

QFM 4.00.01.18 Release Notes

What's New in QFM v4.00.01.18

April 2022

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Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition	14/04/2022	MR

Release Notices

QFM Compatibility

The QFM v4.00.01.18 release is compatible with the following QFM software:

- Workflow Scheduler: 4.00.01.05
- Mobile App: 3.03.01, 4.00.00
- Mobile Server 4.00.00.00
- 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 v4.00.01.18 release includes one new feature. A summary is provided below, with further details on the following page.

SFG20 Integration - Enhancements

QFM integration with SFG20 has been redesigned to provide an improved method of presenting the data in QFM. SFG20 task details are now accessible via specific extract reports which are kept up to date and are automatically associated with QFM Events. Each Event, generated from a schedule linked to an SFG20 schedule will contain an attachment with a full list of tasks and narrative for the whole schedule. It will also have linked an extract attachment which contains just the steps that are relevant to the specific Event (e.g. Monthly steps). Any visits generated against the Event will also contain these linked documents.

SFG20 Integration - Enhancements

Overview

QFM integration with SFG20 has been redesigned to provide an improved method of presenting the data in QFM. SFG20 task details are now accessible via a combination of PDF documents - full reports and data extracts.

Data extracts will exactly match the QFM Schedule Activity, for example the tasks for an SFG20 three monthly check will be linked to the equivalent QFM Maintenance Schedule three monthly check Activity.

SFG20	All Tasks: (Day,Week,Month)
HTM 01-14: Automated Flexible Endoscopes	Endoscope Reprocessors (AER's) - Decontamination of
Date: 08/12/2021 11:28:27	
Version: 3	
Summary	
QFM Frequency (SFG20 Recommend	ded) Tasks
1D (Day)	3, 4
1W (Week)	5, 6, 7, 8, 9, 10
1M (Month)	11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 3 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 5 51, 52, 53, 54, 55, 56, 58, 59
Mandatory Statutory Optimu	Discretionary
Introduction	
for Hospitals and Healthcare prem (HTMs). SFG20 has interpreted the requirements and recognised Cod 2. The 'Service Timings' displayed ag dependent on the size, age and/o schedule may require customising estimate and allocate a Service Tir 3. Automated Endoscope Reprocess	gainst each frequency are generic. Please note that Service Timings are estimated so could vary or location of the equipment/building. Consequently, the timings provided within this task g according to individual circumstances. This also applies where it has not been possible to

- Improved method for accessing SFG20 Schedule data reports and extracts presented as formatted documents. These include colour code highlighting of tasks based on importance. The documents include the bulk of the data sourced from SFG20.
- The documentation is kept up to date automatically via background service.

- Tasks suppressed on the QFM Schedule (e.g. a 12 Monthly may suppress a 3 Monthly Event) are included and made available to operatives for reference to ensure nothing is missed.
- New Import/Export utility provides a dedicated method to maintain links between SFG20 Schedules and QFM Schedules.

Introduction

The previous release of QFM integration with SFG20 used a process which merged SFG20 maintenance task data into QFM Event Instructions. In practice, this had some practical limitations because Event Instructions are simple text and limited to 4000 characters. Some SFG20 instruction sets are much larger than may be accommodated within these. This area has been redesigned to provide an improved method of presenting the data in QFM.

As per earlier versions, QFM still expects SFG20 Schedules to be linked with QFM Maintenance Schedules. Once linked, the system generates the appropriate documentation for each Schedule Activity and links these to generated Events. The document produced comprises a comprehensive SFG20 Report for the current Schedule, containing all the prescribed steps plus individual extracts relating to the Tasks which are required for each Schedule Activity. As in previous versions, the system relies on QFM Schedules being set up with Activities which correspond to the different periods included within the SFG20 Schedule of Tasks, e.g. if the SFG20 Schedule contains Yearly, 3 Monthly and Monthly steps then the QFM Schedule linked to it should also have an Activity for each of these.

Where a QFM Event generated against a Schedule Activity suppresses an Event from the same Schedule but different Schedule Activity (e.g. a Yearly activity suppresses a 3 Monthly activity), the system will link SFG20 Extract reports for both sets of Tasks to ensure the Operative is informed. When using the Mobile App, the SFG20 Extract documents corresponding to the tasks for the current Activity are pushed to the device and so are available offline. They are also tagged so the operative must access the documents before the work may be started (this is configurable). The more comprehensive SFG20 Report listing all the steps required for the year is also included as a link for completeness, but is only available on demand when the Mobile has Wi-Fi connectivity.

The Reports produced include:

- An **SFG20 Report** lists all the required activities. Used when generating and linking the full SFG20 document to a linked Schedule.
- An SFG20 Extract lists the activities which match a particular Schedule Activity. This is a sub-set
 of the full SFG20 Report.
 Used when generating the extract of the specific steps being linked to the Schedule Activity.

Template Schedule Management

The existing 'SFG20 Template Schedule Management' screen, available from the 'Administration > Manage' menu, is enhanced as follows.

• 'Schedule ID' column is removed as it was not useful. The 'Reference' column now shows a link which opens the Schedule in a pop-up window.

٢	ì	SFG	i20 Te	mplate So	hedule Ma	nagement
	٦	[emplate	e Schedules	;		
		Appro	ve	Suppress		
		S 🗸	(Select V	iew) 🔻	(Select Schedule)	(Select Asset)
	Dra	ag a coli	umn heade	r and drop it here	to group by that colun	nn
	K	•	1	► Page size:	10 🔻	
			Active Version	Reference	Review Status	Title
				<u>01-02</u>	🖋 Approved	Boiler Superheater
				<u>15-03</u>	🖋 Approved	Heat Exchangers - Coils
				<u>15-06</u>	🚖 New	Heat Exchangers - Coils

- The Schedule now supports any HTML formatting from the SFG20 Schedule. The system no longer strips out formatted content. The data shown to the user comes directly from SFG20.
- The SFG20 Schedule now displays a colour coding key. The page also has been changed to render any of the rich HTML which may be contained within the SFG20 content.

Schedule				÷¢ – □
🖻 Sche	dule			
Title			Type Version	Status
15-03:H	eat Exchangers - C	Coils	N/A 3*	Approved
Mandat	ory Statutory	Optimur	n Discretionary	
			Discretonary	
Schedu	le Introduction			
When clea	aning, ensure that sys	tem fans are	off to avoid dirt disturbed during cleaning entering into the system.	
Schedu	le Tasks			
Display Order	ltem	SFG20 Fq / QFM Fq	/ Action / Notes	Skilling
1	Water to Air			
	<u>.</u>	Month	Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side.	Mechanical
2	Drain pans	1M	Check that condensate traps on cooling coils are filled with water.	Mechanical
3	Coils			
4	Coil vent	Month 1M	Check operation, condition of filters and sight glasses.	Mechanical
			Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable	

Handling of Suppressed Scheduled Tasks

Any Events generated from linked Schedules, will have corresponding Extracts from SFG20 documents which show applicable SFG20 Tasks. Where Activities have been suppressed, then associated Extracts (for the suppressed Activities) are also included on the Events, so that the operative has access to the full range of Tasks which may be needed.

QFM Schedule Maintenance

SFG20 PDF documents are now automatically generated and added to a QFM Maintenance Schedule within the SFG20 Synchronisation Workflow. Documents will be generated/regenerated when a schedule is linked/changed or a new version of SFG20 schedule is 'Approved'.

The examples below show a full SFG20 Report attached to a Schedule, and an SFG20 Extract attached to a Schedule Activity.

Unsub)	<u>scribe</u>										Activ	
		Asset	Туре		Geogr	aphy	Subscribe	From	Subscribe To		Suppress Eve Generation	nt
			Service E	vent	\$2030 <u>.</u>	_F7DF5	08/04/202	2				
											Show	v More
✓ Activit	ies											
	Priority	Description		Activity Catego		From		End		From Weel		k
<u>View</u>	1	activity 56		1D		08/04/202	22 03:30					
<u>View</u>	2	test inst		1M		08/04/202	22 15:30					
> Date F	lange											
> Notes												
> Planne	er Related											
> Event	Creation											
> Other	Details											
✓ Attach	ments											
ttachme	nts & Reso	ources										
FG20 S	chedule											
A	port - HTM	101-										

Schedule

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Schedule Activity Mainter	nance					÷	Ç	-		×
Schedule Ad	tivity l	Mainte	nance							
Previous	Next	Return To S	Schedule						_	
Description	activity 56	j								
Activity Category	1D This is used to	determine how	these items are displ	ayed on the i	Planner				•	
Start Date 08/04/202	2 03:30	: •	End Date	•			Ē		Э	
Template Schedu	uling At	tachments	Advanced	Other	Forms					
Attachments & Reso	urces									
SFG20 Extract										
SFG20 Extract - HTM (1D) (ScheduleActivity										
			Close							

Schedule Activity

SFG20 Documents

Examples of the SFG20 PDF documents produced in QFM are shown below. The full Report relates to the overall Schedule and the Extract relates to a specific Activity - in this example the Daily frequency tasks 3 and 4.

SFG 20	All Tasks: (Day,Week,Month)
HTM 01-14: Automated Flexible Endoscopes	Endoscope Reprocessors (AER's) - Decontamination of
Date: 08/12/2021 11:28:27	
Version: 3	
Summary	
QFM Frequency (SFG20 Recommen	ided) Tasks
1D (Day)	3, 4
1W (Week)	5, 6, 7, 8, 9, 10
1M (Month)	11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50 51, 52, 53, 54, 55, 56, 58, 59
Mandatory Statutory Optim	um Discretionary
for Hospitals and Healthcare pre	d specialist set of task maintenance schedules is to create a sector recognised structured approach emises which should not be considered as replacements for Health Technical Memorandums he HTM requirements by combining them with the SFG20 core elements, current statutory bodes of Practice. against each frequency are generic. Please note that Service Timings are estimated so could vary

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Date: 08/12/2021 Version: 3	Automated Endoscope Reprocessors (A loscopes 112827	LER's) - Decontamination of		
Summary	(SFG20 Recommended) Tasks			
1D (Day)	3, 4			
Introduction 1. The purpose of for Hospitals (HTMs). SFG2 requirements 2. The 'Service T dependent or schedule may	of the HTM Aligned specialist set of task maintenance and Heathrace premises which should not be conside to bas interpreted the HTM requirements by combini- and recognised Codes of Practice. Iming: displayed against each frequency are generic in the size, age and/or location of the equipment/built require costomising according to and/adual accounts	SFG 20	Extract: (Day)	
3. Automated Er 1. Type 1 /	l allocate a Service Timing to a particular task. indoscope Reprocessors (AER's) for flexible thermo-lat AER's have a single door or lid entry (sometimes calle AER's have two doors and a pass-through facility.		Endoscope Reprocessors (AER's) - Dec	ontamination of
4. AER's are cha temperatures	aracterised by a chemical disinfection stage because th s required for thermal disinfection.	Flexible Endoscopes		
by a por 2. Some A	cessary to ensure that the disinfectant is removed from st-disinfection rinsing stage. VER process cycles are available that add disinfectant t	Date: 08/12/2021 11:28:27 Version: 3		
	rocedure, it is very important that the disinfectant is re	Version. 5		
Display Order	Tasks Daily tasks Criticality: Red QFM Frequency:	Summary		
	Action: 1. Check that the rotating spray arms are free t	QFM Frequency (SFG20 Recommend		
	 Check that the nozzles are not blocked. Remove, clean and replace strainers and filte Check all of the piping in the chemical addit 	1D (Day)	3, 4	
	 Carry out a visual inspection/testing to ensu coagulated or hardened chemical additive (r followed by cleaning or replacing piping as i 	Mandatory Statutory Optimu	m Discretionary	
	 Check that the supply of chemical add For AER's with a built-in water softener necessary. 	Introduction		
-	 6. Clean the inside of the chamber or bowl. 7. Clean door/lid seals. 8. Clean the external surfaces of the AER. 		specialist set of task maintenance schedules is to create a sec	tor recognised structured approach
3	 9. Carry out visual checks to ensure that all gau 10. Check loading equipment and locking mech 		ises which should not be considered as replacements for He	
	11. Check the clock times and cycle numbers ag	requirements and recognised Cod	e HTM requirements by combining them with the SFG20 core les of Practice.	elements, current statutory
	2. The working life of door/id seals can be proforaged by 3. Door seals should be renewed with sparse provided, c. intervals or when there is any sign of damage/detend 4. Maintenance and inspection of door safety devices an should be carried our in accordance with the manufes 5. Care should be taken when changing chemical contail labelling of each dosing system should be in place, pr	or approved, by the manufacturer at recommended ration. Id door interlocking and chamber sealing systems turer's written instructions. There to avoid misconnection of process chemicals. Clear		
	potential for error. Automatic control test - daily			
	Criticality: Red QFM Frequency: 1D Action: 1. Place a test device or a routine endoscope in the chan	Recommended: Day Skill: User		
4	start the cycle. 2. Ensure that accasability record is made of the test. N pressure and time at all significant points of the opera or site itsgl. 3. The test should significant points of middless of the site of the s	lote chamber temperatures (if appropriate), leak test timin gode e.g. the beginning and ending of each stage and requirements are ent: as correctly also of the cycle windless as indicated by the process record are within the limits established as giving chains gode, the time for which the temperature is a guidation and and the cycle and scopes mythem.		
	1. Ensure that the chemical dosing systems are fun 2. Check before and after the test that the correct the dosing pumps are operating in the correct 3. Check that on surachinotesid doguments that be 4. Check for any fluid leaks on the machine and any 5. Log all the results of the tests, either manually on Notes: 1. The automatic control test is designed to show that th	chemicals have been dosed into the machine and that manner even made to the machine or cycle parameters y associated equipment such as filters electronically or both.		
	validated parameters as shown by the values of the cy fitted to the AFR.	cle variables indicated and recorded by the instruments		
	 This test is carried out once a week and is the main test correctly and within the validated parameters. 			

Events

Events generated from a QFM Schedule (linked to an SFG20 Schedule) include the SFG20 documents in the Attachments tab. Where Activities have been suppressed, then associated Extracts (for the suppressed Activities) are also included on the Events, so that the operative has access to the full range of Tasks which may be needed.

Events	Assets	People	Places	Stock	System	Bookings	Service A	Audits	Event Aud	its I	Room Audits	s Adr	ministration	Logout
< ^	Even	t Det	ails: 5	1505	54 - So	hedu	ed Sei	rvice	- Rep	ort	ed (Ne	ew)		
(Find E	Event)	• •	₩ 8 1		Add Eve	ent 🖨 Wo	rksheet	Copy E	vent 🚺	<u>Histo</u>	ry 💊 Add	Watch	Add Att	tachment
	5=1	Event Det	ails	Related	d Events 🍟	🚹 🗍 Visits		Attachm	ents 🕦	Affe	cted Areas		Parts	
		Reporte	d (New)											
Ø A	Add													
Atta	chments &	& Resource	es											
SFG	20 Extra	ct	SFG	20 Sche	dule									
	1 I		R	5										
	,	- HTM 01-	_		t - HTM 01	-								
(1D)) (Schedule	Activity)	14	(Schedule	s)									
Powered	by QFM Teo	hnology												

Import/Export

A new Import/Export utility is available for administrators (Administration > Manage > Import/Export > SFG20 - Maintain Schedule Links).

This provides a dedicated import to maintain links between SFG20 Schedules and QFM Schedules.

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Import/Expo					
ase ensure that you have re	ad and understand the Release Notes around this area before using this	feature.			
FG20 - Maintain ScheduleLir		-			
omma 🔻	Export				
sults					
					C Refresh
chedule ID	Schedule Description	SFG20Reference	SFG20Title	LinkedActivities	LinkedAssets
80	SFG20 Feb Schedule one	#01-03	Thermal Actuators	SFG20 one; SFG20 Two; SFG20 Three	EqRef.9894 (9894)
08	SFG20 March 2022	#01-07	Heat Exchangers - Coils	Activity One ; Activity Two	EqRef.250 (250)
01	SFG20 March 2022 Scheudle	#01-06	Heat Exchangers - Coils	Template SFG20 Test	EqRef.600 (600)
11	sfg20 schedule for asset	#94-04	Heat Exchangers - Coils	DESCRIPTION VIA VIKAS	EqRef.5000 (5000)
07	SFG20 SCHEDULE TWO	#92-04	Heat Exchangers - Coils	Activity One	EqRef.6501 (6501)
04	sfg20 test	#01-07	Heat Exchangers - Coils	test one	EqRef.500 (500)
82	SFGO FEB 15 One	#01-03	Thermal Actuators	SFG20 one; SFG20 Two; SFG20 Three	EqRef.9896 (9896)
10	temp12	#SHTM 01-14	Automated Endoscope Reprocessors (AER's) - Decontamination of Flexible Endoscopes	Sample activity in sample schedule	EqRef.221157 (2)
			A. 4		• • •
					🖒 Refresh
	6 🕨 🍽 Page size: 25 🔻				138 items in 6 pages

Columns included are as follows:

- Schedule ID (read only)
- Schedule Description (read only)
- SFG20 Reference
- SFG20 Title
- Linked Activities (read only)
- Linked Assets (read only)



Minor Enhancements and Changes

The v4.00.01.18 release addresses issues highlighted in the product. Details are as follows:

SWG Reference	Description
25459	Aggregate Visit Remarks are now correctly populated onto the Event, when using QFM in Tablet Mode for Multi-Contracts.

Known Issues

This section details system issues which are identified in v4.00.01.18. 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.
39306	The Report generation process for approved SFG20 Schedules is time consuming; typically 10 seconds per schedule. If 1000 schedules have changed expect process to take about 3 hours.

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 (<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.