it shows a graphical alert in the status bar on the Visits list screen.



Features and benefits include:

- Ensures that significant updates, such as changes to key dates or instructions, are pushed through to operatives in the field.

Introduction

This new feature provides the ability to update key Event/Visit changes to Visits already dispatched to an Operative on the QFM mobile app. When particular Event details are changed, updates are automatically changed in all corresponding Visit records. This ensures that significant updates, such as changes to key dates or instructions, are pushed through to operatives in the field.

If a Visit record has been changed since it was last read on the QFM app by a user, then it shows a graphical alert in the status bar on the Visits list screen. The graphic does not appear for new Visits or Visits which have not yet been progressed.

Notes: Changes made to Event by the information coming back from the QFM mobile app do not trigger updates back to the QFM app for the same Visit.

This feature is only available to clients who upgrade to the latest 3.2 versions of the QFM app, QFM web, Mobile Server and Workflow Scheduler, (refer to *QFM Compatibility* in the *Release Notices* section).

New General Settings are added to the QFM web-based application to control this feature.

Making Visit Changes

When this feature is activated (via General Settings) the QFM web-based application allows Visit details to be changed, if a Visit is Active (not cancelled) with a status of 'Confirmed' or 'Dispatched'.

The fields below can be updated and there is a new 'Update' button available to update the details without changing the current Visit status.

Visit Details Tab

- **Skill**
- **Schedule Start**
- **Est. Effort Mins**
- **Est Travel To (mins)**
- **Schedule Type**
- **Visit Notes**

Scheduling Info Tab

- **Earliest Start**
- **Latest Complete**
- **Scheduler Notes**

Event Details: 511395 - Service Event - Started

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

QFM

Event Details | Visits | Attachments | Affected Areas | Parts | Layout

Started (Started)

Details | Key Dates | Related Assets | Contractor | Costs | Additional Info

Event Type	Service Event	On Behalf Of	tester1_HD	Assigned To	
Reported By	tester1_HD	Service Group	ServiceGroup 2	Estimated Cost	£0.00
Site	S2024_7A841	Service	Service 19	Chargeable	<input type="checkbox"/>
Location	L 2495	Work Type	Standard	PO Number	
Unit	U 4113	Priority	Priority 14	Contact Name	
Partition	P 20840			Contact Email	
				Contact Phone	
				Contact Preference	

Instructions **tester1_HD** 28/05/2021 12:04 (UTC +1): This is a leak in the roof and it's not clear where it is coming from

Remarks

Original Event

Event Details: 511395 - Service Event - Started

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

QFM

Event Details | Visits | Attachments | Affected Areas | Parts | Layout

Started (Started)

Details | Key Dates | Related Assets | Contractor | Costs | Additional Info

Event Type	Service Event	On Behalf Of	tester1_HD	Assigned To	
Reported By	tester1_HD	Service Group	ServiceGroup 20	Estimated Cost	£0.00
Site	S2024_7A841	Service	Service 192	Chargeable	<input type="checkbox"/>
Location	L 2495	Work Type	Standard	PO Number	
Unit	U 10943	Priority	Priority 25	Contact Name	
Partition	P 16597			Contact Email	
				Contact Phone	
				Contact Preference	

Instructions **tester1_HD** 28/05/2021 12:04 (UTC +1): This is a leak in the roof and it's not clear where it is coming from
28/05/2021, 12:05 BST **tester1_HD**: Update they called back it's a blocked sink in the room above.

Remarks

Updated Event

Making Event Changes

When this feature is activated (via General Settings) the QFM web-based application allows Event details to be changed. The fields below can be updated and synchronised to the QFM mobile app.

- **Asset**
- **Instructions**
- **Remarks**
- **Reported By**
- **Of behalf of**
- **Miscellaneous contact details**

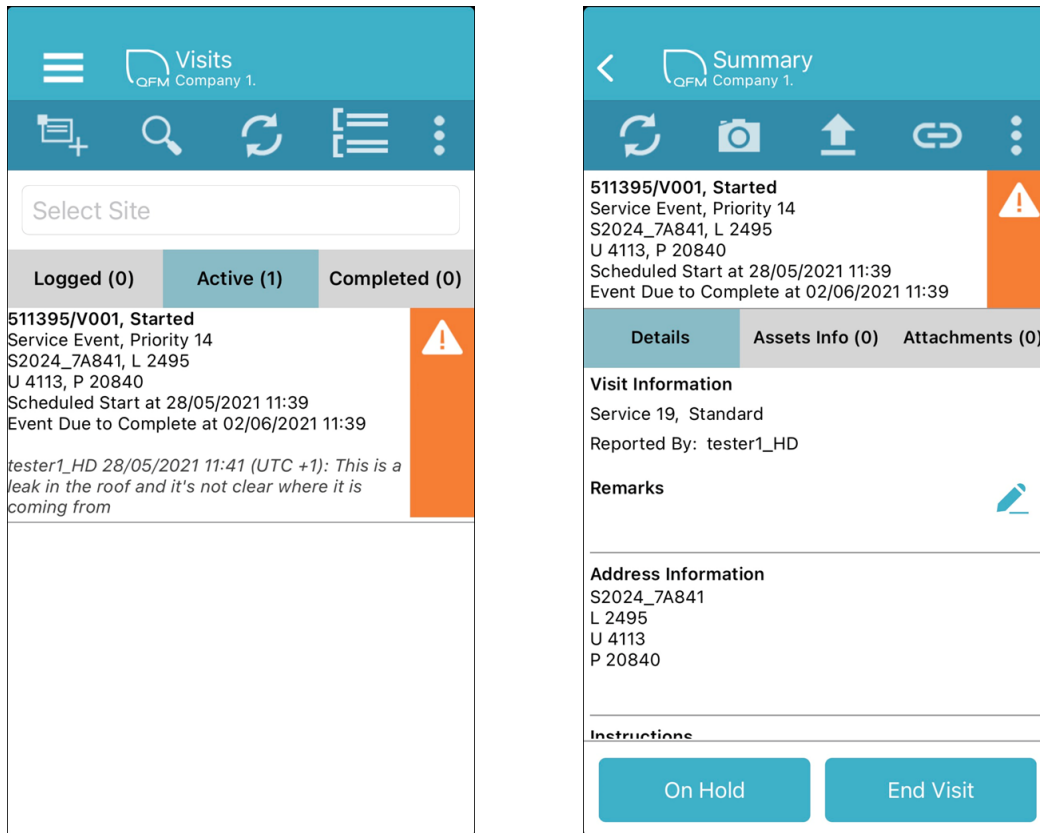
- **Service**
- **Work Type**
- **Priority**
- **Event Type**
- **Reported By**
- **Notified Dates and Due Dates**


Alerts on the QFM app

If a Visit record has been changed since it was last read on the QFM app by a user, then it shows a graphical alert in the status bar on the Visits list screen (as shown in the examples below). The graphic does not appear for new Visits or Visits which have not yet been progressed.

The graphical alert indicates that a Visit has changed since last being read. It is not shown unless the Visit has already been read and material changes have occurred which affect the data in the Visit.

In the two examples shown below, a new Visit is shown with initial job instructions.



In the two examples shown below, an update to the Visit has been made (additional instructions) which is identified by the  icon.

Visits

QFM Company 1.

Select Site

Logged (0)

Active (1)

Completed (0)

511395/V001, Started

Service Event, Priority 25

S2024_7A841, L 2495

U 4113, P 20840

Scheduled Start at 28/05/2021 11:39

Event Due to Complete at 02/06/2021 11:39

!

This is a leak in the roof and it's not clear where it is coming from

28/05/2021, 12:05 BST tester1_HD: Update they called back it's a blocked sink in the room above.

Summary

QFM Company 1.

511395/V001, Started

Service Event, Priority 25

S2024_7A841, L 2495

U 4113, P 20840

Scheduled Start at 28/05/2021 11:39

Event Due to Complete at 02/06/2021 11:39

!

Details

Assets Info (0)

Attachments (0)

Visit Information

Service 192, Standard

Reported By: tester1_HD

Remarks

Address Information

S2024_7A841

L 2495

U 4113

P 20840

Instructions

On Hold

End Visit

Configuration

New General Settings are added to the QFM web-based application, as follows:

Resource Scheduler

These new settings are available for the Global User Class.

- Resource Scheduler Integration
 - Synchronize Event/Visit updates with dispatched Visits**
If set to **ON**, enables the synchronisation of Event/Visit updates to dispatched Visits on the QFM app.
The default is **OFF**.
 - Automatically update Visit Scheduled Date, Latest Completed and Earliest Start Date from updated Event/Visit information (post dispatch)**
If set to **ON**, updates the relevant Visit dates when changed on the Event.
The default is **ON**, but this setting is not active unless the 'Synchronize Event/Visit updates with dispatched Visits' setting is set to **ON**.

> General Options

> System Diary (Beta)

▼ Resource Scheduler

Resource Scheduler Integration

Create Visits On Notification
Off (def)
Copy

Schedule Using Notified Date
On (def)
Copy

Synchronize Event/Visit updates with Dispatched Visits
Off (def)
Copy

Automatically update Visit Scheduled Date, Latest Completed and Earliest Start Date from updated Event/Visit information (post dispatch)
On (def)
Copy

Control and Authorisation

View Only
Off (def)
Copy

The following new setting is available to all User Classes.

- Resource Scheduler Integration
 - Allow updating Visit Details post Dispatch**
If set to **ON**, enables the synchronisation of Event/Visit updates to dispatched Visits on the QFM app.
The default is **ON**.

> General Options

> System Diary (Beta)

▼ Resource Scheduler

Control and Authorisation

View Only

Off (def) ▼

[Copy](#)

Confirm Visits

On (def) ▼

[Copy](#)

Allow updating Visit Details post Dispatch

On (def) ▼

[Copy](#)

Allow to Access

On (def) ▼

[Copy](#)

New Event Screen - Improved Aesthetics

Overview

A number of general aesthetic improvements are made to the New Event screen.

The screenshot shows the 'New Event' screen in the QFM app. The header is teal and contains a back arrow, a camera icon, an upload icon, and a link icon. Below the header, the title 'New Event' is displayed with 'QFM Company 1.' underneath. The main content area contains several sections: 'Service Event', 'Geography' with a 'Tap to select...' prompt and a right arrow, 'Request' with 'Assigned To' set to 'Contractor 1_Operative 3 (Contractor 1)' and a right arrow, 'Service Group' with a 'Select Service Group' input field, 'Service' with a 'No Service Available' message, 'Work Type' with a 'No Work type Available' message, and 'Instructions' with a placeholder text 'Enter the instruction details for this new visit'. At the bottom are 'Cancel' and 'Submit' buttons.

Features and benefits include:

- Improved ease-of-use.

Introduction

General aesthetic improvements are made to the New Event screen, as follows:

- Geography Selection: The caption **Tap to select...** is now indented.
- Operative Selection:
 - The caption is changed from **Assign Event to...** to **Assigned To**.
 - The selected operative field is now indented.

The screenshot shows the 'New Event' screen in the QFM app. The header is teal and contains a back arrow, a camera icon, an upload icon, and a link icon. Below the header, there are several form fields: 'Service Event', 'Geography' (with 'Tap to select...' indented), 'Request' (with 'Assigned To' and 'Contractor 1_Operative 3 (Contractor 1)' indented), 'Service Group' (with 'Select Service Group'), 'Service' (with 'No Service Available'), 'Work Type' (with 'No Work type Available'), and 'Instructions' (with a placeholder text). At the bottom are 'Cancel' and 'Submit' buttons.

- When the user selects an operative, QFM displays the selection options with the current selection highlighted by an asterisk, for improved user context.

Assigned To

tester1_RS (Myself) *

Another Operative (My Team)

Another Operative (Different Team)

Leave Unassigned

Cancel

- When the user selects an Operative from either **(My Team)** or a **(Different Team)** the Operative name is displayed with their contractor in brackets, (There is no longer a caption referencing My Team or Different Team).

Request

Assigned To

Contractor 1_Operative 3 (Contractor 1)

Service Group

Select Service Group

Minor Enhancements and Changes

The v3.02.00.24 release addresses an issues highlighted in the product. Details are as follows:

SWG Reference	Description
31283	Dynamic Forms - users can now successfully re-open a partially completed form if it includes a date and time control.
31288	Android O/S 10 and 11 - when installing a new version of the QFM app (not upgrading), users can now successfully add an audio attachment to an Event Visit.

Known Issues

This section details system issues which are identified in v3.02.00.24. These will be rectified at the earliest opportunity.

Please contact your SWG Account Manager for further details.

SWG Reference	Description
32260	iOS only - Having other applications open with recording capability on a mobile device can prevent the recording of audio in the QFM App.
32825	An issue may be seen on Samsung Galaxy M30s devices with OS 10, after upgrading the app from an earlier release. Attempts to add a Remark to a Visit may fail on the first attempt. Retrying to add the remark will succeed.
32859	On the Visit Summary screen, the 'Not Read' icon may not always be correct when data connectivity is poor.

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.