# SERVICE WORKS GLOBAL
ADDNODE GROUP

# QFM App 3.03.01.05 Release Notes

## What's New in QFM app v3.03.01.05

December 2021

# Contents

## Version Log

| Version # | Summary of Revision | Date | Author |
|-----------|---------------------|------|--------|
| 1.0 | First edition | 06/12/2021 | MR |
| | | | |

## Statement of Confidentiality

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## Release Notices

### QFM Compatibility

The v3.03.01.05 release is compatible with the following:

- **QFM Mobile Server 2.02 and higher (recommended 2.7, 3.1.2, 3.2.0.4, and 3.3.1)**
- **QFM Workflow Scheduler v3.02.00.07**
- **QFM v1.36 and higher**

In order for this release to perform at an optimum level, Service Works strongly recommends that client organisations upgrade to these software versions or later.

The QFM 1.33 release (onwards) is designed to support multiple client contracts. This support is not yet fully extended to the QFM app as it does not respect contract specific business rules around data selection. This specifically affects any Express Events logged on the Mobile application. Currently, these must be logged with valid contract specific values otherwise the event may not be processed when it is returned to the central QFM application.

### Installation

Existing installed versions of the QFM app can now be upgraded, which allows users to retain their current visits and other app data. Upgrades are available for users moving from version 1.10.07 or later. Users running an earlier version of the app (1.10.02 or earlier) will need to uninstall the previous version before installing the new app v3.03.01.05.

### Security

Maintaining high levels of software security continues to be a high priority for us and we've been able to further enhance the security built into QFM 3.1. This, combined with our ISO27001 information security management accreditation provides our clients and service partners with the confidence that their data will be managed securely. In addition, support for non-SSL from the QFM Mobile app will be depreciated in future app release versions.

### Scanner Hardware Notice for iOS Users

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

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

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

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

## Security - Encrypted Connection

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

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

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

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

## User Profile Configuration

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

# New Features Summary

The QFM app 3.03.01.05 release consists of two new features. A summary is provided below, with a detailed breakdown starting on the following pages.

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.

Visit Summary - Additional Information
The active Visits Summary now displays additional information pertaining to the Service or the Asset.

# New Features

The QFM app v3.03.01.05 release includes two new features.

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

## 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.



Features and benefits include:

- Allows mobile operatives to manage their requirement and usage of Parts.
- Supports more efficient reactive and planned maintenance regimes by giving operatives the ability to request Parts whilst on a job.
- Integrated process provides more accurate real-time Warehouse Stock levels.
- Provides a process for operatives to record any ad-hoc Parts sourced locally.
- Enables operatives to request non-catalogue Parts.

# Introduction

Significant enhancements are made to the QFM Parts & Stocks module, providing new and improved features for the management and allocation of Warehouse Stock. Parts functionality is now introduced to the QFM app, including the ability to synchronise Parts, Categories and Stock Levels.

This allows mobile operatives to manage their Parts requirements and usage, and enables them to request specific Parts for an Event, 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.

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.

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).

## 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

## Viewing Parts and Stock

A new 'Parts' option is added to the Main Menu. This enables users to view Part details in one tab and the Stock at various warehouses. Additionally, the distance between the operative and the Warehouse is displayed (subject to the appropriate Warehouse configuration).

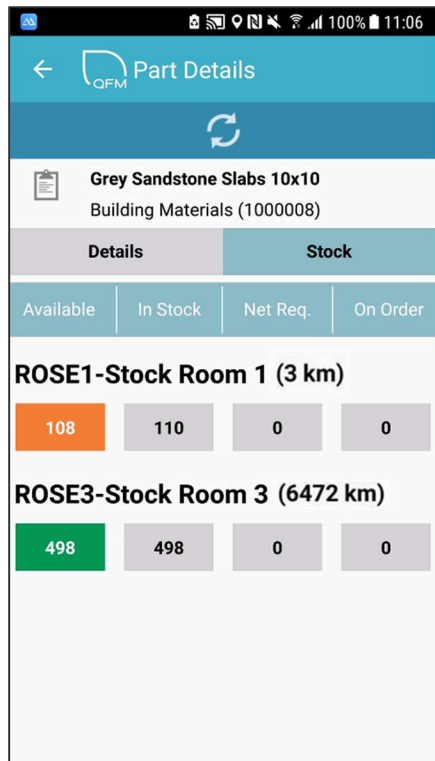The **Parts** option opens the **Find Part** search screen.
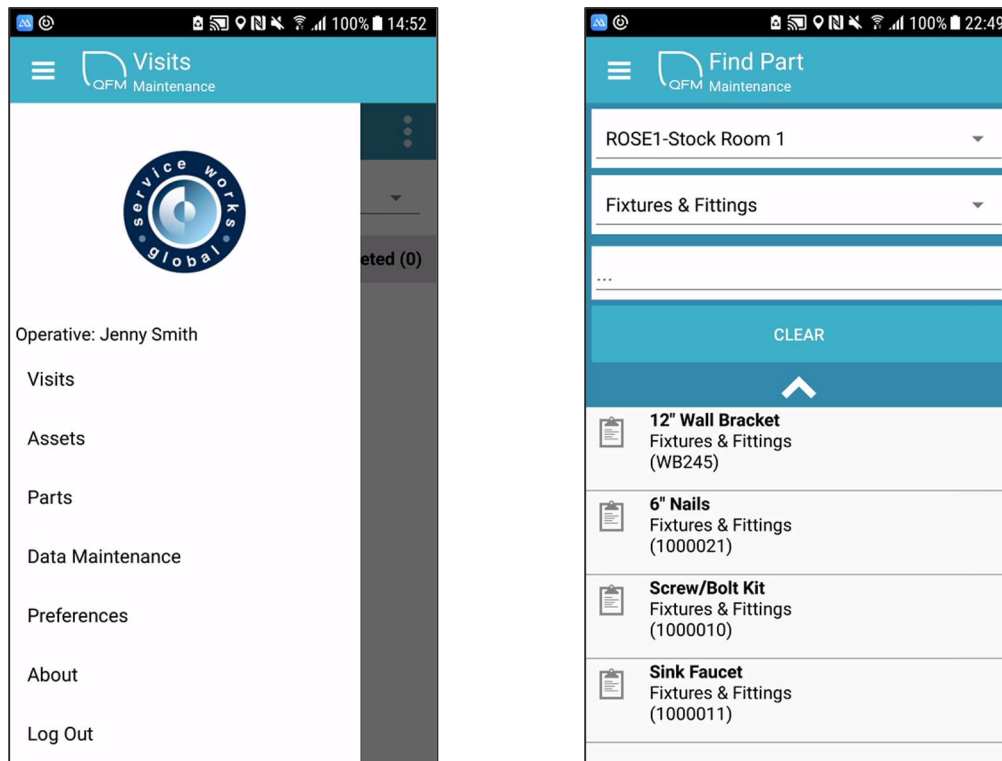


Here, you can select a Part item to access details (**Details** tab) and Stock amounts (**Stock** tab).
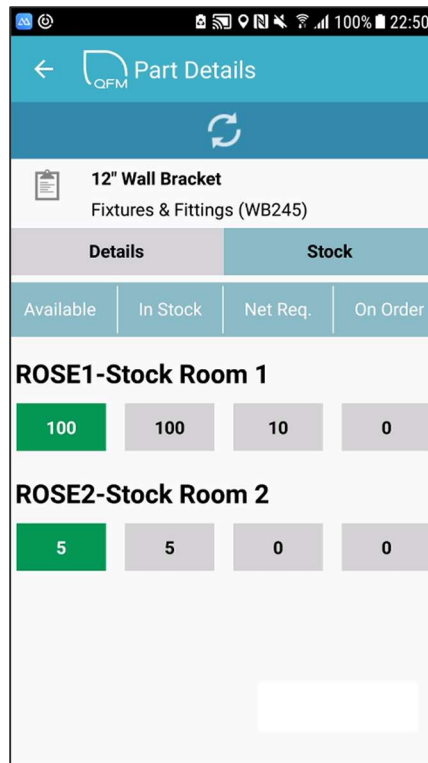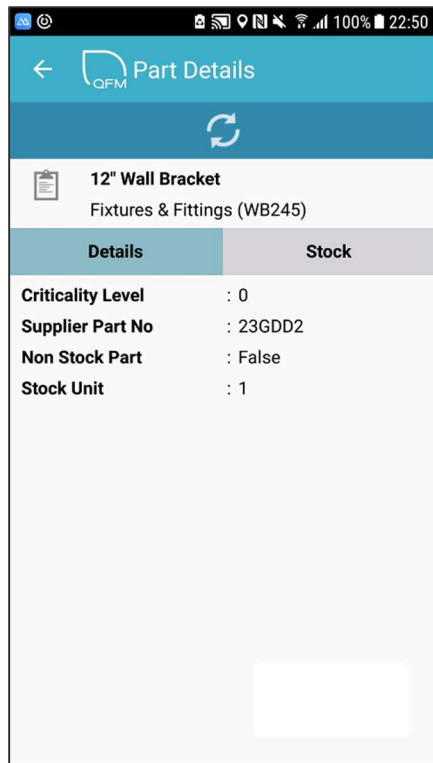
The Stock tab displays the Part quantities at all Warehouses (to which the operative has access). If a Warehouse does not hold a quantity of the Part, then it is not shown.

The distance between the operative and the Warehouse is displayed, (if the longitude/latitude is configured for the Site where the Warehouse is located).
The operative's default Warehouse (if set up) is displayed first, with any others being listed below in order of the nearest first.

## Viewing Parts Required for a Visit

The Summary screen includes a new 'Parts' tab. To accommodate this tab, the 'Assets Info' tab is re-named to 'Assets' and the 'Attachments' tab is now replaced by a paperclip icon.
The Parts tab shows the number of Part Items required for the Visit, in brackets.

**Note:** Users who are not licensed for QFM Parts will not see any Parts features, as shown in the example below.
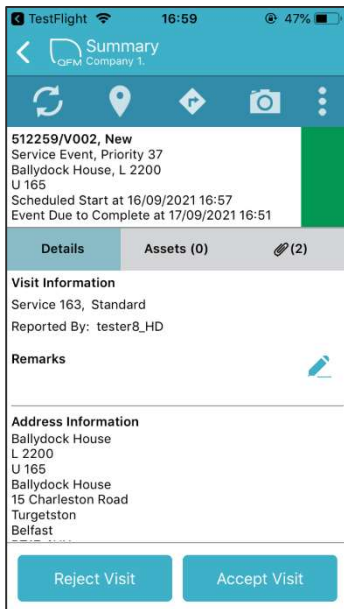
*Parts functionality underlined not licensed.*
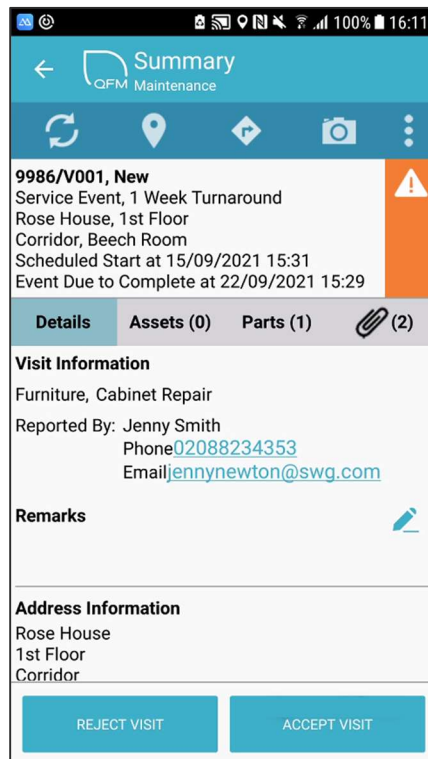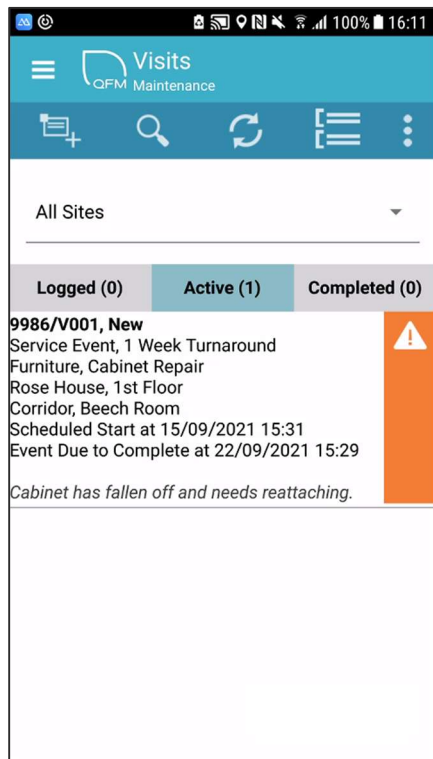




The Parts tab shows a list of the Part Items required for the Visit.

Changes to Parts can only be made on Active Visits and to Parts that have not been previously marked as 'Used'. Changes cannot be made to Parts on Completed Visits.
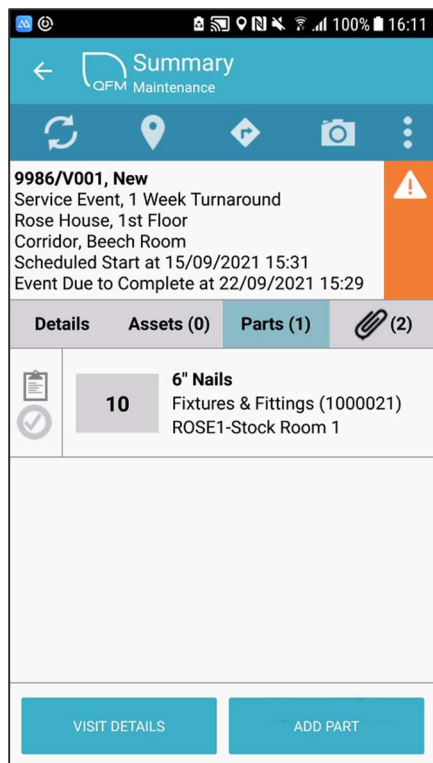
Summary details of the Part are shown, together with the quantity required in the grey box. The summary shows the Part Description, Part Category, Part Number and the Warehouse where it is stored.



- The  icon indicates that the Part Item/s have been Requested, but are not yet approved for allocation.

   **Note:**   You cannot reserve more Parts than were originally allocated. If you need more then you can use what was originally allocated and then create a new Part line on the requisition, which depending on your rights, enables you to either reserve more or reserve/use additional.

- The  icon indicates that the Part Item/s have been Allocated to this Visit.

- The  icon indicates that the Part Item/s have been Used against this Visit.
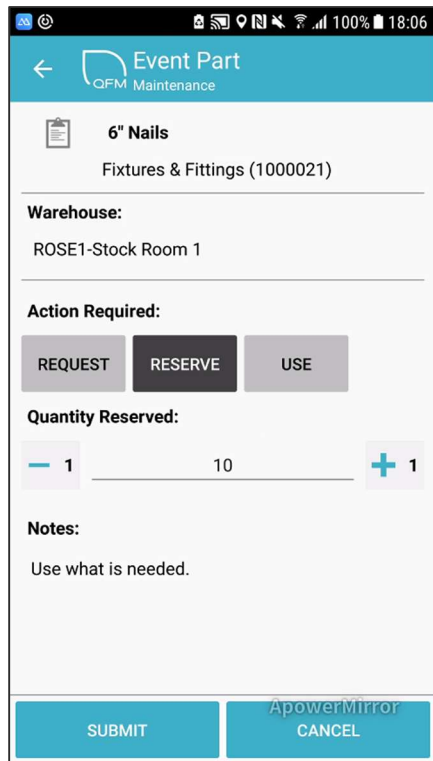
   **Note:**   Parts that are sent through with the Visit, already at Used status, cannot be updated on the QFM app.

If you tap the 🗒 icon, the Part Details screen provides more detailed information about the Part Item.

## Using Allocated Parts

Once you select the Part in the Summary screen Parts tab, the Event Part screen is displayed.
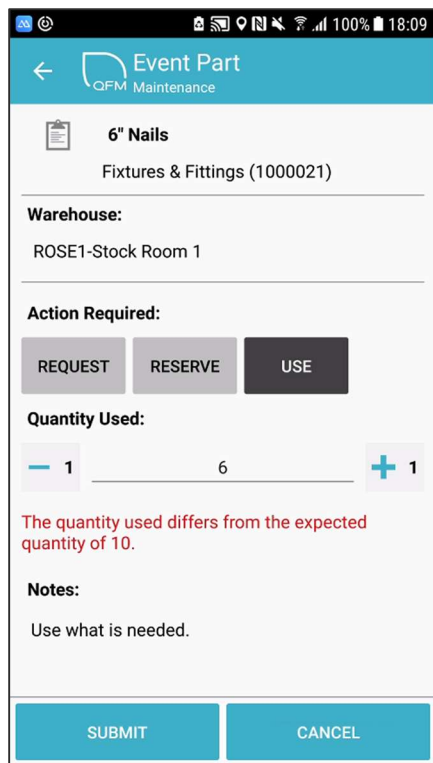
The **Action Required:** section enables you to **REQUEST**, **RESERVE** or **USE** the Part (dependent on your Warehouse rights). In the example shown below, the Part is marked as 'Reserved' (Allocated).



To use the allocated quantity of Parts, tap **USE**.

You can leave the **Quantity Reserved:** amount as originally allocated, or change the amount if required. For example, if you did not need to use all the allocated Part Items you could reduce the amount, as shown in the example below.

A warning message is displayed to highlight the quantity to be used differs from the allocated quantity. You can also add a supporting note.

You then tap **SUBMIT**.

If you have changed the quantity, (as shown in the example below where the quantity has been reduced), a message prompts you to select whether the remaining Part Items will be **USED LATER** or they are **NOT NEEDED**.
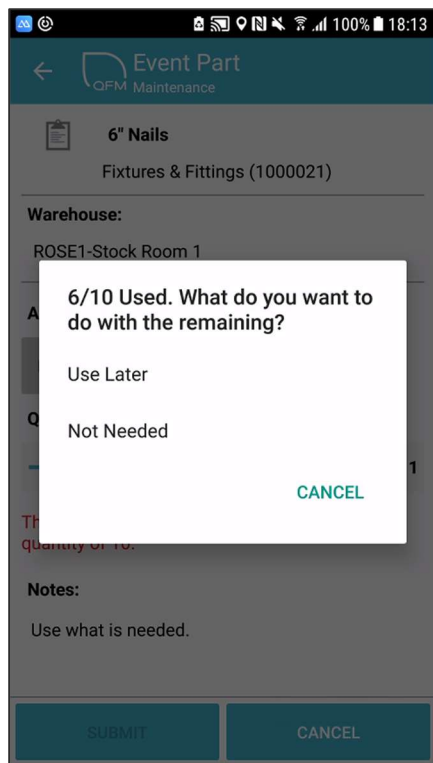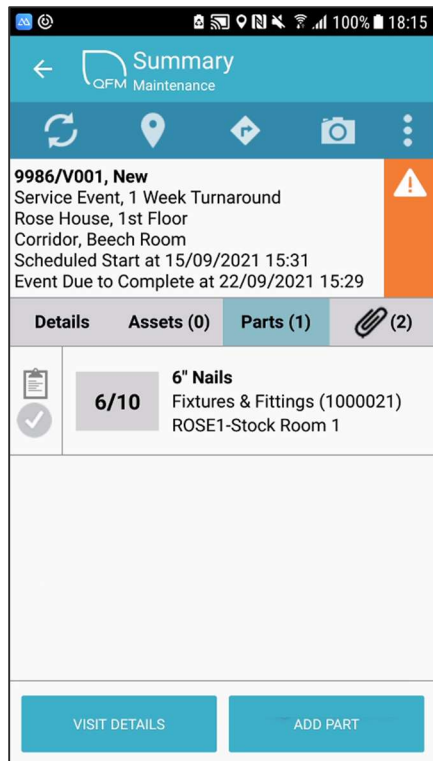
If you select **USE LATER**, QFM creates an extra line item on the Requisition for the remaining Part Items and they remain available to be used.

If you select **NOT NEEDED**, QFM puts the Part Items back into Stock.

In the example below, after **NOT NEEDED** is selected, the Parts tab is updated to show six of the original ten Part Items marked as Used .

## Adding Additional Parts

Whilst on site, it may be apparent that additional Part Items are required to complete a job. These can be selected from the QFM app, by tapping the **ADD PART** button in the Parts tab.

In the Find Parts screen you can search for Part Items and check Stock quantities.

The example shown below shows a quantity of 5 '12" Wall Brackets' in Stock and available.
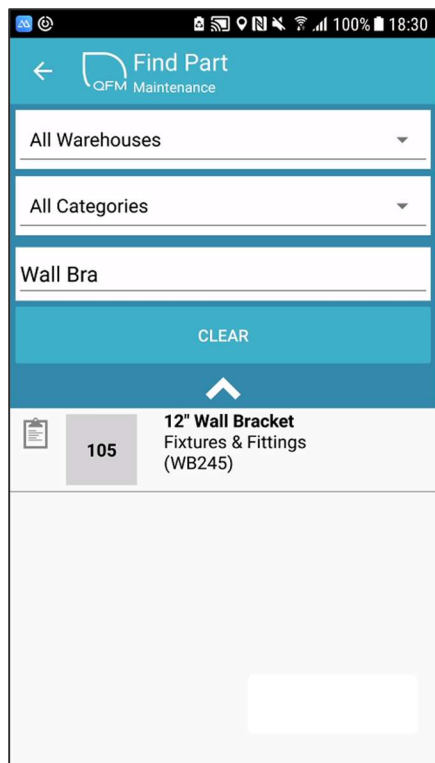
You can select the Part Item to view Warehouse options and quantities, (In Stock - green when available, and On Order - grey).

Choose the Warehouse to select which stock to use - tap on the Warehouse row.
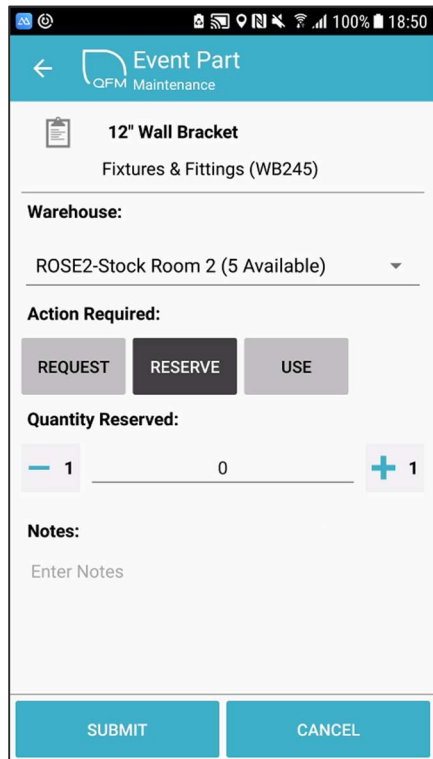
If you tap the 📋 icon, the Part Details screen provides more detailed information about the Part Item.
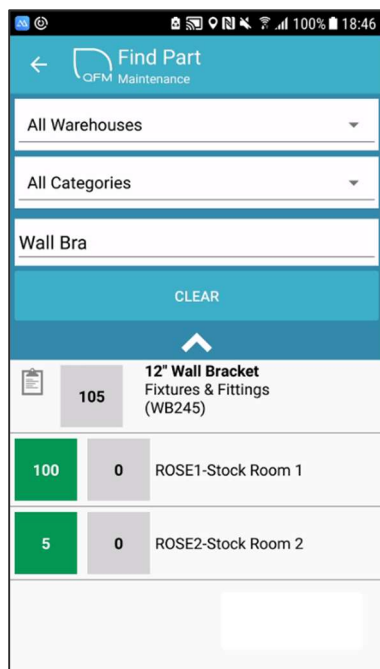
Tap the Part Item to add it to the Visit.
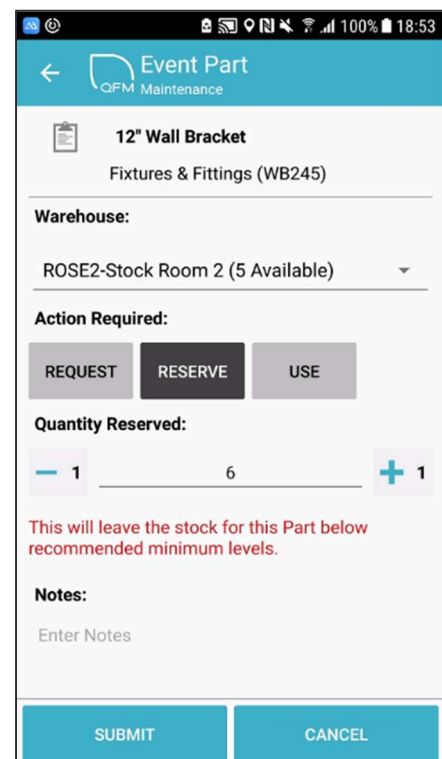
In the Event Part screen, you are able to **REQUEST** or **RESERVE** (depending on your QFM access rights) a quantity of the Part Items.



If you required more Part Items than are currently in Stock, (6 in this example), you could **REQUEST** a quantity greater than 5.
A warning message will be displayed to highlight the quantity to be used differs from the requested quantity.

You can also add a supporting note.



You can then **SUBMIT** the request.

The Summary screen Parts tab is updated to show a quantity of 6 '12" Wall Brackets' marked as

Requested ⓘ, shown right.

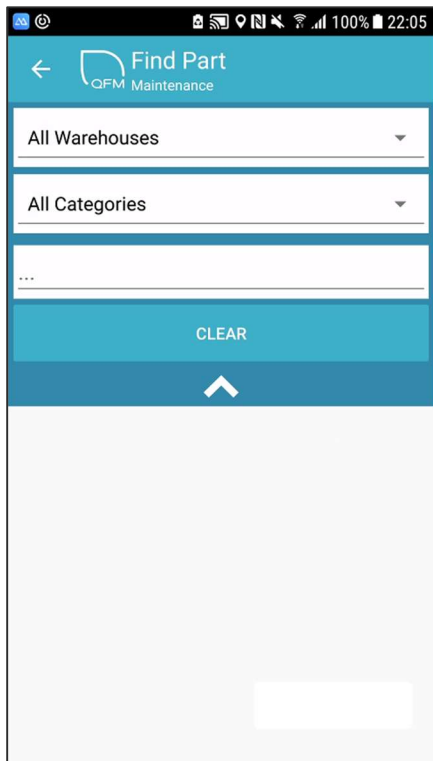The **Visit Details** button returns you to the main Visit information.

## Adding Ad-hoc Parts

There may be occasions when a Part Item is required and an operative can purchase the item locally for use on the Visit. In this instance, the Part Item can be added to the Visit as an 'Ad-hoc Part'.

**Note:**  The process described below shows how to add an Ad-hoc Part which has been purchased locally by an operative.
In the example used for this scenario an operative could Complete a Visit, having applied a temporary fix by purchasing and installing a Part. They could then set a Return Visit to complete the job once the main Parts required come into stock.

To add an Ad-hoc Part, tap **ADD PART** in the Summary screen.

In the Find Part screen, open field, enter the Part Type your organisation uses for 'ad-hoc' Parts (i.e. a specific Part Type must already be set up for ad-hoc Parts).
In this example, the Part Type of **Adhoc** is used.

**Note:**   Quantities are not recorded or required for this Part Type, (hence the display of **N/A**).

Tap to select **Adhoc Part**.

Enter a suitable description in the **Part Description:** field. (A minimum of 10 characters are required).

In the **Action Required:** section tap **USE**.
(**Note:** It is possible to select REQUEST, if you are seeking permission to purchase a Part).

Enter the **Quantity Used:** and **Unit Price:**.

**Note:** For 'Adhoc' Parts, the **Unit Price** is required when 'Used'. It is not required for 'Requested' or 'Reserved'.



The **Tax:** normally defaults to **STANDARD RATE** but you can change this, if required.

The **Total:** is automatically calculated.

Add **Notes:** as appropriate.

Once all the details are added, tap **SUBMIT**.

**Note:** If the Unit Price is left blank (for an ad-hoc Part Type), a warning message is displayed, as in this scenario the Unit Price is required. Refer to the example below.

The Adhoc Part is now added to the Visit.

In the example used for this scenario the operative could Complete the Visit, having applied a temporary fix, then set a Return Visit to complete the job once the Wall Brackets come into stock.

## Adding Unidentified Parts

There may be occasions when a Part Item is required but an operative cannot find the correct Part by using search criteria. In this scenario, they can enter a manual description of the Part and request it.

**Note:**   The process described below shows how to Request a new Part Item from a Warehouse, which is not on the catalogue to select.

To add an Unidentified Part, tap **ADD PART** in the Summary screen.

In the Find Part screen, open field, enter the Part Type your organisation uses for 'unidentified' Parts (i.e. a specific Part Type must be already set up for unidentified Parts).
In this example, the Part Type of **Unidentified** is used.



**Note:**   Quantities are not recorded or required for this Part Type, (hence the display of **N/A**).

Tap to select **Unidentified Part**.

Enter a suitable description in the **Part Description:** field. (A minimum of 10 characters are required).

In the **Action Required:** section tap **RESERVE**.
(**Note:** It is possible to select REQUEST, if you are seeking permission to reserve a Part).

Enter the quantity you require in the **Quantity Reserved:** field.

Add **Notes:** as appropriate.

Once all the details are added, tap **SUBMIT**.

The Unidentified Part is now added to the Visit.

When the Part has been ordered and received into the Warehouse, the Stock Manager must update the Event Requisition with the correct Part details.

## Removing Parts

New Parts which are added to a Visit, but not yet saved back to the main QFM server, can be removed from the Visit, if not required.

**Note:** Existing Parts cannot be removed (but the Quantity can be set to '0' if not required).

When the requisition details are opened, by selecting a Part from the Visit Summary screen Parts Tab, change the Request/Reserve amount to zero then tap **Submit**.



A message is displayed asking if you wish to remove the Part. Select **Yes - Discard**.
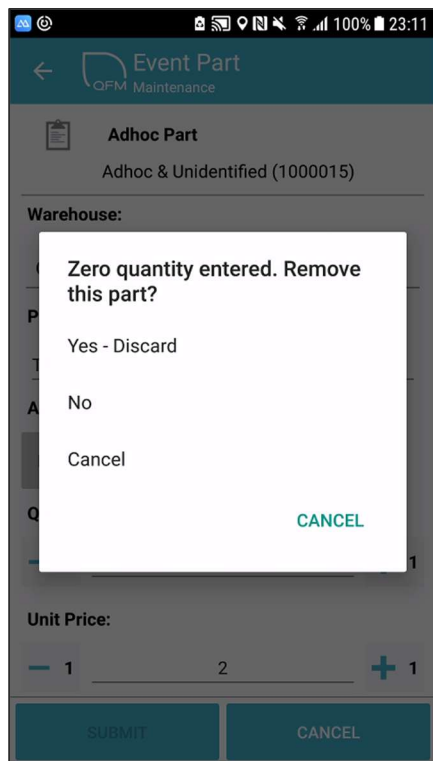
The Part is removed from the Visit Summary screen, Parts tab.
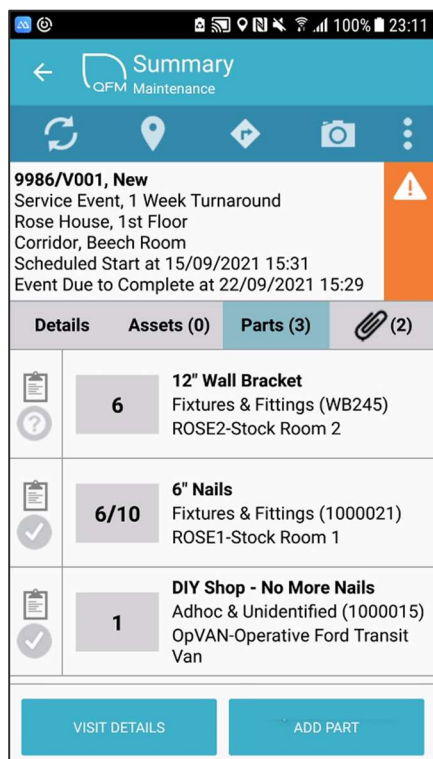
# Refresh Data Feature for Parts and Stock

A new Refresh facility is added to the Data Maintenance section. The **REFRESH PARTS DATA** button removes the existing Parts and Stock data and then re-downloads it, ensuring this data is fully up-to-date.

**Note:** This facility does not refresh Parts Categories, Warehouses or Warehouse Rights. These are covered by REFRESH REFERENCE DATA facility.
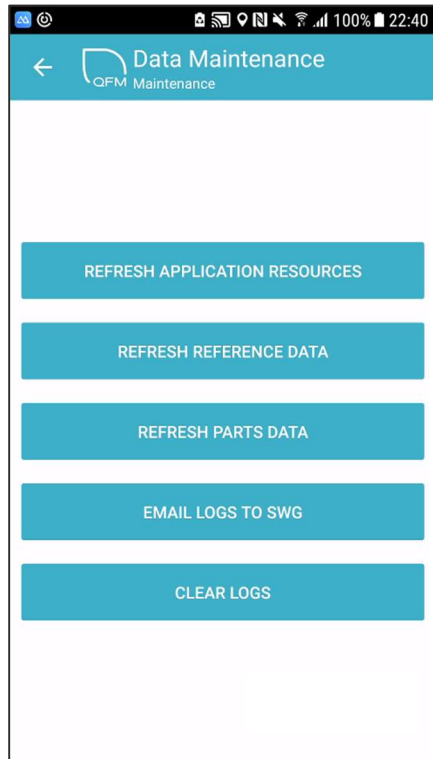


Once **REFRESH PARTS DATA** is selected, a validation message is displayed. Tap **OK** to proceed.
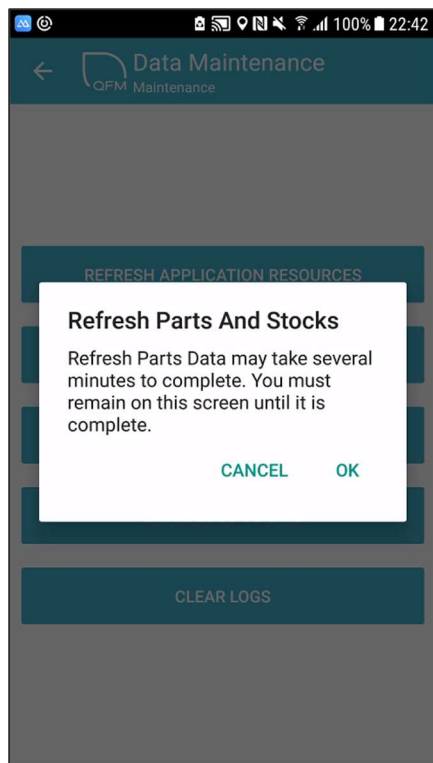
A message confirms when the data refresh is complete.
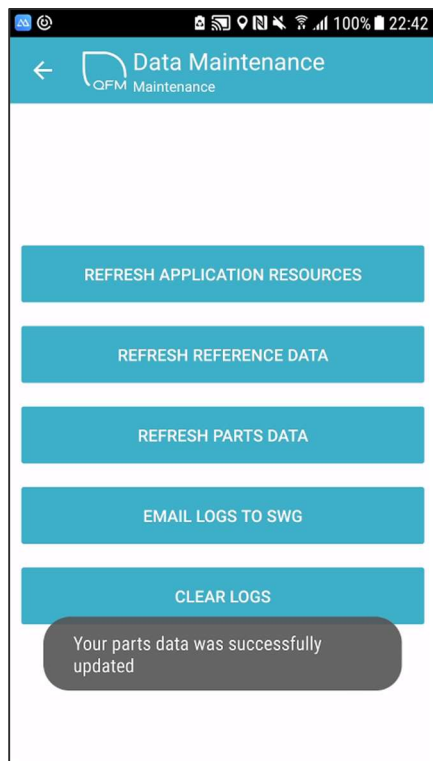
## Visits Summary - Additional Information Displayed

### Overview

The active Visits Summary now displays additional information pertaining to the Service or the Asset.
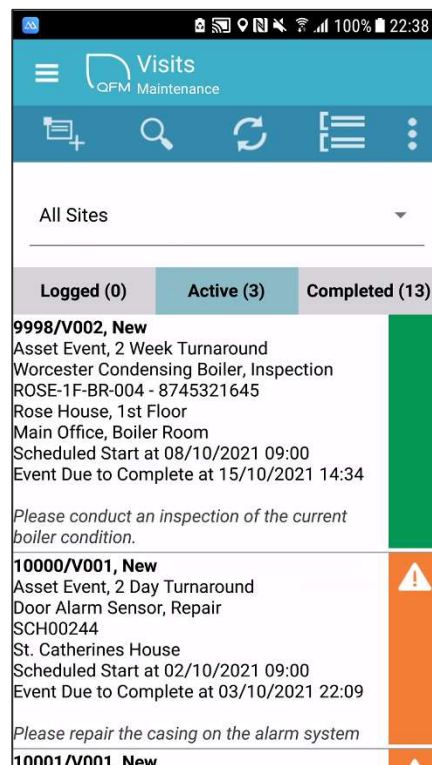


Features and benefits include:

- Extra Service/Asset information in the Visits list makes it easier for an operative to identify the right job.

## Introduction

The active Visits Summary now displays information pertaining to the Service or the Asset, therefore making it easier for an operative to identify the right job.

## Visits Summary
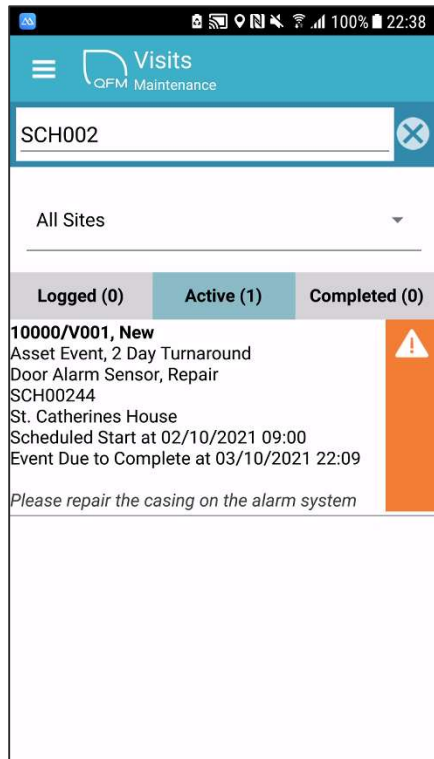
The extra information is introduced in the Visits Summary underneath the 'Event Type' and 'Priority. This includes 'Event Name' and 'Work Type'. If there is a Primary Asset then additional information includes 'Equipment ID' and 'Barcode'.

## Visit Search

The Visit Search is also enhanced to allow searching on any of the new data. When using the search facility, the following message is displayed:
"Search will match the text provided in Geography, Service, Work Type. It will also match any Primary Asset's Model, Equipment Reference or Barcode."

# Minor Enhancements and Changes

The v3.03.01.05 release addresses an issues highlighted in the product. Details are as follows:

| SWG Reference | Description |
|---|---|
| 23077 | When completing a Dynamic Form control with Warning-level "Information", the user is now correctly given the option to Proceed or Cancel. |
| 27140 | Issues regarding some Dynamic Form Control Captions not being correctly displayed, are now resolved. |
| 28019 | The app no longer crashes when a user attempts to scan any random barcode/QR Code on the Connection Setting screen. If a code is scanned which is not a valid connection string, then a message is shown in the host field. Scanning a second but valid code removes the error message and shows the connection settings. |
| 29914 | Visit Summary - minor aesthetic change to tab labels that will be visible to all users, allowing space for new Parts Tab, if and when it is licensed. |
| 32260 | iOS only - the issue which prevented the ability to record audio in the QFM app, is now fixed. |
| 33394 | Visits - when ordering visits the dropdown to select the required ordering now includes two modified labels; the 'Visit Reference Id' is now 'Visit Reference', and 'Event due' is now 'Event Due'. |
| 33681 | The default value for the 'Automatic Synchronisation' setting is modified to 5 minutes (was 10 minutes previously). This default is used when no resources override exists. Information text is update to: *Enable Automatic Synchronisation: Automatically synchronise with the mobile server to download visit, event and part updates. (in minutes, default value 5 mins)* |
| 35223 | Signature images are now correctly displayed on QFM (web) v3.03 Dynamic Form Reports. |

## Known Issues

This section details system issues which are identified in v3.03.01.05. These will be rectified at the earliest opportunity.
Please contact your SWG Account Manager for further details.

| SWG Reference | Description |
|---|---|
| 33661 | When using a filter facility, after selecting 'Search' the screen may experience some fluctuation. |
| 34266 | iOS only - Event Parts - the buttons in the Tax section may not display the full caption. |

# QFM Installation Notices

This release is compatible with QFM Desktop 164 versions only.

Service Works Global (SWG) does not recommend QFM is run with Internet Explorer 6, 7 or 8 browsers. Use of these lower specification browsers may result in users experiencing unstable operation, script, rendering and performance issues. SWG has no current plan to address these issues.

The Workflow Scheduler is a mandatory requirement in order to run this QFM release, as it performs essential background tasks.

SWG is not responsible for user defined reports and should a client upgrade from a non-time zone database to a time zone enabled database it is likely that their user defined reports will be affected as all times and dates will be relative to UTC not local time.

SWG strongly recommends clients review all reports against an upgraded database before relying on the output.

It is the responsibility of the client to ensure any issues are addressed, however Service Works Global may provide consultancy at the standard rates specified in the Customer Order to help the process should this be required by a client.

Please contact your SWG account manager if you need to make use of this service.

QFM includes SAP Crystal Reports runtime environment to enable users to benefit from integrated web based reporting. Clients should refer to the SAP website (www.sap.com) to understand the full strengths and capabilities of the product. SWG will make best endeavours to help support and resolve any issues that arise in this environment but as it is a third party product SWG does not provide any warranties over its abilities or functionality. SWG will aim to implement new patches to this software as they become available and are viewed as stable. It is the client's responsibility to ensure that any bespoke user reports work within the environment provided. Furthermore, extensive concurrent use of reporting within QFM can negatively impact the performance experienced by interactive users. This should be monitored and controlled accordingly.

Please note that clients wishing to upgrade to v3.00.01.37 and above will be required to upgrade Crystal Runtime to 13.0.27. For users with multiple installations on the same machine, all instances will require an upgrade to v3.00.01.37. Please speak to your SWG Account Manager to discuss specific requirements or to raise any concerns. Additionally, clients who wish to upgrade to 64bit will also require all custom Crystal Reports to be updated. SWG will upgrade all standard reports within the core product and provide clear directions to users who have additional custom reports not maintained by SWG.
Furthermore, whilst 32bit does not currently require Crystal Reports to be upgraded, it is recommended that Crystal Reports which use TTX are upgraded, as these are no longer supported by SAP and SWG cannot guarantee future 32bit runtimes will be backward compatible.

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

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

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

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

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

- Priority
- Worktype
- Service
- Service Group

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

Users who use Self Service express event logging should validate that the process is unaffected. If any issues are encountered, users simply need to check the aforementioned settings and replace any values of '0'.

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