SERVICE WORKS GLOBAL
ADDNODE GROUP

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.

QFM

Work Permit: 42 - Approved

Applicant:	Jenny Smith Maintenance 02088234353	**Permit Type:** **Valid:** **Related Work:**	Hot Work Permit 15/02/2022 12:00:00 - 16/02/2022 18:00:00 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 boiler and ensure working correctly, need to thaw the pipes and wear full PPE.

Precautions:

Avoid Hot Work where possible. Prepare a Permit to Work. Clear the area where Hot Work will be carried out. Carry out Hot Work in a designated or prepared area. Ensure those carrying out Hot Work are trained to do so. Monitor gas or vapour in the area being used for Hot Work.

Hazards:	**Equipment:**
Hot Works, Working with Electricity, Reaching Above Head Height	Step Ladder, PPE Head, PPE Hands

Approval History

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

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.

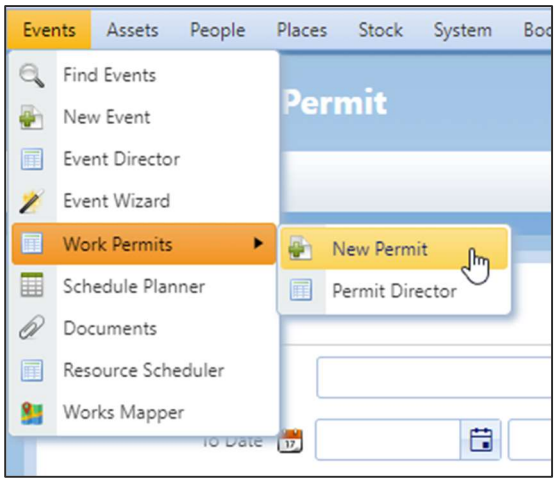
QFM Permit To Work functionality includes the following features:

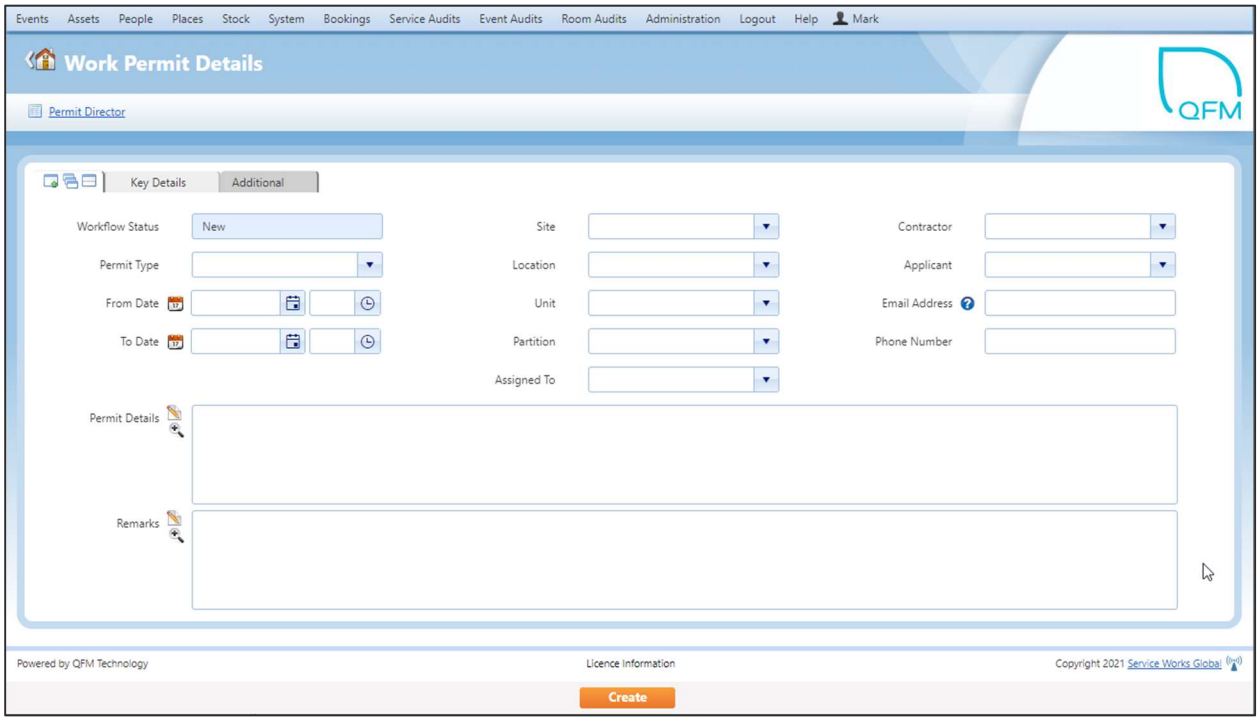
- Provides the ability for internal staff and contractors to initiate a New Permit application, by entering relevant Permit details and file attachments before submitting for approval.
- Permit applications can include specific Hazards and Equipment and can be linked to related Events.
- Where a Permit 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.





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 [1] 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.

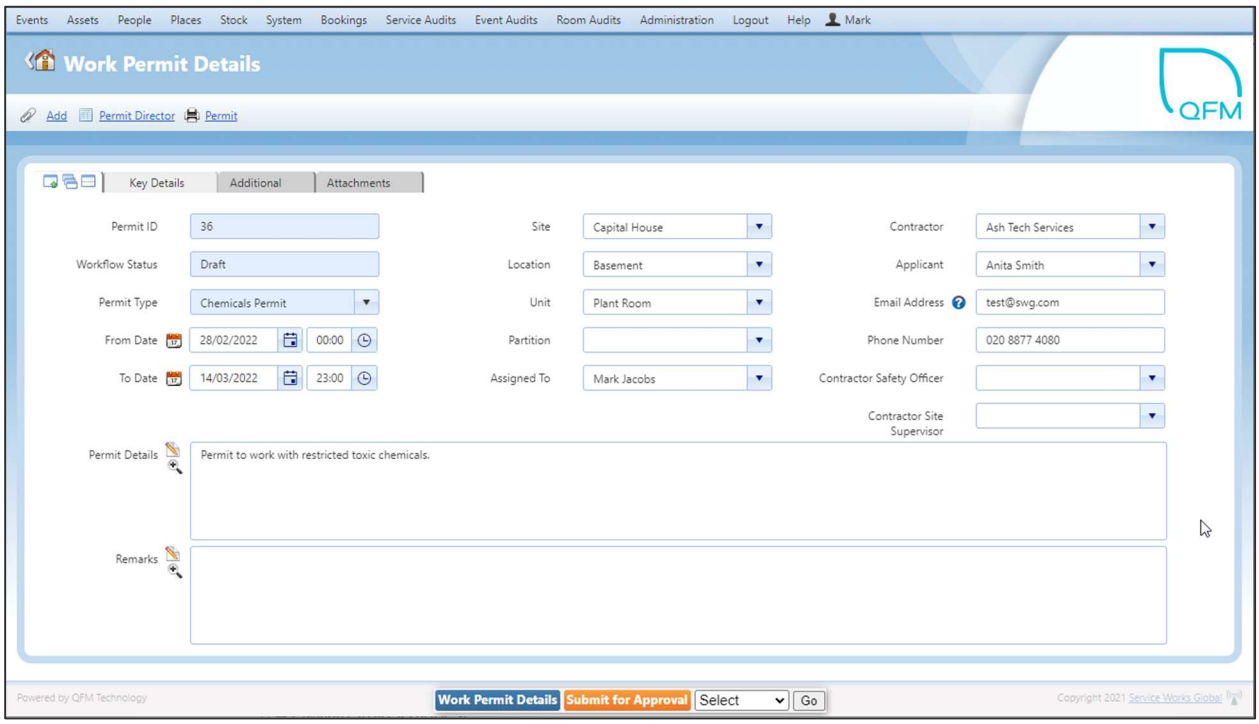
[1] A default approval workflow is available, named 'Default'. This is linked to a workflow named 'Work Permit (Simple 1 x Auth)'. This has a 'Submit for Approval' option and a single 'Approval' step. The Permit may only be approved by the 'Assignee'.

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.



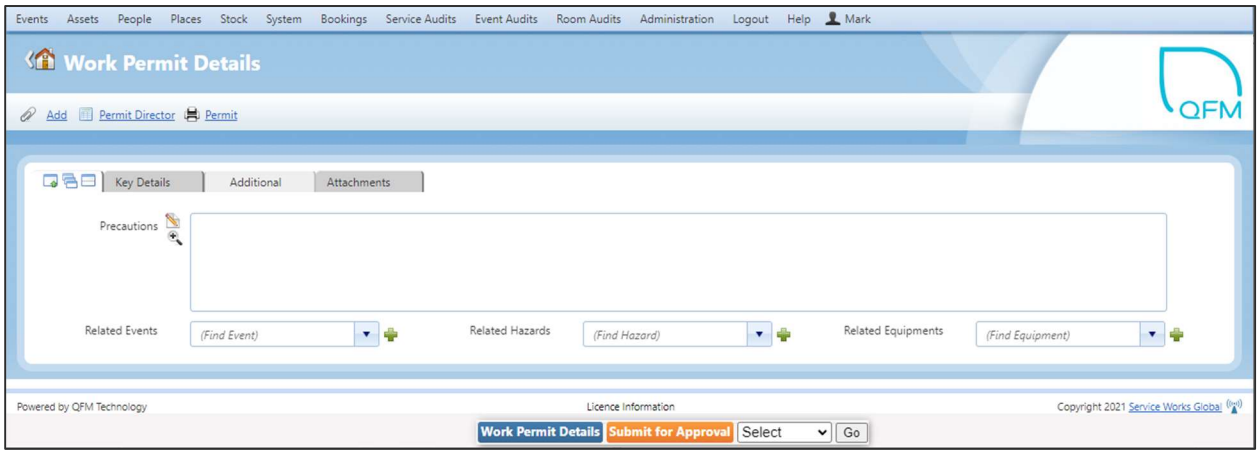
Additional fields made available are detailed as follows:

Key Details Tab

- **Contractor Safety Officer**
  Select from the drop down list.
- **Contractor Site Supervisor**
  Select from the drop down list.

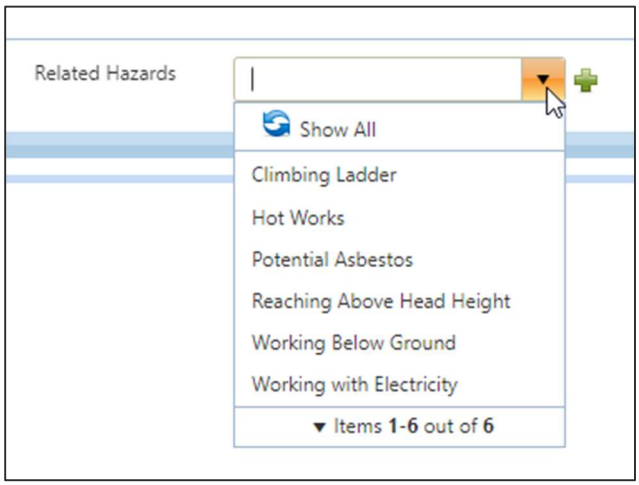
Notes: Whilst it is possible to assign to any personnel, by default these lists show a sub-set of people who have been assigned as this type.
These lists can be populated via Personnel Types on the Personnel Details screen.

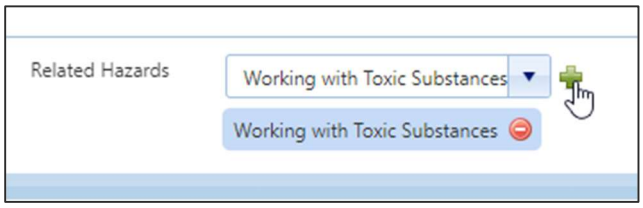
Additional Tab



- **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 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 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 icon, (subject to user permissions).

An example is shown below.

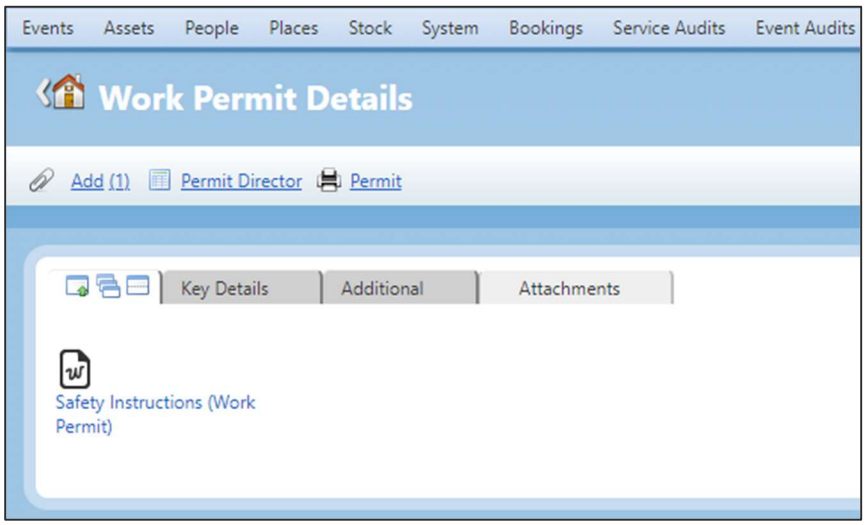




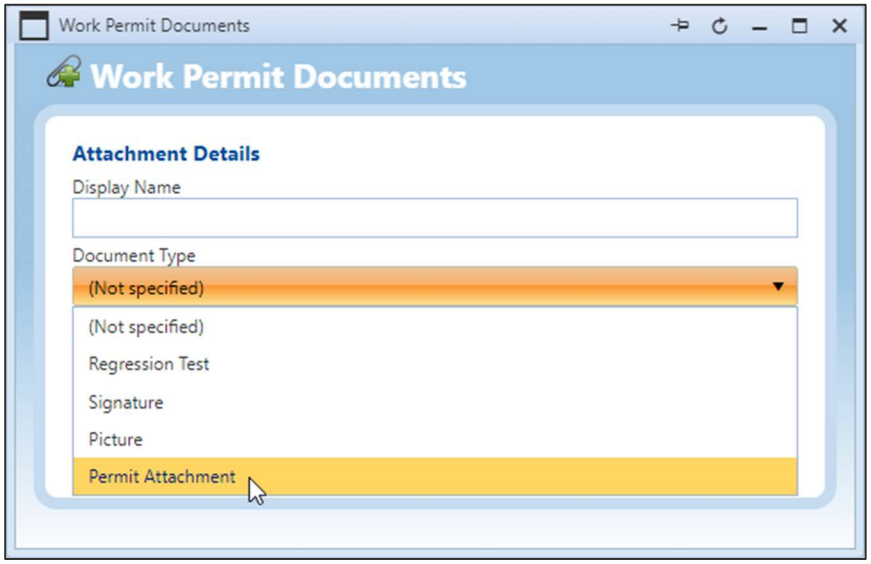
Attachments Tab

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.



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.

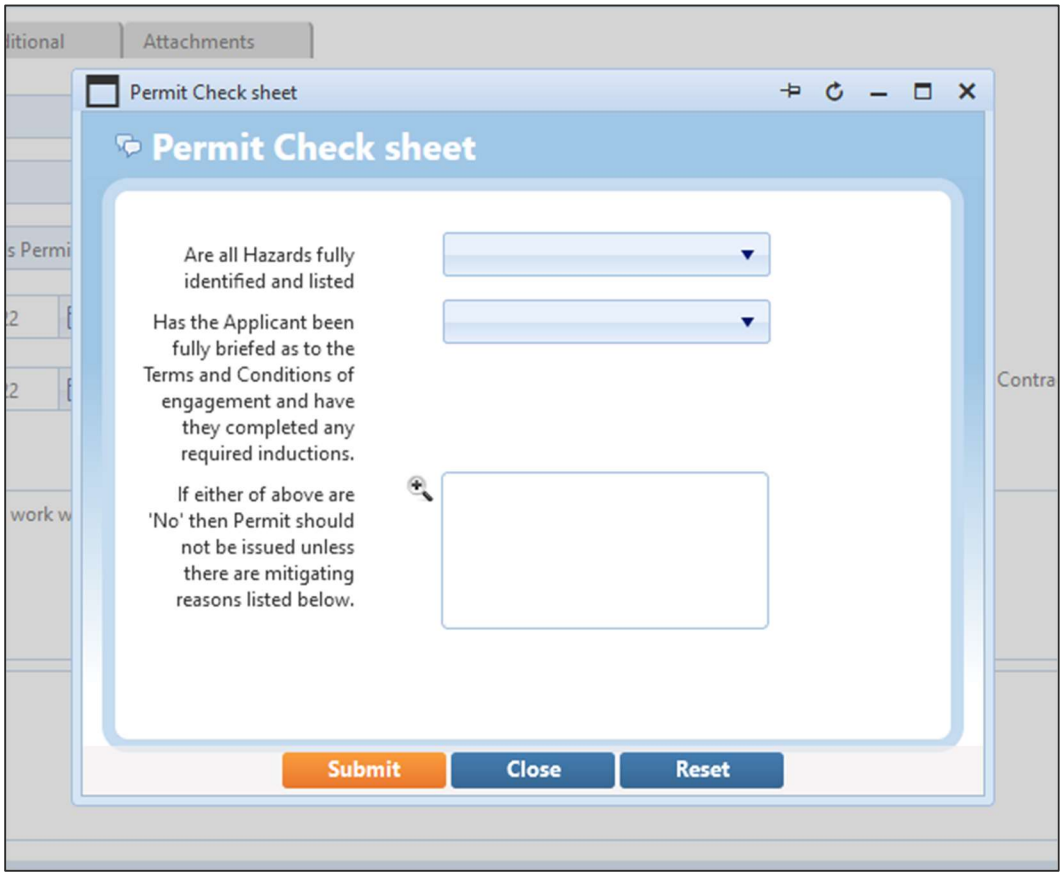


Creating a Digital Permit Document

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.

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 **Submit 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

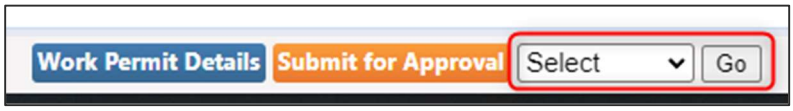
will automatically route to the Primary assignee given by the routing matrix but may also allow users to select another 'Assignee' from a list of allowed assignees.

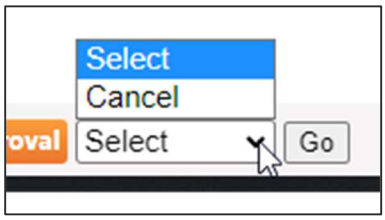
QFM provides the ability to create automated email notifications for Approvers, advising that they have a Permit to review. These can be set up and configured using the Scheduled Jobs facility.

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.





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.

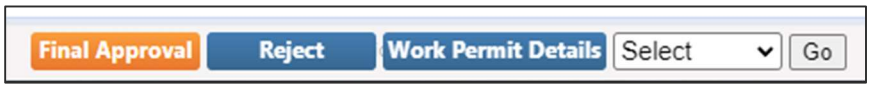
Approving a Permit

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'.



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.

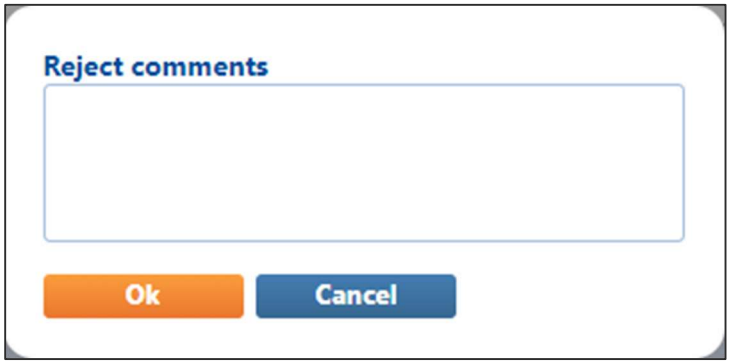
Rejecting a Permit

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.

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

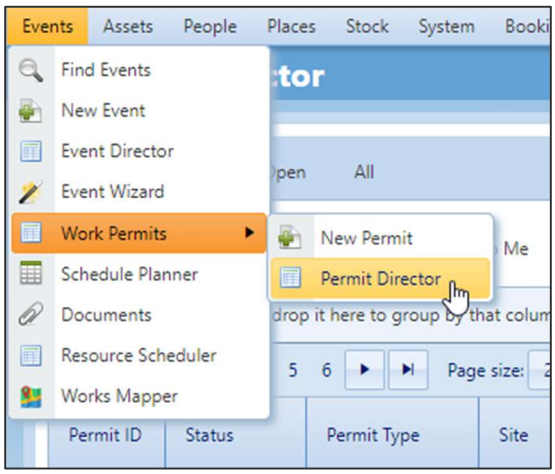


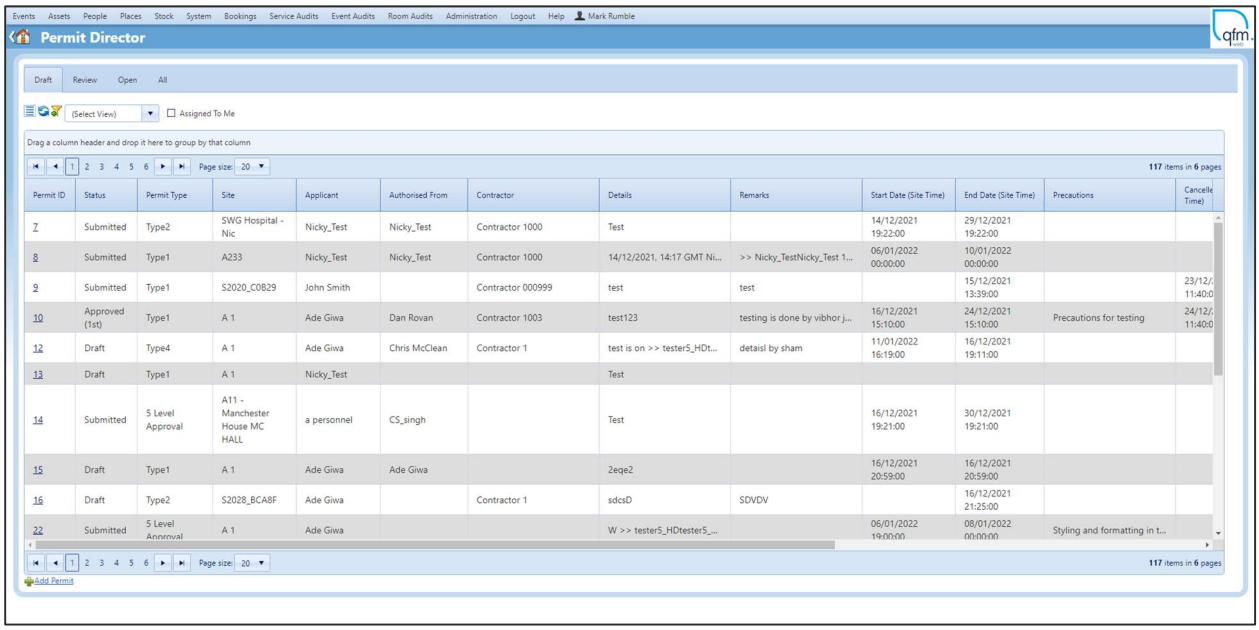
The Permit ‘Workflow Status’ now shows as ‘Rejected’.

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.





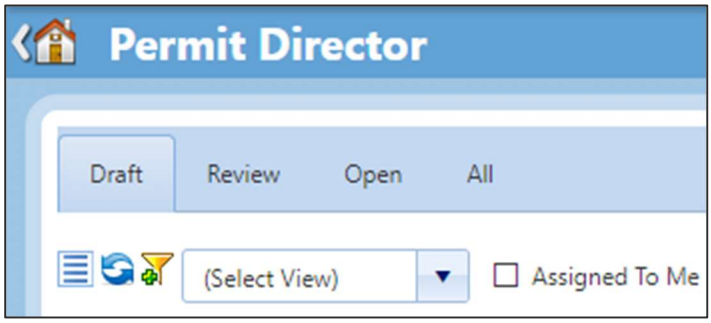
The Permit Director is used to find and access existing Permits. There are four tabs, described below:

- **Draft**
  Includes all Draft Permits not yet submitted for Approval.

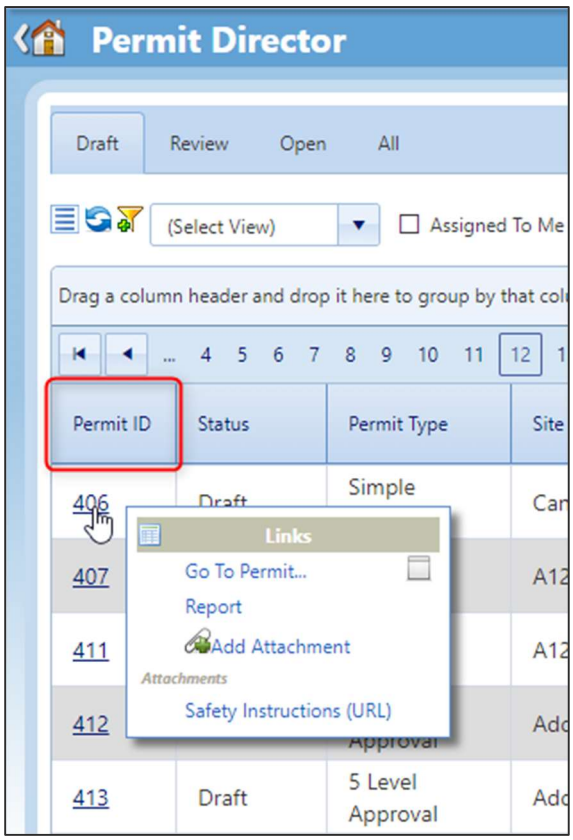
- **Review**
  Includes all Permits submitted for Approval but not yet reached their final approval stage. This is the main Tab used by persons performing Review and Approvals. There is an additional filter 'Assigned to Me' which is used to limit the Permits to those which require the user's attention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

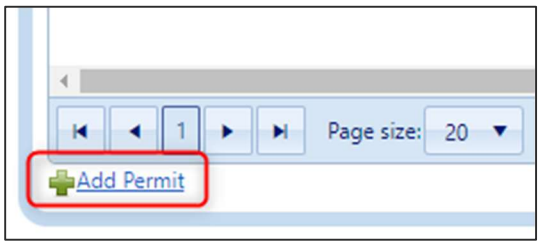


A pop-up menu is provided in the 'Permit ID' column.



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

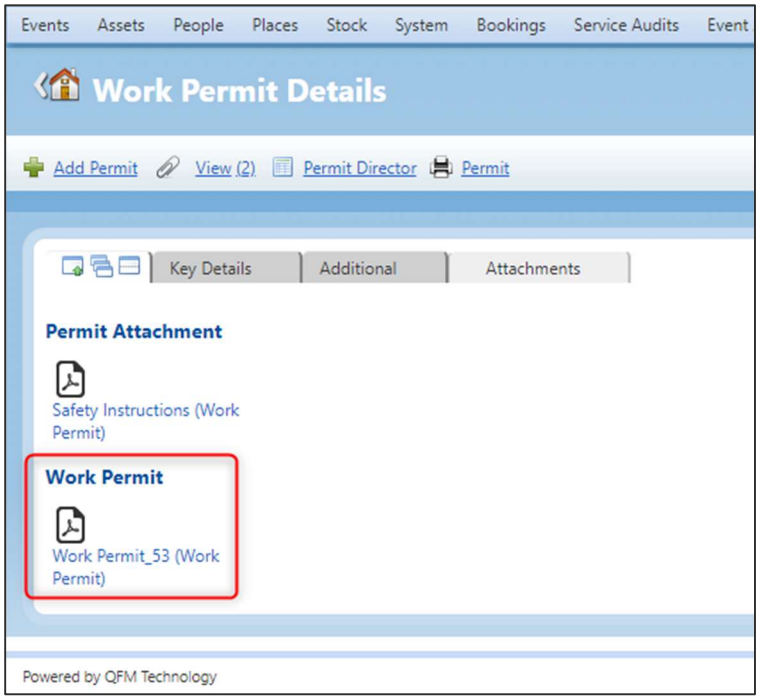
You can also add a New Permit without leaving Permit Director, via the link in the bottom left corner of the screen. (Refer to the *New Work Permit* section).



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).



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 Permit: 42 - Approved

Applicant:	Jenny Smith Maintenance 02088234353	**Permit Type:** **Valid:** **Related Work:**	Hot Work Permit 15/02/2022 12:00:00 - 16/02/2022 18:00:00 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 boiler and ensure working correctly, need to thaw the pipes and wear full PPE.

Precautions:

Avoid Hot Work where possible. Prepare a Permit to Work. Clear the area where Hot Work will be carried out. Carry out Hot Work in a designated or prepared area. Ensure those carrying out Hot Work are trained to do so. Monitor gas or vapour in the area being used for Hot Work.

Hazards:	**Equipment:**
Hot Works, Working with Electricity, Reaching Above Head Height	Step Ladder, PPE Head, PPE Hands

Approval History

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.PDF for .NET.

Hot Work Permit

PermitID: 42 Last Updated: Sophie Permit Status: Approved

Question	Response
Required PPE (if not already listed):	Fully listed
Chemicals to be used (if any):	Deicer
Are all Hazards fully identified and listed	Yes
Has the Applicant been fully briefed as to the Terms and Conditions of engagement and have they completed any required inductions.	Yes
If either of above are 'No' then Permit should not be issued unless there are mitigating reasons listed below.	All clear

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HOT WORK PERMIT

STOP!
Avoid hot work or seek an alternative/safer method, if possible.

This Hot Work Permit is required for any temporary operation involving open flames or producing heat and/or spa
This includes, but is not limited to: brazing, cutting, grinding, soldering, torch-applied roofing and welding.

Instructions for Fire Safety Supervisor:

A. Specify the precautions to take.
B. Fill out and keep **Part 1** during the hot work process.
C. Issue **Part 2** to the person doing the job.
D. Keep **Part 2** on file for future reference, including signed confirmation that the one-hour fire watch and three-hour monitoring have been completed.
E. Final signoff is on **Part 2**.

HOT WORK BY
☐ Employee
☑ Contractor Ocelleke Plumbing

DATE 1/2/18
JOB NUMBER

SPECIFIC LOCATION/BUILDING AND FLOOR Dairy Boiler Room

NATURE OF JOB Welding / Grinding

NAME (PRINT) AND SIGNATURE OF PERSON PERFORMING HOT WORK Bobby K

NAME (PRINT) AND SIGNATURE OF PERSON PERFORMING FIRE WATCH Travis

I verify the above location has been examined, the precautions checked on the Required Precautions Checklist have been taken to prevent fire, and permission is authorized for this work.

NAME (PRINT) AND SIGNATURE OF FIRE SAFETY SUPERVISOR/OPERATIONS SUPERVISOR Ed Wright

TIME STARTED: a.m. p.m.
TIME FINISHED: a.m. p.m.

Permit Expires DATE 1/2/18 TIME 3:30 a.m. p.m.

Note: Emergency notification on back of form.
Use as appropriate for your facility.

To order additional hot work permits or other FM Global resources, order online 24 hours a day, seven days a week, at fmglobalcatalog.com.

Part 1

Required Precautions Checklist

Y	NA	
☑	☐	The fire pump is in operation and switched to automatic.
☑	☐	Control valves to water supply for sprinkler system are open
☑	☐	Hose streams and extinguishers are in service/operable.
☑	☐	Hot work equipment is in good working condition.
		Requirements within 35 ft. (11 m) of hot work
☑	☐	Ignitable liquid, dust, lint and oily deposits removed.
☐	☒	Explosive atmosphere in area eliminated.
☑	☐	Floors swept clean.
☐	☒	Combustible floors wet down, covered with damp sand or fire-resistive sheets.
☑	☐	Remove other combustible material where possible. Otherwise, protect with FM Approved welding pads, blankets and curtains, fire-resistive tarpaulins or metal shields.
☑	☐	All wall and floor openings covered.
☑	☐	FM Approved welding pads, blankets and curtains installed and around work.
☑	☐	Protect or shut down ducts and conveyors that might carry to distant combustible material.
		Hot work on walls, ceilings or roofs
☐	☒	Construction is noncombustible and without combustible or insulation.
☐	☒	Combustible material on other side of walls, ceilings or roofs.
		Hot work on enclosed equipment
☐	☒	Enclosed equipment cleaned of all combustible material.
☐	☒	Containers purged of ignitable liquid/vapor.
☑	☐	Pressurized vessels, piping and equipment removed from service, isolated and vented.
		Fire watch/hot work area monitoring
☑	☐	Fire watch will be provided during and for one (1) hour after including any break activity.
☑	☐	Fire watch is supplied with suitable extinguishers, and with a charged small hose.
☑	☐	Fire watch is trained in use of equipment and in sounding alarm.
☑	☐	Fire watch may be required in adjoining areas, above and below.
☑	☐	Monitor hot work area for up to an additional three (3) hours after one (1) hour fire watch.
☐	☐	**Other precautions taken:**

Evaluation Warning : The document was created with Spire.PDF for .NET.

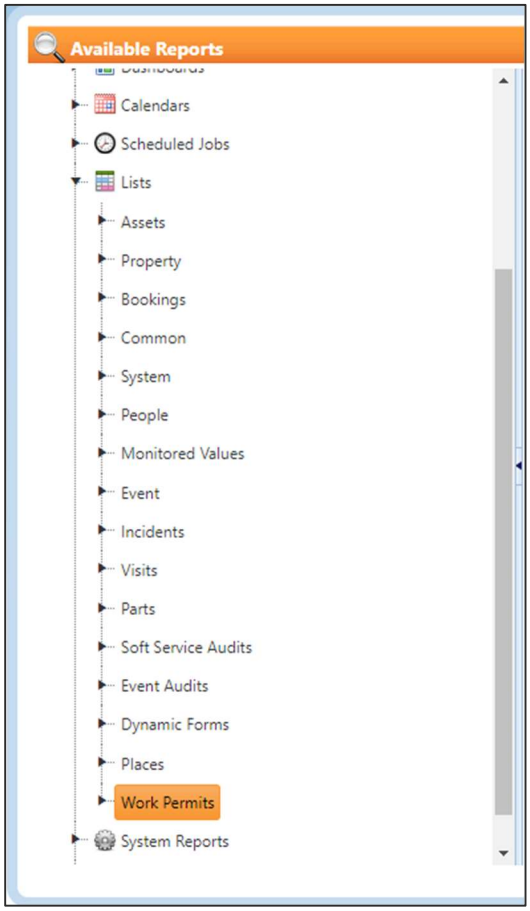
Notifications

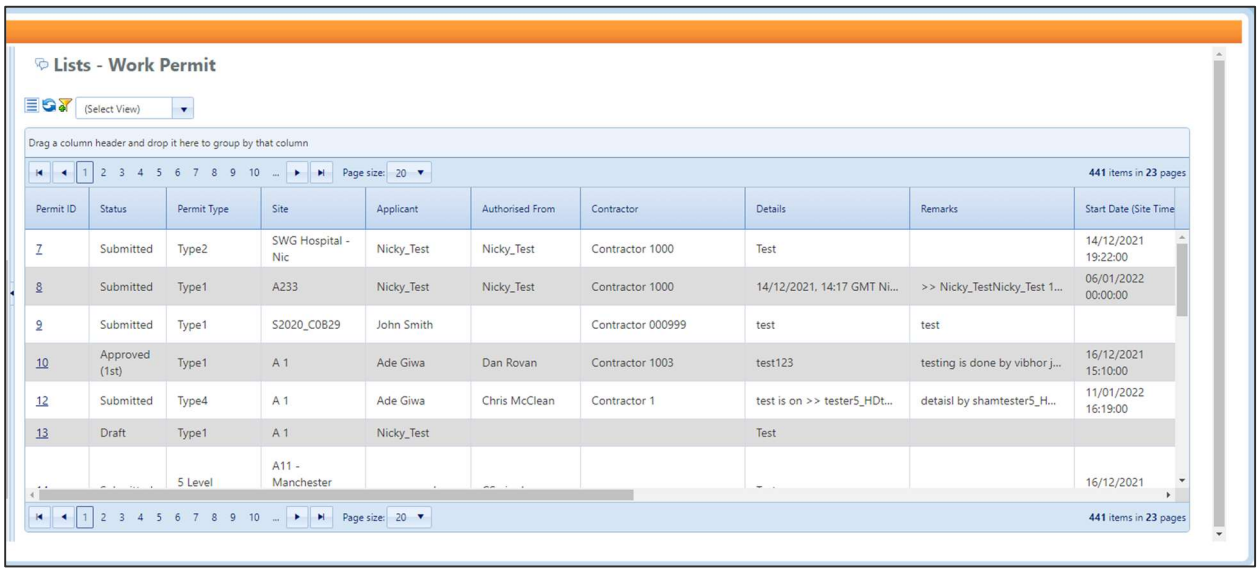
On final approval of a Work Permit, an email notification is sent to all parties on the Email address list on the Permit record, with a link to the consolidated PDF Permit details.

Permit Reporting

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

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





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

Permit Workflow

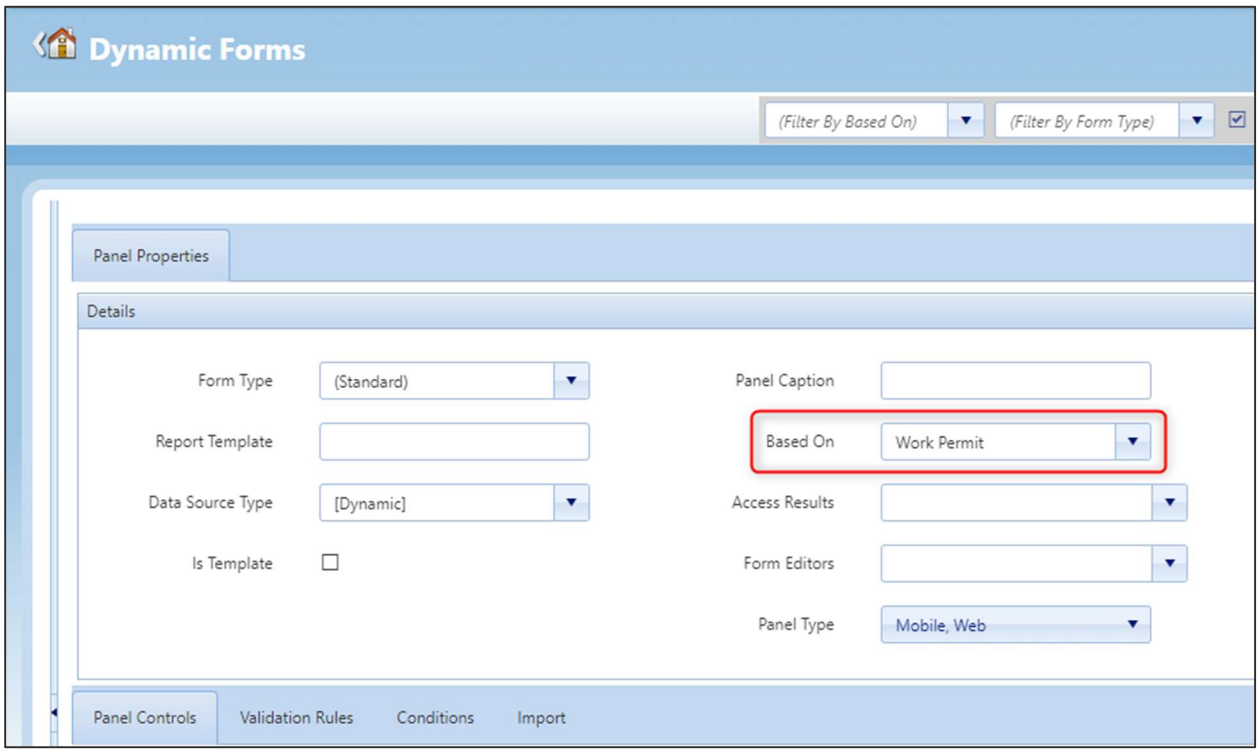
Work Permit Workflows are highly configurable and may be used to limit the fields shown, the buttons available, the status of controls (visible, read-only, mandatory), how many stages of approval are required, if a comment is required when transitioning from one state to another, who may access buttons, 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.

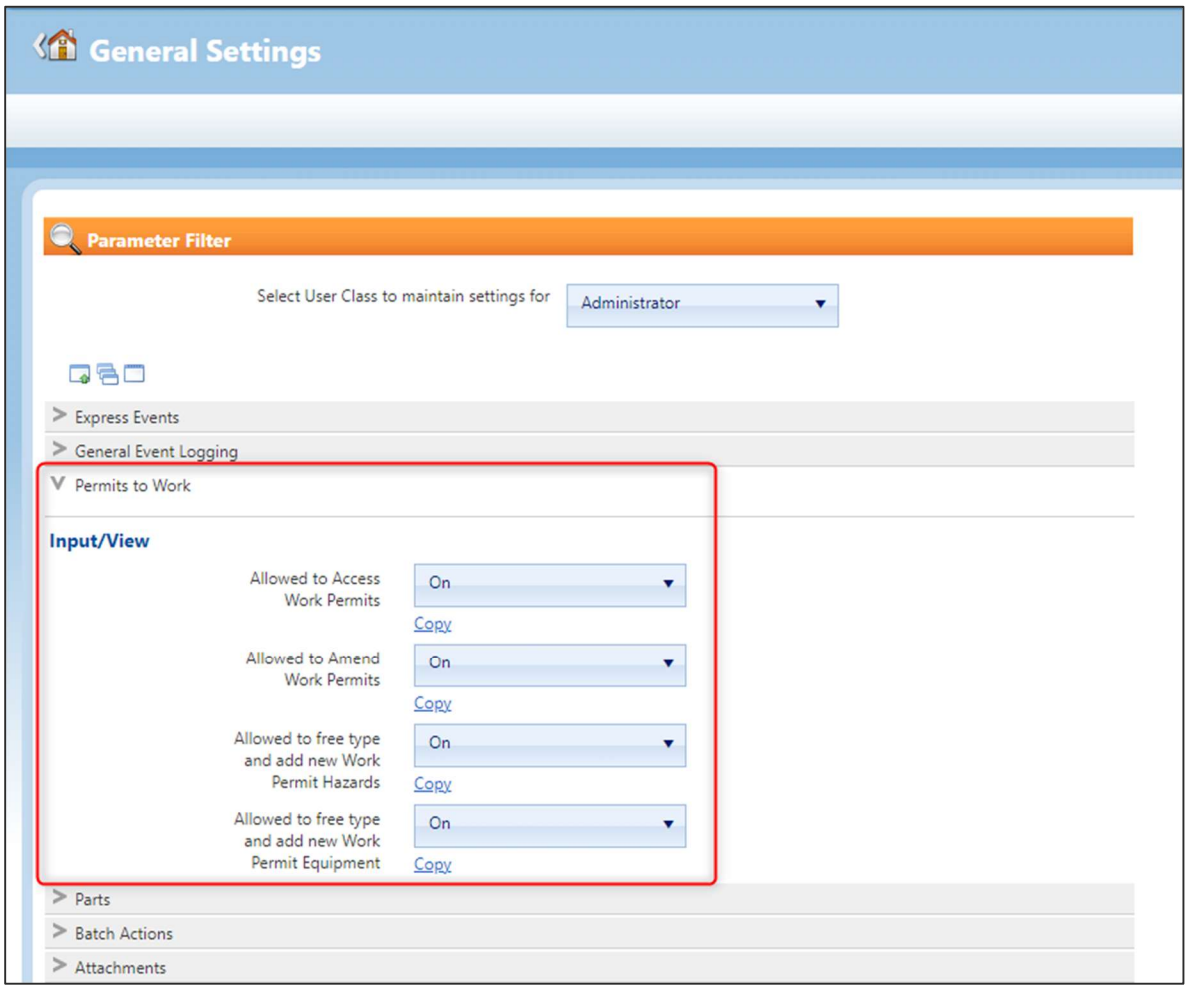


Administration

General Settings

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

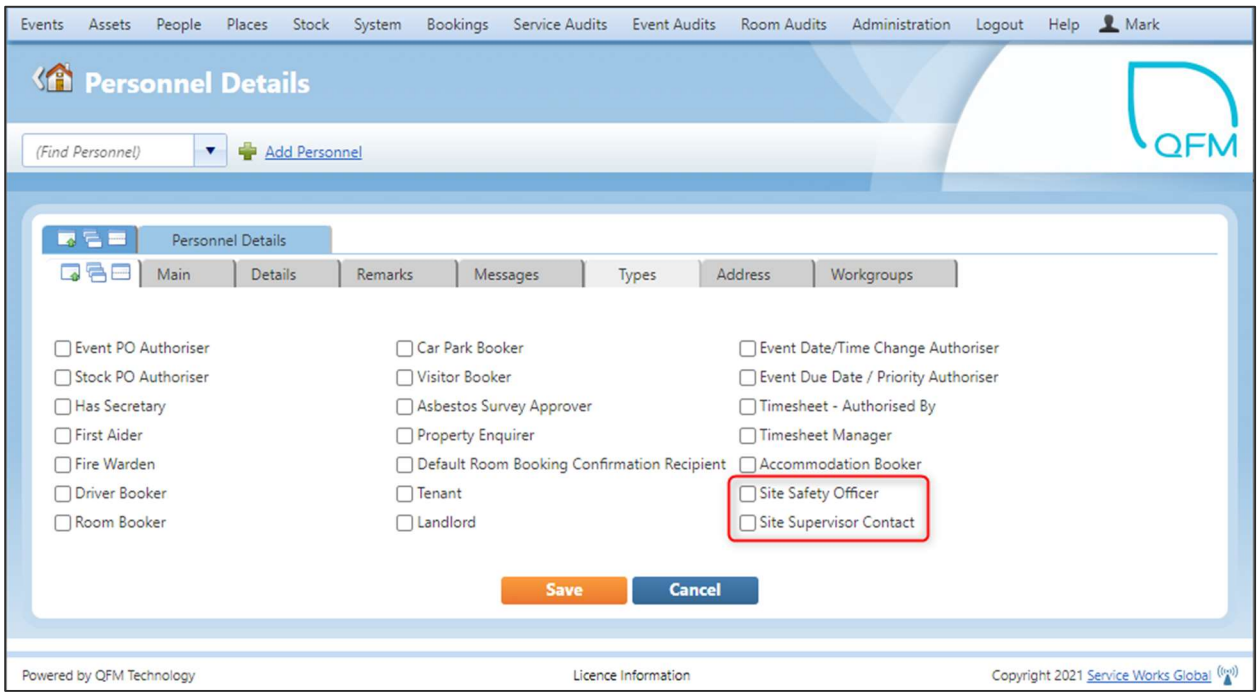
- <u>**Input/View**</u>
  - **Allowed to Access Work Permits**
    When set to **On** allows users to access Work Permit screens.
  - **Allowed to Amend Work Permits**
    When set to **On** allows users to update Work Permit records.
  - **Allowed to free type and add new Work Permit Hazards**
    When 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.



Personnel Types

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

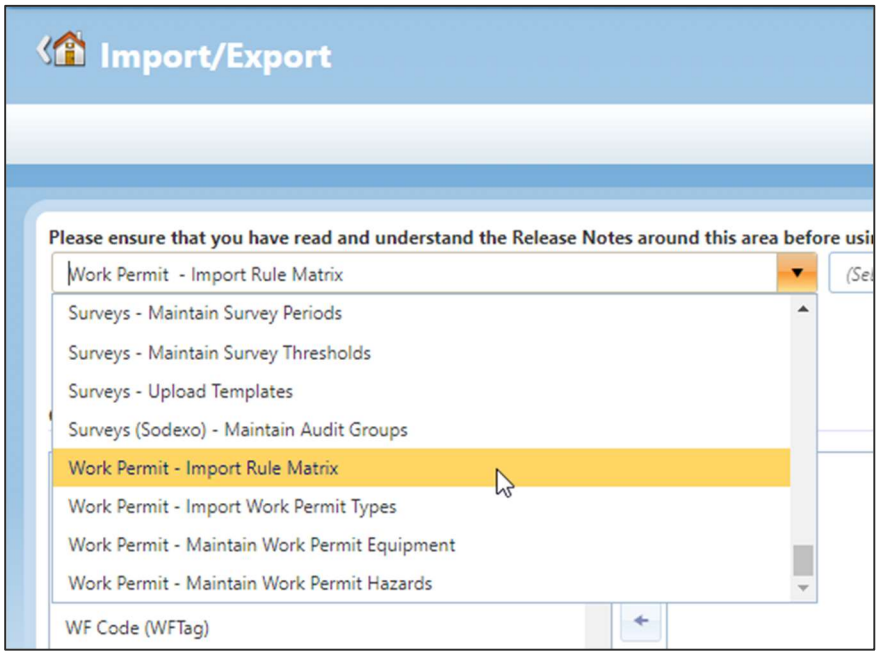
- **Site Safety Officer**
- **Site Supervisor Contact**



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.

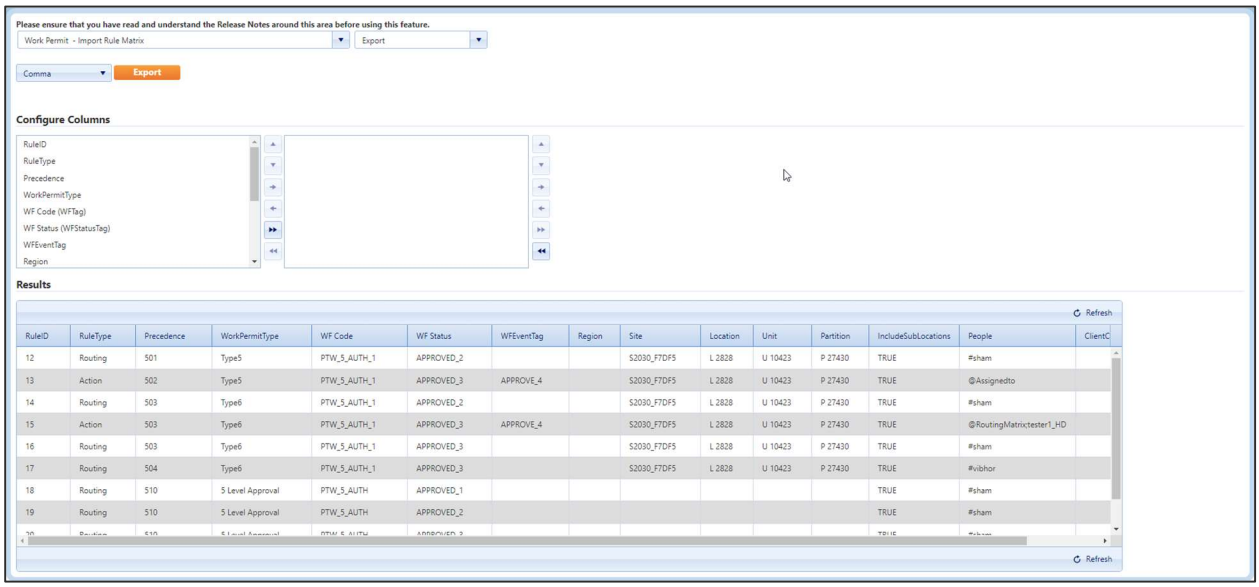


Work Permit - Import Rule Matrix

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.



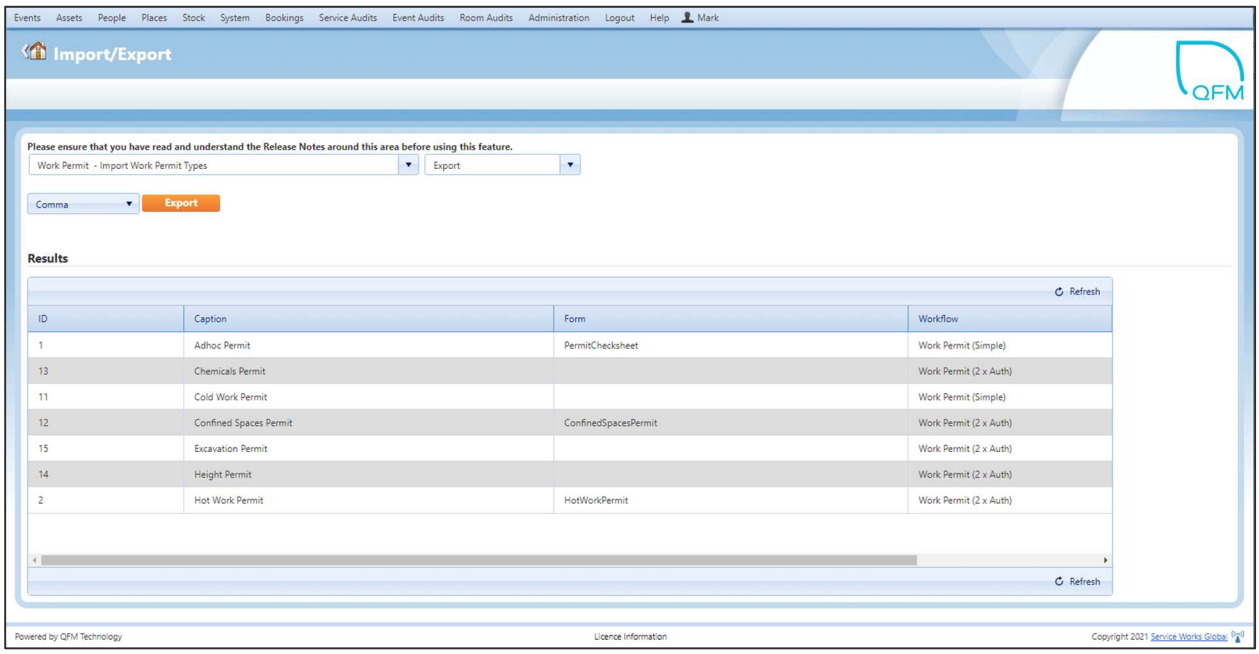
Work Permit - Import Work Permit Types

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).

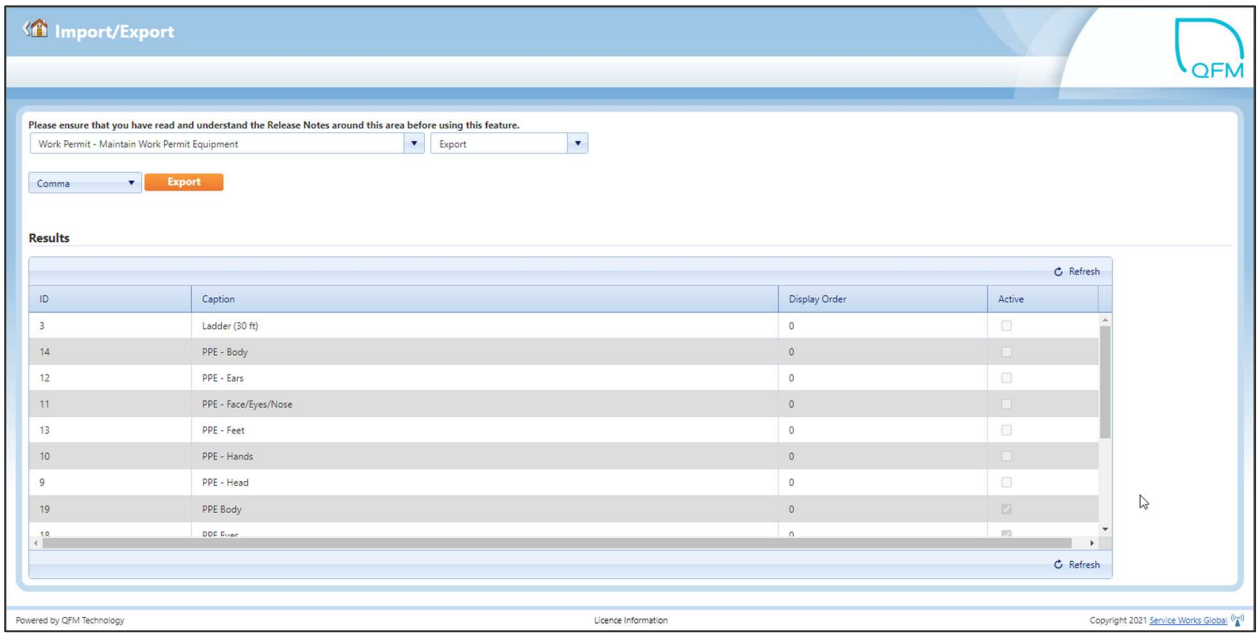
The selected Workflow may be used to control the lifecycle of the Permit including multiple Approvals, Routing to different Assignees, Restricting the available Assignees, Limiting access to certain buttons, etc.

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.



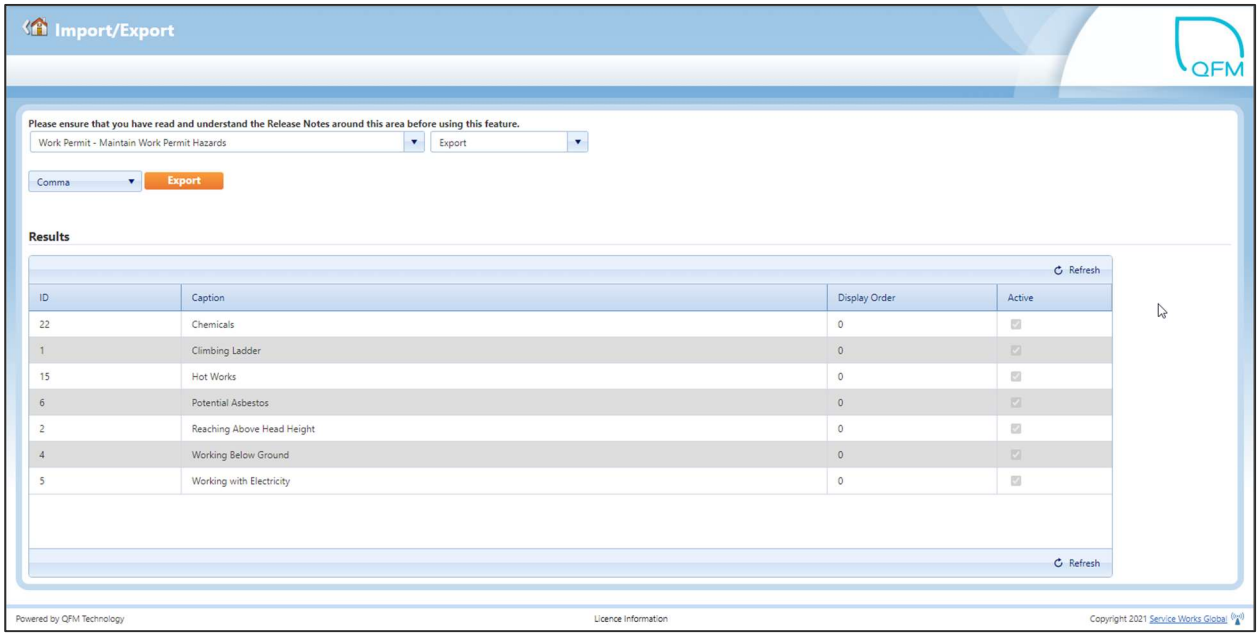
Work Permit - Maintain Work Permit Equipment

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



Work Permit - Maintain Work Permit Hazards

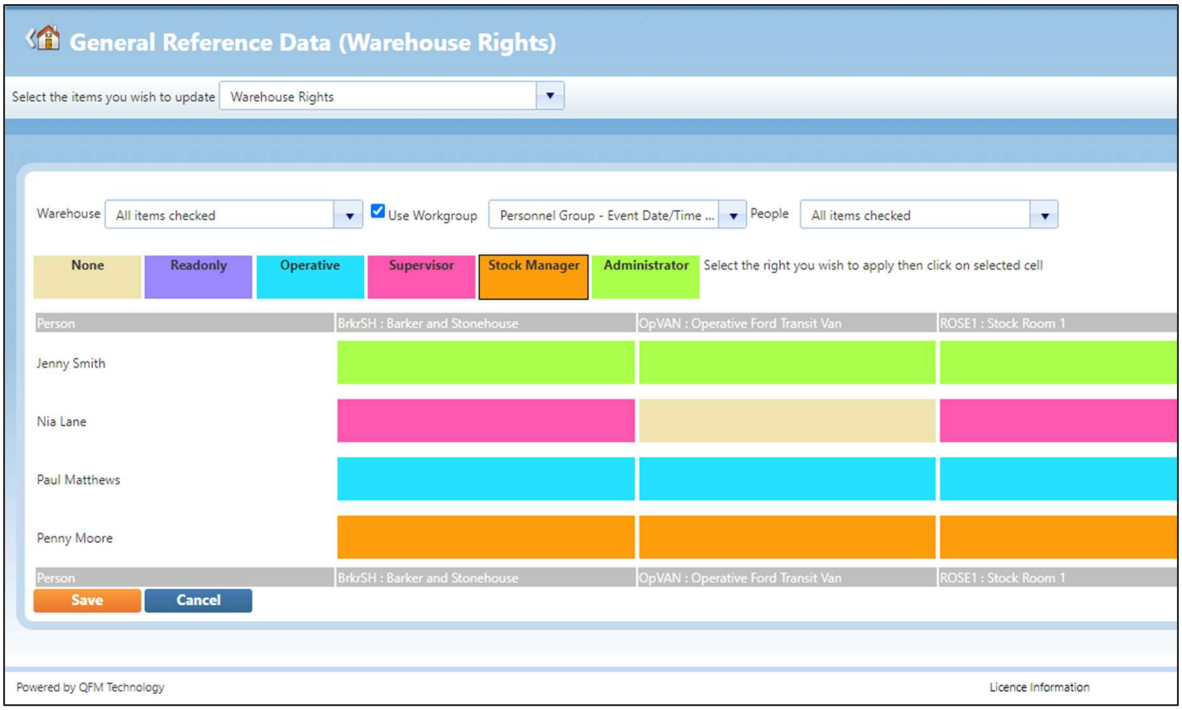
This table is used to create Hazard types to be associated with Work Permits.



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.



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.

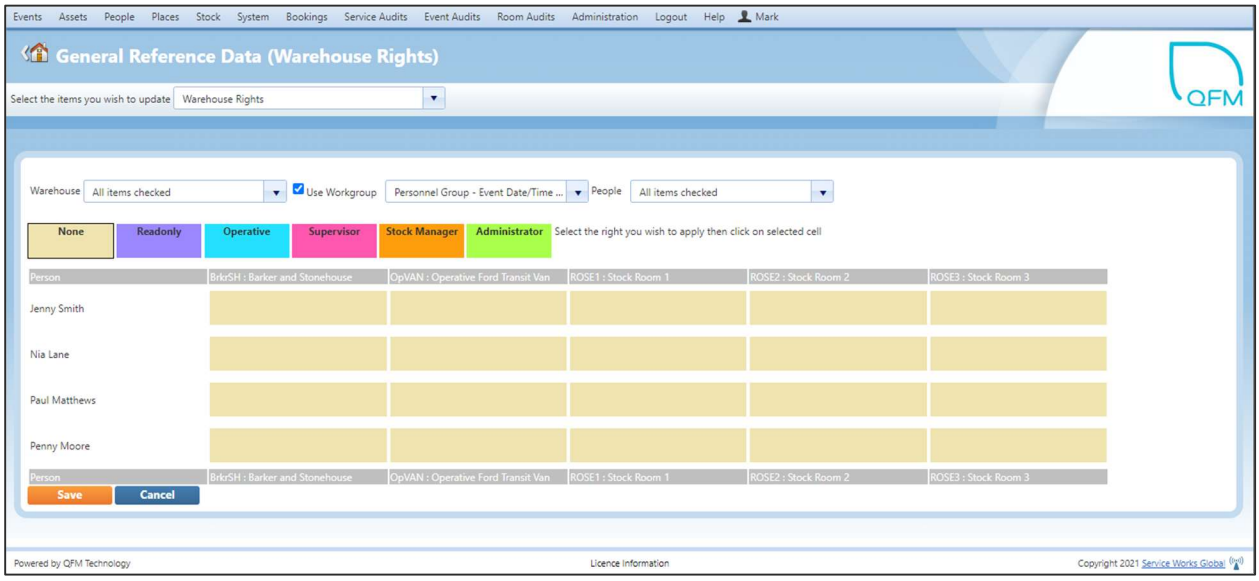
Introduction

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.

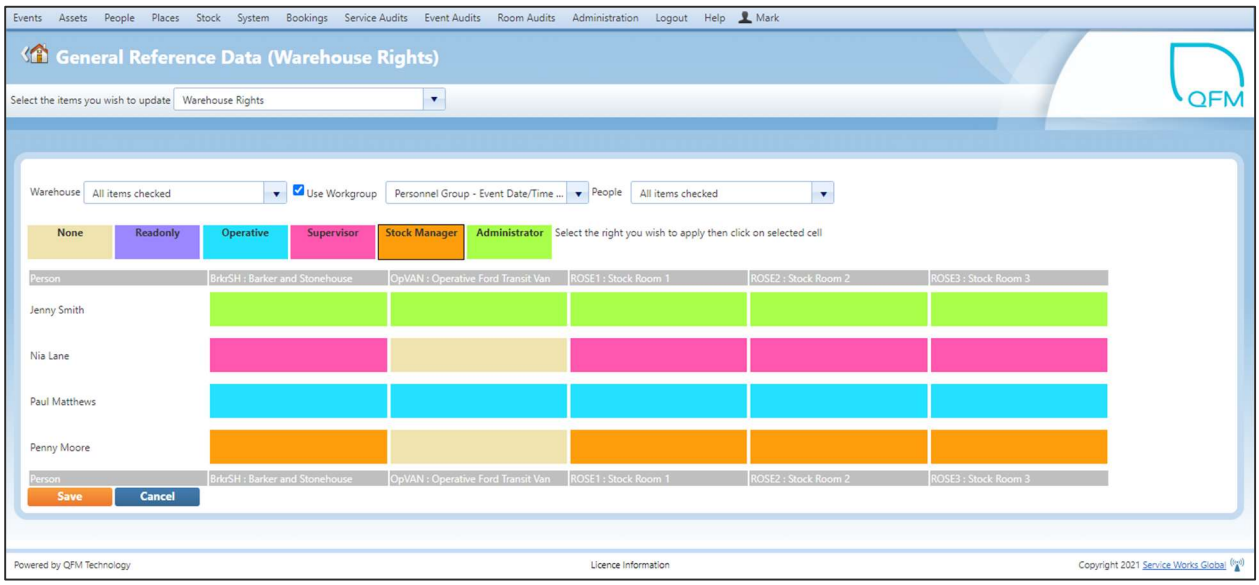
Permissions are initially set to **None** by default.



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,

then clicking on a selected cell in the grid.

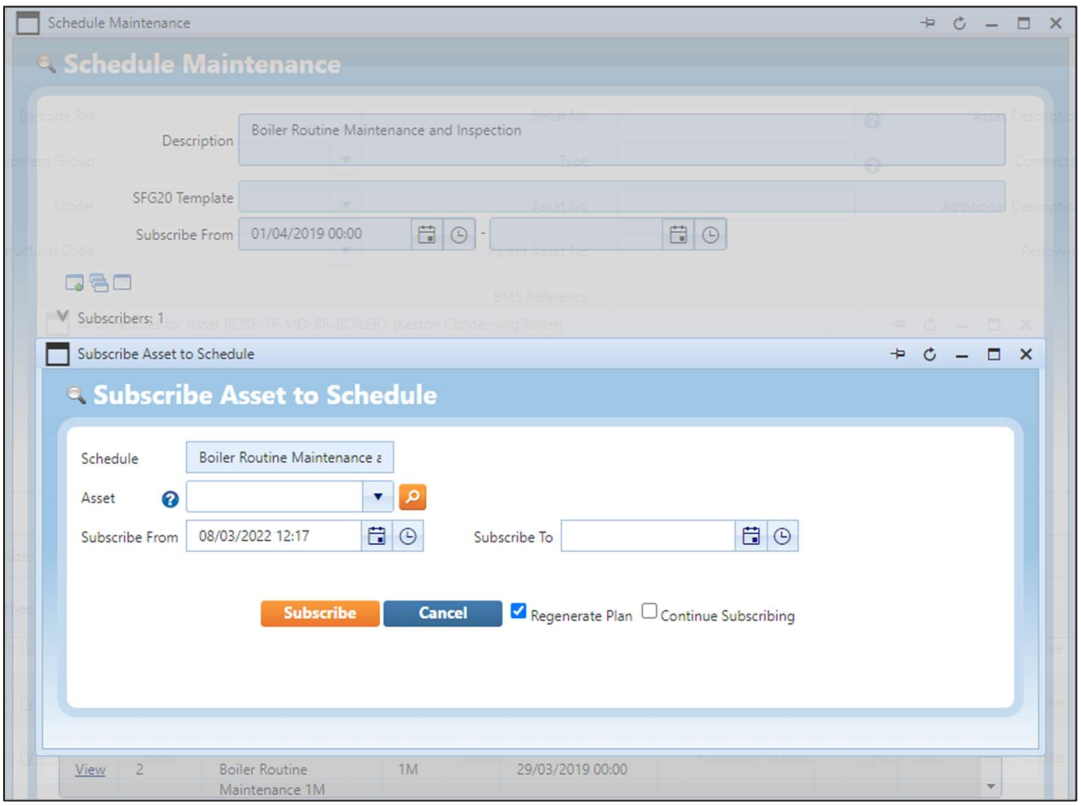


Select **Save** to confirm the updates.

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.



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

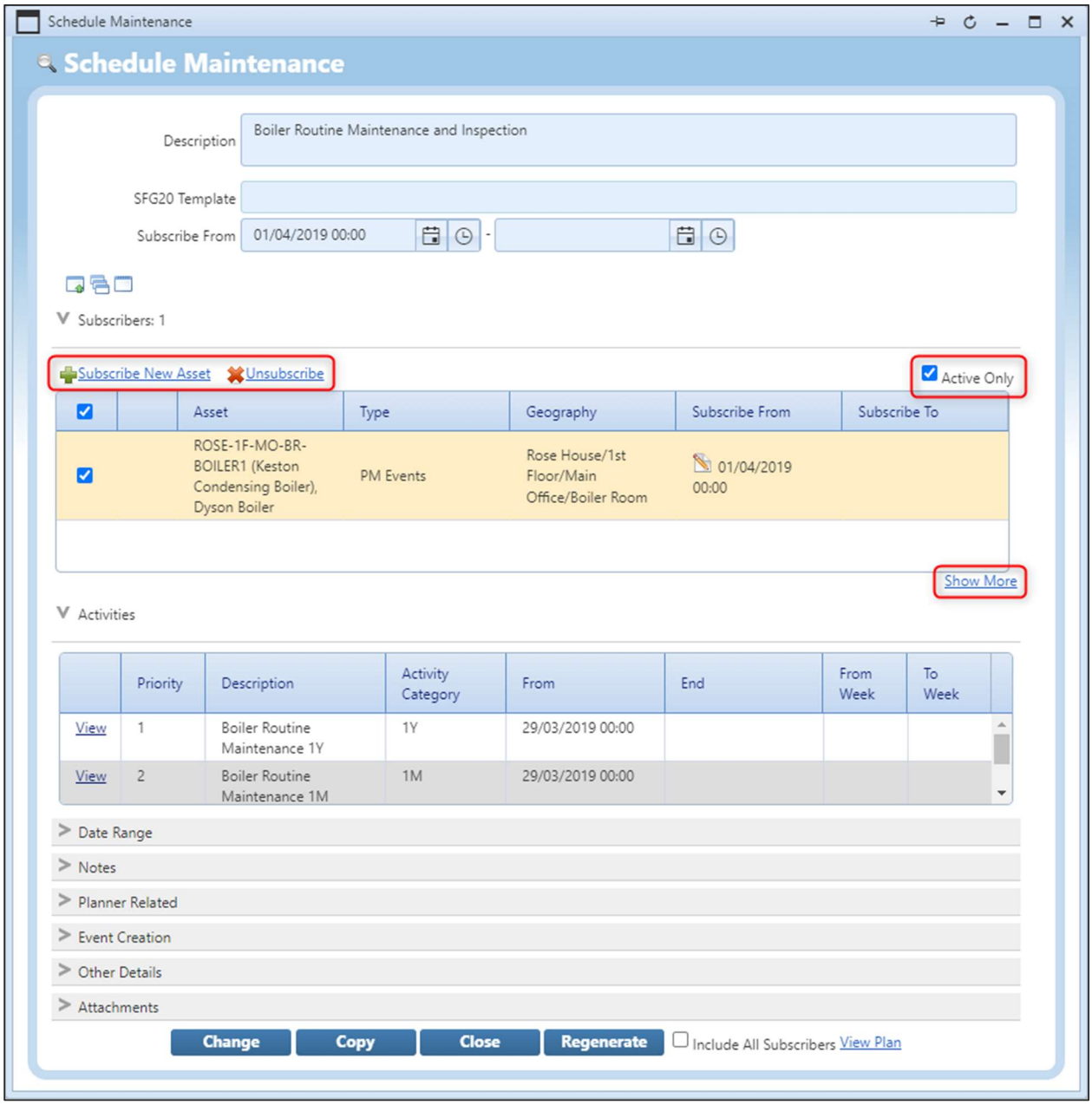
Features and benefits include:

- 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.

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).

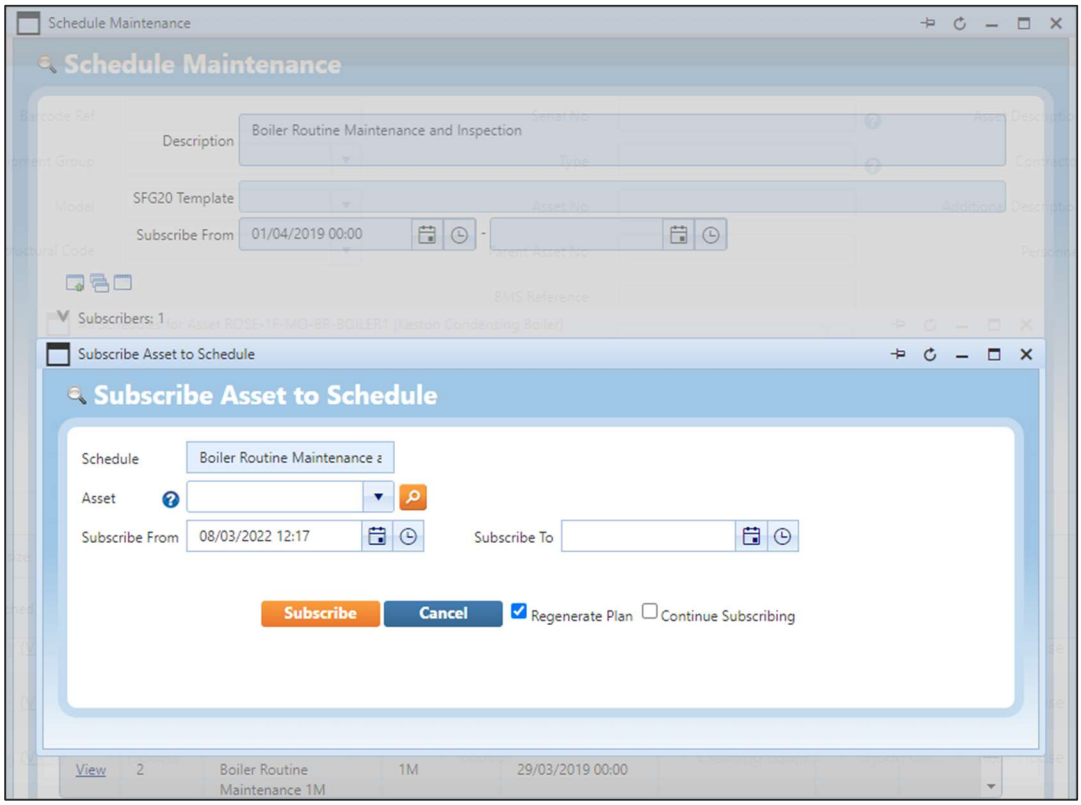
Subscribe New Asset Unsubscribe

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).



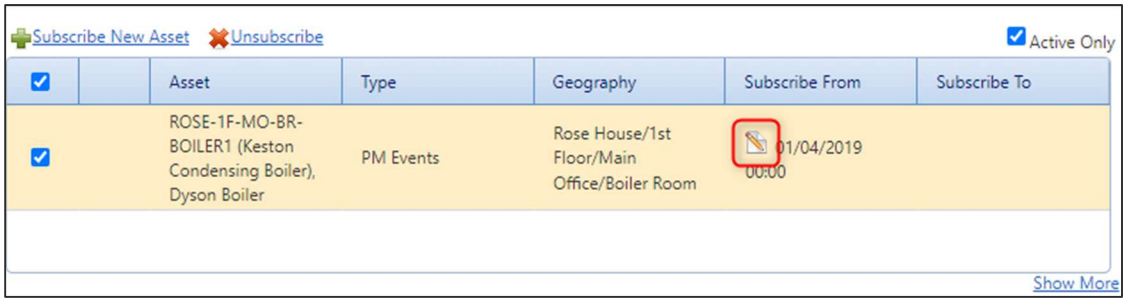
- Use an option to **Regenerate** the Plan based on the additional Asset/s.
- **Continue Subscribing** Assets.

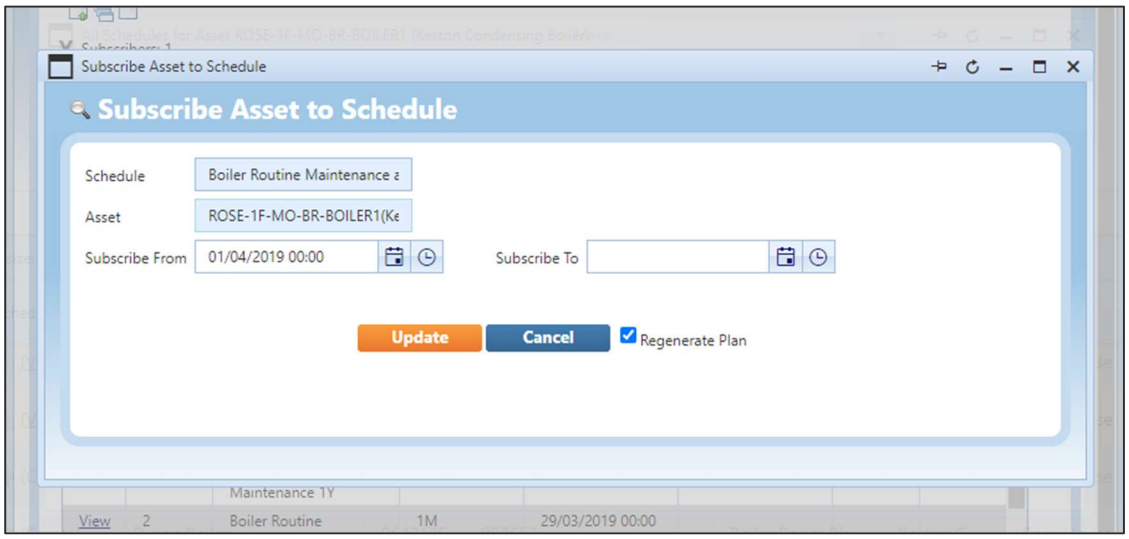
Unsubscribing Assets

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





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

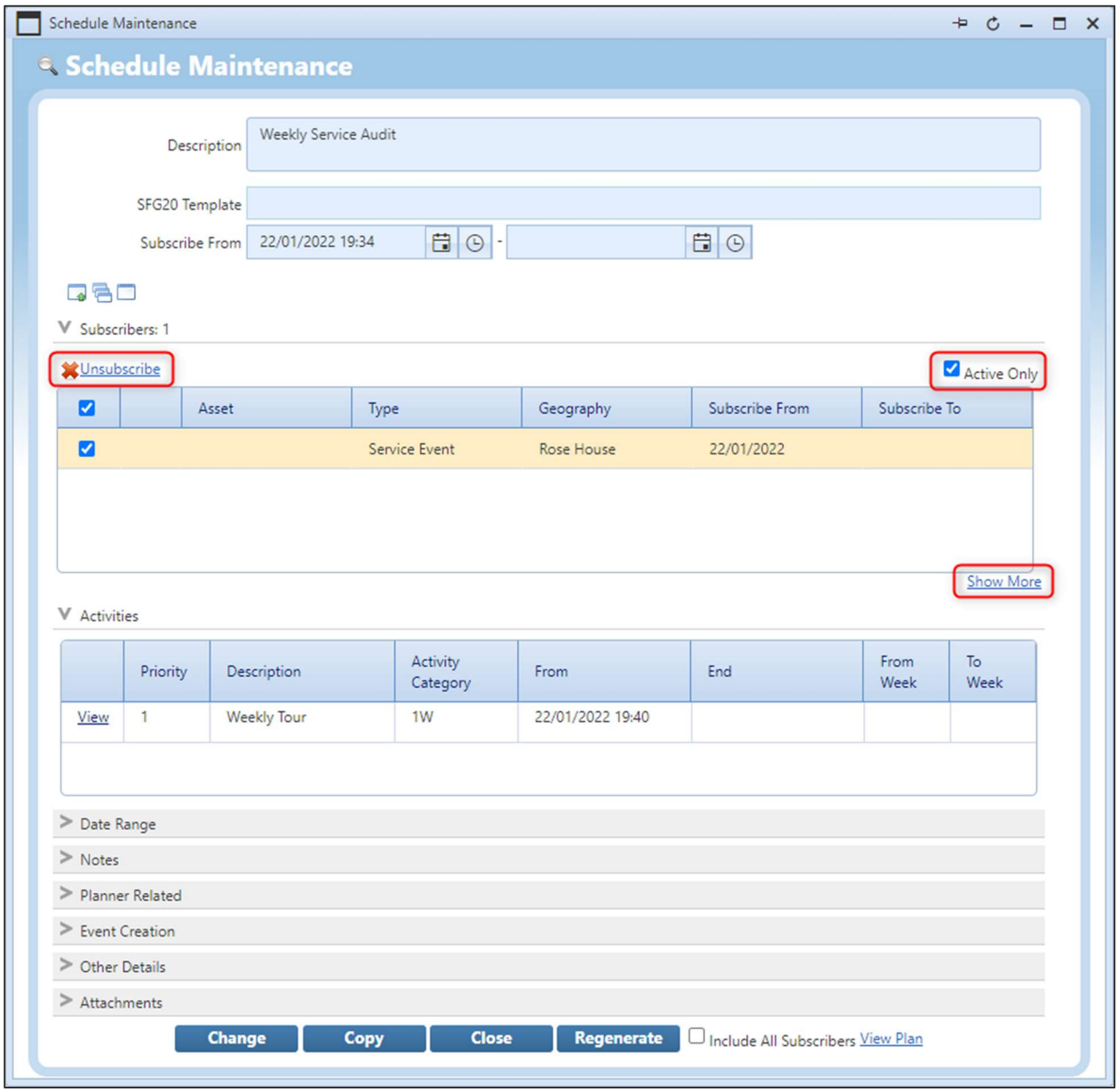
The **Active Only** checkbox allows you to display only those Services which have a current subscription.

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
Schedule Maintenance
Description
Weekly Service Audit
SFG20 Template
Subscribe From
22/01/2022 19:34
Subscribers: 1
Unsubscribe
Active Only
Asset
Type
Geography
Subscribe From
Subscribe To
Service Event
Rose House
22/01/2022
Show More
Activities
Priority
Description
Activity Category
From
End
From Week
To Week
View
1
Weekly Tour
1W
22/01/2022 19:40
Date Range
Notes
Planner Related
Event Creation
Other Details
Attachments
Change
Copy
Close
Regenerate
Include All Subscribers
View Plan

Asset Search Enhancement

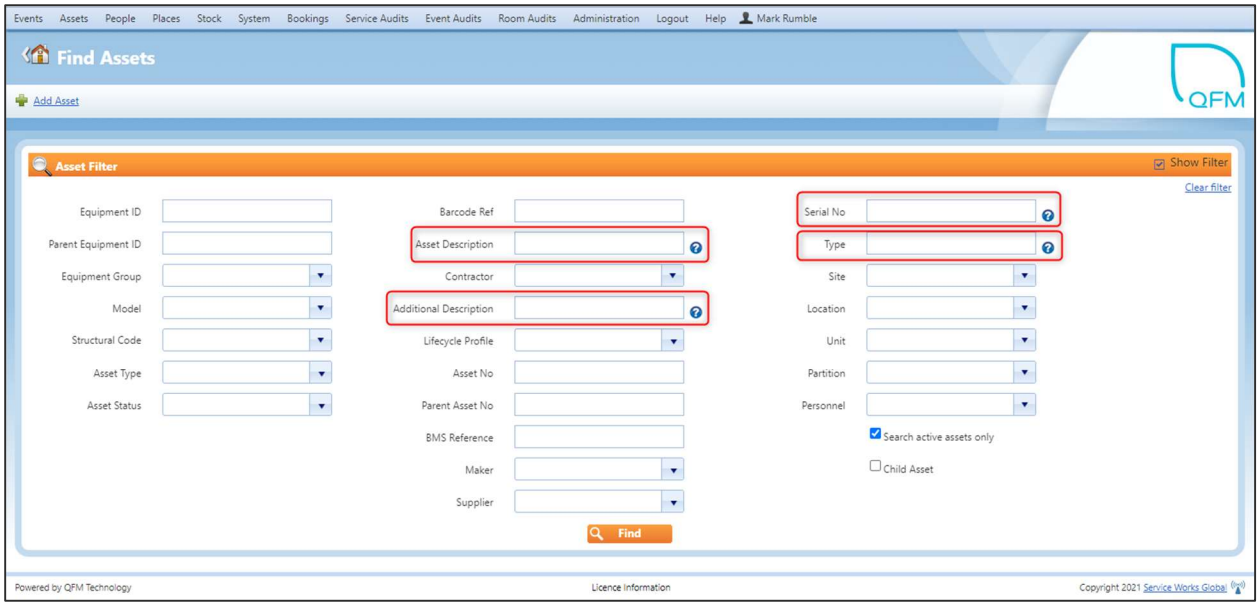
Introduction

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)

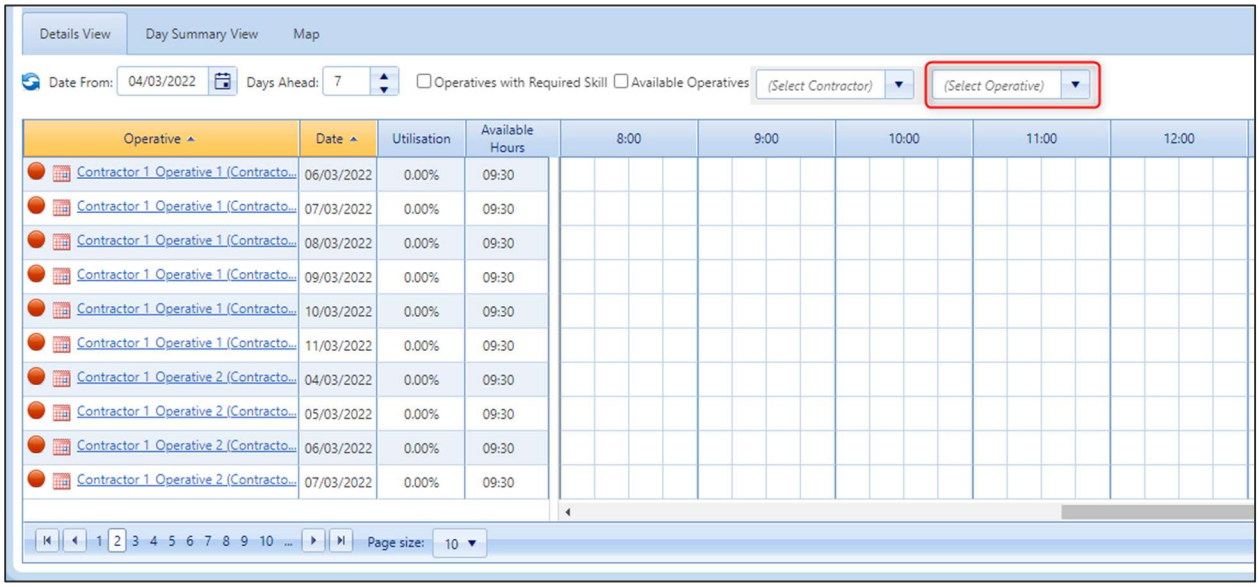


Resource Scheduler - Operative Filtering

Introduction

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

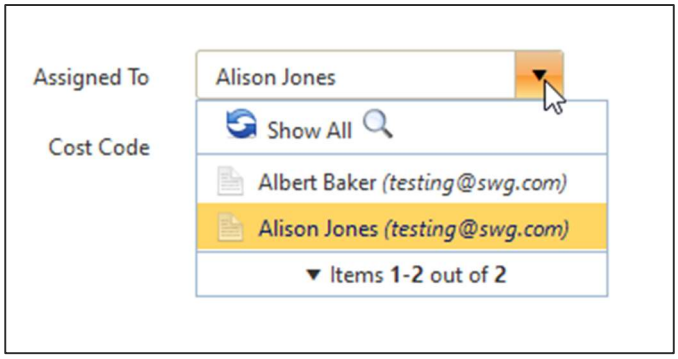
If a Contractor value is entered (in the *Select Contractor* filter), then the Operatives available to select from the *Select Operative* filter will be only those of the selected contractor. Additionally, when a Contractor/Operative filter is applied to the grid the 'Operative Groups' option becomes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



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.



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.

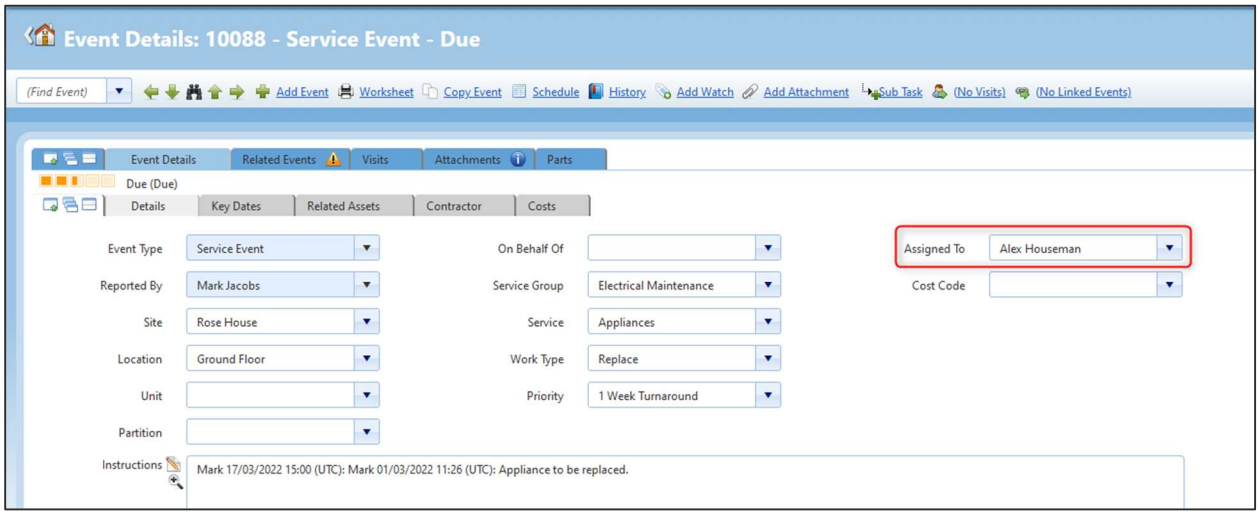
The system also provides the ability to limit who has access to the available workflow button controls and when these controls are shown. Additional types of permissions have been added to provide control over this.

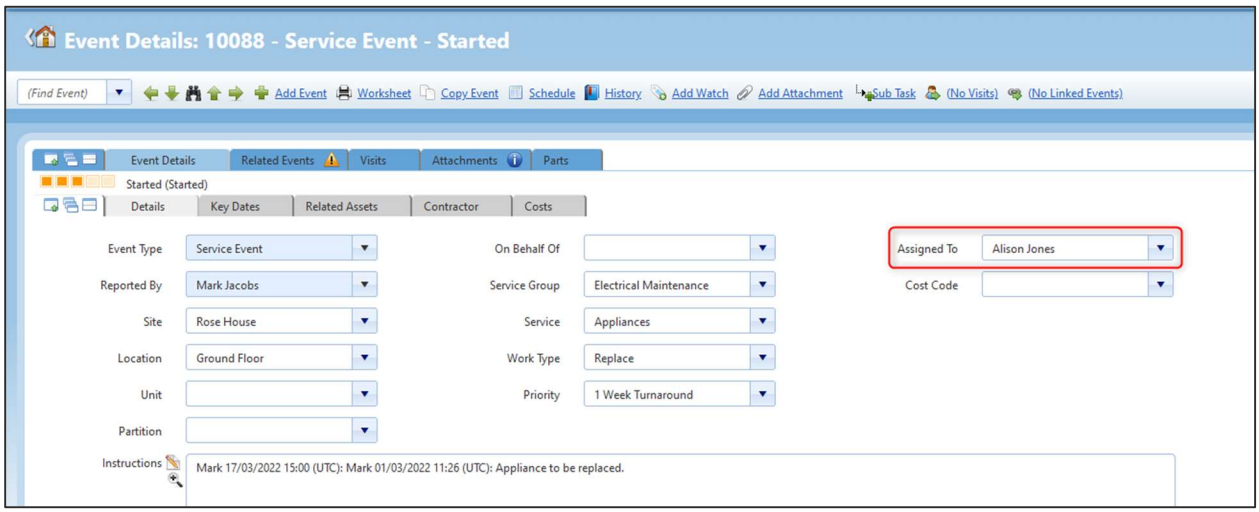
The requirement for Approvers to provide comments can also be defined, therefore ensuring that a narrative is provided to support a decision.

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.

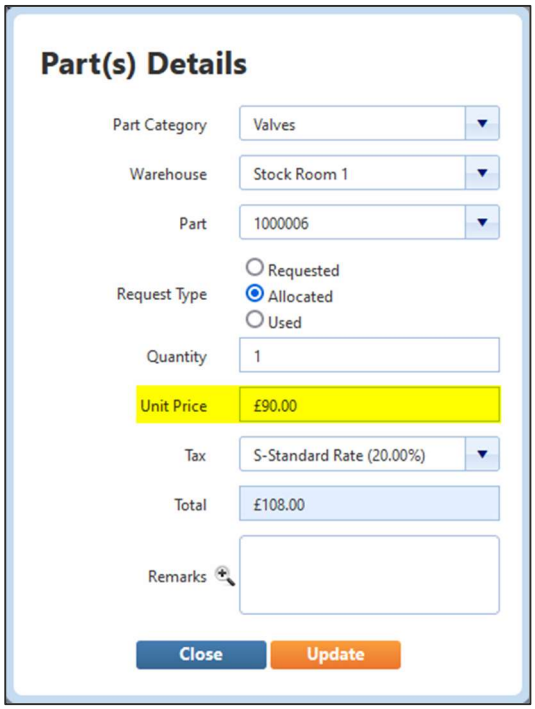



Event Details: 10088 - Service Event - Started
(Find Event)
Add Event
Worksheet
Copy Event
Schedule
History
Add Watch
Add Attachment
Sub Task
(No Visits)
(No Linked Events)
Event Details
Related Events
Visits
Attachments
Parts
Started (Started)
Details
Key Dates
Related Assets
Contractor
Costs
Event 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 15:00 (UTC): Mark 01/03/2022 11:26 (UTC): Appliance to be replaced.

Stock Parts Enhancements

Overview

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



Features and benefits include:

- Provides the ability to update the price for 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.

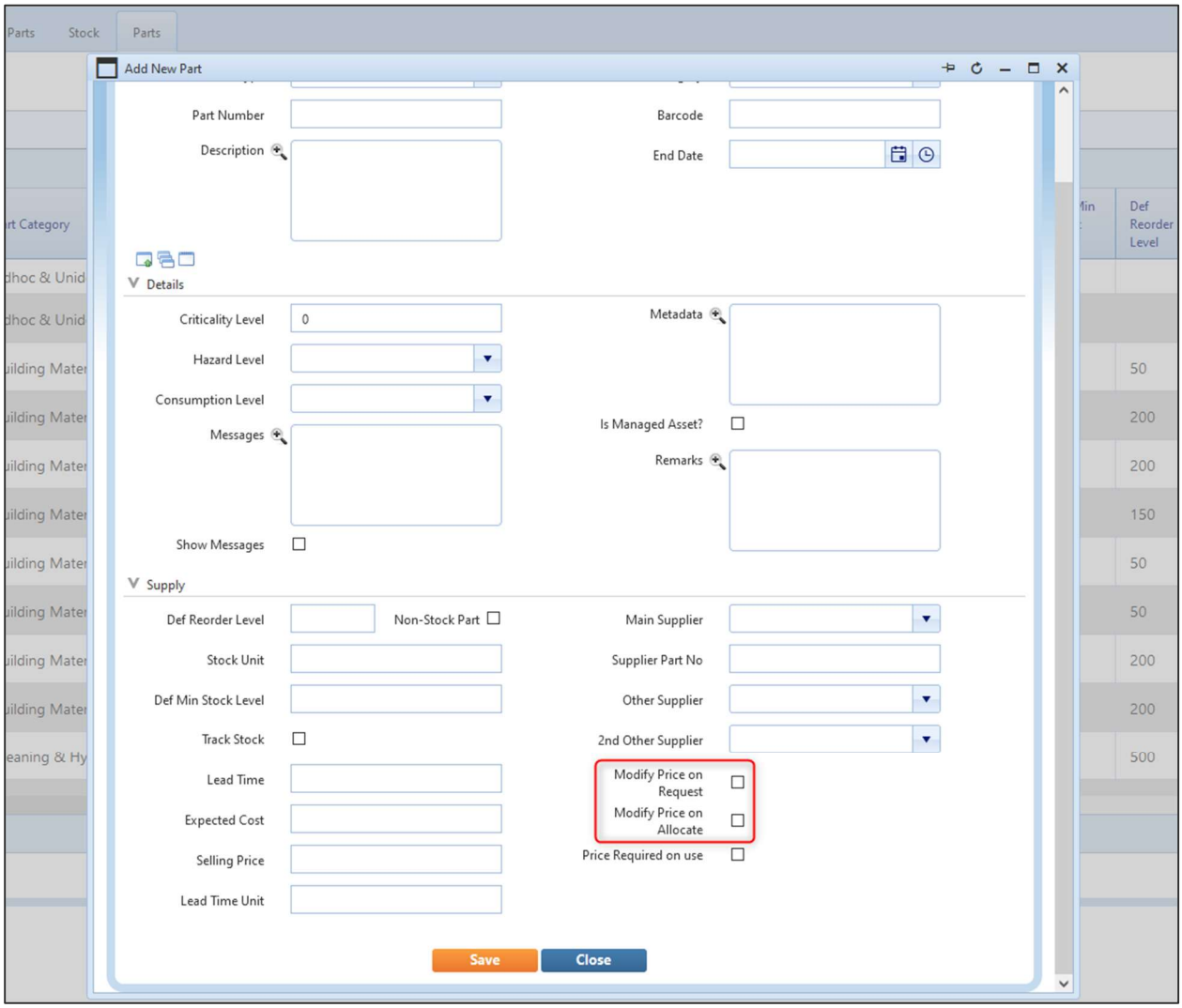
Notes: This is a web only enhancement; the new Price Modes are not available on the QFM mobile app. Users will still require sufficient Warehouse Rights to Request and Allocate, to be able to update the Price.

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

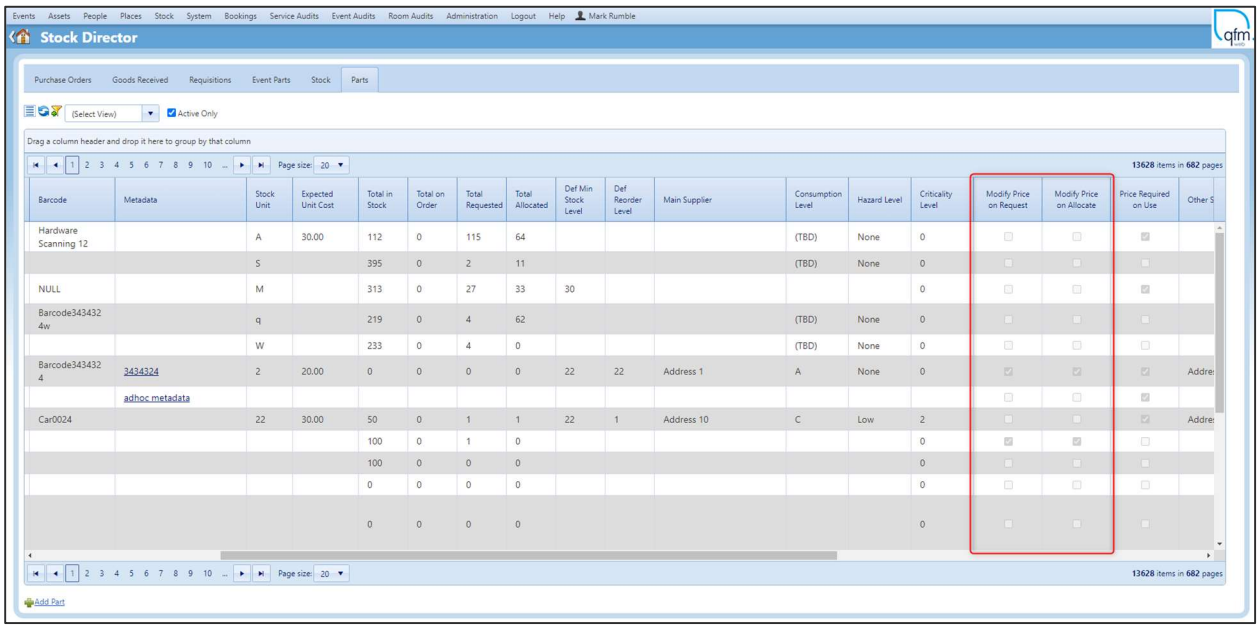
- **Modify Price on Request**
  Allows the Part Price to be modified when a Part is 'Requested' (optional, Price is not mandatory)

- **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.



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


Events Assets People Places Stock System Bookings Service Audits Event Audits Room Audits Administration Logout Help Mark Rumble
Stock Director
Purchase Orders Goods Received Requisitions Event Parts Stock Parts
(Select View)
Active Only
Drag a column header and drop it here to group by that column
Page size: 20
13628 items in 682 pages
Barcode 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 S
Hardware Scanning 12 A 30.00 112 0 115 64 (TBD) None 0
S 395 0 2 11 (TBD) None 0
NULL M 313 0 27 33 30 0
Barcode343432 4w q 219 0 4 62 (TBD) None 0
W 233 0 4 0 (TBD) None 0
Barcode343432 4 3434324 2 20.00 0 0 0 0 22 22 Address 1 A None 0 Addre
adhoc metadata
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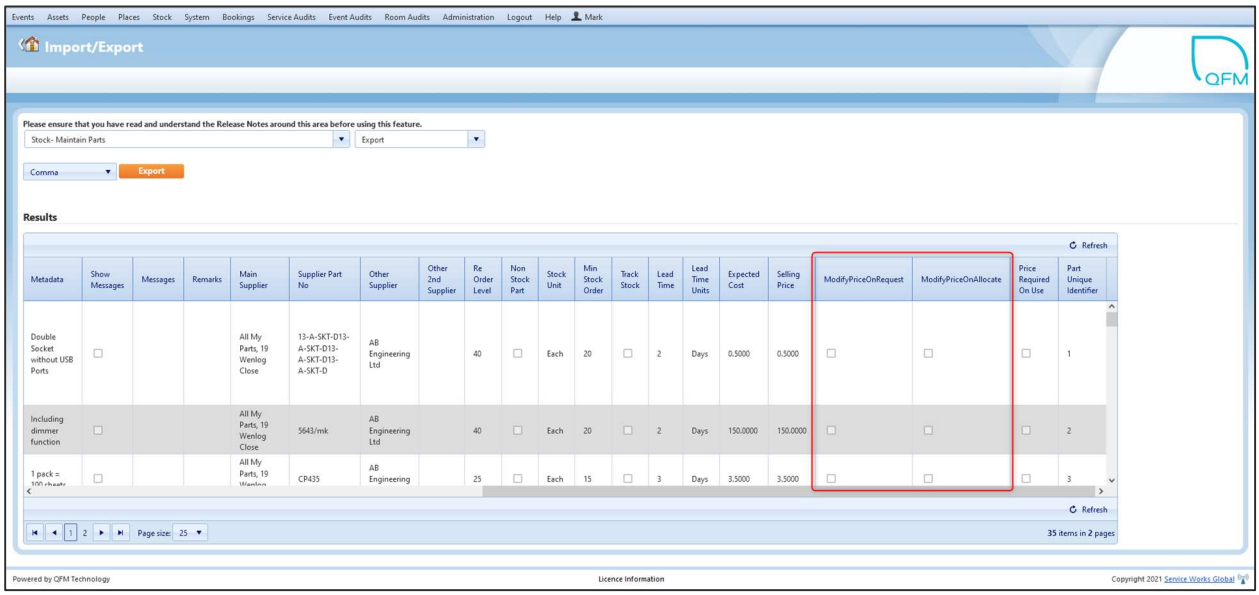
100 0 1 0 0
100 0 0 0 0
0 0 0 0 0
0 0 0 0 0
Add Part


Events Assets People Places Stock System Bookings Service Audits Event Audits Room Audits Administration Logout Help Mark
Import/Export
QFM
Please ensure that you have read and understand the Release Notes around this area before using this feature.
Stock- Maintain Parts
Export
Comma
Export
Results
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-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 2
1 pack = 100 sheets All My Parts, 19 Wenlog CP435 AB Engineering 25 Each 15 3 Days 3.5000 3.5000 3
Page size: 25
35 items in 2 pages
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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 3rd party components, as listed below, in order to provide extended functionality. Use of these products may be subject to separate license agreements with the specific vendors/service providers. Use of these 3rd party components is not covered under the QFM licensing agreement with SWG. It is the client's responsibility to ensure that they have up to date licensing for these specific 3rd party products before they are used within the QFM product.
Crystal Reports (http://www.sap.com/uk/solutions/sap-crystal-solutions/query-reporting-analysis/sapcrystalreports/licensing/index.epx)

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

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

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

- Priority
- Worktype
- Service
- Service Group

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

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

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

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.