

# QFM 4.00.00.130 Release Notes

What's New in QFM v4.00.00.130

March 2022

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# Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition	29/03/2022	MR

# **Release Notices**

# **QFM Compatibility**

The QFM v4.00.00.130 release is compatible with the following QFM software:

- Workflow Scheduler: 4.00.00.06
- Mobile App: 3.03.01.00 (until the release of v4.0 due mid-April)
- Mobile Server 4.00.00.03
- 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 v4.00.00.130 release includes two new features. A summary is provided below, with further details on the following page.

#### Permit To Work

A new Permit To Work module is introduced into QFM.

#### **Operative Warehouse Rights**

Administrators can now access an easy-to-use graphical interface to apply Warehouse Rights to users. Rights can be applied based upon a configuration of Warehouses, Rights and Personnel.

#### Schedule Maintenance Enhancements

The process of adding and removing Assets to/from Maintenance Schedules can now be carried out from within the Schedule itself. Enhancements for Service Schedules are also included in the Site Explorer.

#### Asset Search Enhancement

The Find Assets screen is enhanced to include a 'wildcard' search facility for some fields. The option to search on Asset Type is also added.

#### Resource Scheduler - Operative Filtering

A new Operative filter is added to the Details View and Day summary View. This allows for selection of specific Operatives' calendars.

#### **Event Routing & Approvals**

A new approval structure for Event workflows provides the ability to define a set of Routing Rules which specify elements including an 'assignee' or group of 'assignees' who are able to approve an Event at different stages, limiting access to specific controls, and whether or not Approver comments are required.

#### Stock Part Enhancements

Parts functionality now provides the ability to update prices when Requesting and Allocating a Part.

#### Suppression for SFG20 Maintenance Schedules

This new feature provides an enhancement to QFM SFG20 integration, to take into account suppressed Events from Maintenance Schedules.



# **Permit To Work**

#### **Overview**

A new Permit To Work module is added to QFM. This provides a comprehensive workflow for the provision of Permits; from the initial request through approval and publication to the on-site operative.

Applicant:	Jenny Smith	Permit Type:	Hot Work Permit
	Maintenance	Valid:	15/02/2022 12:00:00 -
			16/02/2022 18:00:00
	02088234353	Related Work:	10081
Site Supervisor:	Anne Hickson		
Site Safety Contact:	Tony Day		
Location:	Rose House 1st Floor Main	Address:	32/34 Kingfisher
	Office		Drive, Wandsworth, SW18 2LP
To complete work on the bo <b>Precautions:</b> Avoid Hot Work where pos designated or prepared are	sible. Prepare a Permit to Work. Clear th a. Ensure those carrying out Hot Work a	he area where Hot Work wi	II be carried out. Carry out Hot Work ir
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To complete work on the boom of the boom of the two	biler and ensure working correctly, need sible. Prepare a Permit to Work. Clear th a. Ensure those carrying out Hot Work a ectricity, Reaching Above Head Height COTY Person	he area where Hot Work wi re trained to do so. Monitor Equipment: Step Ladder, PPE Head, F Action	II be carried out. Carry out Hot Work ir r gas or vapour in the area being used f PPE Hands

### Introduction

A new Permit To Work module is introduced into QFM. A Permit To Work is a document that authorises certain people to carry out specific work within a specified time frame. It sets out the precautions required to complete the work safely, based on a risk assessment.

QFM Permit To Work functionality includes the following features:

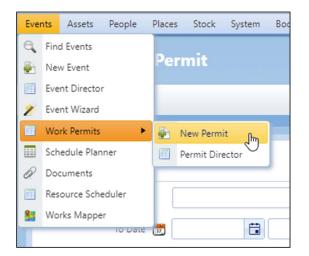
- Provides the ability for internal staff and contractors to initiate a New Permit application, by entering relevant Permit details and file attachments before submitting for approval.
- Permit applications can include specific Hazards and Equipment and can be linked to related Events.
- Where a Permit is linked to one or more Events, the Work Permit document becomes available from the Event record, once the Permit is approved.
- Provides the ability to create a digital Work Permit document, using a QFM Dynamic Form. When the Permit record reaches final approval stage the Dynamic Form is appended as a file attachment.
- A Permit linked to an Event is automatically pushed to the QFM mobile app with the Visit, as a PDF file which may be accessed on site.
- As soon as a Permit is submitted for approval the record becomes read-only in order to prevent changes during the approval process.
- An approval routing workflow is used to assign a Permit to the appropriate next level 'Assigned To' approver there can be up to five levels of approval used (more can be configured, if required).
- An 'Assigned To' approver may Approve, Reject or Cancel a Permit application. Certain Authorisation and Rejection reasons require a user to add a comment/reason.
- A Rejected Permit may be updated and re-submitted.
- A full approval audit is available, showing person, date, action and any comments made.
- Permit records are accessible to those users who are configured to view them.
- Users can access permits via the Permit Director. This shows 'Draft', 'Review', 'Open' and 'All' Permits via different tabs. Users may view their approval workload in the Permit Director 'Review' tab - the default filter shows a user only those Permits they are assigned. Permits may be opened from the Permit Director and users are able to carry out their required action.
- Once a Permit reaches final approval, a hard copy is created and is attached to the Event(s) linked to the Permit. Email notification is sent to all parties on the Permit Address List, together with a link to the Permit.
- Once a Permit reaches final approval status then it still may be 'Cancelled'. If cancelled, the Permit no longer shows on the Event(s) to which it is linked. In this scenario, all parties on the Email Address List are informed of the cancellation.
- Permits have their own report format. The report includes core details, any PDF attachments plus the information collected within a linked Dynamic Form.

The new Permit To Work module is available under a separate QFM software license.



# **New Work Permit**

A new Work Permit screen (New Work Permit) is available from the 'Events > Work Permits' menu.



Events	Assets	People	Places	Stock	System	Bookings	Service Audits	Event Audits	Room Audits	Administration	Logout	Help	1 Mark	
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E P	ermit Direc	tor												<b>\</b> QFN
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	Workfl	ow Status		New			]	Site	e				Contractor	-
	Pe	rmit Type				•	]	Location	n		•		Applicant	-
	F	rom Date				9		Uni	t		•		Email Address 🕢	
		To Date	17			9	l	Partition	n		•		Phone Number	
								Assigned To			•			
	Perm	nit Details	N (											
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														\$
Powered	by QFM Tec	hnology							Licence In	formation				Copyright 2021 Service Works Global
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Adding Permit is two stage process. The basic details must be entered and then saved as a 'draft', so that the system is able to determine which workflow is required based on Permit Class. Permit attributes 'pre-draft' are configurable in the Workflow Maintenance. (SWG Staff only).

Enter the following details to add a draft Permit application.

Key Details Tab

- Workflow Status Read-only. Defaults to New.
- **Permit Type** Select from the drop down list. (See <sup>1</sup> below).
- To Date / From Date Start and End validity dates.
- Site / Location / Unit / Partition Geography where the Permit is required.
   Note: This impacts the selection of linked Events. Site and Contractor are used to restrict the open events which may be linked to the Permit.
- Assigned To
   Person to whom the Permit will be assigned.
   This defaults to the user logged in.
- **Applicant** Person applying for the Permit. This can be free text or chosen from the existing personnel list.
- Contractor
   Contractor to whom the Applicant belongs.
   Note: This impacts the selection of linked Events.
- Email Address Applicant's Email Address.
   Note: Multiple email addresses can be added. Separate with a semi-colon ';'.
- Phone Number
   Applicant's Phone Number.
- **Permit Details** Information regarding the Permit application.
- **Remarks** Remarks are held on the Work Permit screen only.

<sup>1</sup> A default approval workflow is available, named 'Default'. This is linked to a workflow named 'Work Permit (Simple 1 x Auth)'. This has a 'Submit for Approval' option and a single 'Approval' step. The Permit may only be approved by the 'Assignee'.

Select **Create** to create the Permit application.

QFM now determines the approval workflow for the Permit Type in use. Permit attributes are configurable in the Workflow Maintenance. (SWG Staff only).

# **Review and Submission for Approval**

One a Permit application is created it is assigned a Permit ID and a Workflow Status of 'Draft'. The record is displayed for review and submission for Approval. Additional information can also be added at this stage.

Most fields can be updated but those shaded blue cannot at this stage.

**Note:** The options buttons available are dependent on the user's permissions and the workflow configuration.

Events Ass	sets People	Place	es Stock Sy	stem	Booking	Service Audit	s Event Audits R	oom Audits Administra	tion Logout	Help 👤 Mark			
<1 w	/ork Perr	nit	Details									Γ	
Add	Permit Direct	tor (	Permit									•	2FM
6	🖂 📔 Key De	tails	Additiona		Attachr	nents							
	Permit ID		36				Site	Capital House	•	Contractor	Ash Tech Services	•	
v	Workflow Status		Draft				Location	Basement	•	Applicant	Anita Smith	•	
	Permit Type		Chemicals Perm	it		•	Unit	Plant Room	•	Email Address 🕜	test@swg.com		
	From Date		28/02/2022		00:00	)	Partition			Phone Number	020 8877 4080		
	To Date	1	14/03/2022	2	23:00	$\overline{\mathbf{O}}$	Assigned To	Mark Jacobs		Contractor Safety Officer			
										Contractor Site Supervisor		-	
	Permit Details	<b>N</b>	Permit to work	with rest	ricted to:	ic chemicals.							
													6
	Remarks	<u>≥</u>											
Powered by QF	FM Technology					W	ork Permit Details	Submit for Approval	Select V	Go	Copyrig	ht 2021 <u>Service Work</u>	s Global (1991)

Additional fields made available are detailed as follows:

#### Key Details Tab

- Contractor Safety Officer Select from the drop down list.
- Contractor Site Supervisor Select from the drop down list.
- **Notes:** Whilst it is possible to assign to any personnel, by default these lists show a sub-set of people who have been assigned as this type. These lists can be populated via Personnel Types on the Personnel Details screen.

Events	Assets	People	Places	Stock	System	Bookings	Service Audits	Event Audits	Room Audits	Administration	Logout	Help	L Mark			
	Wor	k Peri	nit D	etails												١
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	, ae)			Addit	ional	Attachme	ints									
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	Rela	ted Events	(7	ind Event)	ł.	-	+	Related Hazard	ds (Find F	Hazard)	•	-	Related Equipments	(Find Equipment)		
Powered	d by QFM Te	chnology							Licence I	Information				Co	pyright 2021 Service Works Global	((m))
								Work Pern	nit Details Su	bmit for Approv	al Select	t ·	Go			

#### Additional Tab

#### • Precautions

Details of any precautions which need to be taken on site.

• Related Events

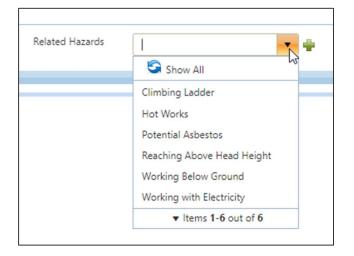
Add any Events that relate to the Permit requirement, by selecting from the drop down list or adding a new Event ID in the open field then selecting the  $\frac{1}{2}$  icon.

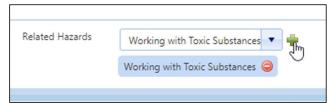
**Note:** These are restricted by open Events, Site and the Contractor listed on the Permit.

- **Related Hazards** Add any Hazards that relate to the Permit requirement, by selecting from the drop down list or adding a new Hazard in the open field then selecting the **P** icon, (subject to user permissions).
- Related Equipments

Add any items of Equipment which relate to the Permit requirement, by selecting from the drop down list or adding a new item of Equipment in the open field then selecting the  $\frac{1}{2}$  icon, (subject to user permissions).

An example is shown below.





#### Attachments Tab

File Attachments can be added via the Add link at the top left corner of the screen. They are then available to access in the Attachments tab.

**Note:** PDF and image files only. Other file types are not currently supported.



Events	Assets	People	Places	Stock	System	Bookings	Service Audits	Event Audits
	Wor	k Peri	nit D	etails				
Q A	<u>dd (1)</u>	Permit Di	rector	) <u>Permit</u>				
	68)	Key Deta	ls	Addition	al	Attachme	nts	
Safe Perr		ions (Work						

A new Document Type of 'Permit Attachment' can be used. Documents in PDF format with this Document Type will be merged into the Work Permit document upon final approval.

The generated Permit is linked to any Related Events and will contain any merged documents.

Work Permit Documents	÷	C	-		×
Gewin Work Permit Documents					
Attachment Details					
Display Name				_	
Document Type				_	
(Not specified)			•	-	
(Not specified)					
Regression Test					
Signature					
Picture					
Permit Attachment					Л
13					

#### **Creating a Digital Permit Document**

A Permit To Work document can be appended to the QFM Permit record as a file attachment, however QFM also provides the ability to create a digital Permit To Work document, using a QFM Dynamic Form. This form may be a 'Digital Work Permit' or a collection of checks about the Permit itself, e.g. "Are all hazards adequately listed?", "Are all required supporting documents included?", etc.

This is available via the Work Permit Details button. A Dynamic Form must be mapped to the Permit Type for this button to be made available. Once the Permit record is submitted for approval the Dynamic Form becomes read-only. When the Permit record reaches Final Approval stage the Dynamic Form is appended as a file attachment. Dynamic Form Data will also be included on the final Permit Report.

litional	Attachments										
	Permit Check shee	t					+	C	-	×	
	🕫 Permit C	heck	she	et							
s Permi	Are all Hazar identified an Has the Applicat fully briefed a Terms and Condii engagement ar they comple required indu If either of ab 'No' then Permit not be issued there are mit reasons listed	d listed nt been s to the tions of nd have ted any juctions. ove are should I unless igating	÷,				<ul> <li>▼</li> </ul>				Contra
		Subm	it		Close	Reset					
								_			

An example of a Dynamic Form used to create a Permit Check Sheet is shown below.

#### Automated Routing to 'Approvers'

Once the Permit application is complete it can be Submitted for Approval

At this point the core details plus attachments are made read-only. The Remarks remain editable (append only mode) so that different parties may add notes against the permit.

Submitting the permit for approval will change the status to the configured approval review status used by your organisation. This may be a single or multiple levels of approval (up to five as standard, however more can be configured). The default Permit Type workflow assigns to whoever is selected in the 'Assigned to' field. However, it is possible to utilise the routing matrix to achieve a multi-level approval and achieve auto routing when it is not known who to select as the 'Assigned to'.

The system may be configured to reference the Routing Matrix in order to determine who the Permit should be assigned to as it changes through its Workflow states. As the Permit moves through its Approval steps at each point the system may derive the next 'Assignee' from the new Routing Matrix. The Routing matrix takes contextual information such as Site, Permit Type and Status in order to determine who the Permit should be assigned to in the current Status. Subject to Workflow configuration, the system

will automatically route to the Primary assignee given by the routing matrix but may also allow users to select another 'Assignee' from a list of allowed assignees.

QFM provides the ability to create automated email notifications for Approvers, advising that they have a Permit to review. These can be set up and configured using the Scheduled Jobs facility.

### **Cancelling a Permit Request**

Cancelling a Permit removes the generated Permit document (and associated links) and a cancellation notice is sent to the email address(es) specified.

To Cancel a Permit select **Cancel** in the field marked 'Select' then **Go** at the bottom of the screen. Typically, the user would be requested to add a reason for cancelling, at this point.

Wo	rk Permit Details	Submit for Approv	alSelect	▼ Go
	Select			
	Cancel			
oval	Select Y	Go		

### **Reviewing a Permit Approval Request**

Users who are recorded as the 'Assigned To' party on a Permit application are able to Approve or Reject a Permit.

#### Approving a Permit

Users can access permits via the Permit Director. This shows 'Draft' (pre-approval), 'Review' (due for a review decision), 'Open' (currently Approved and within date range) and 'All' Permits via different tabs.

A user's approval workload may be viewed in the 'Review' tab. The default filter shows a user only those Permits which they are assigned ('Assigned To Me').

Once a Permit record has been selected and is ready for approval, select the **Final Approval** button.

**Note:** The 'Approval' button changes, e.g. 'Approval', 'First Approval', 'Second Approval' etc. up to 'Final Approval'.

Final Approval	Reject	Work Permit Details	Select	✓ Go

On final approval, a Permit Worksheet is generated as a PDF and is available from the Event(s) linked to the Permit. An email notification is sent to all parties on the Email address list on the Permit record, with a link to the consolidated PDF Permit details.

Dependent on the workflow in use, a Permit will append a Visit pushed to a mobile device (using the QFM mobile app), enabling operative access in the field.

#### **Rejecting a Permit**

Upon review by an Approver, a Permit application may be rejected.

The Permit application will be automatically assigned back to the person who last submitted the Permit for Approval. Subject to workflow configuration this may be automatically re-assigned as the status changes, based on routing rules.

It is possible to configure a custom notification using Scheduled Jobs in the Report Centre.

To Reject a Permit application select the **Reject** button.

Final Approval	Reject	Work Permit Details	Select	▼ Go
			Concer	

Relevant comments are required to be added, as shown in the example below.

Kejo	ect comm	ents		
	Ok		Cancel	

The Permit 'Workflow Status' now shows as 'Rejected'.

### **Permit Director**

A new Permit Director screen is available from the 'Events > Work Permits' menu. This includes an 'Assigned to Me' filter which is used to limit the Permits to those which require the user's attention.

**Note:** The default data grid is the same as the Work Permit List Report grid.

Eve	nts	Assets	People	Place	es Stock	System	Booki
ą	Find	d Events		to	)r		
-	Nev	v Event					
	Eve	nt Directo	r		A.II.		
2	Eve	nt Wizard		pen	All		
	Wo	rk Permits		•	New Perm	it	Me
	Sch	edule Pla	nner		Permit Dir	ector Im	
a	Doc	cuments		drop	it here to g		hat colum
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	Pe	rmit ID	Status		Permit Ty	pe	Site

(Select View) ag a column header and											
• 1 2 3 4		r that column									
		age size: 20 🔻								117 it	ems in 6 page
ermit ID Status	Permit Type	Site	Applicant	Authorised From	Contractor	Details	Remarks	Start Date (Site Time)	End Date (Site Time)	Precautions	Cancelle Time)
Submitte	d Type2	SWG Hospital - Nic	Nicky_Test	Nicky_Test	Contractor 1000	Test		14/12/2021 19:22:00	29/12/2021 19:22:00		Ì
Submitte	d Type1	A233	Nicky_Test	Nicky_Test	Contractor 1000	14/12/2021, 14:17 GMT Ni	>> Nicky_TestNicky_Test 1	06/01/2022 00:00:00	10/01/2022 00:00:00		
! Submitte	d Type1	S2020_C0B29	John Smith		Contractor 000999	test	test		15/12/2021 13:39:00		23/12/. 11:40:0
Q Approve (1st)	d Type1	A 1	Ade Giwa	Dan Rovan	Contractor 1003	test123	testing is done by vibhor j	16/12/2021 15:10:00	24/12/2021 15:10:00	Precautions for testing	24/12/. 11:40:0
2 Draft	Type4	A 1	Ade Giwa	Chris McClean	Contractor 1	test is on >> tester5_HDt	detaisl by sham	11/01/2022 16:19:00	16/12/2021 19:11:00		
<u>3</u> Draft	Type1	A 1	Nicky_Test			Test					
<u>4</u> Submitte	d 5 Level Approval	A11 - Manchester House MC HALL	a personnel	CS_singh		Test		16/12/2021 19:21:00	30/12/2021 19:21:00		
5 Draft	Type1	A 1	Ade Giwa	Ade Giwa		2eqe2		16/12/2021 20:59:00	16/12/2021 20:59:00		
6 Draft	Type2	S2028_BCA8F	Ade Giwa		Contractor 1	sdcsD	SDVDV		16/12/2021 21:25:00		
2 Dian	5 Level	A 1	Ade Giwa			W >> tester5_HDtester5		06/01/2022	08/01/2022	Styling and formatting in t	

The Permit Director is used to find and access existing Permits. There are four tabs, described below:

#### • Draft

Includes all Draft Permits not yet submitted for Approval.

Review

Includes all Permits submitted for Approval but not yet reached their final approval stage. This is the main Tab used by persons performing Review and Approvals. There is an additional filter 'Assigned to Me' which is used to limit the Permits to those which require the user's attention (i.e. they are the 'Assigned To' party).

• Open

This Tab shows all currently Approved Permits. These are effectively Permits which are currently valid on the designated Sites.

• All

This Tab provides a method of viewing all current and historic permits.

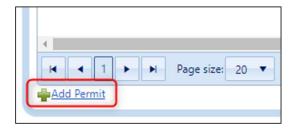
<	Per	mit Dir	ector	
	Draft	Review	Open	All
	I S 7	(Select Vie	w)	<ul> <li>Assigned To Me</li> </ul>

A pop-up menu is provided in the 'Permit ID' column.

K Pe	rmit Directo	or	
Draft	Review Oper	n All	
	(Select View)	<ul> <li>Assig</li> </ul>	ined To Me
Drag a d	olumn header and dro	p it here to group	by that coli
K	4 5 6 7	8 9 10 1	1 12 1
Permit	ID Status	Permit Type	Site
406 1	Draft Links	Simple	Can
407	Go To Permit Report		A12
<u>411</u>	Attachments	ient	A12
<u>412</u>	Safety Instructio	ons (URL) Approvai	Ado
<u>413</u>	Draft	5 Level Approval	Ado

This enables you to view the Permit details (Go To Permit...), view/download the Permit form (Report), Add Attachments and open existing Attachments.

You can also add a New Permit without leaving Permit Director, via the link in the bottom left corner of the screen. (Refer to the *New Work Permit* section).



# **Work Permit Documents & Notifications**

#### **Documents**

On final approval of a Work Permit, a Work Permit document is generated as a PDF and is added to the Permit record Attachments tab (as shown in the example below).

Events	Assets	People	Places	Stock	System	Bookings	Service Audits	Event
	Wor	k Perr	nit D	etails				
🛉 Add	l Permit	View !	( <u>2)</u> 🗐 E	Permit Dire	ector 😫	<u>Permit</u>		
	68)	Key Detai	ils	Addition	nal	Attachme	nts	
Perr	nit Atta	chment						
Safe Perr		tions (Work						
Wo	rk Permi	t						
Wor Perr	) 'k Permit_S nit)	53 (Work						
Powered	by QFM Te	chnology						

The Work Permit record also includes any file attachments which have been added by users (provided they are the correct type and are set as a 'Permit Attachment' document type).

If the Work Permit record includes Related Events, then these Event records will include the Work Permit document (PDF), in the Attachments tab. Any PDF attachments added to the Work Permit record and marked as 'Permit Attachment' will be merged into the Work Permit document added to the Event/s.

An example of a Work Permit document with a merged file attachment and embedded details from a Dynamic Form is shown below.

	Work Pern	nit: 42 - Apj	proved
Applicant:	Jenny Smith	Permit Type:	Hot Work Permit
	Maintenance	Valid:	15/02/2022 12:00:00 - 16/02/2022 18:00:00
	02088234353	Related Work:	10081
Site Supervisor:	Anne Hickson		
Site Safety Contact:	Tony Day		
Location:	Rose House 1st Floor Main Office	Address:	32/34 Kingfisher Drive,Wandsworth,SW18 2LP
Permit Details: To complete work on the bo Precautions:	viler and ensure working correctly, nee	d to thaw the pipes and wear	full PPE.
Avoid Hot Work where pos			I be carried out. Carry out Hot Work in gas or vapour in the area being used fo
Hazards:		Equipment:	
Hot Works Working with El	ectricity, Reaching Above Head Height	Step Ladder, PPE Head, P	PE Hands

Date	Person	Action	Comment
15/02/2022 10:57:27	Alison Carter	Submit for Approval	
15/02/2022 10:58:21	Jennifer Jones	1st Approval	
15/02/2022 10:59:49	Sophie Pond	Final Approval	All clear

Evaluation Warning : The document was created with Spire POP for NEOp 1 of 3 pages Report Generated by Sophie at 15/02/2022 10:59:49

PermitiD: 42	Last Updated: Sophre		Permit Status: Approved	
Question		Response		
Required PPE (if not already licted)	r.	Fully listed		
Chemioals to be used (if any):		Delcer		
Are all Hazards fully identified and	licted	Ys		
Has the Applicant been fully briefer Conditions of engagement and hav required inductions.		Yes		-
if either of above are 'No' then Perr unless there are mitigating reasons		All clear		1
uniece there are integrating reacond				
anete nere are mulgaung reason				
anecc unit are inducating reacon				

HOT WOR	K	PFRMIT III	
	_	in the second second	
Avoid hot work or seek an alte	OP!	a/safer method, it possible.	
This Hot Work Permit is required for any temperary open This includes, but is not limited to: brazing, cutting,	etion inve	siving open flames or producing heat and/or spa	
	art 1	Contraction of the second s	
A. Specify the precautions to take.	1 7 34	Required Precautions Checklist The free pores is in operation and switched to automatic. Control values to water supply for sprenter system are open	
B. Fill out and keep Part 5 during the hot work process.     Issue Part 2 to the person doing the job.	rAca.	near streams and extrepreduce are in perviculaperater.	
<ol> <li>Keep Part 2 on file for future reference, including signed continuation that this one-hour fire watch and three-hour incentoring have been completed.</li> </ol>		tiet work opstymert is in good working candillan Regelerenets widen 25 R. (11 m) of het wack	
E. Final signoff is on Part 2.	1004	spränste liquid, dung liet and ody deposits removed. Explositie atmosphere in wise atministed.	
HOT WORK BY	080	Roors savest clean Combarblue Boors wet slows, covered with damp sand or fee resultive sheets.	
Enorogen Dere 1/24 La Plumbing	100	Remove other conductivitie material where peoples Deservers, protect with FM Approved welding peop, Market	
1/2/18	1.00	and curtains, fire resolutive terpeutine or metal shields. All well and floor openings covered.	
Vary 50. Lee Com	-0.0	TM Approval working pods, Marikets and contains installed and around work.	
RUNE (0 400 Cives / Costadios RUNE (04001) AND SERVICE OF PERSON PERSONNEE NOT WHEN	- 00	Protect or shut down ducts and conveyors that might carry to distant combestible material.	
EASE (FRAT) AND SERVICINE OF FORMER FEMALINE FOR WALCH BAARE (FRAT) AND SERVICINE OF FORMER FEMALINE FOR WALCH	-ox	Hat work an wells, onlongs or reefs Construction is non-contractible and without constantible ze	
Travis	- Q	or maximizer. Combustible material an other aide of welfs, cottings or ranks.	
Everyly the abure Incation has been accessed, the precautions elected on the Required Procession Checklist have been taken to prevent fire, and permission is automized for this work.		Plut week an anchosed ogstjoneed Entimest resignment cleaned of all combustible material. Destamers purged of spratible liquid/upper	
THE DESCRIPTION AND SECURITIES OF THE SAVETY SUPERVISIAN DESCRIPTIONS AND SECURITIES	20	Pressure of verses, proof and apaptions received from a toolated and verses.	
Ed Wase marian	- do	First workthefest work serve resultancing First workth will be provided during and far case (1) have a far	
THE CHARTER AR DA CHICAGE CA DA CHARTER CA DA CHARTER CARDINE		including any break activity. Fire worth is warphed with substree extrepolators, and who	
		a pharmed presid have	
Note: Emergency notification on back of form. Use as appropriate for your facility.	20	Fire workth is transmit in use of experiment and in sounding of fire workth may be required in edgewing aroun, edgewing and Monitor has work area for up to an additional three (3) has	
Use as appropriate for your facting. Use as appropriate for your facting. To other odditional hit work generation wher the Dokel waterness order online 24 hours a Gas seven days a wrest, at high-balanteeling com	00	arts (1) hour fire wants. Other preclastines taken:	
OURSE SA INVESTIGATION	1.171.0		
ion Warning : The document was created with Spire.Pt			
Report	Genera	iled by Sophie at 15/02/2022 10:59:49	

#### Notifications

On final approval of a Work Permit, an email notification is sent to all parties on the Email address list on the Permit record, with a link to the consolidated PDF Permit details.

# **Permit Reporting**

A new Work Permit List Report is available from the Report Centre (Report Centre > All Reports > Lists > Work Permits).

Available Reports	
	Ī
- 🧰 Calendars	
- 🕗 Scheduled Jobs	
🕶 🧱 Lists	
<ul> <li>Assets</li> </ul>	
► Property	
► Bookings	
► Common	
🕨 System	
► People	
<ul> <li>Monitored Values</li> </ul>	
<ul> <li>Event</li> </ul>	
<ul> <li>Incidents</li> </ul>	
<ul> <li>Visits</li> </ul>	
Parts	
<ul> <li>Soft Service Audits</li> </ul>	
<ul> <li>Event Audits</li> </ul>	
<ul> <li>Dynamic Forms</li> </ul>	
► Places	
Work Permits	
🖿 🎡 System Reports 🗸 🗸	
-	1

Note: The default data grid is the same as the Permit Director grid.

	(Select View)	•							
-	_	p it here to group by 6 7 8 9	10 🕨 🕨 Page	size: 20 🔻					441 items in 23 pages
Permit ID	Status	Permit Type	Site	Applicant	Authorised From	Contractor	Details	Remarks	Start Date (Site Time
:	Submitted	Type2	SWG Hospital - Nic	Nicky_Test	Nicky_Test	Contractor 1000	Test		14/12/2021 19:22:00
1	Submitted	Type1	A233	Nicky_Test	Nicky_Test	Contractor 1000	14/12/2021, 14:17 GMT Ni	>> Nicky_TestNicky_Test 1	06/01/2022 00:00:00
2	Submitted	Type1	S2020_C0B29	John Smith		Contractor 000999	test	test	
٥	Approved (1st)	Type1	A 1	Ade Giwa	Dan Rovan	Contractor 1003	test123	testing is done by vibhor j	16/12/2021 15:10:00
12	Submitted	Type4	A 1	Ade Giwa	Chris McClean	Contractor 1	test is on >> tester5_HDt	detaisl by shamtester5_H	11/01/2022 16:19:00
13	Draft	Type1	A 1	Nicky_Test			Test		
		5 Level	A11 - Manchester						16/12/2021

This shows all Work Permit records and allows you to apply the standard List Report configurations.

# **Permit Workflow**

Work Permit Workflows are highly configurable and may be used to limit the fields shown, the buttons available, the status of controls (visible, read-only, mandatory), how many stages of approval are required, if a comment is required when transitioning from one state to another, who may access buttons, etc. Because of the inherent complexity the configuration of workflows must be carried out by SWG to meet client requirements.

The Work Permit system is shipped with a simple one-stage approval workflow. There is very little control other than the person Approving must be the person that the Permit is assigned to. When submitted for approval, no details may be edited other than Remarks may be added by the reviewer. The Approver may 'Approve' or 'Reject' the permit once submitted. If Rejected, the Permit is re-assigned to the person who submitted the Permit and they may make changes.

There is no dynamic form referenced by default.

# **Dynamic Forms**

A new Entity Type of 'Work Permit' is added to the list of Entities available to select in the Dynamic Forms screen 'Based On' field. The Dynamic Form is mapped to a Permit Type via an import. This supports the new Work Permit module.

Carl Dynamic Forms			
		(Filter By Based On) <ul> <li>(Filter By Form Type)</li> </ul>	
<b>(</b>			
Panel Properties			
Details			
Form Type (Standa	rd)	Panel Caption	
Report Template		Based On Work Permit	
Data Source Type [Dynam	ic]	Access Results	
Is Template		Form Editors	
		Panel Type Mobile, Web 🔻	
Panel Controls Validation Rules	Conditions Import		

### Administration

#### **General Settings**

A new section for Permits to Work controls is added to General Settings, as follows.

#### Input/View

- Allowed to Access Work Permits When set to On allows users to access Work Permit screens.
- Allowed to Amend Work Permits When set to **On** allows users to update Work Permit records.
- Allowed to free type and add new Work Permit Hazards When set to **On** allows users to add Related Hazards to Work Permit records.
- Allowed to free type and add new Work Permit Equipment
   When set to On allows users to add Related Equipment to Work Permit records.

General Settings							
Rarameter Filter							
Select User Class to	o maintain settings for Administrator						
G 8 0							
> Express Events							
> General Event Logging							
♥ Permits to Work							
In most O.C							
Input/View							
Allowed to Access Work Permits	On 🗸						
	Сору						
Allowed to Amend	On 🔻						
Work Permits							
Allowed to free type	On <b>v</b>						
and add new Work Permit Hazards							
Allowed to free type and add new Work	On 🔻						
Permit Equipment	Copy						
> Parts							
> Batch Actions							
> Attachments							

#### **Personnel Types**

Two new Personnel Types relating to Work Permits are added. These can be selected from the Personnel Details screen Types tab.

- Site Safety Officer
- Site Supervisor Contact

Events	As	sets	People	Places	Stock	System	Bookings	Service Audit	Event Audit	ts Room Audit	Administration	Logout	Help	L Mark	
		ers onnel)	onnel		ails	nel								ر ۵	FM
	3 6		Persor	nnel Deta	ils										
1	32		Main	Det	tails	Remark	s Me	ssages	Types	Address	Workgroups	]			
	Ever	t PO A	uthoriser				Car Park Bo	oker		Event Da	te/Time Change Aut	horiser			
	Stoc	k PO A	uthoriser				Visitor Book	er		Event Du	e Date / Priority Aut	horiser			
	Has	Secret	ary				Asbestos Su	rvey Approver		Timeshee	et - Authorised By				
	First	Aider					Property En	quirer		Timeshee	et Manager				
	Fire	Warde	n				] Default Roo	m Booking Cont	irmation Recipi	ent Accomm	odation Booker				
	Driv	er Boo	ker				] Tenant			Site Safet	ty Officer				
	Roo	m Boo	ker				] Landlord			Site Supe	ervisor Contact				
										-					
								Save	Canc	el					
Powere	d by C	FM Tec	hnology					Licen	ce Information			Copyri	ght 2021	Service Works G	

If defined, then the system uses these to restrict the corresponding parties available on the Permit screen. You may still access the list of Personnel in 'un-restricted' mode in order to select people who have not been tagged as above.

#### Import / Export

New utilities for Importing and Exporting Work Permit data are now available to administrators.

Import/Export	
ease ensure that you have read and understand the Release No Work Permit - Import Rule Matrix	tes around this area be
Surveys - Maintain Survey Periods	
Surveys - Maintain Survey Thresholds	
Surveys - Upload Templates	
Surveys (Sodexo) - Maintain Audit Groups	
Work Permit - Import Rule Matrix	
Work Permit - Import Work Permit Types	
Work Permit - Maintain Work Permit Equipment	
Work Permit - Maintain Work Permit Hazards	
WF Code (WFTag)	*

#### Work Permit - Import Rule Matrix

This matrix is used for setting Work Permit and Event 'Routing Rules' and 'Action Permissions'. These govern:

• **Routing Rules** Who the Assignee should be for each workflow status.

#### • Action Permissions

Which buttons (actions) are displayed at each status and who should have access.

Work Permit - I	Import Rule Ma	strix		<ul> <li>Export</li> </ul>										
Comma		Export												
	iunits.													
RuleID RuleType						-								
Precedence						<b>*</b>				Do				
WorkPermitType						+								
WF Code (WFTag			*			*								
WF Status (WFSt	tatusTag)		**			**								
WFEventTag Region			<b>_</b>			**								
Results														
														C Refresh
Results	RuleType	Precedence	WorkPermitType	WFCode	WF Status	WFEventTag	Region	Site	Location	Unit	Partition	IncludeSubLocations	People	C Refresh ClientC
Results RuleID F	RuleType Routing	Precedence 501	WorkPermitType Type5	WFCode PTW_5_AUTH_1	WF Status APPROVED_2	WFEventTag	Region	Site \$2030_F7DF5	Location L 2828	Unit U 10423	Partition P 27430	IncludeSubLocations TRUE		
RuleID F 12 F	8.5					WFEventTag APPROVE_4	Region						People	
RuleID F 12 F 13 A	Routing	501	Type5	PTW_5_AUTH_1	APPROVED_2		Region	\$2030_F7DF5	L 2828	U 10423	P 27430	TRUE	People #sham	
RuleID         F           12         F           13         A           14         F	Routing	501 502	Type5	PTW_5_AUTH_1 PTW_5_AUTH_1	APPROVED_2 APPROVED_3		Region	\$2030_F7DF5 \$2030_F7DF5	L 2828 L 2828	U 10423 U 10423	P 27430 P 27430	TRUE	People ≢sham ©Assignedto	
RuleID         F           12         F           13         A           14         F           15         A	Routing Action Routing	501 502 503	Туре5 Туре5 Туреб	PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1	APPROVED_2 APPROVED_3 APPROVED_2	APPROVE_4	Region	\$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5	L 2828 L 2828 L 2828	U 10423 U 10423 U 10423	P 27430 P 27430 P 27430 P 27430	TRUE TRUE TRUE	People #sham @Assignedto #sham	
RuleID         F           12         F           13         J           14         F           15         J           16         F	Routing Action Routing Action	501 502 503 503	Туре5 Туре5 Туреб Туреб	PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1	APPROVED_2 APPROVED_3 APPROVED_2 APPROVED_3	APPROVE_4	Region	\$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5	L 2828 L 2828 L 2828 L 2828 L 2828	U 10423 U 10423 U 10423 U 10423 U 10423	P 27430 P 27430 P 27430 P 27430 P 27430	TRUE TRUE TRUE TRUE	People #sham @Assignedto #sham @RoutingMatrixtester1_HD	
RuteID         F           12         F           13         A           14         F           15         A           16         F	Routing Action Routing Action Routing	501 502 503 503 503	Туре5 Туре5 Туре6 Туре6 Туре6	PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1	APPROVED_2 APPROVED_3 APPROVED_2 APPROVED_3 APPROVED_3	APPROVE_4	Region	\$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5	L 2828 L 2828 L 2828 L 2828 L 2828 L 2828	U 10423 U 10423 U 10423 U 10423 U 10423 U 10423	P 27430 P 27430 P 27430 P 27430 P 27430 P 27430	TRUE TRUE TRUE TRUE TRUE	People #sham ©Assignedto #sham @RoutingMatrictester1_HD #sham	
RuleID         F           12         F           13         J           14         F           15         J           16         F           17         F           18         F	Routing Action Routing Action Routing Routing	501 502 503 503 503 503 504	Туре5 Туре5 Туре6 Туре6 Туре6 Туре6 Туре6	PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1 PTW_5_AUTH_1	APPROVED_2 APPROVED_3 APPROVED_3 APPROVED_3 APPROVED_3 APPROVED_3	APPROVE_4	Region	\$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5 \$2030_F7DF5	L 2828 L 2828 L 2828 L 2828 L 2828 L 2828	U 10423 U 10423 U 10423 U 10423 U 10423 U 10423	P 27430 P 27430 P 27430 P 27430 P 27430 P 27430	TRUE TRUE TRUE TRUE TRUE TRUE	People #sham @Assignedto #sham @RoutingMatrixtester1_HD #sham #vibhor	

#### Work Permit - Import Work Permit Types

This table is used to create Work Permit Types and specify the associated Dynamic Forms and Workflows.

Permit Types may be associated with specific Workflows and optional Dynamic Forms which may be used to collect additional data. The Workflow and optional Dynamic Form associated with the Permit Type needs to be of **'Work Permit' Entity Type** (otherwise the system will not function as expected).

The selected Workflow may be used to control the lifecycle of the Permit including multiple Approvals, Routing to different Assignees, Restricting the available Assignees, Limiting access to certain buttons, etc.

There are a small number of pre-configured Workflows that will be shipped which will have multiple levels of approvals. These will require Rules to be added before they will perform as expected. This is because many of the buttons and flows require Routing Rules to be implemented in order to deduce the assignees for particular states. Without these rules the buttons will not be available as expected.

Events Assets People P	laces Stock System Bookings Service Audits	Event Audits Room Audits Admi	nistration Logout Help 👤 Mark		
M Import/Exp	ort				
	read and understand the Release Notes around this		*		
Work Permit - Import Wor	k Permit Types	Export	·		
Comma	Export				
Results					
Results					
				🖒 Refresh	
ID	Caption		Form	Workflow	
1	Adhoc Permit		PermitChecksheet	Work Permit (Simple)	
13	Chemicals Permit			Work Permit (2 x Auth)	
11	Cold Work Permit			Work Permit (Simple)	
12	Confined Spaces Permit		ConfinedSpacesPermit	Work Permit (2 x Auth)	
15	Excavation Permit			Work Permit (2 x Auth)	
14	Height Permit			Work Permit (2 x Auth)	
2	Hot Work Permit		HotWorkPermit	Work Permit (2 x Auth)	
				C Refresh	
				O Nerresh	
Powered by QFM Technology			Licence Information	Соругі	ght 2021 Service Works Global (1)

#### Work Permit - Maintain Work Permit Equipment

This table is used to create types of Equipment to be associated with Work Permits.

lmport/l	Export			
Work Permit - Maint Comma	ou have read and understand the Release Notes around this area before using this feature. ntain Work Permit Equipment Export  Export	•		
esults			C Refresh	
ID	Caption	Display Order	Active	
3	Ladder (30 ft)	0	(1)	
4	PPE - Body	0		
12	PPE - Ears	0		
1	PPE - Face/Eyes/Nose	0		
3	PPE - Feet	0		
0	PPE - Hands	0		
	PPE - Head	0		
		0		63
19	PPE Body			
19 18	PPE Body DDE Ever	n		

#### Work Permit - Maintain Work Permit Hazards

This table is used to create Hazard types to be associated with Work Permits.

Import/	Export				
Work Permit - Mai	ou have read and understand the Release Notes around this area before using this fea nain Work Permit Hazards	ture.			
Results				🖒 Refresh	
ID	Caption		Display Order	Active	N
22	Chemicals		0	5	C₂
1	Climbing Ladder		0		
15	Hot Works		0		
6	Potential Asbestos		0		
2	Reaching Above Head Height		0		
4	Working Below Ground		0		
5	Working with Electricity		0		
				C Refresh	
Powered by QFM Technolo	77	Licence Information		Copyr	ight 2021 Service Works Global (****)

# **Operative Warehouse Rights**

#### **Overview**

Administrators can now access an easy-to-use graphical interface to apply Warehouse Rights to users. A colour coded grid enables rights to be applied based upon a configuration of Warehouses, Rights and Personnel.

ct the items you wish to update Wa	rehouse Rights		
Warehouse All items checked	Use Workgroup Personnel Grou	up - Event Date/Time 🔻 People 🛛 All items check	ed 🔻
None Readonly	Operative Supervisor Stock Manager	Administrator Select the right you wish to apply	then click on selected cell
Person	BrkrSH : Barker and Stonehouse	Op VAN : Operative Ford Transit Van	ROSE1 : Stock Room 1
Jenny Smith			
Nia Lane			
Paul Matthews			
Penny Moore			
Person Save Cancel	BrkrSH : Barker and Stonehouse	OpVAN : Operative Ford Transit Van	ROSE1 : Stock Room 1

Features and benefits include:

- Easy-to-use, colour coded graphical tool for applying Warehouse Rights to users.
- Import/Export utility for administrators to bulk update user permissions for Warehouses.

### Introduction

A new Warehouse Rights utility is added which enables Administrators to apply different Warehouse permissions to users, via an easy-to-use interface.

The new screen is available at: Administration > Manage > General Reference Data > Warehouse Rights.

Filters allow you to select the Warehouses to be used and the people (QFM users) to have the permissions applied, either from Workgroups or individuals.

Warehouse All items checked	✓ Use Workgroup	▼ People	<b>•</b>	Refresh
None Readonly Operative	Supervisor Stoc	ock Manager Administrator Select the right y	ou wish to apply then click on selected cell	

#### Permissions are initially set to None by default.

Events Assets People Places	Stock System Bookings Service	Audits Event Audits Room Audits	Administration Logout H	elp 👤 Mark		
Carl General Refere	nce Data (Warehouse	Rights)				
Select the items you wish to update V	Varehouse Rights	-				QFM
Warehouse All items checked	🗸 🗹 Use Workgroup	Personnel Group - Event Date/Time	People All items checke	d 🗸		
None Readonly	Operative Supervisor	Stock Manager Administrator	Select the right you wish to apply t	hen click on selected cell		
Person	BrkrSH : Barker and Stonehouse	OpVAN : Operative Ford Transit Van	ROSE1 : Stock Room 1	ROSE2 : Stock Room 2	ROSE3 : Stock Room 3	-
Jenny Smith						
Nia Lane						
Paul Matthews						
Penny Moore						
Person	BrkrSH : Barker and Stonehouse	OpVAN : Operative Ford Transit Van	ROSE1 : Stock Room 1	ROSE2 : Stock Room 2	ROSE3 : Stock Room 3	
Save Cancel						
Powered by QFM Technology			Licence Information		c	opyright 2021 Service Works Global 😭

To apply Warehouse permissions, select the required Warehouse(s) and the QFM users to have the rights applied (either via Workgroup or individual People).

Rights are applied by selecting a coloured Permission level,

None	Readonly	Operative	Supervisor	Stock Manager	Administrator

then clicking on a selected cell in the grid.

Events Assets People Places Stock System Bookings Servi	e Audits Event Audits Room Audits Administration	Logout Help 👤 Mark		
General Reference Data (Warehouse	Rights)			
Select the items you wish to update Warehouse Rights	•			QFM
Warehouse All items checked	p Personnel Group - Event Date/Time 🔻 People 🛛 A	Il items checked		
None Readonly Operative Supervisor	Stock Manager Administrator Select the right you	wish to apply then click on selected cell		
Person BrkrSH : Barker and Stonehouse	OpVAN : Operative Ford Transit Van ROSE1 : Stock Ro	om 1 ROSE2 : Stock Room 2	ROSE3 : Stock Room 3	
Jenny Smith				
Nia Lane				
Paul Matthews				
Penny Moore				
Person BrkrSH : Barker and Stonehouse	OpVAN : Operative Ford Transit Van ROSE1 : Stock Ro	om 1 ROSE2 : Stack Raom 2	ROSE3 : Stock Room 3	
Powered by QFM Technology	Licence Inform	nation	Copyrig	aht 2021 <u>Service Works Global</u> ((🎽

Select **Save** to confirm the updates.



# **Schedule Maintenance Enhancements**

#### **Overview**

The process of adding and removing Assets to/from Maintenance Schedules can now be carried out from within the Schedule itself.

	Description	Boiler Routine	Maintenand	e and Ins	spection					
	Description									
Model SF	FG20 Template									
S	ubscribe From	01/04/2019 00	00		-					
690										
V Subscriber	rs: 1									
Subscribe										
	scribe A	sset to S Routine Mainten		le			÷	¢	-	×
ৎ Sub	scribe A	sset to S		2	Subscribe To	<b>-</b>	+	¢	-	×

Enhancements for Service Schedules are also included in the Site Explorer.

Features and benefits include:

• Improved, easy-to-use process for adding and removing Assets to/from Maintenance Schedules.

### Introduction

QFM now provides the ability to subscribe/unsubscribe Assets to a particular Maintenance Schedule, via the Schedule Maintenance screen.

SI	Ule Ma Descriptio SFG20 Templa Subscribe Fro	on	Maintenance and Inspec	tion				
s	FG20 Templa	on		tion				
s	-							
s	-							
			00 🛱 🕒 -		<b>:</b> •			
	rs: 1							
Subscribe	New Asset	<b>X</b> Unsubscribe					Active	Only
	Asse		Туре	Geography	Subscribe From	Subscri		
	BOIL	E-1F-MO-BR- .ER1 (Keston densing Boiler), on Boiler	PM Events	Rose House/1st Floor/Main Office/Boiler Room	№ 01/04/2019 00:00			
V Activities	Priority	Description	Activity Category	From	End	From Week	Show To Week	More
View 1		Boiler Routine Maintenance 1Y	1Y	29/03/2019 00:00				-
<u>View</u> 2		Boiler Routine Maintenance 1M	1M	29/03/2019 00:00				-
> Date Rang	ge							
> Notes								
> Planner Re	elated							
> Event Crea	ation							
> Other Deta	ails							
> Attachmer	nts							
	Ch	ange C	opy Close	Regenerate	Include All Subscribe	rs <u>View Plan</u>		

Several new features are added to the Schedule Maintenance screen (as shown in the example below).

# Active Only

The Active Only checkbox allows you to display only those Assets which have a current subscription.

Show More The **Show More** control expands the grid to show up to 15 Assets. (Further Assets can be viewed by scrolling).

#### Subscribe New Asset \$\$Unsubscribe

Subscribe and Unsubscribe controls allow you to add and remove Assets to/from the Schedule.

#### Subscribing New Assets

The **Subscribe New Asset** control opens a window which allows you to:

- Search for and select an **Asset**.
- Add Subscribe From and To dates. (Dates are validated. If the 'To' date is left blank, QFM populates the end date of the Schedule).

	Description	Boiler Routine Ma	intenance ar	id Inspectio	Senet No m Type							
	SFG20 Template	01/04/2019 00:00	±1	<b>•</b> •		t						
il Code												
V Subsc												
Subsc	cribe Asset to Schedu	Jie							+Þ	C	-	2
	ubscribe A											
Scheo Asset	t 🕜	Routine Maintenand (2022 12:17		Subsc	ribe To		<b>1</b>	)				

- Use an option to **Regenerate** the Plan based on the additional Asset/s.
- Continue Subscribing Assets.

#### **Unsubscribing Assets**

You can Unsubscribe one or more Assets from the Schedule by selecting the Asset (tick box in the far left grid column), then selecting **X**Unsubscribe.

This adds an End Date of the current date and time.

#### **Updating Asset Subscriptions**

You can update Asset subscriptions by selecting the Edit icon 🖄 in the **Subscribe From** field.

ROSE-1E-MO-BR-	
BOILER1 (Keston     PM Events     Floor/Main       Condensing Boiler)     Dyson Boiler	

		Subseribers 1	Asset ROSE-1F-MO-8R-80	ILER1 (Keston Co	ondensing Boilér)	eser		×	+	ø –	×	
		Subscribe Asset t	o Schedule						÷	Ċ -	×	
	e	🔍 Subscril	be Asset to Sc	hedule								
		Schedule	Boiler Routine Maintenan	nce a								
		Asset	ROSE-1F-MO-BR-BOILER	1(Ke								
size:		Subscribe From	01/04/2019 00:00	<b>:</b> •	Subscribe To		<b>:</b> (9					
enee.												
				Update	Cancel	Regenera	ate Plan					
<u>.</u>												
4.15												
			Maintenance 1Y									
		<u>View</u> 2	Boiler Routine	1M	29/03/2	2019 00:00	Della Denne			~		

#### **Service Schedules**

Some of the enhancements implemented for Asset Maintenance schedules are also available in the Site Explorer for Service Schedules. These are detailed below.

#### Active Only

The Active Only checkbox allows you to display only those Services which have a current subscription.

#### Show More

The **Show More** control expands the grid to show up to 15 Services. (Further Services can be viewed by scrolling).

#### **Unsubscribe**

The **Unsubscribe** control allows you to remove Services from the Schedule.

Schedule Maintenance         Description       Weekly Service Audit         SFG20 Template       Subscribe from         Subscriber from       22/01/2022 19.34         V Subscriber 1       Image: Control of Control	Schedule Maintenance					-	⊨ Č –		
SPECIDIT Emplate   Subscribe from   2/01/2022 19:34   Subscribe from   2/01/2022 19:34   Subscribe from   S	Schedule Main	ntenance							
Subscribe From 22/01/2022 19:34     V Subscribers: 1     V Subscribers: 1     Calcive Only     Asset     Type        Service Event     Rose House        V Activities     Priority   Description   Activity   Category   From   End   From   Veck	Description	Weekly Service Aud	it						
Subscribe From 22/01/2022 19:34     V Subscribers: 1     V Subscribers: 1     Calcive Only     Asset     Type        Service Event     Rose House        V Activities     Priority   Description   Activity   Category   From   End   From   Veck	SFG20 Template							í	
V Subscribers: 1         Image: Subscriber Subscriber From         Image: Subscriber From         Veck         View         Notes         Planner Related         Subscriber From         Subscriber From         Subscriber From         Subscriber From	Subscribe From	22/01/2022 19:34	<b>:</b> •						
Image: Construction of the construc									
Image: Constraint of the state of the s	V Subscribers: 1							_	
Service Event       Rose House       22/01/2022         Show More       Show More         Activities       Show More         View       Description       Activity Category       From       End       From       To         View       1       Weekly Tour       1W       22/01/2022 19:40       Image:       Image:         > Date Range       Image:       Image:       Image:       Image:       Image:       Image:         > Planner Related       Image:       Image:       Image:       Image:       Image:       Image:         > Other Details       Image:       Image:       Image:       Image:       Image:       Image:         > Attachments       Image:       Image:       Image:       Image:       Image:       Image:	Unsubscribe						Active Only	J	
Image: Show More	Asset	Тур	)e	Geography	Subscribe From	Subscribe To	>		
✓ Activities         Priority       Description       Activity Category       From       End       From Week       To Week         View       1       Weekly Tour       1W       22/01/2022 19:40       Image: Comparison of the		Sei	vice Event	Rose House	22/01/2022				
<ul> <li>&gt; Date Range</li> <li>&gt; Notes</li> <li>&gt; Planner Related</li> <li>&gt; Event Creation</li> <li>&gt; Other Details</li> <li>&gt; Attachments</li> </ul>		escription		From	End		То		
<ul> <li>Notes</li> <li>Planner Related</li> <li>Event Creation</li> <li>Other Details</li> <li>Attachments</li> </ul>	View 1 We	eekly Tour	1W	22/01/2022 19:40					
Change Copy Close Regenerate Unclude All Subscribers View Plan	<ul> <li>Notes</li> <li>Planner Related</li> <li>Event Creation</li> <li>Other Details</li> <li>Attachments</li> </ul>								
	Char	nge Copy	Close	Regenerate	Include All Subscribers	View Plan			

### Asset Search Enhancement

#### Introduction

The Find Assets screen is enhanced to include a 'wildcard' search facility for some fields.

Wildcard searching is enabled by using the \* character. For example, **boi**\* would return **boiler** and any other words beginning with **boi**. \***ing** would return **conditioning** and any other words ending with **ing**. \***den**\* would return **condensing** and any other words containing **den**.

Wildcard searching is added to the following fields:

- Additional Description
- Asset Description
- Serial No
- **Type** (new field)

Events Assets P	ople Places	Stock	System	Bookings	Service Audits Event Au	dits Room Audit	s Administration	Logout Help	🙎 Mark Rumb	le				
K Find A	ssets													
🛉 Add Asset														QFM
C Asset Filte													🖉 S	how Filter
Equipr	ent ID				Barco	de Ref			s	erial No		0		<u>Clear filter</u>
Parent Equipr	ent ID				Asset Descr	iption		0	Ē	Туре	6	0		
Equipment	Group			-	Cont	ractor		•	_	Site		•		
	Model			-	Additional Descr	iption		0	1	location		•		
Structure	Code			-	Lifecycle	Profile		-		Unit		•		
Ass	t Type			-	As	et No				Partition		•		
Asse	Status			•	Parent As	et No			P	ersonnel		•		
					BMS Refe	rence					Search active assets only			
					)	Maker		•			Child Asset			
					Su	pplier		-						
							Q Find							
Powered by QFM Techn	logy						Licence Inform	mation					Copyright 2021 Service V	Vorks Global (1)

### **Resource Scheduler - Operative Filtering**

#### Introduction

A new Operative filter is added to the Details View and Day Summary View. This allows for selection of specific Operatives' calendars.

If a Contractor value is entered (in the *Select Contractor* filter), then the Operatives available to select from the *Select Operative* filter will be only those of the selected contractor. Additionally, when a Contractor/Operative filter is applied to the grid the 'Operative Groups' option becomes read only.

Map							
ead: 7	C Oper	atives with Requ	uired Skill 🗌 Available O	peratives (Select Contro	actor)	ect Operative)	
Date 🔺	Utilisation	Available Hours	8:00	9:00	10:00	11:00	12:00
06/03/2022	0.00%	09:30					
07/03/2022	0.00%	09:30					
08/03/2022	0.00%	09:30					
09/03/2022	0.00%	09:30					
10/03/2022	0.00%	09:30					
11/03/2022	0.00%	09:30					
04/03/2022	0.00%	09:30					
05/03/2022	0.00%	09:30					
06/03/2022	0.00%	09:30					
07/03/2022	0.00%	09:30					
			4				
► ► Pa	age size: 10	•					
	ad: 7 Date	ad: 7 ↓ □ Oper Date ∧ Utilisation 06/03/2022 0.00% 07/03/2022 0.00% 08/03/2022 0.00% 10/03/2022 0.00% 11/03/2022 0.00% 04/03/2022 0.00% 05/03/2022 0.00% 05/03/2022 0.00%	Date         Utilisation         Available Hours           06/03/2022         0.00%         09:30           07/03/2022         0.00%         09:30           07/03/2022         0.00%         09:30           09/03/2022         0.00%         09:30           09/03/2022         0.00%         09:30           10/03/2022         0.00%         09:30           11/03/2022         0.00%         09:30           05/03/2022         0.00%         09:30           05/03/2022         0.00%         09:30           05/03/2022         0.00%         09:30           06/03/2022         0.00%         09:30           07/03/2022         0.00%         09:30	Attailable       Available       B:00         Date A       Utilisation       Available       B:00         06/03/2022       0.00%       09:30       0       0         07/03/2022       0.00%       09:30       0       0       0         08/03/2022       0.00%       09:30       0       0       0       0         09/03/2022       0.00%       09:30       0       0       0       0       0         10/03/2022       0.00%       09:30       0<	Ad:       7       Operatives with Required Skill       Available Operatives       Science Contribution         Date       Utilisation       Available Hours       8:00       9:00         06/03/2022       0.00%       09:30       Image: Contribution       Rest in the contribution       Rest in the contribution         06/03/2022       0.00%       09:30       Image: Contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution         07/03/2022       0.00%       09:30       Image: Contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution         08/03/2022       0.00%       09:30       Image: Contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution         10/03/2022       0.00%       09:30       Image: Contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution       Rest in the contribution         06/03/2022       0.00%       09:30       Image: Contribution       Image: Contribution       Image: Contribution       Image: Contribution       Image: Contribution         07/03/2022       0.00%       09:30       Image: Contribution       Image: Contribution       Image: Contribu	Available Hours       Available Hours       8:00       9:00       10:00         06/03/2022       0.00%       09:30       0 </th <th>Available Hours       Available Hours       8:00       9:00       10:00       11:00         06/03/2022       0.00%       09:30       <td< th=""></td<></th>	Available Hours       Available Hours       8:00       9:00       10:00       11:00         06/03/2022       0.00%       09:30       0 <td< th=""></td<>

Details V	View Day Summary View Map										
🗿 Date Fr	rom: 04/03/2022 🛅 To: 11/03/2022		Operatives with Re	quired Skill 🗌 Ava	ilable Operatives	Selected Operativ	ves 🗌 Operatives I	Within Radius (mile	5	(Select Con	stractor)   (Select Operative)  (Operative Groups)
	Operative	Distance (miles)	04/03/2022	05/03/2022	06/03/2022	07/03/2022	08/03/2022	09/03/2022	<u>10/03/2022</u>	<u>11/03/2022</u>	
	Contractor 10 Operative 29 (Contractor 10)	N/A	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	]
	Contractor 10 Operative 30 (Contractor 10)	N/A	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	]
	Contractor 1000 Operative 2998 (Contractor 1000)	N/A	9h 30m	9h 30m	9h 30m	<u>9h 30m</u>	<u>9h 30m</u>	<u>9h 30m</u>	9h 30m	9h 30m	]
	Contractor 1000 Operative 2999 (Contractor 1000)	N/A	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	9h 30m	]
	Contractor 1000 Operative 3000 (Contractor 1000)	N/A	9h 30m	9h 30m	9h 30m	<u>9h 30m</u>	<u>6h 30m</u>	9h 30m	9h 30m	9h 30m	]

### **Event Routing & Approvals**

#### **Overview**

A new approval structure for Event workflows provides the ability to define a set of Routing Rules which specify elements including an 'assignee' or group of 'assignees' who are able to approve an Event, limiting access to specific controls, and whether or not Approver comments are required.

Assigned To	Alison Jones
Cost Code	Show All 🔍
	Albert Baker (testing@swg.com)
	🖺 Alison Jones (testing@swg.com)
	▼ Items 1-2 out of 2

Features and benefits include:

• Provides a high level of flexibility to define authorisation requirements at different stages of the Event workflow.

Event Workflows are highly configurable and may be used to limit the fields shown, the buttons available, the status of controls (visible, read-only, mandatory), how many stages of approval are required, if a comment is required when transitioning from one state to another, who may access buttons, etc. **Because of the inherent complexity the configuration of workflows must be carried out by SWG to meet client requirements**.

Please contact your SWG Account Manager for further information.

#### Introduction

A new approval structure for Event workflows is provided. This is based upon pre-defined workflow and routing rules.

The system may be configured to reference a new Event Routing Matrix in order to determine who an Event should be assigned to as it changes through its workflow states. As an Event moves through its stages, at each point the system may derive the next 'Assignee' from the new Routing Matrix. The matrix takes Event attribute information such as Geography, Service, Work Type, Estimated Costs and Status in order to determine who the Event should be assigned to in the current status. Subject to Workflow configuration, the system will automatically route to the Primary Assignee given by the routing matrix but may also allow users to select another 'Assignee' from a list of allowed assignees.

The system also provides the ability to limit who has access to the available workflow button controls and when these controls are shown. Additional types of permissions have been added to provide control over this.

The requirement for Approvers to provide comments can also be defined, therefore ensuring that a narrative is provided to support a decision.

Features include:

- Routing rules may be configured using the new Import/Export 'Maintain Event Routing Permission Matrix' (SWG use only).
- New configurable Routing Matrix defines 'routing' and 'action' rules.
- Ability to restrict the list of Event Assignees, based upon contextual information.
- Typically, routing rules are used to route an Event to an Assignee or to limit the People in the Assignee selection list.
- Where there are multiple rules which match with the criterion on the Event then the system will invoke the rule with the highest precedence rating, (each rule may be assigned a precedence). Typically, the more granular the rule, the more attributes need to match and hence these should typically be the higher precedence ones.

The example below shows an Event assigned to different personnel, as it moved through the workflow stages.

🅼 Event Detail	s: 10088 - Se	rvice Event	- Due					
(Find Event) 💌 🖕 🦊	💏 🚖 🌩 🌞 Add Ev	ent 😫 Worksheet	Copy Event 🔟 Schedule	📔 History 🗞 Add Watch	Add Attach	ment 🕒 🔒 Sub Task 💩 (No Vi	<u>sits)</u> 🧠 ( <u>No Linked Event</u>	<u>(3)</u>
6								
Event Deta	ils Related Event	s 🔔 Visits	Attachments 🕦 Parts					
Due (Due)								
Details	Key Dates R	lelated Assets	Contractor Costs	1				
Event Type	Service Event	•	On Behalf Of		•	Assigned To	Alex Houseman	
Reported By	Mark Jacobs	-	Service Group	Electrical Maintenance	-	Cost Code		
Site	Rose House	-	Service	Appliances	•			
Location	Ground Floor	-	Work Type	Replace	-			
Unit		-	Priority	1 Week Turnaround	-			
Partition		-						
Instructions 📉 R	Mark 17/03/2022 15:00	(UTC): Mark 01/03/202	22 11:26 (UTC): Appliance to be i	replaced.				

Carl Event Detail	s: 10088 - S	ervice Event	- Started					
(Find Event) 🔻 橾 🦊	🛗 🚖 🌩 🚔 Add I	ivent 😫 Worksheet	Copy Event 🔟 Schedule	🚺 History 🗞 Add Watch	Add Attac	hment 🦾 Sub Task 💩 (No Vi	sits) 🧠 (No Linked Eve	<u>nts)</u>
				_				
Event Deta	ails Related Even	nts 🛕 Visits	Attachments 🛈 Parts					
Started (Sta								
Details	Key Dates	Related Assets	Contractor Costs					
Event Type	Service Event	-	On Behalf Of			Assigned To	Alison Jones	
Reported By	Mark Jacobs	*	Service Group	Electrical Maintenance		Cost Code		
Site	Rose House		Service	Appliances				
Location	Ground Floor		Work Type	Replace	-			
Unit		-	Priority	1 Week Turnaround	-			
Partition								
Instructions 🔌	Mark 17/03/2022 15:0	0 (UTC): Mark 01/03/20	22 11:26 (UTC): Appliance to be	replaced.				

Stock Parts Enhanc	ements		
Overview			
Parts functionality now provide	es the ability to upd	ate prices when Requesting and Allocating a F	°art.
	Part(s) Detail	s	
	Part Category	Valves	
	Warehouse	Stock Room 1	
	Part	1000006	
	Request Type	Requested     Allocated     Used	
	Quantity	1	
	Unit Price	£90.00	
	Tax	S-Standard Rate (20.00%)	
	Total	£108.00	
	Remarks 🕄		
	Close	Update	
Features and benefits include:			
Provides the ability to	update the price fo	r a Part at all states.	

#### Introduction

Two new controls for the modification of Part Prices are added. These allow the price of a Part to be updated at 'Request' and 'Allocate' statuses.

**Notes:** This is a web only enhancement; the new Price Modes are not available on the QFM mobile app. Users will still require sufficient Warehouse Rights to Request and Allocate, to be able to update the Price.

When adding a new Part, the following controls are available to be specified:

#### • Modify Price on Request

Allows the Part Price to be modified when a Part is 'Requested' (optional, Price is not mandatory)

Modify Price on Allocate

Allows the Part Price to be modified when a Part is 'Allocated' (optional, Price is not mandatory)

The example below shows the Add Parts screen in the Stock Director Parts tab.

Parts Stor	ck	Parts						
	E	Add New Part			- 0 +			
		Part Number		Barcode		^	·	
		Description 🏵		End Date	<b>:</b> ©			
rt Category							1in :	Def Reorder Level
dhoc & Unid		V Details						
dhoc & Unid		Criticality Level	0	Metadata 👻				
uilding Mater		Hazard Level	<b>•</b>					50
uilding Mater		Consumption Level	· · · · · · · · · · · · · · · · · · ·	Is Managed Asset?				200
		Messages 👻		is Managed Asset? Remarks 🗨				1
uilding Mater				Remarks 😋				200
uilding Mater								150
uilding Mater		Show Messages						50
uilding Mater		Def Reorder Level	Non-Stock Part	Main Supplier	· · ·			50
uilding Mater		Stock Unit		Supplier Part No				200
uilding Mater		Def Min Stock Level		Other Supplier	•			200
eaning & Hy		Track Stock		2nd Other Supplier				500
,		Lead Time		Modify Price on Request				
		Expected Cost		Modify Price on Allocate				
		Selling Price		Price Required on use				
		Lead Time Unit						
			Save	Close		v	,	

These new fields are also added to the Stock Director - Parts tab and the Import/Export Stock - Maintain Parts utility.

urchase Orders		Event Parts	s Stock P	arts													
Select View	) 🔹 🗹 Active Only																
	nd drop it here to group by that co																
<li>1 2 3</li>	4 5 6 7 8 9 10	<ul> <li>N Pag</li> </ul>	ge size: 20 🔻											<u></u>		13628 items	in 682 pa
larcode	Metadata	Stock Unit	Expected Unit Cost	Total in Stock	Total on Order	Total Requested	Total Allocated	Def Min Stock Level	Def Reorder Level	Main Supplier	Consumption Level	Hazard Level	Criticality Level	Modify Price on Request	Modify Price on Allocate	Price Required on Use	Other
Hardware Scanning 12		A	30.00	112	0	115	64				(TBD)	None	0			12	
		S		395	0	2	11				(TBD)	None	0	0			
NULL		M		313	0	27	33	30					0			12	
3arcode343432 Iw		q		219	0	4	62				(TBD)	None	0				
		w		233	0	4	0				(TBD)	None	0				
3arcode343432 I	3434324	2	20.00	0	0	0	0	22	22	Address 1	A	None	0	2		12	Addre
	adhoc metadata													0		121	
Car0024		22	30.00	50	0	1	1	22	1	Address 10	С	Low	2	D			Addre
				100	0	1	0						0	2	2		
				100	0	0	0						0				
				0	0	0	0						0				
				0	0	0	0						0				
																J	

î Impo	rt/Expo	rt																		1
		ead and under	stand the Rel	ease Notes aro	und this area before			1.001												
Stock- Maintai		Export	1		<u> </u>	Export		•												
Results																				
kesuits																				C Refresh
Metadata	Show Messages	Messages	Remarks	Main Supplier	Supplier Part No	Other Supplier	Other 2nd Supplier	Re Order Level	Non Stock Part	Stock Unit	Min Stock Order	Track Stock	Lead Time	Lead Time Units	Expected Cost	Selling Price	ModifyPriceOnRequest	ModifyPriceOnAllocate	Price Required On Use	Part Unique Identifier
Double Socket without USB Ports				All My Parts, 19 Wenlog Close	13-A-SKT-D13- A-SKT-D13- A-SKT-D13- A-SKT-D	AB Engineering Ltd		40		Each	20		2	Days	0.5000	0.5000				1
Including dimmer function				All My Parts, 19 Wenlog Close	5643/mk	AB Engineering Ltd		40		Each	20		2	Days	150.0000	150.0000	Ξ.			2
1 pack =				All My Parts, 19 Wanloo	CP435	AB Engineering		25		Each	15		3	Days	3.5000	3.5000				3
																				C Refresh

### Suppression for SFG20 Maintenance Schedules

#### Background

A typical maintenance schedule (AC Maintenance for example) may contain several tasks to be repeated, e.g. annually (1Y), every six months (6M) and monthly (1M). QFM enables these tasks and frequencies to be created as separate Activities within a Schedule.

As an example, a 1Y Activity would be to clean the Heating and Cooling Coils, the 6M Activity would be to change the filters and the 1M Activity to inspect the cooling element.

QFM creates specific Events for each Activity, so in this example there will be a scenario (once in a year) when three Events are created at the same time - one for each Activity.

In many circumstances, it is preferrable to prevent QFM generating multiple Activity Events when they align with each other in a particular period. So, if the 1Y, 6M and 1M Activities are scheduled to fall within the same time period, the 6M and 1M Activities can be suppressed, leaving only the 1Y Activity/Event to be generated. However, when using suppression in these circumstances, QFM Schedules should be predefined so that the 1Y Activity instructions also contain notes to direct the operative to complete the 1Y, 6M and 1M tasks in one Event; QFM doesn't not merge all activity steps.

With the SFG20 Integration, it is possible for QFM Schedules linked to SFG20 to generate Events with instructions containing steps equivalent to the prescribed SFG20 activities and frequencies. Therefore, in the scenario above, if the AC schedule was linked to SFG20, the SFG20 tasks for the 1Y Activity could appear in the instructions, but the 6M and 1M tasks would not be included.

#### **New Feature**

This new feature provides an enhancement to QFM SFG20 integration, to take into account suppressed Events from Maintenance Schedules. Where a QFM Schedule is defined with multiple activities and the system suppresses generation of one or more activities, then as there is another Event being generated during same schedule period, (in the example scenario the 1Y is being generated and the 6M and 1M are being suppressed), then the 1Y Event can now also include the SFG20 steps for the suppressed frequencies (6M and 1M) in addition to the 1Y steps.

If a planned activity is not suppressed, then the tasks for any frequencies not suppressed will be generated into the instructions of their own Event - with no change to the current process.

Please note, this enhancement is for the SFG20 Integration only. the suppression behaviour for QFM Schedules not integrated with SFG20 remains unchanged. QFM Schedules will still need to be predefined so that the Activity instructions contain notes to direct the operative to complete all tasks in one Event; QFM doesn't not merge all activity steps.

# Minor Enhancements and Changes

The v4.00.00.130 release addresses issues highlighted in the product. Details are as follows:

SWG Reference	Description
31609	General Reference Data - Stock. Errors no longer occur when entering an invalid adjusted quantity.
35017	Events - when adding a related Asset, adding a barcode in the 'Assets Like' field should find any matching assets with that value in the barcode field (and subject to other restrictions).
35030	Import/Export - when importing a large amount of data for 'Stock - Adjust Stock Levels' and 'Stock - Maintain Stock Information', an on-screen counter now displays the import progress, e.g. 'XXX of XXX rows imported'.
35222	Using Billing Contracts functionality causes the system to behave slightly differently to normal. If Billing Contracts is in use then the Contractor selection is disabled and the Contractor cannot be cleared by other activity. Selecting a different Billing Contract will change the Contractor and clear any selected Operatives (if the contract has a different contractor to that previously selected).
35223	Dynamic Forms - forms with signature controls now correctly display the signature on reports, after completion.
35462	Event Director - the 'Reference' field is now an available column.
35514	Event Director - Events can now be correctly batch cancelled.
36003	Events - in the Parts tab, Parts that are recently added to the requisition can now be correctly updated.
36550	Events - the extended search facility is no longer present for the 'Assigned To' field drop down list when the Routing Matrix is controlling the population.
36627	The performance of the Event navigation for moving forwards and backwards between Events has been improved.
36880	When carrying out an Event Audit, if there is a requirement to raise a new task then the Express Event raised - as a Sub-Task - is now linked to the QFM Event being inspected, (rather than the Tour Event).
37565	Issues affecting the suppression and publication of SFG20 template versions in some scenarios are now resolved.



38306 A number of enhancements are made to QFM screens when used in Mobile Mode (screen Mode can be set at the QFM Login page). These provide a general improvement in screen rendering and include Event and Permit screens.

## Known Issues

This section details system issues which are identified in v4.00.00.130. These will be rectified at the earliest opportunity.

Please contact your SWG Account Manager for further details.

SWG Reference	Description
36253	Find Assets screen - when hovering over some fields, the tooltip may display inconsistently.
36410	Stock Director - Stock tab. The 'Part Category' column in the grid displays Part Category 'Description' and not the Part Category 'Name'.
38159	Permit Director - when in Tablet Mode, the Permit Hover menu for 'Permit ID' may show with a duplicate label on some devices.

## **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 3<sup>rd</sup> 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 3<sup>rd</sup> 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 3<sup>rd</sup> party products before they are used within the QFM product.

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

Google maps (<u>https://developers.google.com/maps/licensing</u>) (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.

Please note that when completing Upgrades for QFM Web 3.3 and above it will be necessary to upgrade web features by selecting the 'Update Web Features' button located directly beneath the 'Update Database' button on the QFM Web Upgrade screen. This button is to be selected once the 'Update Database' process has finished. This function will update web features, such as republishing Dynamic Forms and associated tables.