

QFM 3.03.01.18 Release Notes

What's New in QFM v3.03.01.18

November 2021

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Version Log

| Version # | Summary of Revision | Date | Author |
|-----------|---------------------|------------|--------|
| 1.0 | First edition | 12/11/2021 | MR |
| | | | |

Release Notices

QFM Compatibility

The QFM v3.03.01.18 release is compatible with the following QFM software:

- **Workflow Scheduler: 3.03.01.04**
- **Mobile App: 3.03.01.00**
- **Mobile Server 3.03.01.02**
- **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 Service works. Combined with our ISO27001 information security management accreditation this 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.

BIM SkyViewer

QFM must be installed on Windows Server 2016+ in order to connect with SkyViewer.

New Features Summary

The QFM v3.03.01.18 release includes two new features. A summary is provided below, with further details on the following page.

Stock Management

Significant enhancements are made to the QFM Parts & Stocks module, providing new and improved features for the management and allocation of Warehouse Stock, and integration with the QFM app allowing mobile operatives to manage their Parts requirements and usage.

Dynamic Forms for Additional Asset Data

Changes are made to Dynamic Forms for Assets. These can now be created in order to hold additional information about the item/equipment. Information recorded on the form during an initial Visit can be subsequently accessed and updated during a separate inspection or review.

SFG20 Integration

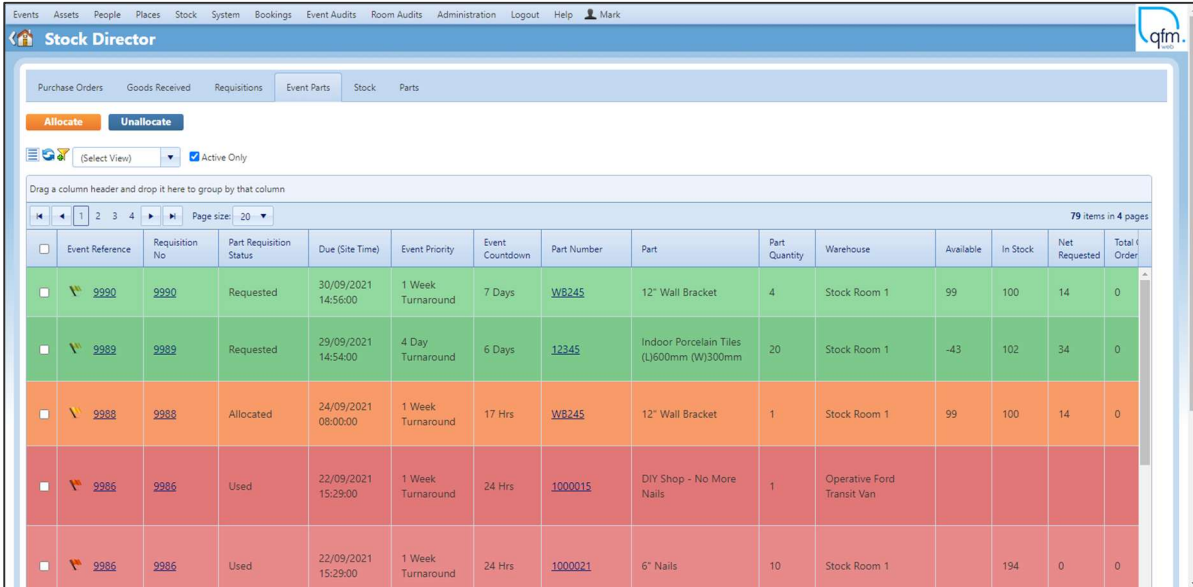
QFM now has the ability to synchronise a local copy of the SFG20 repository from the external SFG20 database to provide the latest Maintenance Template Schedules. This enables QFM Maintenance Schedules to be linked to corresponding SFG20 Schedules, allowing QFM Events to be generated which include the relevant SFG20 maintenance steps in the instructions. Operatives can then receive the instructions via the QFM mobile app or a worksheet.

A new QFM Workflow Scheduler synchronisation service ensures that any external changes to templates are automatically updated in QFM, ensuring the latest maintenance standard versions are always available.

Stock Management

Overview

Significant enhancements are made to the QFM Parts & Stocks module, providing new and improved features for the management and allocation of Warehouse Stock, and integration with the QFM app allowing mobile operatives to manage their Parts requirements and usage.



The screenshot shows the 'Stock Director' web application. The top navigation bar includes links for Events, Assets, People, Places, Stock, System, Bookings, Event Audits, Room Audits, Administration, Logout, Help, and a Mark icon. Below the navigation bar, there are tabs for Purchase Orders, Goods Received, Requisitions, Event Parts, Stock, and Parts. The 'Requisitions' tab is active. The interface includes buttons for 'Allocate' and 'Unallocate', a '(Select View)' dropdown, and a checkbox for 'Active Only'. A message says 'Drag a column header and drop it here to group by that column'. The table below has 15 columns: Event Reference, Requisition No, Part Requisition Status, Due (Site Time), Event Priority, Event Countdown, Part Number, Part, Part Quantity, Warehouse, Available, In Stock, Net Requested, and Total (Order). The table displays 5 rows of data, with the first two rows highlighted in green and the last three in red. The status of the requisitions varies: 'Requested', 'Allocated', and 'Used'.

| Event Reference | Requisition No | Part Requisition Status | Due (Site Time) | Event Priority | Event Countdown | Part Number | Part | Part Quantity | Warehouse | Available | In Stock | Net Requested | Total (Order) |
|-----------------|----------------|-------------------------|---------------------|-------------------|-----------------|-------------|--|---------------|----------------------------|-----------|----------|---------------|---------------|
| 9990 | 9990 | Requested | 30/09/2021 14:56:00 | 1 Week Turnaround | 7 Days | WB245 | 12" Wall Bracket | 4 | Stock Room 1 | 99 | 100 | 14 | 0 |
| 9982 | 9982 | Requested | 29/09/2021 14:54:00 | 4 Day Turnaround | 6 Days | 12345 | Indoor Porcelain Tiles (L)600mm (W)300mm | 20 | Stock Room 1 | -43 | 102 | 34 | 0 |
| 9988 | 9988 | Allocated | 24/09/2021 08:00:00 | 1 Week Turnaround | 17 Hrs | WB245 | 12" Wall Bracket | 1 | Stock Room 1 | 99 | 100 | 14 | 0 |
| 9986 | 9986 | Used | 22/09/2021 15:29:00 | 1 Week Turnaround | 24 Hrs | 1000015 | DIY Shop - No More Nails | 1 | Operative Ford Transit Van | | | | |
| 9986 | 9986 | Used | 22/09/2021 15:29:00 | 1 Week Turnaround | 24 Hrs | 1000021 | 6" Nails | 10 | Stock Room 1 | | 194 | 0 | 0 |

Features and benefits include:

- Allows mobile operatives to manage their requirement and usage of Parts.
- Stock Allocation management facilities to control the distribution of Parts to jobs and alerts/controls for when the jobs requiring Parts should be actioned.
- Stock Control functions in order to view requirements, Stock levels, commitments, etc and to be able to maintain Stock levels using a controlled and evidenced process.
- Ability to view Stock levels in real time within multiple Warehouses.
- Control the ordering and allocation of Parts by setting specific user roles to ensure the correct Warehouse is accessed.
- Ad-hoc Parts fields introduced to allow operatives to list additional Part purchases for scheduled events.

Introduction

Significant enhancements are made to the QFM Parts & Stocks module, providing new and improved features for the management and allocation of Warehouse Stock, and integration with the QFM app allowing mobile operatives to manage their Parts requirements and usage. This enables them to request specific Parts for an Event, purchase ad-hoc Parts and request Parts not in catalogue. Mobile operatives are also able to view the Parts catalogue at particular Warehouses and request or reserve Parts (dependent on rights) and mark Parts as used, providing more accurate and real-time inventory data.

Warehouses and Parts

The management of Warehouses is improved to support data scoping by Personnel, including the concept of an operative's 'default' Warehouse and Warehouse rights e.g. a person may View, Request, Allocate, Receive etc. These concepts provide the central pillar of control for the Parts lifecycle throughout the system. It supports the concepts of an operative's 'parts in van', the allocation, collection and return of Parts.

The Parts Register supports the key concepts of:

- Real-time Parts inventory by Warehouse. Levels are updated by actions such as Goods Received and Event Requisitions.
- Adhoc Parts. These are used for Parts not listed in the QFM Stock inventory. These can be used, for example, to record a Part purchased locally for use on a job.
- Unidentified Parts. These are used for Parts not listed in the QFM Stock inventory. These can be used, for example, to request a specific known Part.
- Parts which require prices to be added when used.
- Minimum and re-order level alerts.
- User defined Roles to determine the individuals' rights within each Warehouse, making it possible to control the ability to order, request and use parts. This ensures users are viewing and taking stocked Parts from the Warehouses relevant to them.
- Metadata Tags to help with Searches.

Mobile Functionality

Parts functionality is introduced to the QFM app, including the ability to synchronise Parts, Categories and Stock Levels. Only those Warehouses that an operative has access to are synchronised. Operatives can now record Parts used against a Visit, return unused Part Items to the Warehouse, request additional Part Items (catalogued and non-catalogued) and record ad-hoc Part Items purchased separately.

Key functionalities on the QFM app include:

- Synchronise Parts and Stock levels.
- Ability to see any parts Requisitioned on an Event.
- Ability to see Stock Levels in various Warehouses.
- Ability to Request and Reserve Parts (dependant on rights) for a Visit.

- Ability to mark Requisitioned Parts as 'Used', updating the corresponding Event Requisition.
- Ability to record Parts Required with the quantity updating/creating a Requisition against the Event.
- Ability to request an Ad-hoc Part and specify the details, e.g. to record a Part purchased locally for use on a job.
- Ability to request an Unidentified Part, e.g. a specific known Part which is not on catalogue.
- Support for effective Parts searching and sourcing from Warehouses.
- Ability to establish whether Parts allocated to a Visit have been marked as 'Allocated' from the source Warehouse.
- Ability to view the Status of Parts across active Visits (useful for operative route preparation/organisation).

Stock Requisitions

Enhanced functionality includes:

- Improved Parts searching to include extended filtering on metadata tags.
- Specific Part Items which will be required for a job can be added to an Event record as a requisition. The status can be updated to 'Requested', 'Allocated' or 'Used'.
- Request Parts on a Purchase Order, to include new Part Types of Adhoc, Standard and Unidentified. Other new features include, barcode, criticality level, hazard level, consumption level, metadata, track stock, price required on use,
- Record Goods Received. Allows the recording of good partially received, if different to the original requisition.
- Approve Goods Received (subject to appropriate QFM access rights).

Stock Director

Key functionality includes:

- New Event Parts tab provides Stock Managers with the overall requirement for Stock Items requisitioned from Events.
- Users with the appropriate access rights can bulk allocate (and un-allocate) Part Items requisitioned from Events.
- Colour coding, based on Event Priorities, provides a visual method for establishing the priorities for Stock allocation.
- Real-time availability amounts ensure that inventories can be efficiently maintained.
- Key fields include 'Available', 'In Stock', 'Net Requested', 'Total On Order'.

Personnel

- A new 'Default Warehouse' option is added to the Personnel Details screen, allowing a default Warehouse to be specified for the QFM user, when they add a Parts requisition. It is also used for the Personnel's equivalent Operative in the QFM mobile app.

Event Director

- Ability to View and Filter on 'Part Status', showing the status of the Parts required for Events. This can be either 'Requested', 'Allocated' or 'Used'.

Resource Scheduling

- New 'Part Status' column shows the status of the Parts required for the Visit. This can be either 'Requested', 'Allocated' or 'Used'.
- New feature ensures that when Auto Allocate is in use, any Visits with a Part Status of 'Requested' will not be automatically dispatched.

Note: Clients using QFM Desktop parts are likely to face issues when upgrading to the QFM 3.03 (web) release, as QFM Desktop Parts functionality is no longer compatible and SWG is no longer supporting QFM Desktop Parts. Any client using QFM Desktop Parts modules, who wishes to upgrade to QFM 3.03 (web), should seek advice from SWG before upgrading.

Stock Inventories

A new Stock tab in the Stock Director provides an inventory of Stock Parts by Warehouse. Levels are updated in real-time by actions such as Goods Received and Event Requisitions.

This area is available under the separate **(FM) Parts & Materials** QFM software license.

Note: Currently QFM supports whole numbers for Stock quantities and does not support decimal values.



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

Stock Director

Purchase Orders Goods Received Requisitions Event Parts **Stock** Parts

(Select View) ☒ Active Only

Drag a column header and drop it here to group by that column

Page size: 20 58 items in 3 pages

| Warehouse | Part Number | Part | Part Category | Barcode | Stock | Allocated | Requested | On Order | Available | Minimum Stock Level | Min. Stock Alarm Status | Reorder Level | Reorder Quantity | Reorder Alarm Status |
|--------------|-------------|--------------------------------------|-----------------------|---------|-------|-----------|-----------|----------|-----------|---------------------|-------------------------|---------------|------------------|----------------------|
| Stock Room 1 | 1000006 | 375mm Globe Valve | Valves | | 0 | 0 | 0 | 100 | 0 | | 0 | | | 2 |
| Stock Room 1 | 1000021 | 6" Nails | Fixtures & Fittings | | 194 | 0 | 0 | 0 | 194 | | 0 | | | 0 |
| Stock Room 1 | 1000002 | Circuit Breaker | Electrical | 1500007 | 0 | 0 | 0 | 30 | 0 | 800 | 2 | 900 | | 2 |
| Stock Room 1 | 1000026 | Concealed 4G SIM comms unit | Telecoms Equipment | | 0 | 5 | 0 | 4 | -5 | | 0 | 0 | | 2 |
| Stock Room 1 | 1000004 | Copper Wire | Electronic Components | 1000004 | 209 | 0 | 0 | 70 | 209 | 10 | 0 | 25 | | 0 |
| Stock Room 1 | 1000003 | Copy Paper 5 Reams | Stationery | | 0 | 0 | 0 | 100 | 0 | | 0 | | | 2 |
| Stock Room 1 | 1000012 | EVO-STIK 50g Quick Leak Repair Putty | Mechanical | 1000012 | 1 | 0 | 0 | 0 | 1 | | 0 | | | 0 |
| Stock Room 1 | 1000007 | Fulham Timber Planks 32x115mm | Building Materials | 1000007 | 95 | 0 | 4 | 0 | 95 | 45 | 0 | 50 | | 0 |
| Stock Room 1 | 1000008 | Grey Sandstone Slabs 10x10 | Building Materials | 1000008 | 110 | 2 | 0 | 0 | 108 | 150 | 2 | 200 | | 0 |

Page size: 20 58 items in 3 pages

Two Stock level warning columns are provided, as detailed below. These provide an easy to see notification of low Stock levels and can be used with custom filters for a focussed view. They can also be used in the 'Stock Information' List Report to create automatic email notifications with Scheduled Jobs functionality.

- **Min. Stock Alarm Status**

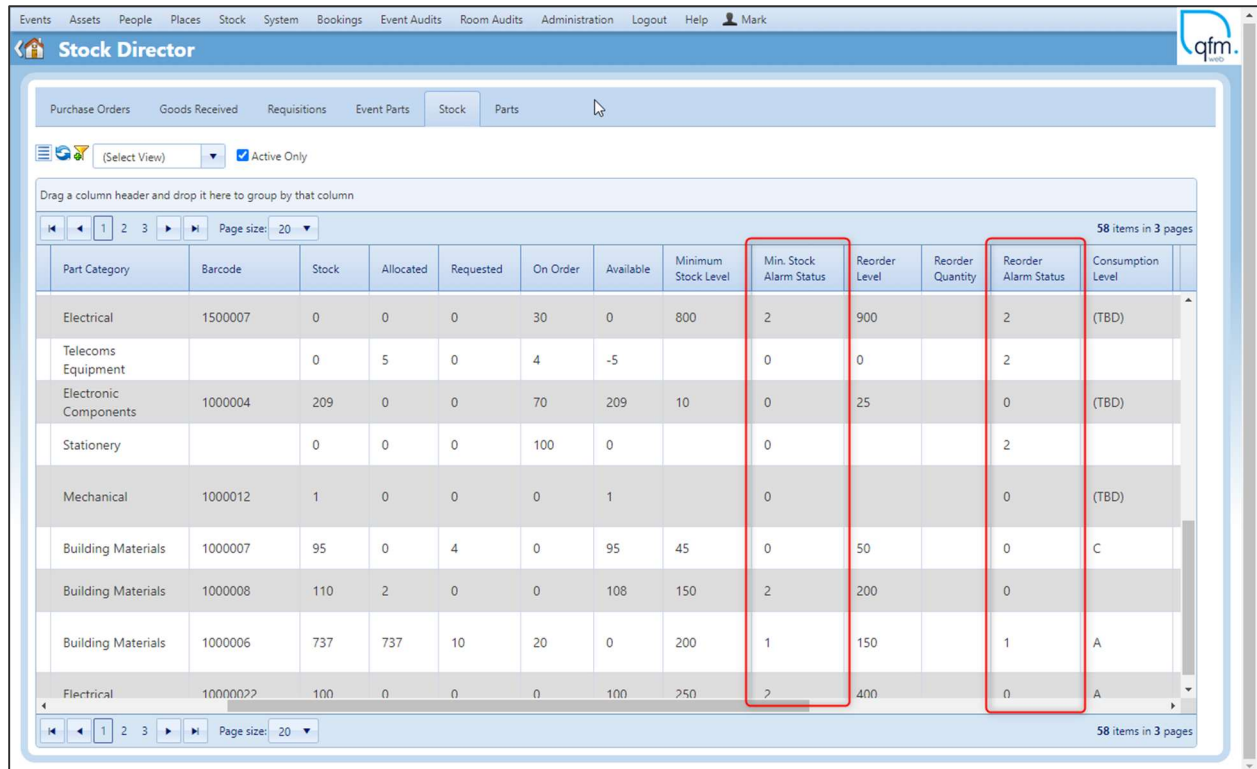
This column is an alert indicator to warn if the Stock amount falls below the Minimum Level set.

- If the **Stock** amount less the **Allocated** amount less than the **Minimum Stock Level** amount, then the value is **1**.
- If the **Stock** amount is less than the **Minimum Stock Level** amount, then the value is **2**.
- If neither of the above conditions are met, then the value is **0**.

- **Reorder Alarm Status**

This column is an alert indicator to warn if the Stock amount falls below the Minimum Reorder Level set.

- If the **Stock** amount less the **Allocated** amount less than the **Reorder Level** amount, then the value is **1**.
- If the **Stock** amount is less than the **Reorder Level** amount, then the value is **2**.
- If neither of the above conditions are met, then the value is **0**.



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

Stock Director qfm.

Purchase Orders Goods Received Requisitions Event Parts Stock Parts

(Select View) Active Only

Drag a column header and drop it here to group by that column

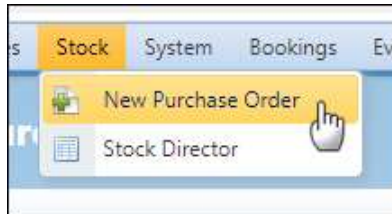
1 2 3 Page size: 20 58 items in 3 pages

| Part Category | Barcode | Stock | Allocated | Requested | On Order | Available | Minimum Stock Level | Min. Stock Alarm Status | Reorder Level | Reorder Quantity | Reorder Alarm Status | Consumption Level |
|-----------------------|----------|-------|-----------|-----------|----------|-----------|---------------------|-------------------------|---------------|------------------|----------------------|-------------------|
| Electrical | 1500007 | 0 | 0 | 0 | 30 | 0 | 800 | 2 | 900 | | 2 | (TBD) |
| Telecoms Equipment | | 0 | 5 | 0 | 4 | -5 | | 0 | 0 | | 2 | |
| Electronic Components | 1000004 | 209 | 0 | 0 | 70 | 209 | 10 | 0 | 25 | | 0 | (TBD) |
| Stationery | | 0 | 0 | 0 | 100 | 0 | | 0 | | | 2 | |
| Mechanical | 1000012 | 1 | 0 | 0 | 0 | 1 | | 0 | | | 0 | (TBD) |
| Building Materials | 1000007 | 95 | 0 | 4 | 0 | 95 | 45 | 0 | 50 | | 0 | C |
| Building Materials | 1000008 | 110 | 2 | 0 | 0 | 108 | 150 | 2 | 200 | | 0 | |
| Building Materials | 1000006 | 737 | 737 | 10 | 20 | 0 | 200 | 1 | 150 | | 1 | A |
| Electrical | 10000022 | 100 | 0 | 0 | 0 | 100 | 250 | 2 | 400 | | 0 | A |

1 2 3 Page size: 20 58 items in 3 pages

Ordering Parts via a Purchase Order

The Stock Purchase Order screen enables you to create a Purchase Order for Parts items. The screen is available from the Stock menu.



Notes: This area is available under the separate **(FM) Parts & Materials** QFM software license. The Stock Purchase Order screen is not new for this release, but has been enhanced.

Raising a Purchase Order will ultimately result in goods being received (in full or partially) into a Warehouse.

To create a Purchase Order, enter the details in the fields in the top and bottom sections of the screen.

 A screenshot of the 'New Stock Purchase Order' screen. The screen has a blue header with the title and a QFM logo. Below the header is a navigation bar with 'Stock Director' selected. The main content area contains several input fields for order details:

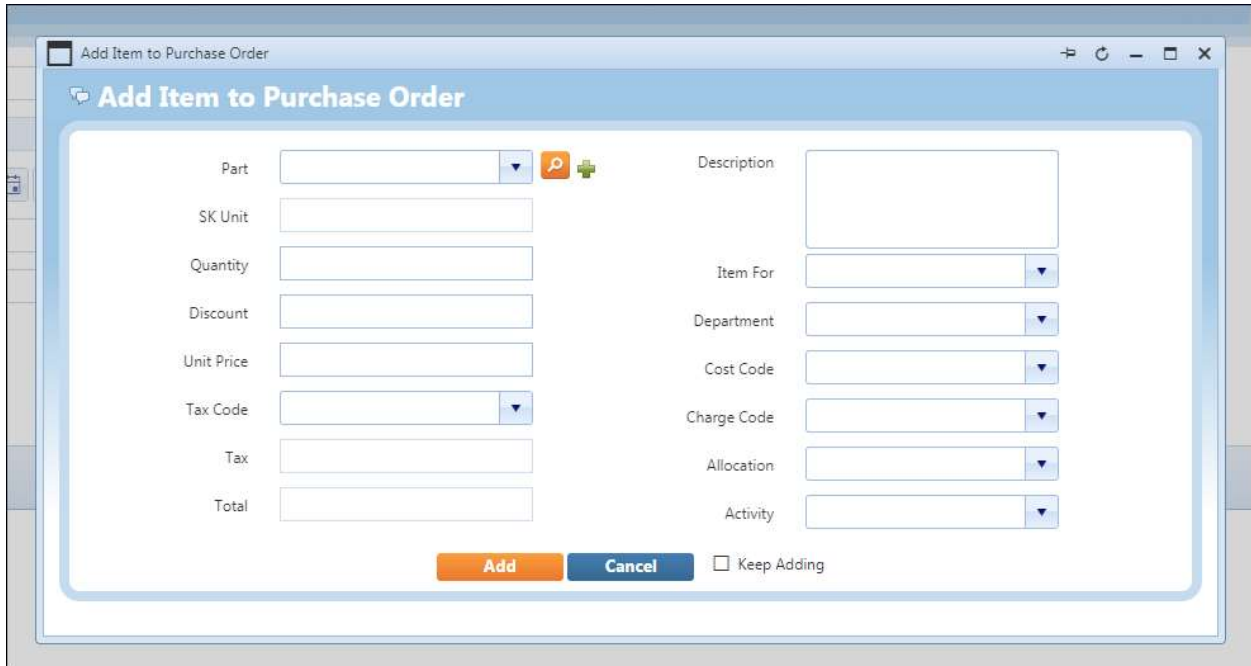
- Order Type: Contract (dropdown)
- Order Status: New (text)
- Order Date: 03/08/2021 (calendar icon)
- Invoice To: (dropdown)
- Invoicing Contact: (dropdown)
- Requested By: (dropdown)
- Reference: (text)
- Location: (text)
- Account: (dropdown)
- Authorised By: (dropdown)
- Warehouse: (dropdown)
- Supplier: (dropdown)
- Supplier Contact: (dropdown)
- Deliver To: (dropdown)
- Delivery Contact: (dropdown)
- Delivery Date: (calendar icon)

 Below these fields is a table with columns: Part Group, Equipment Group, Model, Supplier Part Number, Description, Quantity, SK Unit, Unit Price, Discount, Net Value, VAT Code. The table is currently empty with the message 'No records to display.' Below the table is a pagination bar showing 'Page size: 20' and '0 items in 0 pages'. At the bottom of the form are fields for Carriage, Tax (Carriage) Code, Tax (Carriage) @ 0%, Net Amount, Tax, Gross Amount, Internal Notes, and Remarks for Supplier. There are 'Save' and 'Submit' buttons at the bottom. The footer contains 'Powered by QFM Technology', 'Licence Information', and 'Copyright 2021 Service Works Global'.

Adding Part Items

To add specific Parts to the Purchase Order, select  [Add Item\(s\)](#)

In the **Part** field select an item from the drop down list or search for an item via the  icon.




Once you have selected a Part, you can add any further details to fields which are not automatically populated (from the existing Part record).

Select **Add** to add the Part Item to the Purchase Order. **Save** the Purchase Order details.

Creating a New Part Item

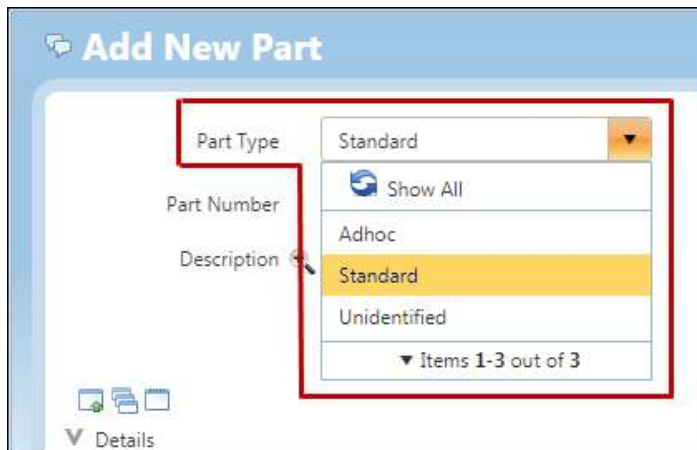
If a Part you wish to order does not exist in the system, you can create a new Part record then add it to the Purchase Order, without having to leave the Stock Purchase Order screen.

Select the  icon then add the details in the Add New Part window.

Parts are categorised into three different types:

- Adhoc
- Standard
- Unidentified

The fields required to setup a new Part are different according to the Part Type you select.



Add New Part

Part Type: Standard

Part Number:

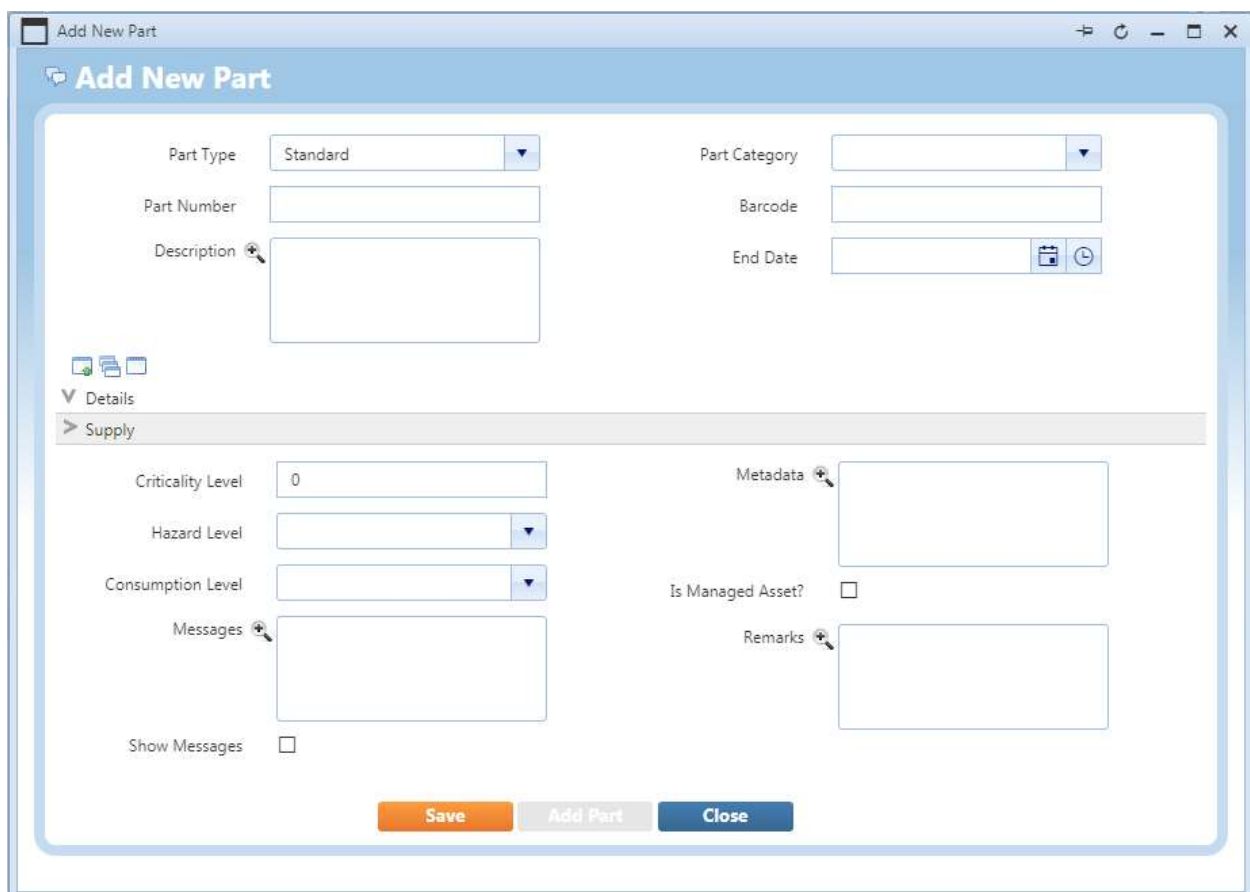
Description:

▼ Items 1-3 out of 3

▼ Details

Standard Part Type

A Standard Part Type is used for a Part listed in the QFM Stock inventory.



Add New Part

Part Type: Standard

Part Category:

Part Number:

Barcode:

Description:

End Date:

▼ Details

> Supply

Criticality Level: 0

Hazard Level:

Consumption Level:

Messages:

Show Messages: ☐

Metadata:

Is Managed Asset? ☐

Remarks:

Save Add Part Close

Details tab

| | | | | |
|--|--------------------------|---|-----------------------|--------------------------|
| Reorder Level | <input type="text"/> | Non-Stock Part <input type="checkbox"/> | Main Supplier | <input type="text"/> |
| Stock Unit | <input type="text"/> | | Supplier Part No | <input type="text"/> |
| Min Stock Level | <input type="text"/> | | Other Supplier | <input type="text"/> |
| Track Stock | <input type="checkbox"/> | | 2nd Other Supplier | <input type="text"/> |
| Lead Time | <input type="text"/> | | Price Required on use | <input type="checkbox"/> |
| Lead Time Unit | <input type="text"/> | | Expected Cost | <input type="text"/> |
| | | | Selling Price | <input type="text"/> |
| <input type="button" value="Save"/> <input type="button" value="Add Part"/> <input type="button" value="Close"/> | | | | |

Supply tab

Fields are as follows:

- **Part Type - NEW**
Select either **Standard**, **Adhoc** or **Unidentified**.
- **Part Number**
Unique reference for the Part. This field is extended to 40 characters.
- **Description**
Description of the Part. This field is extended to 100 characters.
- **Part Category**
Select an appropriate Category from the drop down list.
- **Barcode - NEW**
Barcode number for the Part, if applicable.
- **End Date**
Date when the Part record will become inactive in QFM.

Details Tab:

- **Criticality Level - NEW**
Provides a means to optionally define the relative Criticality of the stock Part in order to ensure it is available when required. Elements to consider include availability, lead time, minimum stock levels, usage profile etc.
Email alerts may be set up for the criticality of stock items.
Enter an appropriate value of **0 - 3**.
- **Hazard Level - NEW**
Provides a means to optionally define the relative Hazard Level of the stock Part, as highly hazardous stock may require special treatment/storage/stacking/etc.
Select an appropriate level of **None**, **Low**, **Medium** or **High** from the drop down list.

- **Consumption Level - NEW**
Provides a means to optionally define the Consumption Level by supporting ABC analysis - an approach for classifying inventory items based on their consumption values.
Select an appropriate level of **(TBD)**, **A**, **B** or **C** from the drop down list.
- **Messages**
Notes relevant to the Part.
- **Show Messages**
If ticked, displays any messages at Event logging stage when this Part is used.
- **Metadata - NEW**
Enables you to add a unique identifier for the Part, which can be used in 'Part' field drop down searches on both QFM and the QFM app. For example, if different suppliers have their own serial numbers for the same Part.
- **Is Managed Asset?**
If ticked, indicates that a corresponding inventory item should be set up when the Part is received, as it is considered something which should be managed by QFM.
- **Remarks**
Notes relevant to the Part. These will remain on the Part record only.

Supply Tab:

- **Reorder Level**
When the Parts stock reaches a specific level or amount, additional Parts will need to be re-ordered. In this field enter that specific level or amount.
Take into account Lead Time when setting the Reorder Level.
- **Non-Stock Part**
If ticked, signifies the Part is not normally stocked. (The Part may be purchased into a Warehouse in order to satisfy a requirement, but there is not normally an active inventory for it).
- **Stock Unit**
Used to record the unit of measure.
- **Min Stock Level**
Minimum number of Parts required to be maintained.
- **Track Stock - NEW**
Allows the tracking of Parts by using List Report filters based on this setting. Tick the box if this is a Part you wish to track.
- **Lead Time**
Time it takes for the supplier to deliver the Part, represented as a number. (Relates to the 'Lead Time Unit' field).
- **Lead Time Unit**
Unit of time for the supplier to deliver the Part, e.g. Days, Weeks. (Relates to the 'Lead Time' field).

- **Main Supplier**
Select Main Supplier from the drop down list.
- **Supplier Part No**
Supplier's reference for the Part. This field is extended to 40 characters.
- **Other Supplier**
An alternative Supplier.
- **2nd Other Supplier**
A second alternative supplier.
- **Price Required on use - NEW**
If ticked, QFM will require a Price to be entered by the operative when the Part is marked as used on an Event/Visit.
The default is set to OFF (not ticked) for 'Standard' and 'Unidentified' Part Types, and ON (ticked) for 'Adhoc' Part Types. These values can be overridden.
- **Expected Cost**
Price per unit for each Part.
- **Selling Price**
Sale price per unit for each Part, if sold onwards.

Adhoc Part Type

An Adhoc Part Type is used for Parts not listed in the QFM Stock inventory. This can be used, for example, to record a Part purchased locally for use on a job.

Note: Parts with an Adhoc Part Type do not track/monitor Stock quantities.

The screenshot shows a web application window titled "Add New Part". The window has a light blue header bar with the title and standard window controls. Below the header, the form is organized into several sections. At the top, there are two rows of fields: "Part Type" (a dropdown menu with "Adhoc" selected) and "Part Category" (a dropdown menu), followed by "Part Number" (a text input) and "End Date" (a date picker). Below these is a large "Description" text area. A horizontal separator line divides the form into two main sections. The top section is labeled "Details" with a downward arrow icon. The bottom section is labeled "Supply" with a rightward arrow icon. In the "Supply" section, there are four fields: "Metadata" (text input), "Messages" (text input), "Remarks" (text input), and "Show Messages" (a checkbox). At the bottom of the window, there are two buttons: "Save" (orange) and "Close" (blue).

Details tab

This screenshot shows the same "Add New Part" window, but with the "Supply" tab selected. The "Details" section is now collapsed. The "Supply" section is expanded, showing the "Metadata", "Messages", and "Remarks" text input fields. The "Show Messages" checkbox is still present and unchecked. Additionally, a new checkbox labeled "Price Required on use" is visible at the bottom left of the form, which is currently checked. The "Save" (orange) and "Close" (blue) buttons remain at the bottom right.

Supply tab

Refer to the *Standard Part Type* section for field descriptions.

Unidentified Part Type

An Unidentified Part Type is used for Parts not listed in the QFM Stock inventory. This can be used, for example, to request a specific known Part.

Note: Parts with an Unidentified Part Type do not track/monitor Stock quantities.

Details tab

Refer to the *Standard Part Type* section for field descriptions.

For all Part Types:

Save the details, then back in the 'Add Item to Purchase Order' window select **Add** to add the Part Item to the Purchase Order.

Finally, **Save** the Purchase Order details.

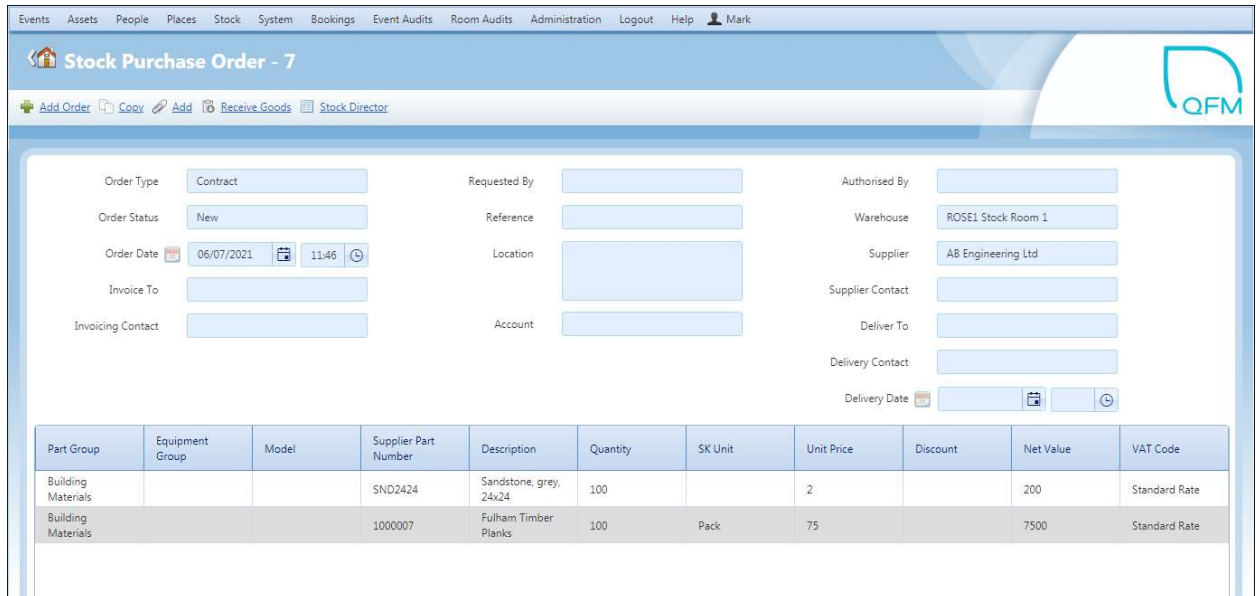
In the Stock Director, Stock tab, the Part Item is updated to reflect the order.

Recording Goods Received


When goods ordered via a Purchase Order are delivered from the supplier, they can be recorded as 'received'.

This area is available under the separate **(FM) Parts & Materials** QFM software license.

1. Go to the Stock Director, Purchase Orders tab and select the Purchase Order to which the received good relate.
2. In the Stock Purchase Order screen the Purchase Order with the individual Part Items is displayed.



| Part Group | Equipment Group | Model | Supplier Part Number | Description | Quantity | SK Unit | Unit Price | Discount | Net Value | VAT Code |
|--------------------|-----------------|-------|----------------------|------------------------|----------|---------|------------|----------|-----------|---------------|
| Building Materials | | | SND2424 | Sandstone, grey, 24x24 | 100 | | 2 | | 200 | Standard Rate |
| Building Materials | | | 1000007 | Fulham Timber Planks | 100 | Pack | 75 | | 7500 | Standard Rate |

Select  **Receive Goods** at the top of the screen.

3. The Goods Received screen is displayed. The screen defaults to the ordered goods being received in full but allows you to make adjustments if goods are only partially received, as shown in the examples below.

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

New Goods Received Note

Stock Director

Status: (New) PO Number: 11 Supplier: City Electrical Factors, Unit 2
 GRN Reference: GRN Date: Received By: Mark Jacobs
 Warehouse: Stock Room 2 Remarks:
 SDN Ref:



☒ Show Outstanding Only

| Part No | Part Description | Quantity | Delivery Status |
|------------|------------------------|--|---------------------|
| 1000004 | Copper Wire | 1 <input type="button" value="+"/> <input type="button" value="-"/> | 1 of 1 Delivered. |
| 13-A-SKT-D | 13 Amp Double Socket | 6 <input type="button" value="+"/> <input type="button" value="-"/> | 6 of 6 Delivered. |
| mk89/0987 | Twin Pole Light Switch | 2 <input type="button" value="+"/> <input type="button" value="-"/> | 2 of 2 Delivered. |
| EEE333 | 150 Watt Light Bulb | 10 <input type="button" value="+"/> <input type="button" value="-"/> | 10 of 10 Delivered. |

Page size: 50 4 items in 1 pages

Create Submit

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The **Quantity** column shows the amount originally ordered and allows you to make an adjustment to reflect the actual amount received (if different). Once the Quantity accurately reflects the amount received, click the  icon to confirm receipt. The icon then changes to .


If you have ordered multiple Part Items (as shown in the example below) you will need to do this for each Part Item row.

| Quantity | Delivery Status |
|--|---|
| 1 <input type="button" value="+"/> <input type="button" value="-"/> |  1 of 1 Delivered. |
| 6 <input type="button" value="+"/> <input type="button" value="-"/> |  6 of 6 Delivered. |
| 2 <input type="button" value="+"/> <input type="button" value="-"/> |  2 of 2 Delivered. |
| 10 <input type="button" value="+"/> <input type="button" value="-"/> |  10 of 10 Delivered. |

- If ordered Part Items are only partially received, you can update the **Quantity** received, as shown in the example below.

| Quantity | Delivery Status |
|--|---|
| 1   |  1 of 1 Delivered. |
| 4   |  4 of 6 Delivered. |
| 2   |  2 of 2 Delivered. |
| 10   |  10 of 10 Delivered. |

Next, click on the flag icon  in the **Delivery Status** column. In the dialog box enter a reason for the partial delivery (as shown in the example below) and select either **More Expected** or **Final Delivery** as appropriate.

 4 of 6 Delivered.

More Expected Final Delivery Close

This is then updated in the **Delivery Status** column, as shown in the example below.

| Quantity | Delivery Status |
|--|--|
| 1   |  1 of 1 Delivered. |
| 4   |  4 of 6 Delivered. More Expected Manufacturer supply problems. Change |
| 2   |  2 of 2 Delivered. |
| 10   |  10 of 10 Delivered. |

- Once the Delivery Status is confirmed for all Part Items, select the Submit button which is now enabled.

The Goods Received Note **Status** changes from **New** to **Review**. It is now ready to be approved by a user with appropriate QFM access rights.

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

Goods Received Note

Add
Stock Director

Status

REVIEW

GRN Reference

R42002P

Warehouse

Stock Room 2

SDN Ref

PO Number

11

GRN Date

05/08/2021

10:00

Supplier

City Electrical Factors, Unit 2

Received By

Mark Jacobs

Remarks

Awaiting further delivery for 13 amp double socket balance.

☒ Show Outstanding Only

| Part No | Part Description | Quantity | Delivery Status |
|------------|------------------------|----------|--|
| 1000004 | Copper Wire | 1 | ✓ 1 of 1 Delivered. |
| 13-A-SKT-D | 13 Amp Double Socket | 4 | ✓ 4 of 6 Delivered. More Expected Change Manufacturer supply problems. |
| mk89/0987 | Twin Pole Light Switch | 2 | ✓ 2 of 2 Delivered. |
| EEE333 | 150 Watt Light Bulb | 10 | ✓ 10 of 10 Delivered. |

1

Page size: 50

4 items in 1 pages

Approve

Reject

Cancel

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Note: Any outstanding Part Items still awaiting delivery can be processed using this procedure, once they are received.

Approving Good Received

To approve a Goods Received Note users will require appropriate QFM access rights.

Goods Received Notes awaiting approval are listed in the new Goods Received tab on the Stock Director. The example below shows the GRN for Purchase Order 11.

| ID | Status | GRN Ref | GRN Date | Warehouse Ref | PO ID | SDN Ref | Remarks | Supplier | Received By | PO Date | PO Reference | PO Instructions | Warehouse | Insert User | Ins |
|----|--------|---------|---------------------|---------------|-------|---------|-----------------------|---------------------------------|-------------|---------------------|--------------|-----------------|--------------|-------------|-------|
| 11 | | R42002P | 05/08/2021 09:00:00 | ROSE2 | 11 | | Awaiting further d... | City Electrical Factors, Unit 2 | Mark Jacobs | 04/08/2021 15:12:00 | XA42K3 | | Stock Room 2 | Mark | 05/10 |
| 4 | Draft | 1989 | 05/07/2021 08:00:00 | ROSE1 | 6 | | | AB Engineering Ltd | Jenny Smith | 02/07/2021 17:18:00 | - | | Stock Room 1 | 18 | 02/16 |

Simply select the **ID** to display the Goods Received Note, then select **Approve**. The GRN can also be Rejected if required.

| Part No | Part Description | Quantity | Delivery Status |
|------------|------------------------|----------|--|
| 1000004 | Copper Wire | 1 | 1 of 1 Delivered. |
| 13-A-SKT-D | 13 Amp Double Socket | 4 | 4 of 6 Delivered. More Expected Manufacturer supply problems. |
| mk89/0987 | Twin Pole Light Switch | 2 | 2 of 2 Delivered. |
| EEE333 | 150 Watt Light Bulb | 10 | 10 of 10 Delivered. |

When a Goods Received Note is approved, the Part Quantities are updated in the Stock Director, Stock tab.

Adding a Parts Requirement to an Event

When creating a new QFM Event, specific Part Items which will be required can be added to the Event record as a requisition. Once the initial Event request is saved, Part Items can be added in the Event screen Parts tab.

Each specific Part Item has its own **Status**, i.e. 'Requested', 'Allocated', 'Used'.

A new **Part Status** field replaces the 'Requisition Status' field and this shows the overall Part Status for the Event. This is derived from the earliest Part Item Status, for example, if an Event requires two Parts; one has a Status of 'Requested' and the other is 'Allocated', then the overall Part Status for the Event would be 'Requested'.

Event Details: 9983 - Asset Event - Started (Incomplete)

Requisition No: 9983 External Ref: Req. Date: 21/09/2021 15:33

Part Status: Requested

| Warehouse | Part | Description | Quantity | Status | Used | Unit Price |
|--------------|-------|-------------------|----------|-----------|------|------------|
| Stock Room 3 | 375GV | 375mm Globe Valve | 1 | Requested | 0 | £75.00 |

Support is added for User Warehouse Rights. This provides the ability to add configuration to ensure that users only have access to assigned Warehouses, as a minimum.

Refer to [Stock - Maintain Roles for Warehouses](#).

Parts with a Part Type of 'Unidentified' cannot be set to a Status of 'Used'. If 'Unidentified' Parts are requested, then the correct Part should be added at a later date and the 'Unidentified' Part Quantity should be set to '0'.

To add Parts required for an Event, follow the steps below:

1. In the Event screen Parts tab, select [Add Part\(s\)](#) to open the Add Part(s) window.

| Warehouse | Part | Description |
|--------------|-------|-------------------|
| Stock Room 3 | 375GV | 375mm Globe Valve |

| Warehouse | Part | Description | Tax | Tax Amount | Total Price | Raised By User | Remarks |
|--------------|---------|----------------------|-----|------------|-------------|----------------|---------|
| Stock Room 2 | FD88 | Fire Door | S | £61.25 | £411.25 | Mark | |
| Stock Room 1 | 1000007 | Fulham Timber Planks | S | £0.00 | £0.00 | Mark | |

- The **Part Category**, **Warehouse** and **Part** fields are used to select the Part Item.
Note: If a Part Category of 'Adhoc & Unidentified' is used then a short description is required.
- Depending on Warehouse rights, the user will either be able to **Request** the Part Item from the Warehouse (with the request needing to be subsequently approved), or they will be able to directly **Allocate** the Part Item, effectively reserving it at the Warehouse (with no further approval required). This is actioned in the **Request Type** selection.
- Add the **Quantity** required and ensure the **Tax** rate is correct.
If the Part Item is 'Allocated', the **Unit Price** and **Total** fields will be automatically calculated, as shown in the example below.
Notes: The 'Unit Price' is derived from the Stock record by default. If no price is found, QFM takes the price from the Part record.
The 'Unit Price' field is read-only unless the Part Type specifies 'Price Required on Use'.

Add Part(s)

Part Category

Fixtures & Fittings

Warehouse

ROSE2

Part

Fire Door

Request Type

☐ Requested
☒ Allocated
☐ Used

Quantity

1

Unit Price

£245.00

Tax

S-Standard Rate (17.50%)

Total

£287.88

Remarks

Close

Add Part

☐ Keep Adding

5. Enter any **Remarks** if appropriate and select the **Keep Adding** box if you need to add more Part Items.

6. Select **Add Part**.

7. In the main Parts tab select **Update Order**.

Important:

Once the 'Update Order' button is selected, Part Items cannot be deleted from the Event. For any unwanted Parts, the 'Quantity' should be set to '0'.

Due (Due)

Requisition No: 9949

External Ref:

Part Status: N/A

Req. Date: 23/09/2021 11:33

Remarks:

Update Order Cancel

Add Part(s)

| | Warehouse | Part | Description | Quantity | Status | Used | Unit Price | Tax | Tax Amount | Total Price | Raised By User | Remarks |
|--|--------------|-------|---------------------------|----------|-----------|------|------------|-----|------------|-------------|----------------|---------|
| | Stock Room 2 | FD88B | Fire Door Overhead Closer | 1 | Allocated | | £350.00 | £ | £61.25 | £411.25 | Mark | |

Note: If data is incorrect or missing from the Parts requisition, QFM shows a warnings column which indicates the Part Items that have issues. Open the pop-up warning to view the issue.

The Parts tab is updated to reflect the order. In the example below, Part 'FD88B' is 'Allocated' and as such, shows the Unit Price, Tax Amount and Total Price. Part '1000007' is 'Requested' and so does not show these amounts.

Due (Due)

Requisition No: 9948

External Ref:

Part Status: Requested

Req. Date: 06/08/2021 11:22

Remarks:

Add Part(s)

| | Warehouse | Part | Description | Quantity | Status | Used | Unit Price | Tax | Tax Amount | Total Price | Raised By User | Remarks |
|--|--------------|---------|------------------------------|----------|-----------|------|------------|-----|------------|-------------|----------------|---------|
| | Stock Room 2 | FD88B | Fire Door | 1 | Allocated | 0 | £350.00 | £ | £61.25 | £411.25 | Mark | |
| | Stock Room 1 | 1000007 | Fulham Timber Planks 32x1... | 4 | Requested | 0 | £0.00 | £ | £0.00 | £0.00 | Mark | |

If the Status of these Part Items changes, i.e. once they are Allocated or Used, this can be updated from the grid by clicking on the Status to toggle between 'Requested', 'Allocated' and 'Used'.

Part Items added to an Event will update the relevant Part details in the Stock Director, Stock tab.

| Quantity | Status |
|----------|-----------|
| | Allocated |
| | Requested |

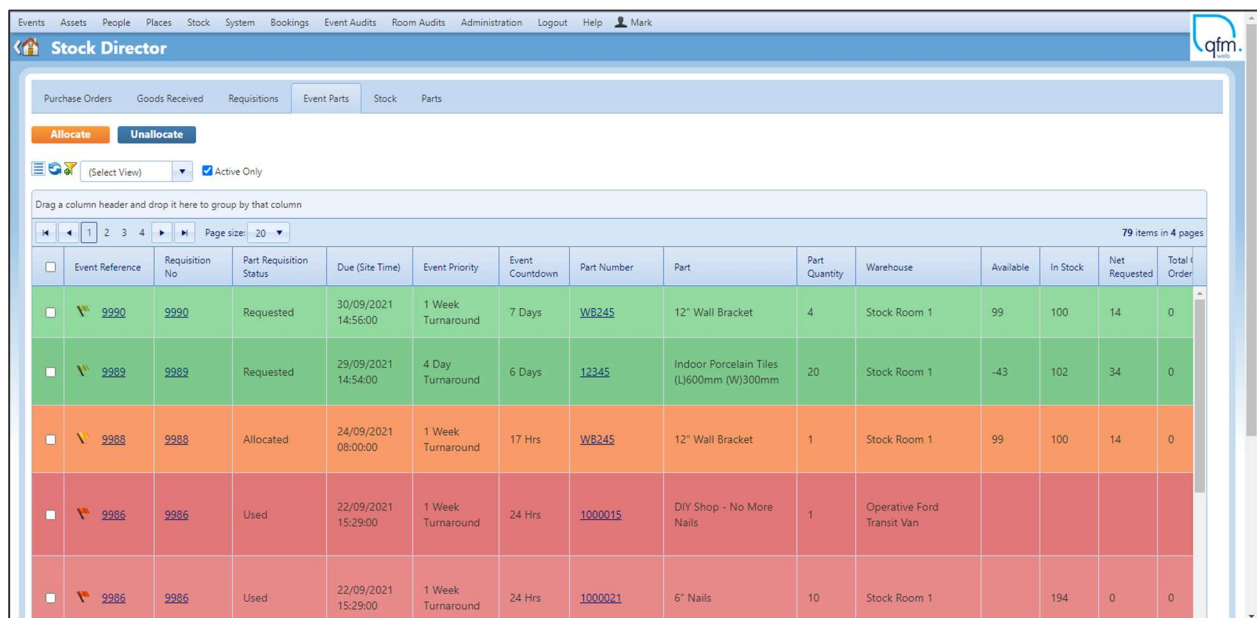
If the appropriate QFM Parts workflow is in use, should some allocated Parts remain unused, QFM is able to move these back into stock or keep the unused Parts on the requisition to be used at a later date. These options can be selected by the user.

Allocating Parts to an Event

A new Event Parts tab in the Stock Director provides Stock Managers with the overall requirement for Stock Items requisitioned from Events. Colour coding, based on Event Priorities, provides a visual method for establishing the priorities for Stock allocation. Real-time availability amounts ensure that inventories can be efficiently maintained.

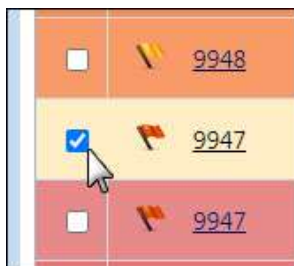
Key fields include:

- **Available**
Total number of Parts available to use (total in stock less the total requested).
- **In Stock**
Total number of Parts in stock (excluding any requested or on order).
- **Net Requested**
Total number of Parts that have been requested by Event requisitions.
- **Total On Order**
Total number of Parts ordered in to the Warehouse.



| Event Reference | Requisition No | Part Requisition Status | Due (Site Time) | Event Priority | Event Countdown | Part Number | Part | Part Quantity | Warehouse | Available | In Stock | Net Requested | Total On Order |
|-----------------|----------------|-------------------------|---------------------|-------------------|-----------------|-------------|--|---------------|----------------------------|-----------|----------|---------------|----------------|
| 9990 | 9990 | Requested | 30/09/2021 14:56:00 | 1 Week Turnaround | 7 Days | WB245 | 12" Wall Bracket | 4 | Stock Room 1 | 99 | 100 | 14 | 0 |
| 9989 | 9989 | Requested | 29/09/2021 14:54:00 | 4 Day Turnaround | 6 Days | 12345 | Indoor Porcelain Tiles (L1600mm (W)300mm | 20 | Stock Room 1 | -43 | 102 | 34 | 0 |
| 9988 | 9988 | Allocated | 24/09/2021 08:00:00 | 1 Week Turnaround | 17 Hrs | WB245 | 12" Wall Bracket | 1 | Stock Room 1 | 99 | 100 | 14 | 0 |
| 9986 | 9986 | Used | 22/09/2021 15:29:00 | 1 Week Turnaround | 24 Hrs | 1000015 | DIY Shop - No More Nails | 1 | Operative Ford Transit Van | | | | |
| 9986 | 9986 | Used | 22/09/2021 15:29:00 | 1 Week Turnaround | 24 Hrs | 1000021 | 6" Nails | 10 | Stock Room 1 | | 194 | 0 | 0 |

From here, users with the appropriate access rights can allocate Part Items requisitioned from Events by simply selecting the Part Item (as shown below) then selecting **Allocate** at the top of the screen.





Note: Parts which have been 'Allocated' can be 'Unallocated' **Unallocate**. Once a Part is 'Used' it cannot be 'Unallocated'.











Resource Scheduler




A new column is added to the Resource Scheduler. The 'Part Status' shows the status of the Parts required for the Visit. This can be either 'Requested', 'Allocated' or 'Used', as shown in the example below.


A new feature ensures that when Auto Allocate is in use, any Visits with a Part Status of 'Requested' will not be automatically dispatched.


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


 **Resource Scheduler**


  Add  Confirm  Unschedule  Cancel  Copy  Re-Allocate  Event Actions  Refresh  Auto Allocate


  Visits to Assign to ... 

(Event Ref) 

(Site) 





(Event Contractor) 


(Event Type) 














(Skill) 





(Event Priority)


Drag a column header and drop it here to group by that column

  1 **2** 3 4 5 6  

Page size: 10 

| <input type="checkbox"/> | | Visit Reference | Event Reference  | Scheduling Status | Geography | Part Status | Event Contractor |
|--------------------------|----|---------------------------|--|---|------------------------------|-------------|------------------|
| <input type="checkbox"/> | II | 9945/V002 |  9945 |  Provisional | Rose House | Used | Maintenance |
| <input type="checkbox"/> | II | 9937/V002 |  9937 |  Provisional | Rose House | Requested | Maintenance |
| <input type="checkbox"/> | II | 9936/V002 |  9936 |  Provisional | Rose House | Allocated | Maintenance |
| <input type="checkbox"/> | II | 9935/V003 |  9935 |  Provisional | Rose House | Requested | Maintenance |
| <input type="checkbox"/> | II | 9934/V001 |  9934 |  Provisional | Rose House 1st Floor Corr... | Requested | Maintenance |
| <input type="checkbox"/> | II | 9933/V007 |  9933 |  Provisional | Rose House 1st Floor Corr... | Requested | Maintenance |

  1 **2** 3 4 5 6  

Page size: 10 

Event Director

A new column is added to Event Director. The 'Part Status' shows the status of the Parts required for the Event. This can be either 'Requested', 'Allocated' or 'Used', as shown in the example below.

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

Event Director - default *

Select View: default * [Remove View](#) [Save View..](#) [Refresh](#) Interval: 10 Minutes [\[X\]](#)

Contractor like * and Only show latest escalations and Event Types in (Asset Event, Service Event) and Day Type is Reported and Max Days Back is 60 and Max Days Forward is 10

☒ Monitor ☐ Summary By Contractor ☐ Summary By Site ☐ Summary By Status Watches: Quick Watch ☒ Include Deferred [Batch Actions](#)

Event List [Include/Exclude Columns..](#) [Change Filter](#) ☐ Show in Site Time

Drag a column header and drop it here to group by that column

| Event Type | Event ID | Status | Contractor | Operative | Part Status | Alert | Site | Loc |
|---------------|----------------------|---------|--------------------|-----------------|-------------|------------------|------------|-----|
| Service Event | 9990 | Due | Bryco Construction | Derek Warburton | Requested | Pending (7 Days) | Rose House | 1st |
| Service Event | 9989 | Due | BBL Builders | Grant Prescott | Requested | Pending (6 Days) | Rose House | Gr |
| Service Event | 9988 | Due | Maintenance | Jenny Smith | Allocated | Due (16 Hrs) | Rose House | 1st |
| Service Event | 9987 | Due | Maintenance | Jenny Smith | | Due (16 Hrs) | Rose House | 1st |
| Service Event | 9986 | Started | Maintenance | Jenny Smith | Requested | Overdue (1 Days) | Rose House | 1st |

Personnel Details

A new **Default Warehouse** drop down field is added to the Personnel Details screen, which allows a default Warehouse to be specified for the QFM user, when they add a Parts requisition. It is also used for the Personnel's equivalent Operative in the QFM mobile app.

This field is only available when the '(FM) Parts & Materials' license is active.

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

Personnel Details

(Find Personnel) Add Personnel

Personnel Details

Main Details Remarks Messages Types Address Workgroups

Division Department Grade

Auth Level Cost Code Allocation

Export Value Default Warehouse Start Date

End Date System Login ID

Save Cancel

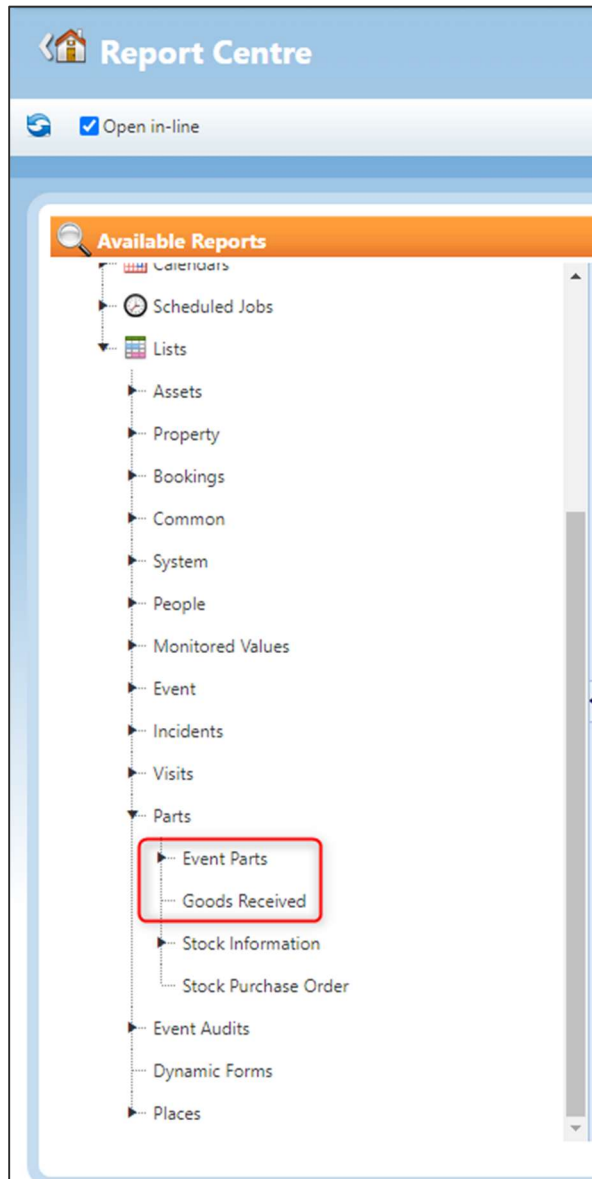
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Default Warehouse

List Reports - Event Parts

The Report Centre, Event Parts List Report is updated to correspond with the new Stock Director, Event Parts tab. A new Goods Received is also added - this is linked to the Stock Director, Goods Received tab.

Note: All existing Report Centre lists with a linked list in Stock Director have been updated as a result of the updates to Stock Director.



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

Report Centre

Open in-line

Available Reports

- Favourites
- All Reports
- User Reports
- Room Booking Reports
- Event History Reports
- Dashboards
- Calendars
- Scheduled Jobs
- Lists
- Assets
- Property
- Bookings
- Common
- System
- People

Lists - Event Parts

(Select View)

Drag a column header and drop it here to group by that column

Page size: 20 106 items in 6 pages

| Event Reference | Requisition No | Part Requisition Status | Due (Site Time) | Priority | Count Down | Part Number | Part | Quantity | Warehouse |
|-----------------|----------------|-------------------------|---------------------|--------------------|------------|-------------|-----------------------------|----------|--------------|
| 9937 | 9937 | Used | 06/09/2021 08:00:00 | 1 Month Turnaround | 3 Weeks | 13-A-SKT-D | 13 Amp Double Socket | 5 | Stock Room 1 |
| 9937 | 9937 | Allocated | 06/09/2021 08:00:00 | 1 Month Turnaround | 3 Weeks | 13-A-SKT-D | 13 Amp Double Socket | 2 | Stock Room 1 |
| 9936 | 9936 | Used | 05/08/2021 11:40:00 | 1 Day Turnaround | 1 Weeks | 12345 | 6 Inch Nails | 10 | Stock Room 1 |
| 9936 | 9936 | Allocated | 05/08/2021 11:40:00 | 1 Day Turnaround | 1 Weeks | W8245 | 12" Wall Bracket | 1 | Stock Room 1 |
| 9935 | 9935 | Used | 04/08/2021 09:53:00 | 1 Hour Turnaround | 1 Weeks | T3436 | Concealed 4G SIM comms unit | 100 | Stock Room 1 |

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

Report Centre

Open in-line

Available Reports

- Favourites
- All Reports
- User Reports
- Room Booking Reports
- Event History Reports
- Event Performance & Penalties
- Dashboards
- Calendars
- Scheduled Jobs
- Lists
- Assets
- Property
- Bookings
- Common
- System
- People
- Monitored Values
- Event
- Incidents
- Visits

Lists - Goods Received

(Select View)

Drag a column header and drop it here to group by that column

Page size: 20 16 items in 1 pages

| ID | Status | GRN Ref | GRN Date | Warehouse Ref | PO ID | SDN Ref | Remarks | Supplier | Received By | PO Date | PO Reference | PO |
|----|----------|---------|---------------------|---------------|-------|---------|---------|---------------------------------|-------------|---------------------|--------------|----|
| 19 | Complete | 123454 | 16/09/2021 17:42:00 | ROSE3 | 17 | | | All My Parts. 19 Wenlog Close | Jenny Smith | 16/09/2021 18:40:00 | - | |
| 18 | Draft | 123453 | 16/09/2021 16:46:00 | ROSE1 | 15 | | | AB Engineering Ltd | Jenny Smith | 01/09/2021 13:06:00 | - | |
| 17 | Complete | 123452 | 16/09/2021 16:45:00 | ROSE1 | 13 | | | AB Engineering Ltd | Jenny Smith | 01/09/2021 12:58:00 | - | |
| 16 | Complete | 123451 | 16/09/2021 16:43:00 | ROSE1 | 12 | | | AB Engineering Ltd | Jenny Smith | 01/09/2021 12:55:00 | - | |
| 15 | Complete | 123450 | 16/09/2021 16:42:00 | ROSE2 | 11 | | | City Electrical Factors. Unit 2 | Jenny Smith | 04/08/2021 15:12:00 | X442K3 | |

Working with Parts on the QFM app

The QFM mobile app now provides a range of new functionality for working with Part requirements on Event Visits, including:

- Recording Parts used against a Visit
- Returning unused Part Items to the Warehouse
- Requesting additional Part Items
- Adding ad-hoc Part Items purchased separately

For details on these new features, refer to the separate *What's New in QFM app 3.03.01* document.

System Administration

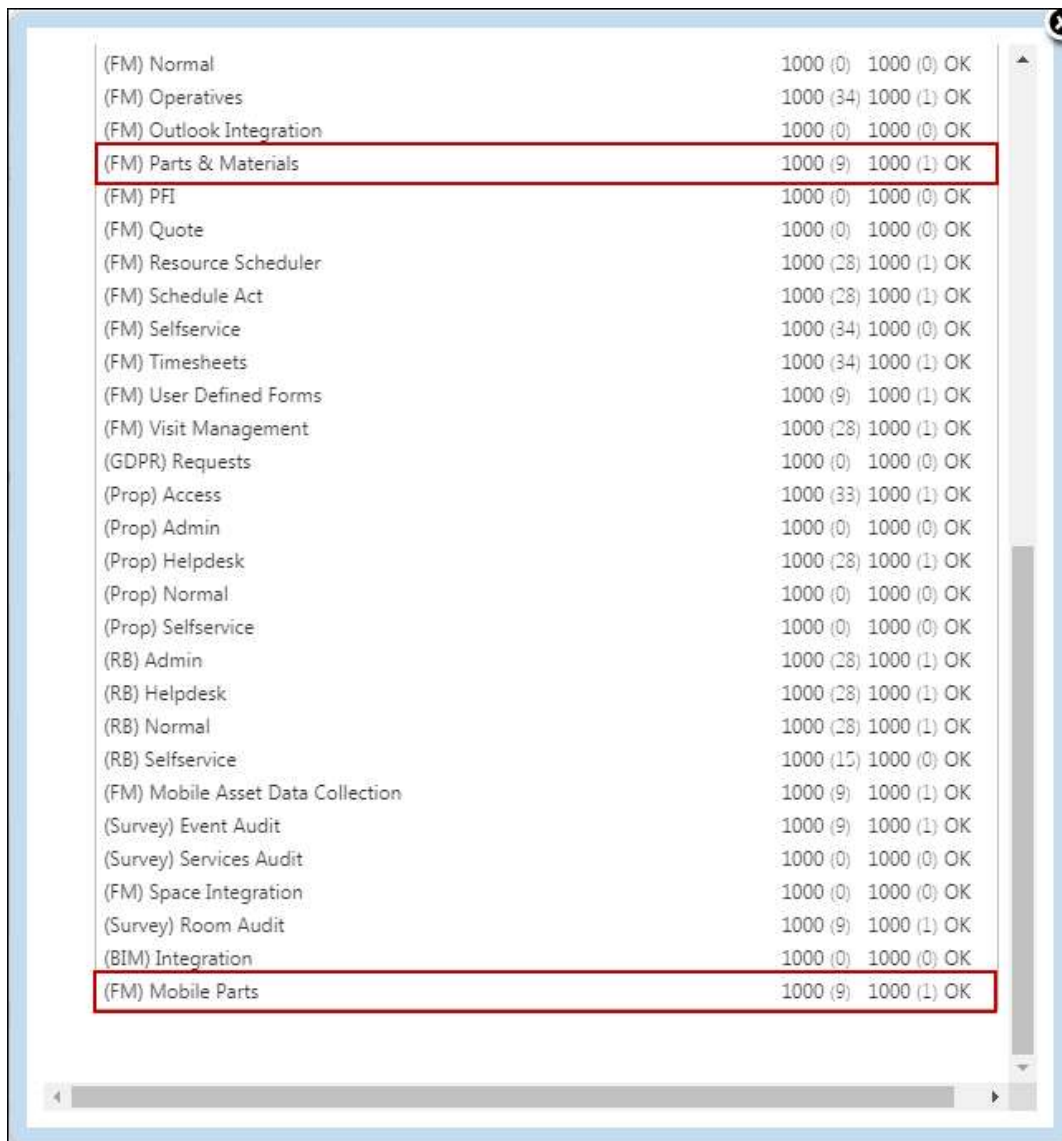
There are a number of administrative settings which need to be correctly configured in order to activate Stock / Parts in QFM.

Software License

Stock / Parts functionality is available under two separate QFM software licenses:

- **(FM) Parts & Materials**
QFM web-based functionality
- **(FM) Mobile Parts**
QFM mobile app functionality

(Refer to the example below).



| | | | |
|-----------------------------------|-----------|----------|----|
| (FM) Normal | 1000 (0) | 1000 (0) | OK |
| (FM) Operatives | 1000 (34) | 1000 (1) | OK |
| (FM) Outlook Integration | 1000 (0) | 1000 (0) | OK |
| (FM) Parts & Materials | 1000 (9) | 1000 (1) | OK |
| (FM) PFI | 1000 (0) | 1000 (0) | OK |
| (FM) Quote | 1000 (0) | 1000 (0) | OK |
| (FM) Resource Scheduler | 1000 (28) | 1000 (1) | OK |
| (FM) Schedule Act | 1000 (28) | 1000 (1) | OK |
| (FM) Selfservice | 1000 (34) | 1000 (0) | OK |
| (FM) Timesheets | 1000 (34) | 1000 (1) | OK |
| (FM) User Defined Forms | 1000 (9) | 1000 (1) | OK |
| (FM) Visit Management | 1000 (28) | 1000 (1) | OK |
| (GDPR) Requests | 1000 (0) | 1000 (0) | OK |
| (Prop) Access | 1000 (33) | 1000 (1) | OK |
| (Prop) Admin | 1000 (0) | 1000 (0) | OK |
| (Prop) Helpdesk | 1000 (28) | 1000 (1) | OK |
| (Prop) Normal | 1000 (0) | 1000 (0) | OK |
| (Prop) Selfservice | 1000 (0) | 1000 (0) | OK |
| (RB) Admin | 1000 (28) | 1000 (1) | OK |
| (RB) Helpdesk | 1000 (28) | 1000 (1) | OK |
| (RB) Normal | 1000 (28) | 1000 (1) | OK |
| (RB) Selfservice | 1000 (15) | 1000 (0) | OK |
| (FM) Mobile Asset Data Collection | 1000 (9) | 1000 (1) | OK |
| (Survey) Event Audit | 1000 (9) | 1000 (1) | OK |
| (Survey) Services Audit | 1000 (0) | 1000 (0) | OK |
| (FM) Space Integration | 1000 (0) | 1000 (0) | OK |
| (Survey) Room Audit | 1000 (9) | 1000 (1) | OK |
| (BIM) Integration | 1000 (0) | 1000 (0) | OK |
| (FM) Mobile Parts | 1000 (9) | 1000 (1) | OK |

Import / Export

Important

Bulk updates can take a significant amount of time to process, therefore you are advised to follow the standard Import/Export guidelines. Import times vary from import to import due to the varied and complex business rules.

Stock - Adjust Stock Levels

A new Import/Export screen is added to enable bulk updates of Stock Levels, which correspond to the Stock Director, Parts tab.

For Parts with a Part Type of 'Adhoc' and 'Unidentified', stock levels are not tracked. The circumstances under which these Parts are used means it is not appropriate to keep track of stock. When importing Parts with a Part Type of 'Adhoc' and 'Unidentified', any quantities are ignored and a validation message is shown post import advising that quantities are not supported, therefore values are not imported.

| Warehouse | PartNo | Part | In Stock | Allocated | Required | On Order | Reason |
|-----------|--|--|----------|-----------|----------|----------|--------|
| ROSE1 | 13-A-SKT-D13-A-SKT-D13-A-SKT-D13-A-SKT-D | 13 Amp Double Socket (incl. integrated fuse and circuit break triggered on irregular fluctuations) | 58 | 58 | 1 | 0 | |
| ROSE2 | 13-A-SKT-D13-A-SKT-D13-A-SKT-D13-A-SKT-D | 13 Amp Double Socket (incl. integrated fuse and circuit break triggered on irregular fluctuations) | 5 | 0 | 0 | 0 | |
| ROSE2 | 1000029 | Twin Pole Light Switch mk89/0987 | 2 | 2 | 0 | 0 | |
| ROSE3 | 1000029 | Twin Pole Light Switch mk89/0987 | 15 | 1 | 0 | 0 | |
| ROSE1 | 1000003 | Copy Paper 5 Reams | 0 | 0 | 0 | 100 | |
| ROSE2 | 1000003 | Copy Paper 5 Reams | 32 | 0 | 0 | 0 | |
| Bkr5H | 1000003 | Copy Paper 5 Reams | 100 | 0 | 0 | 0 | |
| ROSE2 | 1000001 | Fire Door Overhead Closer | 3 | 1 | 0 | 0 | |
| ROSE1 | 1000006 | 374mm (Double) Valve | 0 | 0 | 0 | 100 | |

Columns available for Import/Export are:

- Warehouse
- Part No
- Part
- In Stock
- Allocated
- Required
- On Order
- Reason
- Approver

Stock - Maintain Roles for Warehouses

A new Import/Export screen is added to enable bulk updates for QFM User access rights by Warehouse. This import controls which Warehouses a user can access in Stock Director, the Event screens and the mobile app. It does not affect General Reference Data screens.

Please ensure that you have read and understand the Release Notes around this area before using this feature.

Stock - Maintain Roles for Warehouses | Export

Comma | **Export**

Results

| Person | Warehouse | StockRole | End Date |
|--------|-----------|---------------|----------|
| | BkrSH | Administrator | |
| | OpVAN | Administrator | |
| | ROSE1 | Administrator | |
| | ROSE2 | Administrator | |
| | ROSE3 | Administrator | |
| | BkrSH | Administrator | |
| | OpVAN | Administrator | |
| | ROSE1 | Administrator | |
| | BkrSH | Administrator | |

Page size: 25 | 40 items in 2 pages

Columns available for Import/Export are:

- Person
- Warehouse
- Stock Role
- End Date

Default Roles and Rights are shown below. Refer to your SWG Account Manager for details on changes to these Roles and additional Roles; (QFM can support up to ten Roles).

| Stock Role ID | Caption | Display Order | System Name | View | Order | Receive | Take | Request | Allocate | Adjust |
|---------------|---------------|---------------|---------------|------|-------|---------|------|---------|----------|--------|
| 1 | None | 0 | NONE | No | No | No | No | No | No | No |
| 2 | Read Only | 10 | READONLY | Yes | No | No | No | No | No | No |
| 3 | Operative | 20 | OPERATIVE | Yes | No | No | Yes | Yes | No | No |
| 4 | Supervisor | 30 | SUPERVISOR | Yes | No | No | Yes | Yes | Yes | No |
| 5 | Stock Manager | 40 | STOCKMANAGER | Yes | Yes | Yes | No | No | Yes | Yes |
| 6 | Administrator | 50 | ADMINISTRATOR | Yes | Yes | Yes | Yes | Yes | Yes | Yes |

Stock - Maintain Stock Information

A new Import/Export screen is added to enable bulk updates for items of Stock, which correspond to the Stock Director, Stock tab.

For Parts with a Part Type of 'Adhoc' and 'Unidentified', stock levels and price details are not tracked. The circumstances under which these Parts are used means it is not appropriate to keep track of stock or prices.

When importing Parts with a Part Type of 'Adhoc' and 'Unidentified', any quantities and prices are ignored and a validation message is shown post import advising that quantities and prices are not supported, therefore values are not imported.

Please ensure that you have read and understand the Release Notes around this area before using this feature.

Stock - Maintain Stock Information ▼ Export ▼

Comma ▼ **Export**

Configure Columns

| | |
|---------------|---|
| Warehouse | ▲ |
| Part Number | ▼ |
| Part Name | → |
| Quantity | ← |
| Bin No | ↔ |
| Expected Cost | ↔ |
| Selling Price | ↔ |
| Average Cost | ↔ |

Results

| Warehouse | Part Number | Part Name | Quantity | Bin No | Expected Cost | Selling Price | Average Cost | Remarks | Messages |
|-----------|-------------|------------------------------------|----------|--------|---------------|---------------|--------------|---------------------|---|
| ROSE3 | 1000024 | Samsung 8GB RAM | | 1 | 25.6000 | 35.0000 | 24.9500 | A very special part | When fitting, the spirit and not wat contact with the j |
| ROSE2 | 1000018 | Suma Bac D10 Cleaner and Sanitiser | | 1 | 2.0000 | | | | |
| ROSE3 | 1000002 | Circuit Breaker | 50 | 322 | 7.0000 | 10.0000 | | | |
| ROSE1 | 1000018 | Suma Bac D10 Cleaner and Sanitiser | 6 | | | | | | Stock Message |
| ROSE1 | 1000000 | Microsoft Keyboard | | | 18.9900 | | | | |
| Brkr5H | 1000003 | Copy Paper 5 Reams | 100 | 56 | 1.5000 | | | | |
| ROSE1 | 1000004 | Copper Wire | 209 | | | | | | |
| ROSE2 | 1000007 | Fulham Timber Planks 32x115mm | 1500 | 94 | 75.0000 | | | | |

Page size: 25 ▼ 58 items in 3 pages

Columns available for Import/Export are:

- Warehouse
- Part Number
- Part Name
- Quantity
- Bin No
- Expected Cost
- Selling Price
- Average Cost
- Remarks
- Messages
- Show Messages
- Reorder Level
- Latest Cost
- Minimum Stock Level

- Reorder Quantity
- Stock Identifier

Stock - Maintain Parts

A new Import/Export screen is added to enable bulk updates for Part details.

Please ensure that you have read and understand the Release Notes around this area before using this feature.

Stock: Maintain Parts

Comma

Results

| Part Type | Part Number | Description | Part Category | Barcode Reference | Part End Date | Criticality Level | Hazard Level | Consumption Level | Managed Asset | Equipment Group | Model | Metadata | Show Messages | Messages | Remarks | Main Supplier |
|-----------|-------------|-------------------------------|----------------------|-------------------|---------------|-------------------|--------------|-------------------|--------------------------|-----------------|-------|---|--------------------------|----------|---------|--------------------|
| Standard | 1000004 | Copper Wire | Electronic Component | 1000004 | | 0 | None | (TBD) | <input type="checkbox"/> | | | | <input type="checkbox"/> | | | AB Engineering Ltd |
| Standard | 1000005 | Portland cement 10ks | Building Materials | 1000005 | | 0 | Low | (TBD) | <input type="checkbox"/> | | | Concrete | <input type="checkbox"/> | | | AB Engineering Ltd |
| Standard | 1000007 | Fulham Timber Planks 32x115mm | Building Materials | 1000007 | | 0 | None | C | <input type="checkbox"/> | | | Pine or Oak, 32x115mm, Flooring | <input type="checkbox"/> | | | AB Engineering Ltd |
| Standard | 1000008 | Grey Sandstone Slabs 10x10 | Building Materials | 1000008 | | 0 | | | <input type="checkbox"/> | | | Paving Slabs - 900mm x 600mm, Sandstone | <input type="checkbox"/> | | | AB Engineering Ltd |

Page size: 25 33 items in 2 pages

A wide range of data items are available to update. This Import/Export corresponds with the Stock Director, Parts tab.

General Settings

New controls are added to the Parts section in General Settings, as follows.

- **Input/View**
 - **Allowed to View Goods Received Notes**
When set to **On** allows users to view Goods Received Notes.
 - **Allowed to Amend Goods Received Notes**
When set to **On** allows users to update Goods Received Notes.
 - **Stock Administration Features**
Allows users to hide/show the 'Recalculate Stock Levels' routine, which is available from the Common Actions screen (Administration > Utilities > Common Actions).
 - **Stock Price to use for Requisitions**
Defines the default field to be used for the Price on Stock Requisitions.
Choose from **Selling Price**, **Latest Cost**, **Average Cost**.

> Express Events

▼ Parts

Input/View

| | | |
|--|---------------|----------------------|
| Allowed to Access Parts Director | On | Copy |
| Allowed to View Parts in Parts Director | On | Copy |
| Allowed to Add/Change Parts | On | Copy |
| Allowed to View Purchase Orders | On | Copy |
| Allowed to Amend Purchase Orders | On | Copy |
| Allowed to View Requisitions | On | Copy |
| Allowed to Amend Requisition | On | Copy |
| Allowed to View Goods Received Notes | On | Copy |
| Allowed to Amend Good Received Notes | On | Copy |
| Allowed To View Warehouse Stock | On | Copy |
| Stock Administration Features | On | Copy |
| Stock Price to use for Requisitions | Selling Price | Copy |
| This setting is used to define which field to take Price from to use on Requisitions | | |
| Allowed to View Parts on Event | On | Copy |
| Allowed to Update Parts on Event | On | Copy |
| Default Requisition Status | Ordered (def) | Copy |
| Synchronize Estimated Cost with Used Quantity | On (def) | Copy |
| Synchronize Actual Cost with Used Quantity | On (def) | Copy |

> General Event Logging

> Batch Actions

Dynamic Forms for Additional Asset Data

Overview

Changes are made to Dynamic Forms to provide a new concept for utilising forms, based around Assets.

Dynamic Forms can now be created for Assets in order to hold additional information about the item/equipment. Information recorded on the form during an initial Visit can be subsequently accessed and updated during a separate inspection or review.

Features and benefits include:

- Collect, edit, and view customised reference data against an asset record.
- Provides an efficient platform for inspecting an Asset with access to the original form, enabling a cross referencing review to take place.

Introduction

Changes are made to Dynamic Forms to provide a new concept for utilising forms, based around Assets.

Dynamic Forms can now be created for Assets in order to hold additional information about the item/equipment. Information recorded on the form during an initial Visit can be subsequently accessed and updated during a separate inspection or review.

The changes are made to both Web and Mobile Dynamic Forms and us the standard Alias mappings for Visits.

Example Scenario:

During the installation and commissioning of an Asset, a Dynamic Form is attached to a Visit and completed with the relevant information. At a later date, an inspection of the Asset is made (for example by a supervisor) via a Return Visit, which includes a review of the original form and the ability to make updates to that form. Any new information recorded is then updated against the main Asset record in QFM.

Dynamic Forms for Assets can contain all the standard form elements and controls, e.g. capture readings, numerical values, date/time, signatures, text etc. They are also appended to the Event in the usual way.

Forms for Assets can be mapped to an Asset or Model Work Type, so that all Visits for Assets with a particular Work Type will receive the form. After an entry is made on the form, when the form is called again the previous data/responses will be shown, along with any previous attachments. If an Alias is used, this can be at a particular stage of the Visit process.

It is not possible to delete previous attachments from the QFM app.

Once completed and synchronised back to the QFM server, Asset based forms can be accessed in QFM via the Asset record (Attachments tab) in addition to the Event record and the Report Centre.

To set up Dynamic Forms for Assets, ensure that the **Based On** field is set to **Asset** and the **Context** field is left blank.

Forms for Assets can be applied to Web-based forms and Mobile-based forms.

The screenshot shows the 'Panel Properties' dialog box with the 'Details' tab selected. The 'Based On' field is set to 'Asset' and the 'Context' field is empty, both highlighted with red boxes. Other fields include Form Type, End Date, Report Template, Master Page, Include Form Link, Document Type, Include Report Link, Include Image Link, Form Fragment, Panel Caption, Notes, Access Results, Form Editors, Panel Type, Data Source Type, Is Template, and System Name.

Note: Asset Forms are not compatible with the Triggered Events from Forms Data feature.

SFG20 Integration

Overview

QFM builds on its ability to synchronise a local copy of the SFG20 repository from the external SFG20 database to provide the latest Maintenance Template Schedules. Enhancements are included to support the linking of QFM Maintenance Schedules to their corresponding SFG20 Schedules. This enables QFM Events to be generated which include the relevant SFG20 maintenance steps within the instructions. Operatives can then receive the instructions via the QFM mobile app or a worksheet.

A new QFM Workflow Scheduler Synchronisation Service ensures that any external changes to templates are automatically updated in QFM, ensuring the latest maintenance standard versions are always available. A new interface is provided which allows clients to access any changes to SFG20 Schedules and to review the revised version of a given schedule before approving or suppressing. When generating QFM Events, the system will take the latest approved version of the linked schedule.

The screenshot shows a web application window titled 'Schedule'. It displays a maintenance schedule for '92-04:Heat Exchangers - Coils'. The interface includes a header with 'Title', 'Type', 'Version', and 'Status' fields. Below this is a 'Schedule Introduction' section with a paragraph of text. The main section is 'Schedule Tasks', which contains a table with columns for 'Display Order', 'Item', 'SFG20 Fq / QFM Fq', 'Action', 'Notes', and 'Skillings'.

| Display Order | Item | SFG20 Fq / QFM Fq | Action | Notes | Skillings |
|---------------|---------------------------|-------------------|---|--|------------|
| 1 | Water to Air | | | | |
| 2 | Drain pans | Month 1M | Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side. | Check that condensate traps on cooling coils are filled with water. | Mechanical |
| 3 | Coils | | | | |
| 4 | Coil vent | Month 1M | Check operation, condition of filters and sight glasses. | | Mechanical |
| 5 | External surface air side | Month 1M | Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable training given. | Where necessary clean with appropriate sterilising solution, especially when coils operated under moist air conditions or act as a dehumidifier. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended. | Mechanical |

Features and benefits include:

- Ensures compliance with industry standard maintenance regimes.
- A QFM Synchronisation Service ensures the latest maintenance standard versions are always held in QFM.
- Provides the ability to create customised instructions and maintenance routines, by defining text and tags to select different elements from an external maintenance standard.

Introduction

QFM now has the ability to synchronise a local copy of the SFG20 repository from the external SFG20 database to provide the latest maintenance template schedules. These can then be integrated with QFM Maintenance Schedules to provide industry standard maintenance regimes.

Launched in 1990 by the Building Engineering Services Association (BESA), **SFG20** is recognised as the industry standard for building maintenance specifications. It is a web based service, with a library of over 1200 template maintenance schedules, covering more than 70 equipment types.

In this process QFM links with the SFG20 database, but this feature is designed to also be used with other external entities to accept feeds for similar types of maintenance data used for different purposes or in other geographical regions.

The API pulls the latest external Template Schedule data (in this process SFG20 data) into QFM and stores it there. It is constantly looking for changes in the external database and ensures that the latest data is downloaded.

QFM Maintenance Schedules can be set up to link with an external Template Schedule. A specific tag is used to refer to a QFM Notifications Template. Here, a set of default tags are used to select the required information from the Template Schedule (SFG20) and add it to Event Instructions. The Notifications Template provides the ability to create customised instructions and maintenance regimes, by defining text and tags to select different elements from an external Template Schedule.

Synchronisation

A new QFM Workflow Scheduler service 'SFG20 Synchronisation' links with the external SFG20 database to download the Template Schedule data. The QFM service also looks for changes/different versions etc. on an ongoing basis, pulling any updated data into QFM.

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

Workflow Scheduler

Display Options
Refresh

Refresh (sec)
60
Filter
SFG20 Synchronization
Log Length
200
Status
(All)
Hide offline workflows
☐

The scheduler is working as expected. It last refreshed 1 Seconds ago

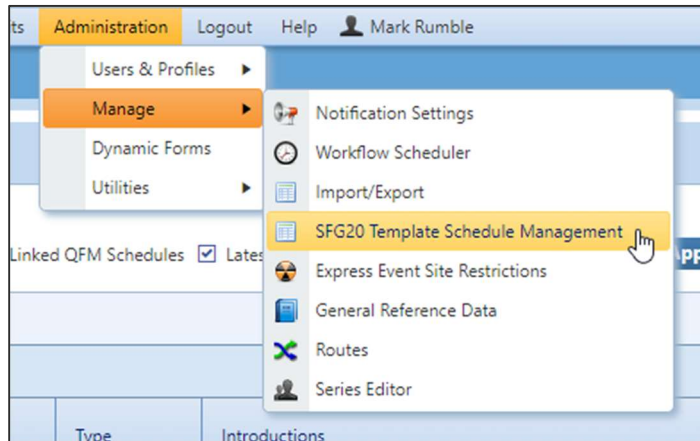
| Status | Summary | Log | Last Run | Next Run |
|---|-----------------------|--|--------------------------------|--|
| Complete 0 Take Offline | SFG20 Synchronization | 05 Nov 2021 11:24:58: Completed 05 Nov 2021 11:24:58 (UTC): Workflow Completed: Rescheduled for 11/6/2021 11:24:30 AM (UTC) Rescheduled for :06 Nov 2021 11:24:30 (UTC) 05 Nov 2021 11:24:..... | 05/11/2021 11:24 3 Mins ago | 06/11/2021 11:24 (24 Hours) Schedule Run Now Clear Change Schedule Date |

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Licence Information

The QFM Workflow Scheduler is available to QFM administrators from the Administration menu.

Template Schedule Management

The new 'SFG20 Template Schedule Management' screen, available from the Administration menu, holds the Template Schedules downloaded from the external SFG20 database.



The screenshot shows the 'SFG20 Template Schedule Management' screen. It features a table with columns for 'Active Version', 'Modified', 'Schedule ID', 'Reference', 'Review Status', 'Title', 'Type', 'Introductions', 'Version Date', 'Version', and 'Suppress'. The table contains 629 items across 32 pages. The 'Introductions' column contains text describing cleaning procedures for heat exchangers.

| Active Version | Modified | Schedule ID | Reference | Review Status | Title | Type | Introductions | Version Date | Version | Suppress |
|--------------------------|--------------------------|-------------|-----------|---------------|-------------------------|------|--|---------------------|---------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 07-06 | Approved | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:47:46 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 07-07 | Approved | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:47:46 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-01 | Suppress | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 10/11/2016 11:17:12 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-02 | Suppress | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 10/11/2016 11:17:12 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-03 | Approved | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:58:07 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-04 | Approved | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:47:47 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-05 | Approved | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:47:48 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-06 | Approved | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:47:48 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 08-07 | New | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 11/11/2016 12:47:48 | 1 | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | Q | 09-01 | New | Heat Exchangers - Coils | | When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system. | 10/11/2016 11:17:12 | 1 | <input type="checkbox"/> |

This enables you to view all the SFG20 template schedules in the QFM database and configure these as required. This screen includes the following features:

- **Approve / Suppress** SFG20 template schedules to control which are actively linked to the QFM Maintenance Schedule.

- **Filter Options** provide a range of valuable pre-configured views.
- Drill down to the detailed **SFG20 template schedule steps** to view the individual activities.
- Pushing the detailed SFG20 template schedule steps through to **Event Instructions**.


Approval / Suppression

The SFG20 template schedules available in the QFM database can be Approved or Suppressed (details below).
Select the required template schedule record by ticking the box at the left end of the row.


| Drag a column head | |
|-------------------------------------|-------------------------------------|
| 1 | |
| <input type="checkbox"/> | Active Version |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> |

| |
|--|
| <div> <div>Approve</div> <div>Suppress</div> </div> <div> <div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div> <div>(Select View)</div> <div>(Select Schedule)</div> <div>(Select Asset)</div> </div> <div> <input checked="" type="checkbox"/> Linked QFM Schedules <input checked="" type="checkbox"/> Latest Version Only <input type="checkbox"/> Schedules With Revisions </div> <div> <div>Apply</div> <div>Clear Filter</div> </div> </div> |
|--|

Approve

Sets the SFG20 template schedule 'Review Status' to . This makes the template the 'Active' version for the QFM Maintenance Schedule, if it is the latest Approved version of the template.
If there are several versions of the same template which all have a Review Status of Approved, the most recent Approved version will be the 'Active' version - this is signified by a tick in the 'Active Version' column.

Suppress

Sets the SFG20 template schedule 'Review Status' to . This deactivates the template version so that it will not feed into the QFM Maintenance Schedule.
If the latest 'active' template version is Suppressed, then the most recent Approved template version automatically becomes the 'Active' version.

Approval and Suppression can be applied in bulk; simply select the required template schedule records by ticking the box at the left end of the row.

Drag a column header and drop it

Page 1

| <input type="checkbox"/> | Active Version | Modified |
|-------------------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Screen Filters

A selection of data filters are available at the top of the screen.

☒ Linked QFM Schedules
 ☒ Latest Version Only
 ☐ Schedules With Revisions

- Select View**
 Select any pre-configured custom Views.
- Select Schedule**
 Select an SFG20 Template Schedule
- Select Asset**
 Select an Asset to display the SFG20 Template Schedules linked to QFM Maintenance Schedules to which the Asset is subscribed.
- Linked QFM Schedules**
 When ticked, displays all SFG20 Template Schedules which are linked to one or more QFM Maintenance Schedule.
- Latest Version Only**
 When ticked, displays the SFG20 Template Schedule 'Active' version (or the latest non-suppressed version if none in a series are approved).
- Schedules With Revisions**
 When ticked, this highlights any new SFG20 Template Schedule versions. The new version is displayed together with the latest 'Active' version, (enabling these to be reviewed).

Once changes are made to the default filter settings, select to apply the new filters.

Grid Columns

Data available in the grid is as follows:

- **Active Version**
If ticked, indicates that this Template Schedule is the 'Active' version for the QFM Maintenance Schedule.
- **Modified**
If ticked, indicates that this Template Schedule has been modified.
- **Schedule ID**
SFG20 Schedule ID.
- **Reference**
SFG20 Reference for the Template Schedule.
- **Review Status**
Displays the current Status of the Template Schedule. Either 'Approved', 'Suppress' or 'New'.
- **Title**
Template Schedule Title.
- **Type**
The type of SFG20 Schedule.
- **Introductions**
Template Schedule summary information.
- **Version Date**
SFG20 Version Date.
- **Version**
The Version Number for the Template Schedule.
- **Suppressed**
If ticked, indicates that this Template Schedule version is Suppressed.
- **Latest Version**
If ticked, indicates that this is the most recent version of the Template Schedule.
- **No. Linked Schedules**
Number of QFM Maintenance Schedules to which the Template Schedule is linked.
- **No. Tasks**
Number of individual tasks in the Template Schedule.
- **Published**
Signifies whether the Schedule is approved by a QFM user.
- **Active**
Signifies whether this is the latest approved version.

- **End Date**
Date when the Template Schedule record will become inactive in QFM.

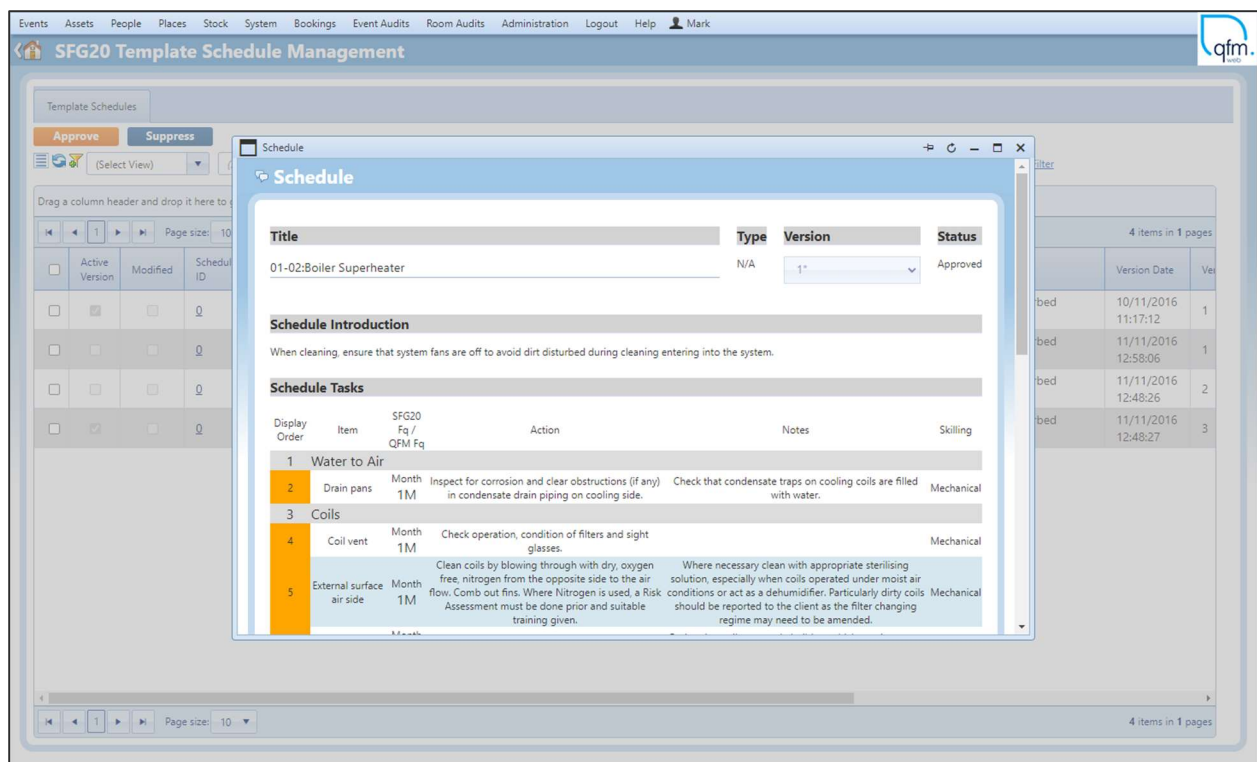
Viewing Schedule Tasks

Details of SFG20 Template Schedules, including the individual task steps, are available by selecting the **Schedule ID** link for the appropriate record.



| | Active | Version | Modified | Schedule ID | Ref |
|--------------------------|-------------------------------------|---------|--------------------------|-------------|-----|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | 0 | 01 |

Schedule details are displayed in a pop-up window.



The screenshot shows the 'SFG20 Template Schedule Management' interface. A pop-up window titled 'Schedule' is open, displaying details for a schedule with ID '01-02:Boiler Superheater'. The window is divided into several sections:

- Title:** 01-02:Boiler Superheater
- Type:** N/A
- Version:** 1
- Status:** Approved
- Schedule Introduction:** When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system.
- Schedule Tasks:** A table listing tasks with columns: Display Order, Item, SFG20 Fq / QFM Fq, Action, Notes, and Skilling.

| Display Order | Item | SFG20 Fq / QFM Fq | Action | Notes | Skilling |
|---------------|---------------------------|-------------------|---|--|------------|
| 1 | Water to Air | | | | |
| 2 | Drain pans | Month 1M | Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side. | Check that condensate traps on cooling coils are filled with water. | Mechanical |
| 3 | Coils | | | | |
| 4 | Coil vent | Month 1M | Check operation, condition of filters and sight glasses. | | Mechanical |
| 5 | External surface air side | Month 1M | Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable training given. | Where necessary clean with appropriate sterilising solution, especially when coils operated under moist air conditions or act as a dehumidifier. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended. | Mechanical |

Summary details are displayed at the top of the window, with individual task details listed in the Schedule Task section below. Examples are shown below.

Schedule

Schedule

Title

01-02:Boiler Superheater

Type

N/A

Version

1

Status

Approved

Schedule Introduction

When cleaning, ensure that system fans are off to avoid dirt disturbed during cleaning entering into the system.

Schedule Tasks

| Display Order | Item | SFG20 Fq / QFM Fq | Action | Notes | Skilling |
|---------------|---------------------------|-------------------|---|--|------------|
| 1 | Water to Air | | | | |
| 2 | Drain pans | Month 1M | Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side. | Check that condensate traps on cooling coils are filled with water. | Mechanical |
| 3 | Coils | | | | |
| 4 | Coil vent | Month 1M | Check operation, condition of filters and sight glasses. | | Mechanical |
| 5 | External surface air side | Month 1M | Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable training given. | Where necessary clean with appropriate sterilising solution, especially when coils operated under moist air conditions or act as a dehumidifier. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended. | Mechanical |

Schedule

10 Steam to air

11 Operation of steam traps

Month 1M

Check operation, condition of filters and sight glasses.

For full details of maintenance requirements see Pipework Systems - Steam Services (SFG 40-11).

Mechanical

12 Coils - External surface air side.

Month 1M

Clean coils by blowing through with dry, oxygen free nitrogen from the opposite side to the air flow. Comb out fins. Where nitrogen is used, a Risk Assessment must be done prior and suitable training given.

Where necessary clean with appropriate sterilising solution. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended.

Mechanical

13 Coil casing

Month 1M

Inspect for rust and clean and repaint as required.

Mechanical

14 Coil mounting bolts

Month 1M

Check for tightness and secure if necessary.

Corroded bolts should be replaced.

Mechanical

15 Pipework

Month 1M

Inspect connections, pipes and supports for damage, loose or missing fittings. Repair as necessary.

Mechanical

16 Indirect Gas Fired to Air

17 Heat exchanger - flue gas side

Month 1M

Clean surfaces where access is provided.

Report to client any deterioration of heating surface which requires further attention.

Gas Safe

18 Heat exchanger - air side

Month 1M

Clean coils air-side surfaces by blowing through with dry, oxygen free nitrogen from the opposite side to the air flow. Where nitrogen is used, a Risk Assessment must be done prior and suitable training given.

Comb fins if appropriate. Where necessary clean with appropriate sterilising solution. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended.

Gas Safe

19 Heat exchanger casing

Month 1M

Inspect for rust and clean and repaint as required.

Gas Safe

20 Heat exchanger mountings

Month 1M

Check for tightness and secure if necessary.

Corroded bolts should be replaced and any leaking joints between the heat exchanger and discharge of products of combustion must be rectified before the heater is put back into service.

Gas Safe

Gas burners

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What's New in QFM 3.03.01.18 Release

Task Colour Coding

A colour-coded rating system enables you to visualise the prioritisation of tasks to optimise maintenance. SFG20 Task Maintenance Schedules display the recommended rating based on legislation, regulations and industry best practice. Colour-coding definitions are as follows:

- **Red** - Statutory/Legal (To ensure legal compliance).
- **Pink** - Mandatory - Business Critical (To ensure sector/organisation compliance).
- **Amber** - Optimal - (Function Critical and Industry Best Practice).
- **Green** - Discretionary (Non-Critical Maintenance).



Task Frequency

The **SFG20 Fq / QFM Fq** column displays the SFG20 frequency for the task. This is the frequency to be used in QFM Maintenance Schedules.

| Schedule Tasks | | | |
|----------------|---------------------------|-------------------|---|
| Display Order | Item | SFG20 Fq / QFM Fq | Action |
| 1 | Water to Air | | |
| 2 | Drain pans | Month 1M | Inspect for corrosion and clean in condensate drain piping |
| 3 | Coils | | |
| 4 | Coil vent | Month 1M | Check operation, condition glasses. |
| 5 | External surface air side | Month 1M | Clean coils by blowing through free, nitrogen from the opposite flow. Comb out fins. Where Nit Assessment must be done training given |

Incorporating SFG20 Templates into QFM Schedules

QFM Event Schedules may be linked with a Template Schedule (in this process a 'Template Schedule' is an SFG20 Schedule).

If the QFM Schedule is linked and the Schedule Instructions contain the tag "{#IncludeTemplateScheduleInformation#}" then the Event generation process will substitute this tag for information relating to the linked Template Schedule.

QFM enables you to pick different elements from a Template Schedule which are to be used in Scheduled Event Instructions, via configuration of a Notification Template (in the Notification Settings screen).

Typically, an SFG20 Template Schedule will contain activities with a mixture of different frequencies (e.g. Annually, Monthly etc.). The mapping of SFG20 task frequencies to QFM frequencies enables QFM to analyse the timing of the SFG20 activities on a particular Template Schedule, and schedule these to take place on the correct dates.

Schedule Maintenance

QFM Schedule Maintenance allows users to link QFM Schedules to corresponding Template Schedules (e.g. SFG20).

Specify a Template Schedule in a QFM Schedule to create a link. When an Event is generated, details are pulled from the Template Schedule and merged into the generated Events. (QFM will always have the latest published version from external database, in this process SFG20).

Schedule Maintenance

Description: SFG20 01-02 Maintenance Schedule

Subscriber: EqRef.300145 (Model 1049),

SFG20 Template: 01-01:Heat Exchangers - Coils

Show All

Subscribe From: 01-01:Heat Exchangers - Coils

Suppress Event Generation: ☒

Activities*

| Priority | Description |
|----------|-------------|
| 1 | Sar |

▼ Items 1-50 out of 631

Add New Activity

> Date Range

> Notes

> Planner Related

> Event Creation

> Other Details

Save **Cancel**

In the Activity Maintenance, Template tab, the tag “{#IncludeTemplateScheduleInformation#}” added to the Instructions section will enable the Event generation process to substitute the tag for information relating to the linked Template Schedule.

Schedule Activity Maintenance

Template | Scheduling | Attachments | Advanced | Other

▼ Main

Event Type: (Default)

Work Type: Standard

Priority: 1 Day Turnaround

Contract: (Default)

Trade: (Default)

▼ Resourcing

☐ Get Contractor from Contract ☐ Specify Contractor ☒ None

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

▼ Instructions/Remarks

Instructions: Usual instructions for the Event and some additional for SFG20:
{#IncludeTemplateScheduleInformation#}
Remember to check out at reception before leaving the building.

Remarks:

> Created Event Workflow

> Other

> Costs

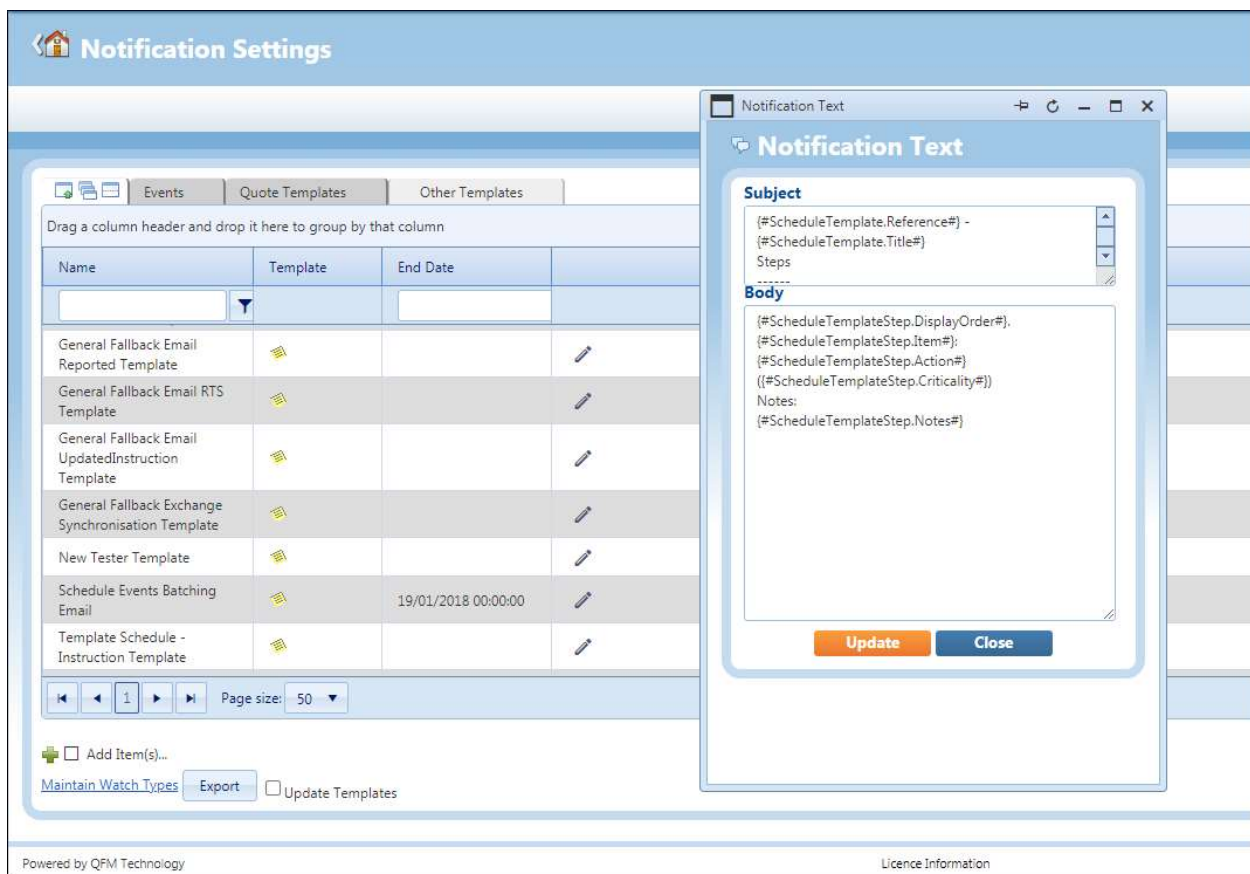
OK Cancel



Instructions: Usual instructions for the Event and some additional for SFG20:
{#IncludeTemplateScheduleInformation#}
Remember to check out at reception before leaving the building.

Notification Settings

When the “{#IncludeTemplateScheduleInformation#}” tag is added to QFM Maintenance Schedule Instructions, QFM refers to a Notifications Template to determine the information to be published to Event Instructions.

In the 'Other Templates' tab, the **Template Schedule - Instructions Template** uses a set of default tags to select the required information from the Template Schedule (SFG20) and add it to Event Instructions. The Notifications Template provides the ability to create customised instructions and maintenance regimes, by defining text and tags to select different elements from an external Template Schedule.



| Name | Template |
|---|---|
| <input type="text"/> |  |
| Template Schedule - Instruction Template |  |
| Template Schedule - | |

The **Template Schedule - Instruction Template** contains a set of default tags which retrieve the relevant information from the Template Schedule (SFG20) and add it to Event Instructions. Additional customised Notification Templates may be added to QFM - refer to your QFM Account Manager for further details.

Subject

{#ScheduleTemplate.Reference#} -

{#ScheduleTemplate.Title#}

Steps

Body

{#ScheduleTemplateStep.DisplayOrder#},

{#ScheduleTemplateStep.Item#};

{#ScheduleTemplateStep.Action#}

{{#ScheduleTemplateStep.Criticality#}}

Notes:

{#ScheduleTemplateStep.Notes#}

Update

Close

Example Event Instructions

The examples below shows the SFG20 Template Schedule maintenance instructions for a QFM Planned Maintenance Event.

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

Event Details: 10027 - PM Event - Due (Notified)

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

Event Details Related Events Visits Attachments Parts

Due (Notified)

Details Key Dates Related

Event Type: PM Event

Reported By: Yearly Compressor Maintenance

Site: Fernedene Heights

Location: Arc

Unit: Ground Floor

Partition: Catering Kitchen

Instructions: Yearly Compressor Maintenance

Take guidance from SFG20 steps as listed below - 15-03 - Heat Exchangers - Coils Steps -----

Remarks

1. External surface air side: Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable training given. > (Amber)

Notes: >Where necessary clean with appropriate sterilising solution, especially when coils operated under moist air conditions or act as a dehumidifier. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended. >

Update Reset Fields (Other Options) Go Suppress Notifications

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Summary details are shown at the top and the individual steps (1 - 4) below.

Edit Instructions

Use Template (Select Template) Use > Done Cancel

Yearly Compressor Maintenance for linked Assets.

Take guidance from SFG20 steps as listed below - 15-03 - Heat Exchangers - Coils Steps -----

1. External surface air side: Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable training given. > (Amber)

Notes: >Where necessary clean with appropriate sterilising solution, especially when coils operated under moist air conditions or act as a dehumidifier. Particularly dirty coils should be reported to the client as the filter changing regime may need to be amended. >

Edit Instructions

+

Edit Instructions

Use Template

(Select Template)

Use >

Done

Cancel

2. Water side: Flush out coils to remove sediment.

> (Amber)

Notes:

>On heating coils, any scale build up which restricts water flow should be reported for further action.

>

3. Coil casing: Inspect for rust and clean and repaint as required.

> (Amber)

Notes:

>

4. Coil mounting bolts: Check for tightness and secure if necessary.

> (Amber)

Notes:

>Corroded bolts should be replaced.

>

Summary

QFM Maintenance

10028/V001, New

PM Event, 1 Week Turnaround

Fernedene Heights, Arc

Ground Floor, Catering Kitchen

Scheduled Start at 04/11/2021 12:55

Event Due to Complete at 10/11/2021 15:52

Details

Assets (4)

Parts (0)

0

1. Drain pans: Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side. > (Amber)

Notes: >Check that condensate traps on cooling coils are filled with water. >

2. Coil mounting bolts: Check for tightness and secure if necessary. > (Amber)

Notes: >Corroded bolts should be replaced. >

3. Pipework: Inspect connections, pipes and supports for damage, loose or missing fittings. Repair as necessary. > (Amber)

Notes: >

REJECT VISIT

ACCEPT VISIT

Import/Export

Key Schedule Information

The 'Import/Export - Key Schedule Information' utility is updated to include two new fields:

- **Template Reference**
- **Template Title**

This enables the linked SFG20 Template Schedule to be shown against the QFM Maintenance Schedule.

Data for these two fields is validated when importing a spreadsheet back into QFM and error messages are displayed for any invalid data.

Events
Assets
People
Places
Stock
System
Bookings
Service Audits
Event Audits
Room Audits
Administration
Lo

Import/Export

Please ensure that you have read and understand the Release Notes around this area before using this feature.

Key Schedule Information
Export

Comma
Export

Results

| Schedule Activity ID | Schedule Description | Schedule Activity Description | TemplateReference | TemplateTitle | RegeneratePlan | WeeksToPlan | WeeksTo |
|----------------------|---------------------------|-------------------------------|-------------------|--------------------------|--------------------------|-------------|---------|
| 548 | Vibhor SFG20 | Activity One | 01-07 | Heat Exchangers - Coils | <input type="checkbox"/> | 53 | 4 |
| 548 | Vibhor SFG20 | Activity One | 01-07 | Heat Exchangers - Coilss | <input type="checkbox"/> | 53 | 4 |
| 549 | Schedule related to sgf20 | sfg20 | 01-03 | Heat Exchangers - Coils | <input type="checkbox"/> | 53 | 4 |
| 550 | SFG20 SCHEDULE TWO | Activity One | 92-04 | Heat Exchangers - Coils | <input type="checkbox"/> | 53 | 4 |
| 551 | SURVEY SFG20 SCHEUDLE | Activity One | 94-04 | Heat Exchangers - Coils | <input type="checkbox"/> | 53 | 4 |

12
Page size: 50

Planner Categories

A new Import/Export utility is added for Planner Categories. This includes a new 'Template Schedule Frequency Code' used by external Template Schedules such as SFG20.

(There is also a General Reference Data screen available for Planner Categories).

Please ensure that you have read and understand the Release Notes around this area before using this feature.

Planner Categories

Comma

Results

| ScheduleActivityTypeID | ShortName | ShortCode | Description | TemplateScheduleFrequencyCode |
|------------------------|-----------|-----------|--------------------|-------------------------------|
| 1 | 6Y | 1Y | Monthly test one & | SFG20 |
| 2 | 2Y | 2Y | 2 Yearly | |
| 3 | 3Y | 3Y | 3 Yearly | |
| 4 | 1M | 1M | Monthly | |
| 5 | 2M | 2M | 2 Months | |
| 6 | 3M | 3M | 3 Months | |
| 7 | 4M | 4M | 4 Months | |
| 8 | 5M | 5M | 5 Months | |
| 9 | 6M | 6M | 6 Months | |

Page size: 25 41 items in 2 pages

System Administration

General Settings

General Settings are added in a new Template Schedule Integration tab (Administration > Users & Profiles > General Settings).

Note: Settings in the 'Template Schedule Options' section are available for all User Profiles. Settings in the 'Integration Settings' section are available for the Global User Class only.

The screenshot shows a web interface for 'Template Schedule Integration'. It features a sidebar with navigation links: 'User Maintenance Options', 'Schedule Activity Options', and 'Template Schedule Integration' (which is expanded). The main content area is divided into two sections. The first section, 'Template Schedule Options', has two settings: 'Allowed to View Template Schedules' and 'Allowed to Amend Template Schedules', both set to 'On' via dropdown menus, with 'Copy' links below each. The second section, 'Integration Settings', contains five text input fields for 'Template Schedule API Url', 'Template Schedule Client ID', 'Template Schedule Client Secret', 'Template Schedule Customer ID', and 'Template Schedule Client Secret', each with a 'Copy' link below it. A red rectangle highlights the entire 'Template Schedule Integration' section.

- **Template Schedule Options**
 - **Allowed to View Template Schedules**
When set to **On**, allows users to view Template Schedules.
 - **Allowed to Amend Template Schedules**
When set to **On**, allows users to update Template Schedules.
- **Integration Settings**
The information used to populate these settings should be supplied by the client to enable QFM integration/synchronisation with their SFG20 Repository.
 - **Template Schedule API Url**
 - **Template Schedule Client ID**
 - **Template Schedule Client Secret**
 - **Template Schedule Customer ID**
 - **Template Schedule Client Secret**

General Reference Data - Planner Categories

The General Reference Data - Planner Categories screen is enhanced to include a new 'SFG20 Frequency' column. This is used to hold the 'Template Schedule Frequency' codes used by external Template Schedules such as SFG20, and map these to the relevant QFM frequency.

(There is also an Import/Export utility available for Planner Categories).

General Reference Data (Planner Categories)

Select the items you wish to update: Planner Categories

Drag a column header and drop it here to group by that column

| Short Name | Short Code | Description | SFG20 Frequency | |
|------------|------------|-------------|-----------------|--|
| 2Y | 2Y | 2 Yearly | 2Y | |
| 3Y | 3Y | 3 Yearly | 3Y | |
| 1M | 1M | Monthly | 1M | |
| 2M | 2M | 2 Months | 2M | |
| 3M | 3M | 3 Months | 3M | |
| 4M | 4M | 4 Months | 4M | |
| 5M | 5M | 5 Months | 5M | |
| 6M | 6M | 6 Months | 6M | |
| 7M | 7M | 7 Months | 7M | |

1 2 3 4 5
 Page size: 10

41 items in 5 pages

Add Item(s)...

Add new item

Short Name:

Short Code:

Description:

SFG20 Frequency:

Add

Minor Enhancements and Changes

The v3.03.01.18 release addresses issues highlighted in the product. Details are as follows:

| SWG Reference | Description |
|---------------|--|
| 21910 | Asset Watches - using QFM 3.3, users can set up trigger emails on a specified date to indicate a key action required against an Asset. This could include email reminders about warranty deadlines or contractor changes. Two type of Watch are available; Quick Watch (Asset) and Shared Watch (Asset). |
| 22291 | Dynamic Forms - the process to determine which forms are sent to the QFM mobile app, based on the DF Form Alias mapping hierarchy, is now enhanced to respect Model and Asset Work Type-based mappings. |
| 25411 | Monitored Values - when the Reset Type for a Monitored Value Type is 'Reset and Increment', then the field label for 'Reset Value' is changed to 'Reset Increment'. |
| 27132 | Event Attachments - when adding a web URL, the character limit is now extended to 400 characters. |
| 28012 | Contractor Viewer - when a Contractor Certificate (Certificates tab) has passed its End Date, the Status is now correctly changed to 'Expired'. |
| 31597 | List Reports - the 'Site' List Report now correctly displays the 'Contact Name' and 'Contact E-mail Address' fields. |
| 32287 | Dynamic Forms - the Panel Caption now accepts form names with special characters. |
| 32415 | Dynamic Forms - an 'invalid template' error no longer occurs when importing a .csv file where the caption is left blank. |
| 33270 | Events - Remarks updated to the Event screen, returned from the QFM app, are now appended with appropriate spacing between each entry. |
| 33290 | Manage Users (Administration) - Operatives with an End Date which has passed are no longer displayed in the 'Operative Name' drop down list. |
| 33651 | A problem with the bulk control Import/Export feature of Dynamic Forms, whereby existing 'Validators' and 'Dependency' actions were being lost when form controls were Exported then Imported, is now fixed. |
| 33926 | Events - in the Find Events screen, the 'Event Type' filter function in Advanced Find now functions correctly. |

- 34019 Event Wizard - it is now possible to set up Incident Event logging with a default contractor (in Wizard maintenance) to which users logging the Incident do not have data scoping rights to access. An Incident can be logged correctly, but the user is not be able to navigate to the Incident Event, once logged.

- 34029 Events - when setting a Return Visit, the 'Latest Completed' date cannot now be set to before the 'Earliest Start' date. This enables automatic allocation in the Resource Scheduler.

- 34032 Events - grammatical changes are made to text in the Visits 'Actions' pop-up box.

- 34203 The Workflow Scheduler is enhanced so that Visits with Stock Requisitions are evaluated to check for any residual 'Requested' Parts. If found, then the functionality to auto-publish is skipped and the Visits remain at their default new state. This is to prevent the automatic re-allocation of Return Visits if there are outstanding requested Parts.

- 34230 Mobile Server - following some client requests to disable QFM Location Services, as they are not required, a global Mobile Server config setting is added to overwrite the need to carry out the location checks;
 <preferences> <requireslocationservices>>false</requireslocationservices> </preferences>
 If the setting is set to OFF then any requests for Location coordinates are skipped.

- 34249 Dynamic Forms - Data is retained when an Asset based form is opened from the button added by the workflow, in the Event Details screen.

Known Issues

This section details system issues which are identified in v3.03.01.18. These will be rectified at the earliest opportunity.

Please contact your SWG Account Manager for further details.

| SWG Reference | Description |
|---------------|---|
| 34027 | Clients using QFM Desktop parts are likely to face issues when upgrading to the QFM 3.03 (web) release, as QFM Desktop Parts functionality is no longer compatible and SWG is no longer supporting QFM Desktop Parts. Any client using QFM Desktop Parts modules, who wishes to upgrade to QFM 3.03 (web), should seek advice from SWG before upgrading. |
| 34755 | Stock Director - lists show dates and times in local time but filters display in UTC. An additional Site Time filter is required for all date and time filters. |
| 34862 | Events - performance issues have been experienced for Events with an unusually high number of Related Assets. Service Works recommends not more than 50 Related Assets per Event. |
| 35030 | When attempting to import large files for 'Stock - Adjust Stock Levels' and 'Stock - Maintain Stock Information', the import may fail. |
| 35223 | Signature images are now correctly displayed on Dynamic Form Reports. |
| 35474 | Form alias mappings to Schedules should only be done when the Schedule is in View mode. If links are edited/added/removed whilst a Schedule is in Edit mode then those changes are lost upon 'Saving' the schedule. |
| 36003 | Stocks and Parts - If a user adds a new Part via the Event screen Parts tab, then opens the details via the selector on the grid row, the dialogue opens in 'Add Part' mode and does not load the existing information for editing. Only the 'Add Part' and 'Cancel' buttons are available. (Selecting 'Add Part' will add new line item for same part). Users <i>are</i> able to change Part details after the requisition is saved. |
| 36123 | Workflow Scheduler known behaviour - Asset Forms are not compatible with the Triggered Events from Forms Data feature. |

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'.

Deploying QFM to the root of the Web site is not a supported configuration. It should be deployed as an Application in a virtual folder referenced from the root site.