SERVICE WORKS GLOBAL
ADDNODE GROUP

QFM 4.01.00.55 Release Notes

What's New in QFM v4.01.00.55

June 2022

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Version Log

Version #	Summary of Revision	Date	Author
1.0	First edition	01/06/2022	MR

Release Notices

QFM Compatibility

The QFM v4.01.00.55 release is compatible with the following QFM software:

- **Workflow Scheduler: 4.01.00.02**
- **Mobile App: 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.

New Features Summary

The QFM v4.01.00.55 release includes a range of new features. A summary is provided below, with further details on the following page.

Event Type Data Scoping

Data Scoping Filters can now be applied on Event Type by User Class. This provides a wider set of options for applying Event related restrictions, i.e. the types of Event that a particular class of users are able to access can now be controlled. Restrictions are be applied throughout QFM where Events and related records are used.

Additional Flexible Event Characteristic Fields

Support for an optional additional 6 'Characteristic' fields is added to the Event and supporting screens. These follow same implementation as Event Characteristics 1 - 5 on the Event screen. They may be configured to be shown/hidden/updatable/mandatory to different users for different Event Types and States via the Workflow configuration associated with an Event Type. As per the other Characteristics, these may be set up to be look-up or free typed and may be relabelled as per other controls. These are intended to provide clients with improved support for capturing bespoke Event data which may be of interest.

Note: This is an advanced configuration feature which must be carried out by trained SWG staff.

A new Import/Export is available for maintaining all characteristics 1 - 11.

Document Viewer Enhancements

The Event Document Viewer has been enhanced with improvements to data and view/filtering functionality available. It has also been enhanced to show Asset related documents. The documents shown now respect 'Event', 'Asset', 'Client contract' and 'Editor Workgroup' data scoping.

Enhanced Event Director Filtering

Additional filter conditions are added to the Event Director to allow users to search in Instructions or for jobs assigned to them. These new filters are persisted with saved views for easy retrieval of key information of interest.

Permit To Work Enhancements

This module has been extended to support the maintenance of dependencies between Hazards and associated Risks, Equipment and Required Documentation. If set up, then these are added to Work Permits as Hazards are identified.

Permit reporting has been enhanced to include these new inclusions and also to contain optional configurable blocks of text for areas such as 'Acknowledgement' and 'Sign-off' sections.

Stock Enhancements

The usage of Adhoc Parts has been enhanced to differentiate between 'Stocked' and 'Non-Stocked' Adhoc parts. When users use a Non-Stocked Adhoc part they are forced to provide a custom description of the Part. When using a 'Stocked' Adhoc Part then the catalogue description is used. In both cases, the system does not keep a stock count of these 'Adhoc' Parts.

The Part Description has been extended to allow up to 260 characters (limitations and restrictions apply).

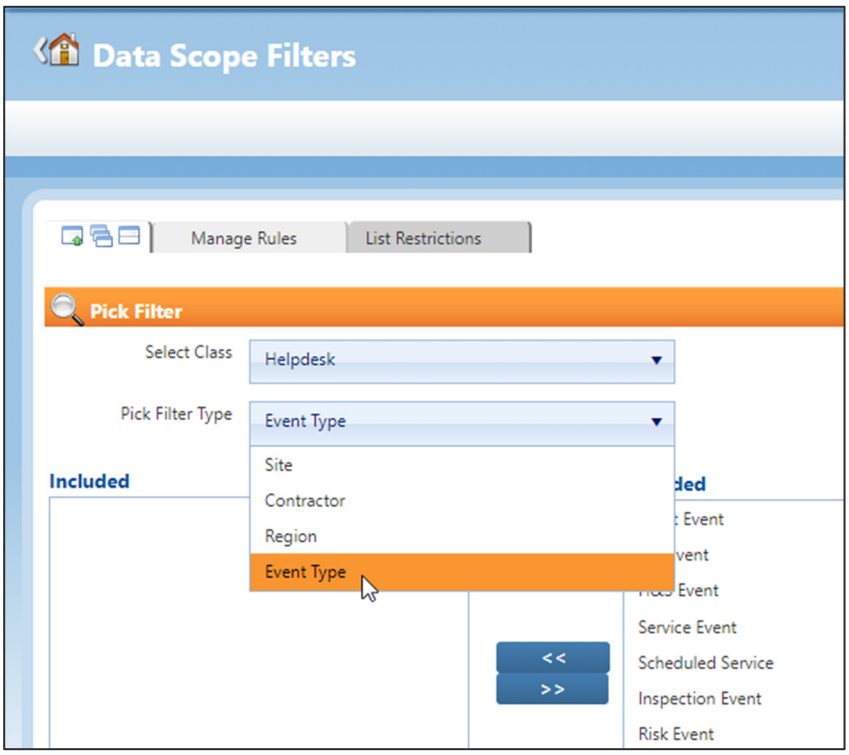
The control around when a web requisition may be viewed/edited by a user has been improved, so it may now be managed by the Workflow configuration. It may be controlled by User Grouping/Event Status/Event Type.
Note: This is an advanced configuration feature which must be carried out by trained SWG staff.

Extended Data Available for Dynamic Forms Reporting
The system has been enhanced to make more Event/Visit/Asset based information available, to be referenced on customised Dynamic Form and Survey Reports.

Event Type Data Scoping

Overview

Data Scoping Filters can now be applied by Event Type. This provides a wider set of options for applying Event related restrictions, i.e. the types of Event that a particular group of users are able to access can now be controlled.
Restrictions can be applied throughout QFM where Events and related records are used.



Features and benefits include:

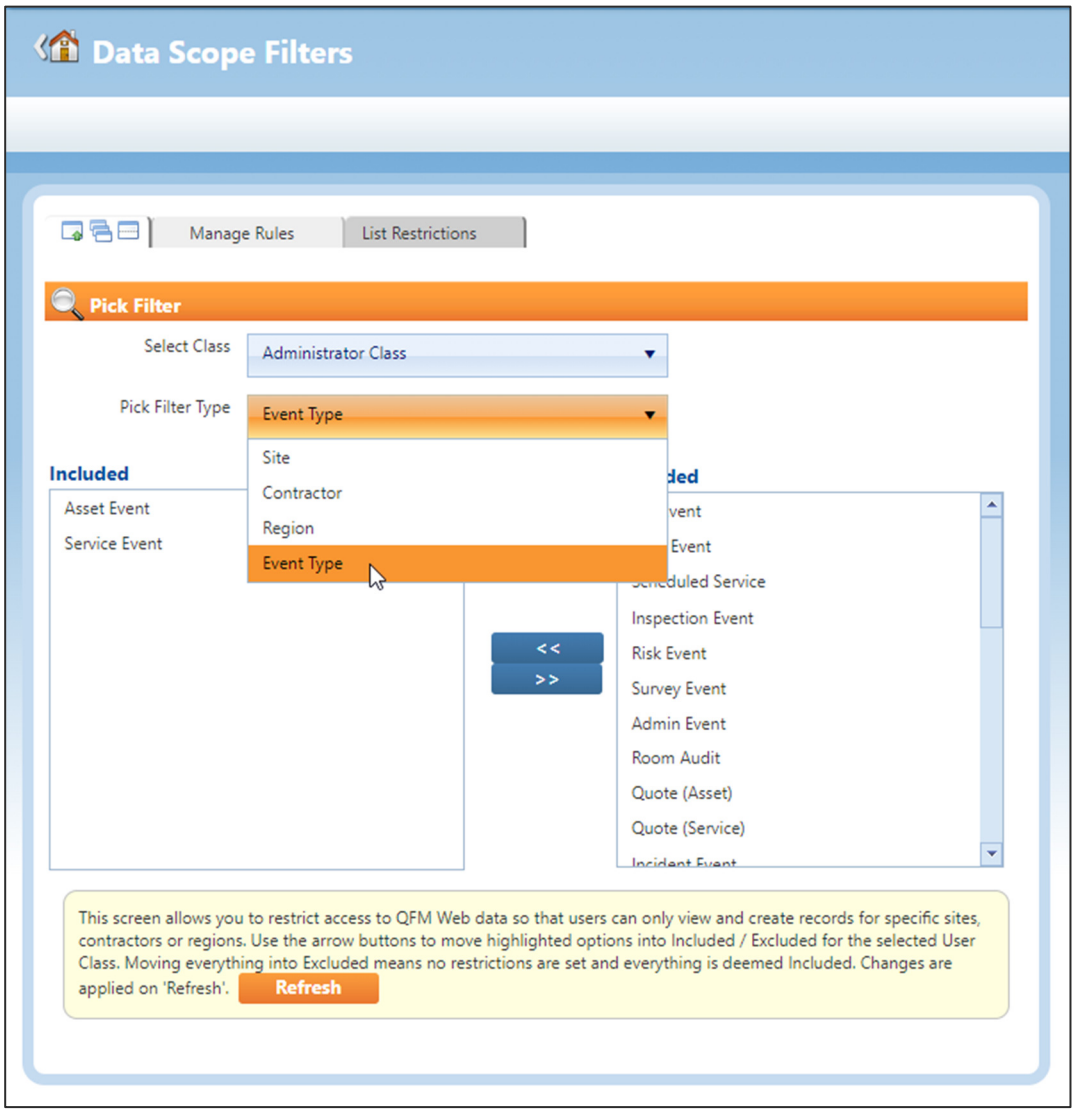
- Broadens the options for applying Data Scoping restrictions, so that these can now be applied by type of Event.

Introduction

Data Scoping Filters enable administrators to apply certain data restrictions within QFM. Restrictions can be applied by Site, Contractor, Region and now Event Type. This means that you can restrict the types of Event that a particular group of users are able to access.

Filters are applied by User Class and are used to control which categories of data the users belonging to the User Class, are able to access. By using this screen, for example, you can ensure that a particular contractor with access to QFM (with their own User Class) only has access to the Event records that they are assigned.

Data Scoping is available at; Admin > Users & Profiles > Data Scoping Filters.



Data Scope filtering by Event Type is now available across a wide range of key QFM areas, including:

- **Report Centre**
- **Event Director**
- **Find Events**
- **Events**
- **Resource Scheduler**
- **Batch Actions**
- **Works Mapper**
- **Link Events**
- **Event Sub-Tasks and Related Events**
- **Site Explorer**
- **'My Home' screen**
- **Dynamic Report Lists**
  Note: Existing Dynamic Forms DO NOT respect Event Type Data Scoping.
  New Dynamic Forms (created from this release onwards) DO respect Event Type Data Scoping.
- **Report Centre Lists**
  Note: The 'Events' and 'Visits' List Reports DO respect Event Type Data Scoping.
  The 'Events (ALL)' and 'Visits (ALL)' List Reports DO NOT respect Event Type Data Scoping.

Notes: In all cases where this is supported, if a User Class has not been configured to see a particular Event Type, then users attached to the User Class will not see the Event Type in lists or reports, or as linked sub-tasks.

Data Scoping is not implemented on the Wizard Tile configuration.

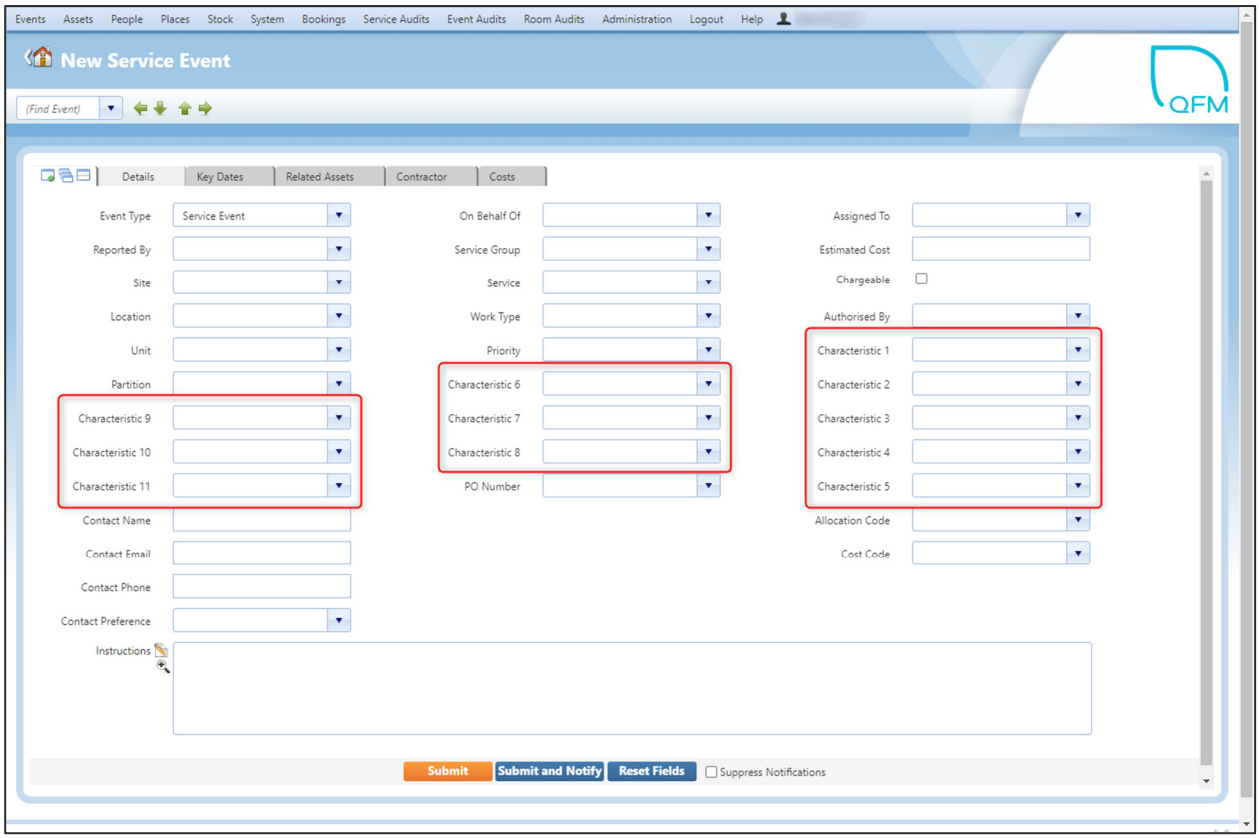
Additional Flexible Event Characteristic Fields

Introduction

Six additional 'Characteristic' fields are added to the Event screen, to make 11 in total. These provide greater flexibility, as the labels are user-configurable and values entered can be validated from customised lookup lists or enabled for free text. This enhances the ability to capture bespoke data.

Administrators can maintain Lookup values via the Import/Export utility and the option for free type text is available from General Settings.

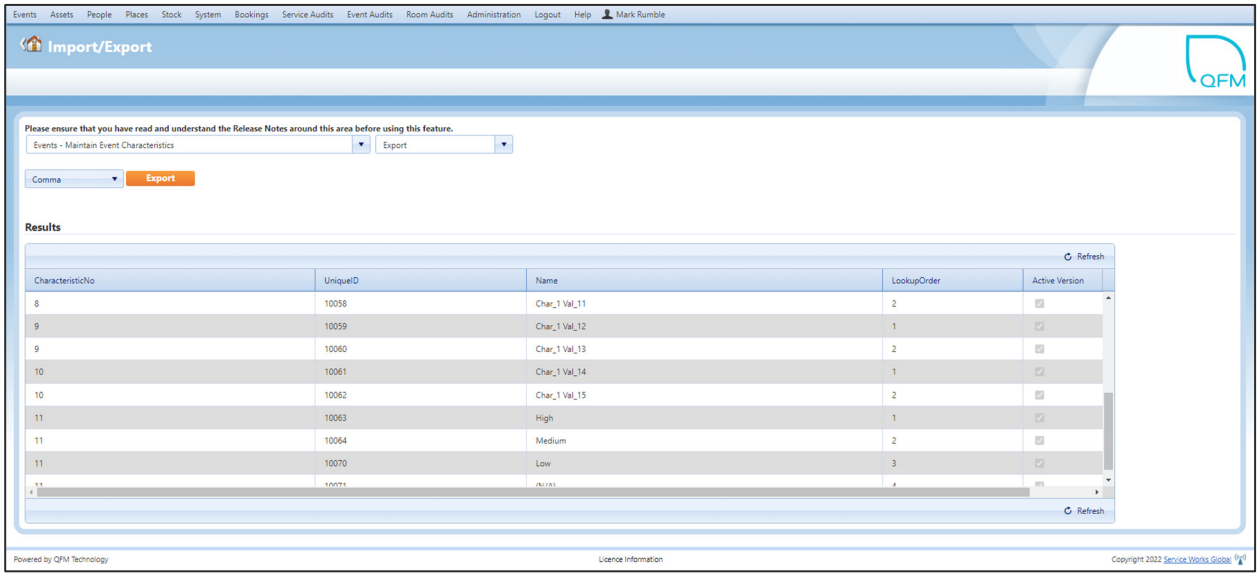
'Characteristic' fields can be enabled/disabled for different stages in Event workflow (refer to your SWG Account Manager for further details).



Import/Export

The new Import/Export screen 'Events - Maintain Event Characteristics' enables you to add and maintain Lookup values for the Event Characteristic 1 - 11 fields.

The screen is available to administrators at; Administration > Manage > Import/Export.



Available fields are as follows:

- **Characteristic No**
  The Characteristic field (1 - 11) to which the Lookup item will be attached.

- **Unique ID**
  A Unique Identifier for the Lookup item.

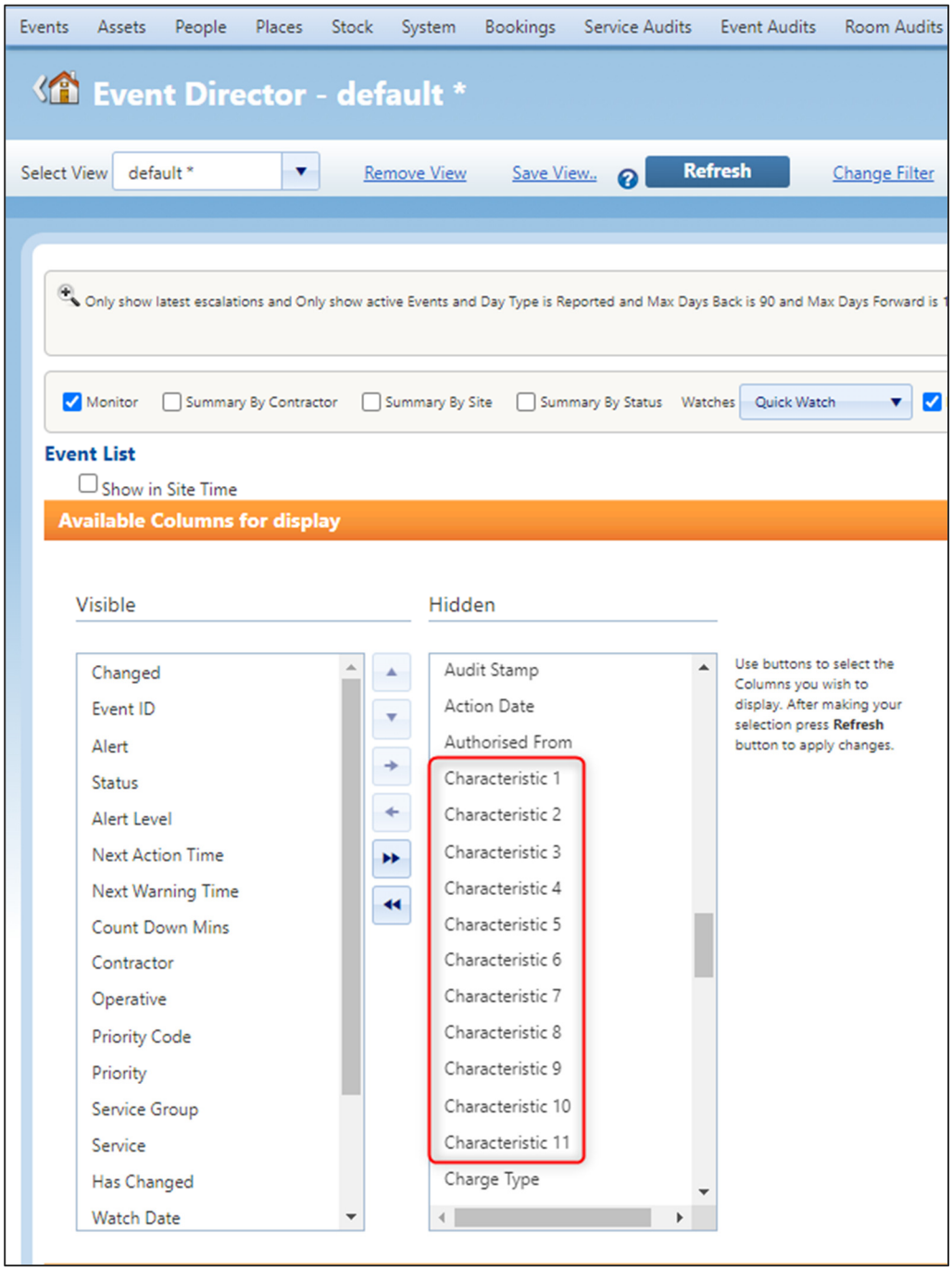
- **Name**
  Name of the Lookup item, as it will appear in the lookup list.

- **Lookup Order**
  The order in which the Lookup item will appear in the list, (1 = top).

- **Active Version**
  Enables deactivation of a Lookup item without removing the entry.

Event Director

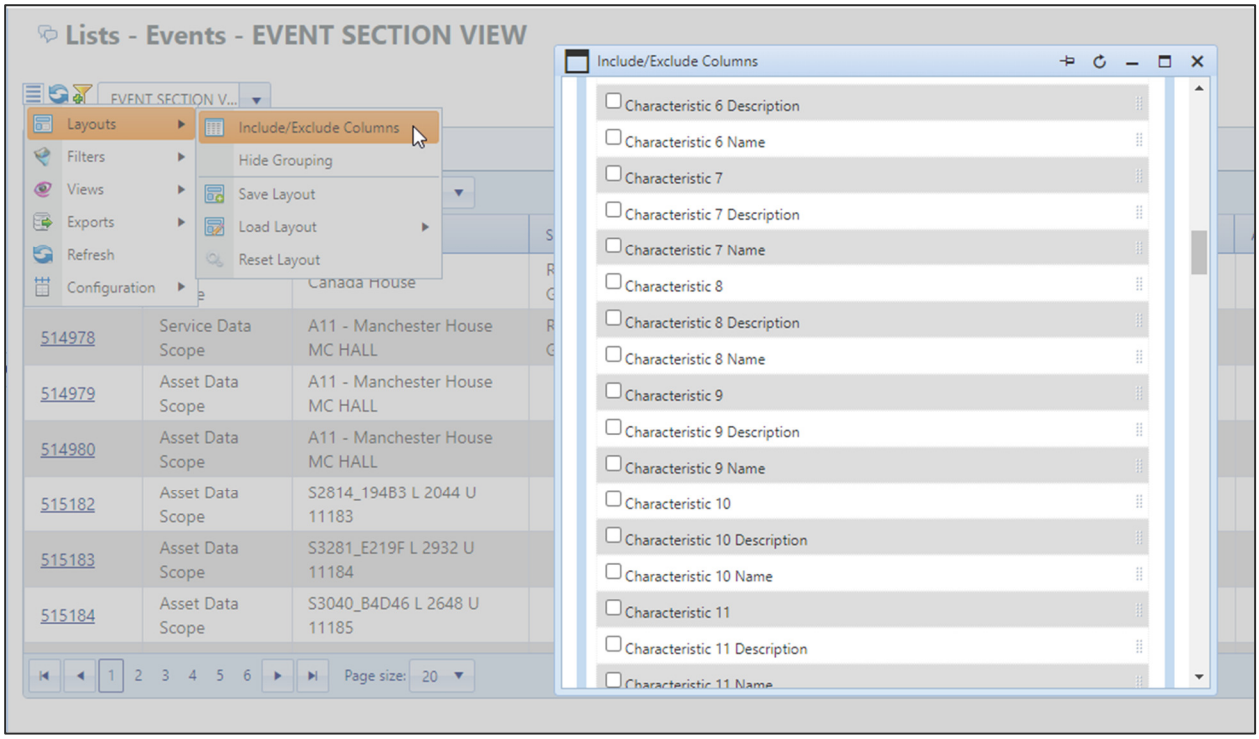
Characteristic fields 6 - 11 are available to include as columns in Event Director, (in addition to the existing Characteristic 1 - 5 fields).



List Reports

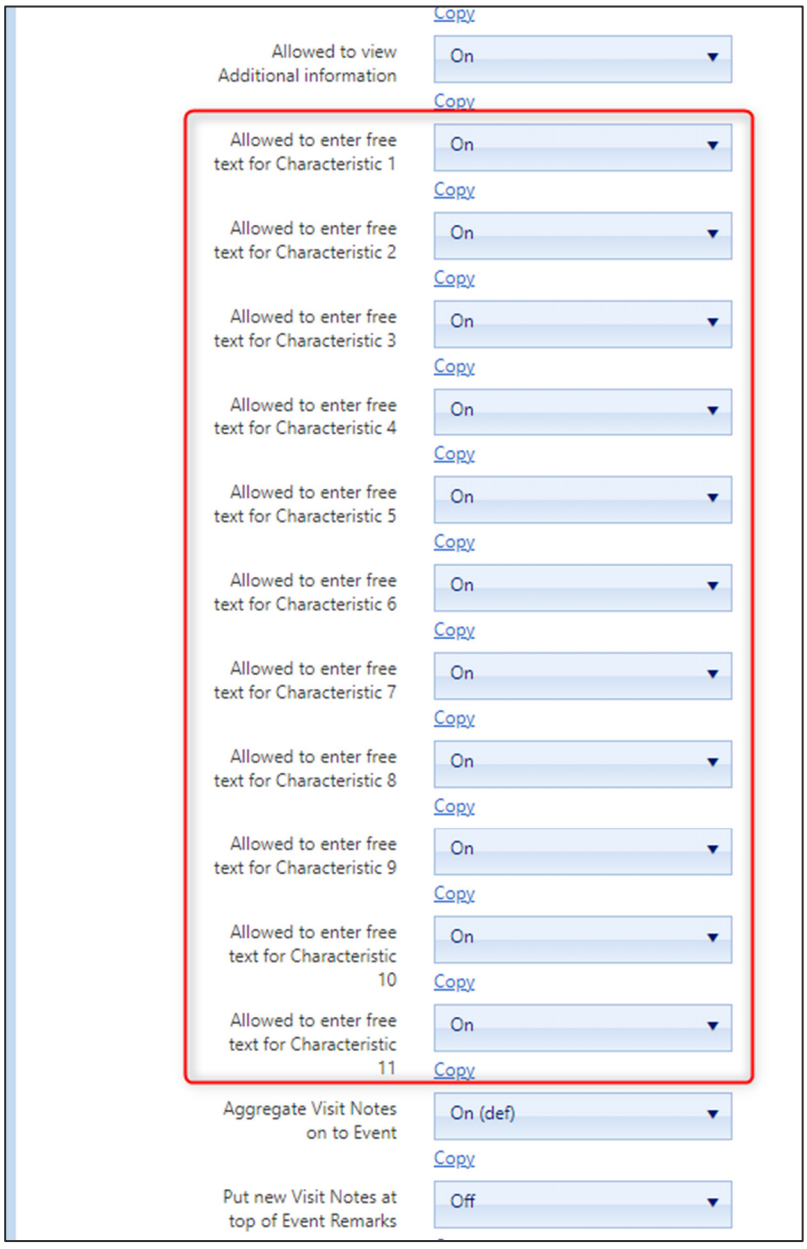
The following Lists Reports include the option to filter on Event Characteristics 6 - 11 (in addition to the existing Characteristic 1 - 5 filters).
List Reports are available from System > Report Centre > All Reports > Lists.

- Events
- Events (ALL)
- Event Audit List

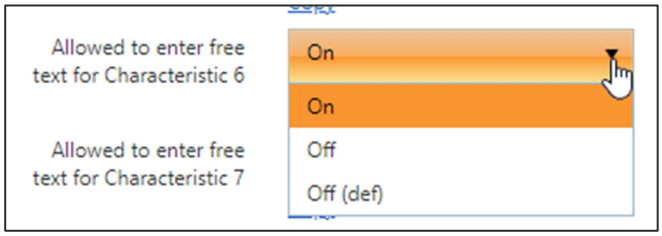


General Settings

New General Settings are available for administrators to configure the 'Characteristic 1 - 11' fields. These are available from 'Administration > Users & Profiles > General Settings > General Event Logging', for the Global User Class.



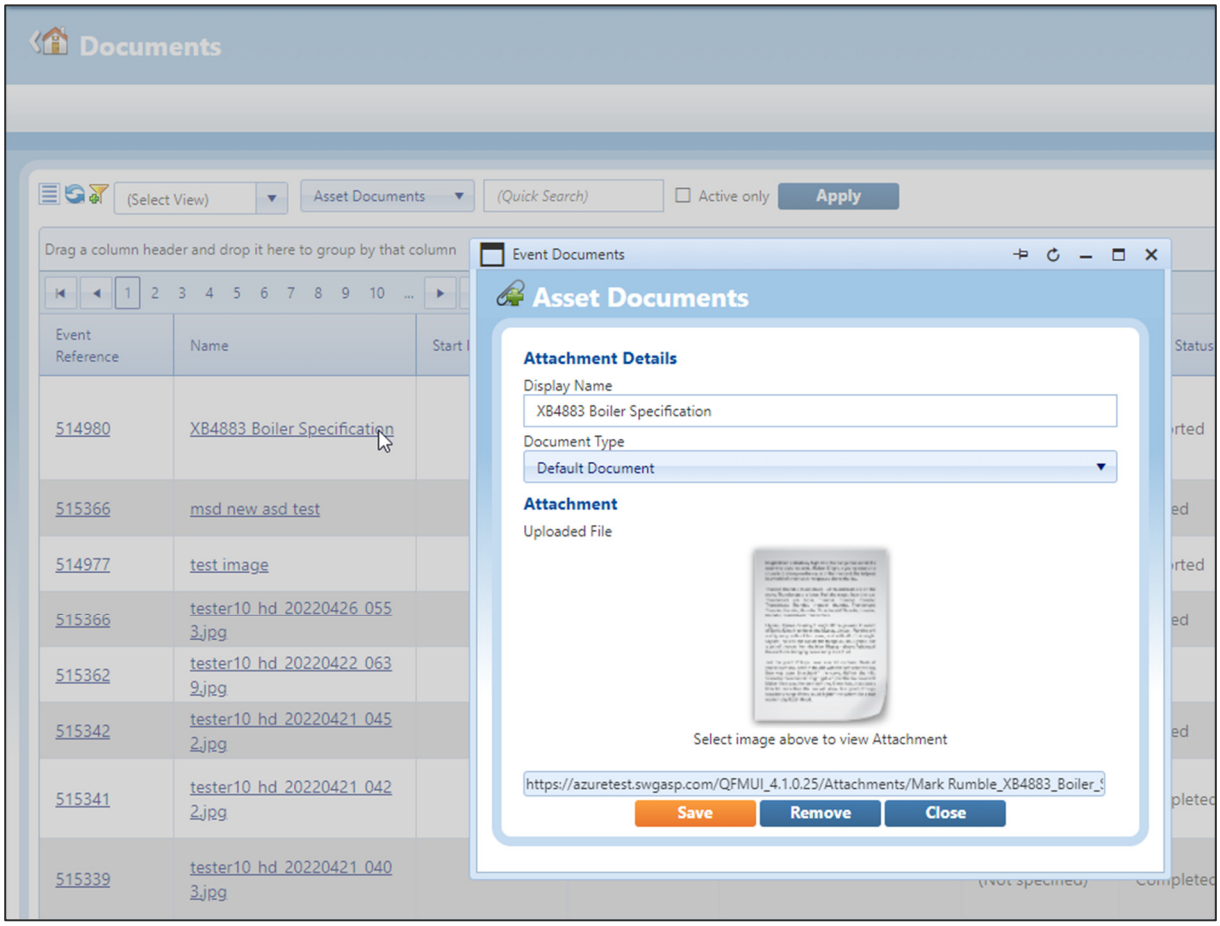
- **Input/View**
  - **Allowed to enter free text for Characteristic 1 - 11**
    When set to **On**, users can enter a free text value (or select from a drop down list, if available).


Allowed to enter free text for Characteristic 6
On
On
Off
Off (def)
Allowed to enter free text for Characteristic 7

Document Viewer Enhancements

Overview

Improvements have been made to the existing Document Viewer for Events, including more information, filtering and search options. It has also been extended to show Asset based Documents.



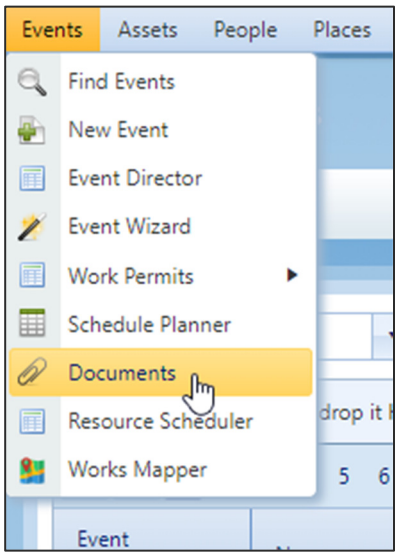
Features and benefits include:

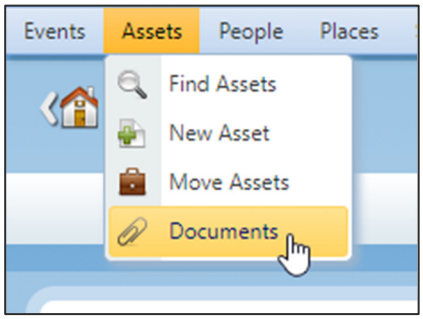
- Document Viewer now extended to show more Asset information where it is relevant.
- Improved facilities for document searching and filtering (including quick searching).
- Option to switch between Asset based documentation and Event based documentation.
- Respect for Event, Asset, Client Contract and Editor Workgroup Data Scoping.
- Small improvements to Event and Asset Hover Menus so they list the last 5 attachments added and also allow users to Add and View attachments.

Introduction

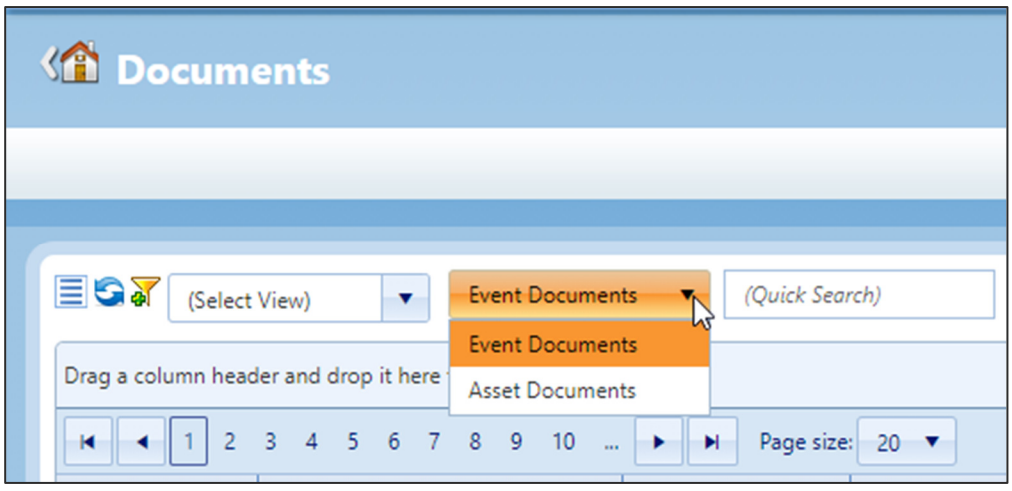
QFM now includes a new option on the Document Viewer to show Asset based attachments. Improvements are also made to extend Asset based information shown and the associated filtering.

Document Viewers are available from the Event and Asset menus. This opens the Document Viewer in the appropriate mode (but users are then able to switch).





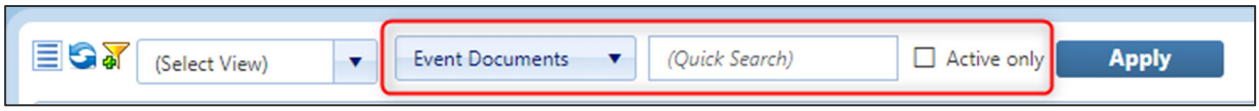
Both the Event and Asset Document Viewers feature a toggle option which enables you to switch between Event and Asset attachment views.



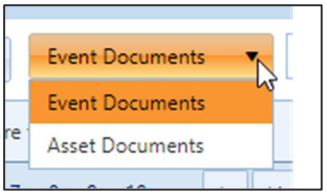
Note: Access to both Document Viewers is controlled by the General Setting 'Allow to Access Document Viewer' (Attachments section).

Document Viewer (Event Mode)

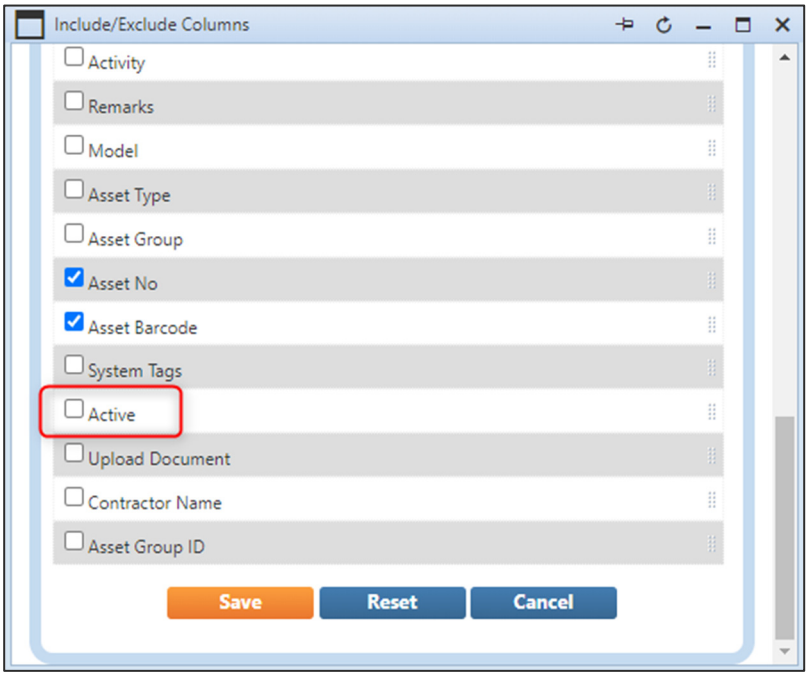
A number of improvements are made to the Document Viewer when showing Event based documents.



- A toggle option is added, enabling you to switch between Event and Asset attachment modes without having to leave the screen.

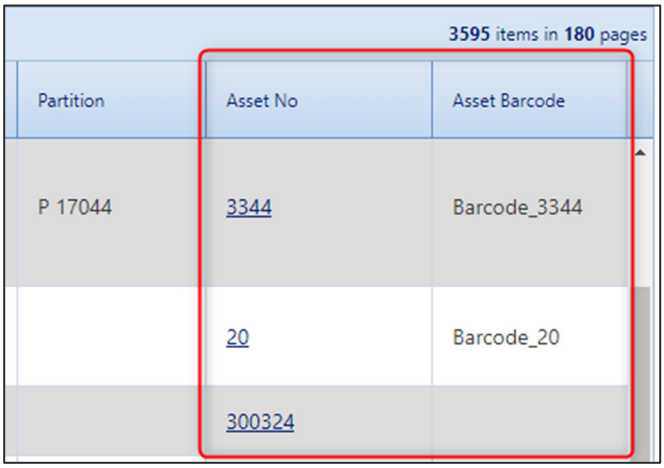


- A ‘Quick Search’ is added. This allows searches against ‘Event Reference’, ‘Asset No’, ‘Name’, ‘Metadata’, ‘Equipment ID’, ‘Remarks’ and ‘Barcode Reference’. Wildcard (*) searching is supported.
- An ‘Active Only’ tick box shows only those documents associated with open Events.
- Layout filtering now includes the option to filter on Active (open) Events.

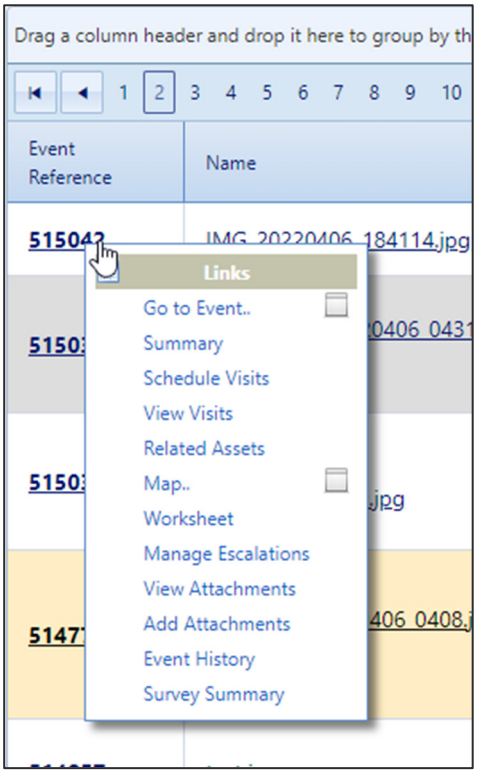


- Data Scoping is enabled, i.e. Document Viewer only shows those documents for Events which the user has the rights to see.

- New columns for ‘Asset No’ and ‘Asset Barcode’ are added, (for Assets related to Events). The ‘Asset No’ includes a link to the Asset record.

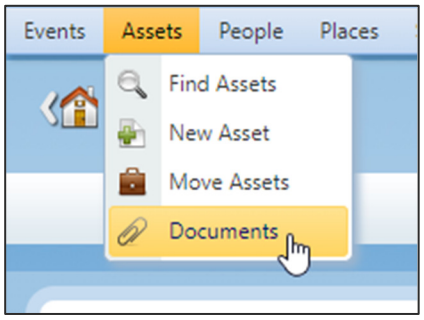


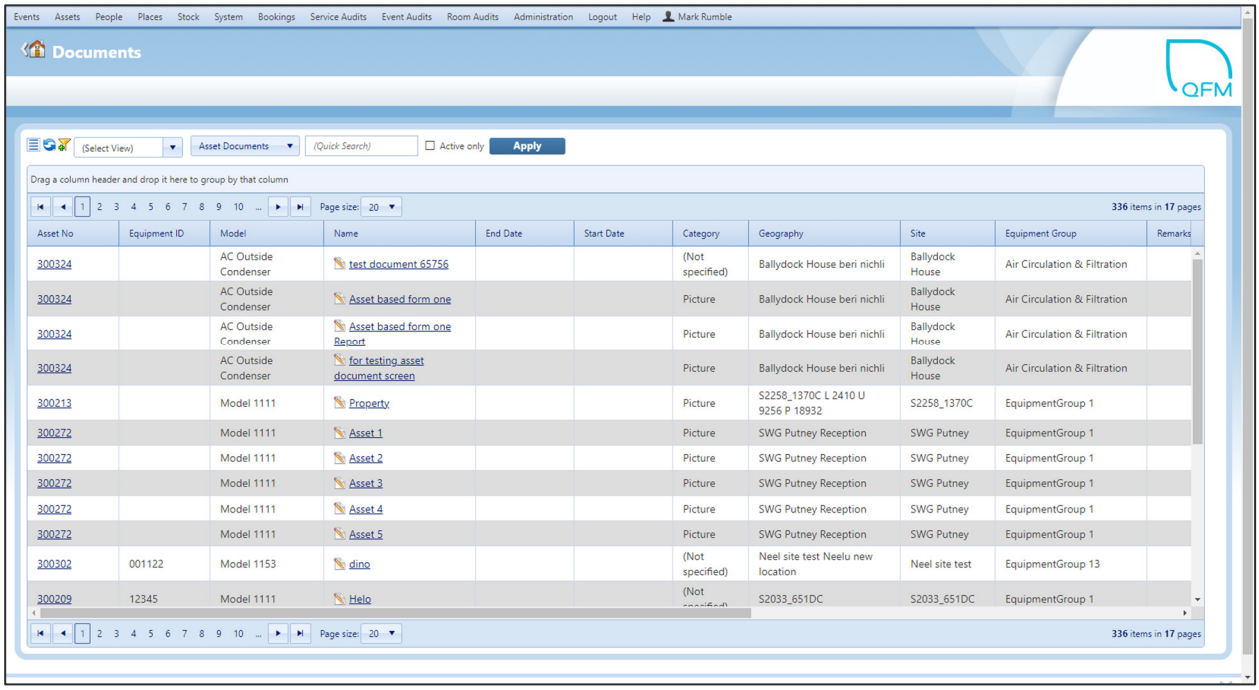
- A new Hover Menus is added to the ‘Event Reference’ with a range of options.



Document Viewer (Asset Mode)

The Document Viewer is extended to optionally support Asset Mode; available from the Assets menu (or by switching to 'Asset Documents' when viewing Event Documents).





This provides the same features as the Document Viewer in Event Mode, but shows documents attached to Asset records rather than Events. Active documents are considered to be those attached to non-end dated Assets.

The columns are derived from the Asset details plus the document details.

- **Asset No**
- **Equipment ID**
- **Model**
- **Name**
- **Start Date**
- **End Date**
- **Metadata**
- **Document Type**

- **Geography**
- **Site**
- **Equipment Group**
- **Remarks**
- **Asset Type**
- **Asset Group**
- **Asset Barcode**
- **Type**
- **Related To**
- **Path**

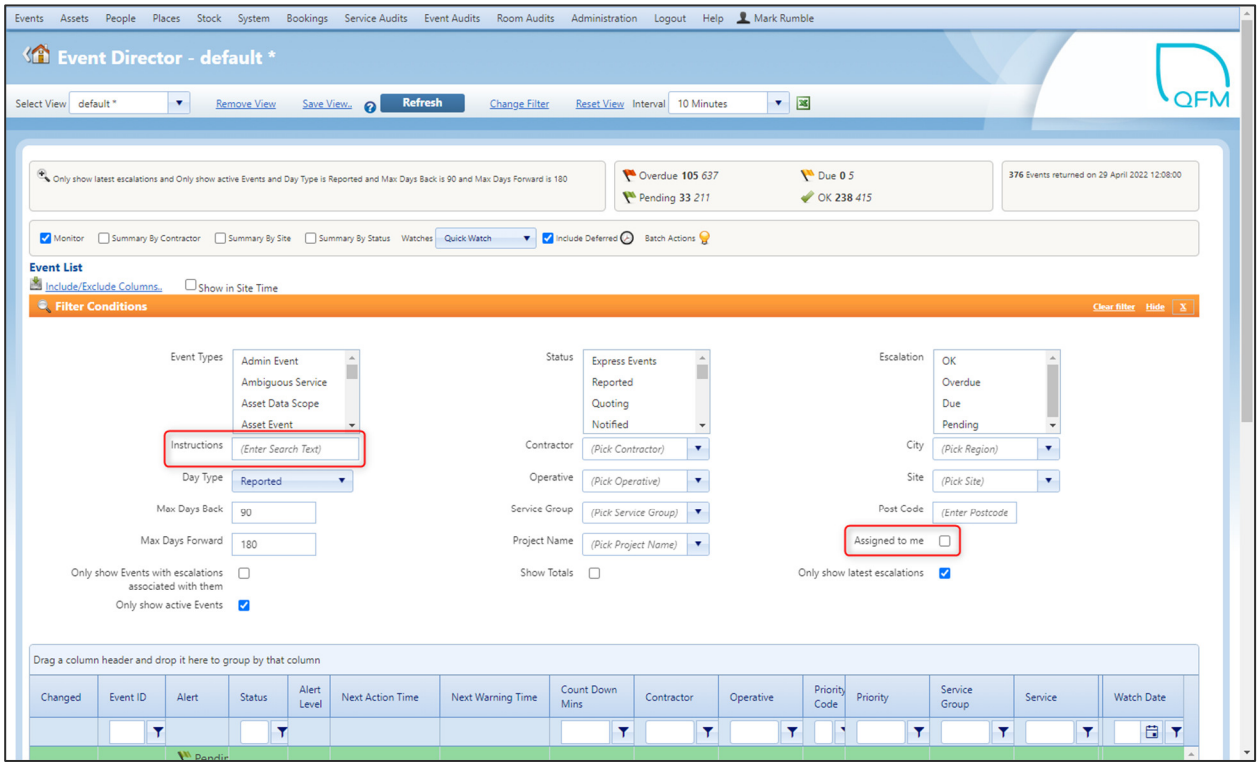
Enhancements to Event Director Filtering

Introduction

Two additional filter conditions are added to the Event Director:

- **Assigned to me**
  Selects only those Events assigned to the user logged in.

- **Instructions**
  Allows search text to be entered on Event Instructions. Wildcard (*) searching is supported.



These settings are persisted with the saved ‘Views’, making it much easier to set up shared ‘Views’ to reflect Events which the current user needs to handle.

In both cases, it is recommended to use these filters together with other conditions to narrow down the scope of the search.

Permit To Work Enhancements

Overview

This module has been extended to support maintenance dependencies between Hazards and associated Risks, Equipment and Required Documentation.

If dependencies are set up, these linked inclusions are added to a Work Permit as Hazards are identified on the Permit.

The inclusions (Hazards, Risks, Equipment and Required Documents) have been extended to include an optional 'Short Code' for each. This is used when importing dependent inclusions against a Hazard.

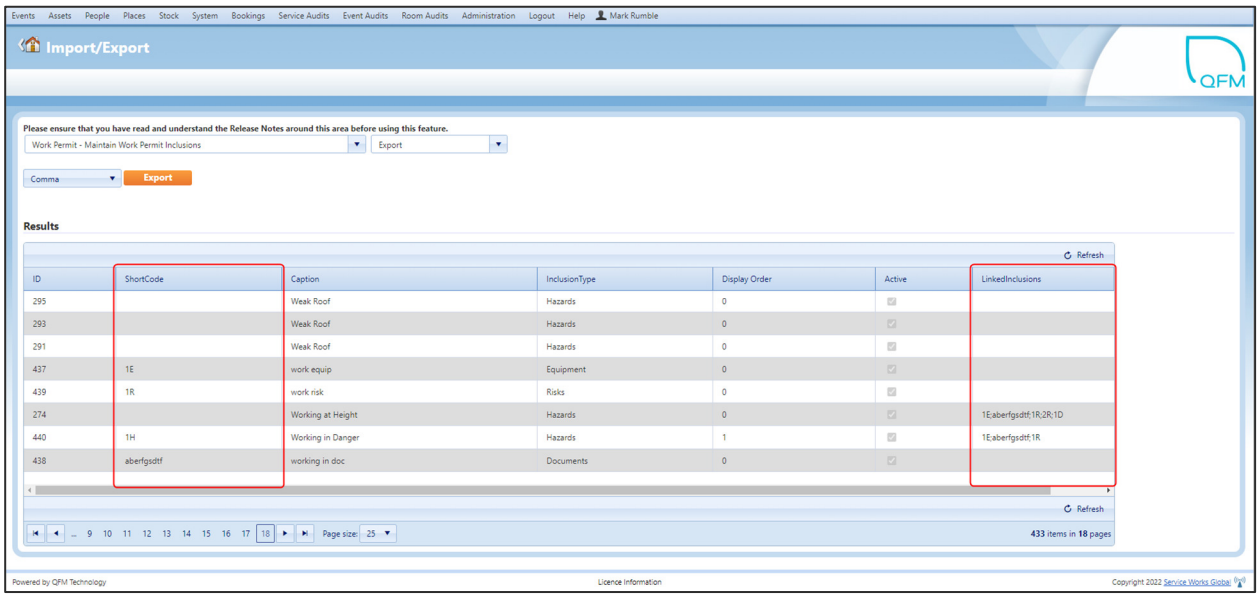
The reporting has been enhanced to include the new inclusions and also to contain optional configurable blocks of text for areas such as 'Acknowledgement' and 'Sign-off' sections.

Features and benefits include:

- By setting up pre-defined Documents, Risks and Equipment against known Hazards, the Permit will be automatically populated with relevant information once the 'Hazards' are identified.
- The extra Inclusions; 'Risks' and 'Required Documentation' are available for the Approving Party to double-check against the content of the Permit before they authorise.
- The new document sections provide clients with a way to insert their own preferred text/sign-off block for these key sections.

Setting up Inclusions with Short Codes and Links

Two new columns have been added to the Import/Export utility 'Work Permit - Maintain Work Permit Inclusions'; **Short Code** and **Linked Inclusions**.



- **Short Codes** are used to provide a quick method of referencing a specific inclusion, when linking.
- The **Linked Inclusions** column is used to show/update the list of inclusions associated with a 'Hazard' type inclusion.

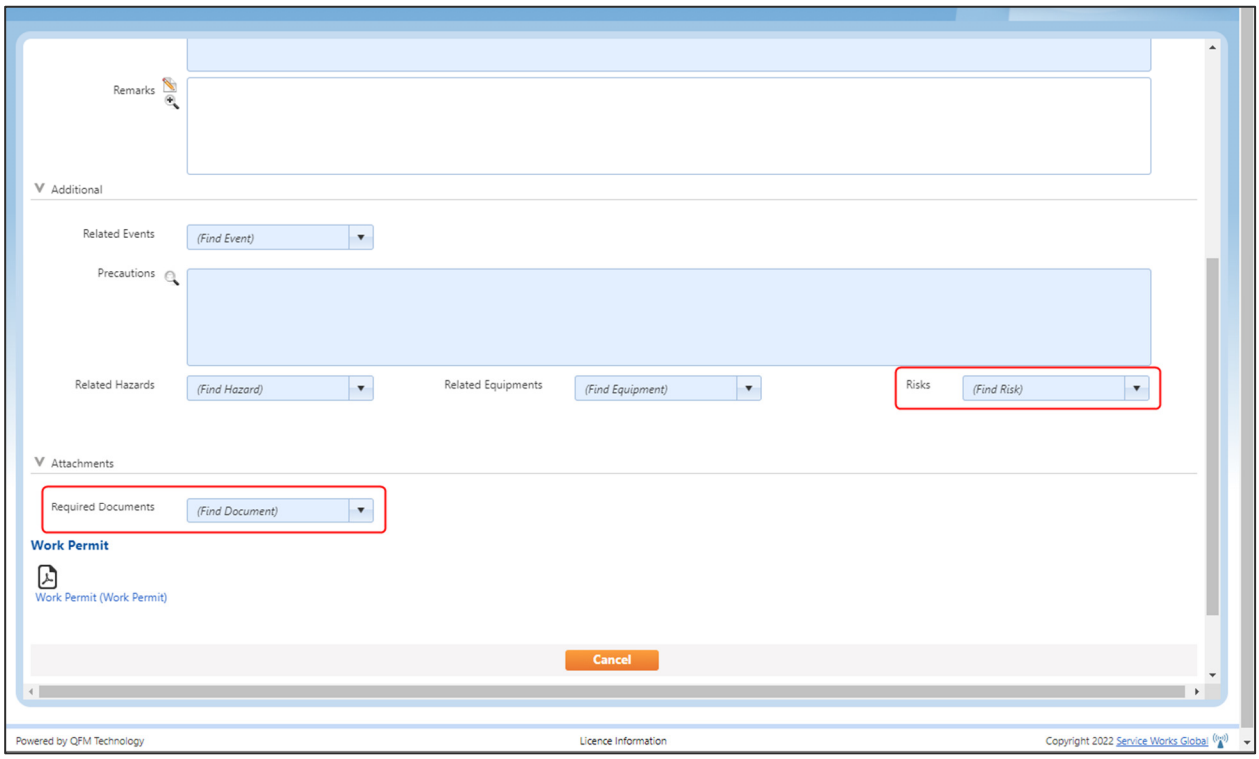
Using the Import/Export to Link Inclusions:

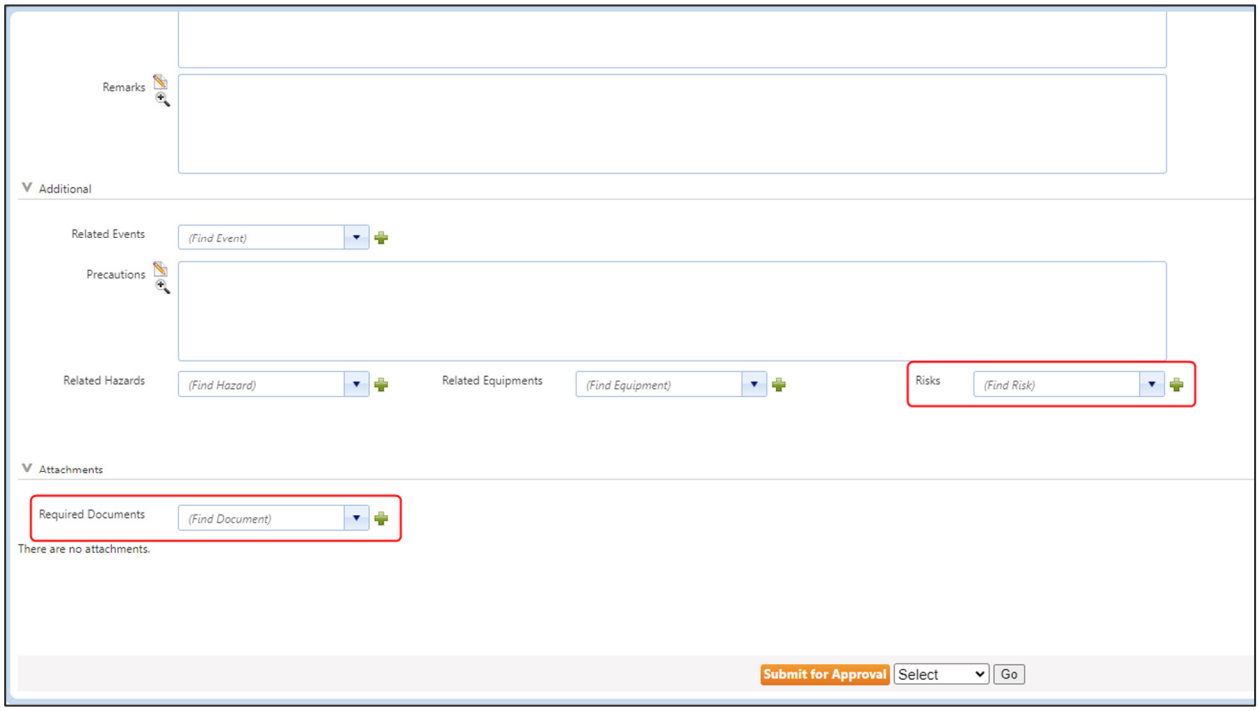
- It is possible to link Risks, Documents and Equipment type of Inclusions to Hazards using the Import/Export utility. If practical, the inclusions to be linked should be first given a meaningful unique Short Code.
- Once inclusions have a unique Short Code, it is possible to link one or more to a Hazard by supplying a semi-colon delimited list of Short Codes.

Changes to Permit UI to Link Risks and Required Documents

Two new sections are added to the Permit To Work Report; for 'Required Documentation' and 'Risks'.

- Any Documents associated with the identified Hazards are listed in the 'Required Documentation' section.
- Any Risks associated with the identified Hazards are listed in the 'Risks' section.
- The existing section for 'Equipment' now includes any additional Equipment associated with the identified 'Hazards' which are not already linked manually.





Update Mode

SWG recommends the items in the Additional tab are added after the initial Permit is Created. (This is set as the default, but can be changed if required).

If linked inclusions are set up, once the 'Related Hazard' is selected any linked Equipment, Risks and Documents will be populated.

Notes: The linked inclusion fields must be available on screen for the inclusions to be added, i.e. if any of these items are not available to a user (as determined by their User Profile) then they will not be added to the Permit.

If a Hazard is removed, any linked inclusions will not be automatically removed. They must be manually removed.

SWG recommends that users validate all inclusions before submitting, to ensure they are appropriate.

Changes to Permit Report

The Permit Report now shows the new Inclusions; 'Required Documents' and 'Associated Risks'. It also contains optional 'Acknowledgement' and 'Sign Off' sections.

Hazards:	**Equipment:** Body suites / overalls - If Applicable, Dust masks - If Applicable, Eye protection - If Applicable, Test of adding an item - manually
Required Documents:	**Associated Risks:**
Acknowledgement: All workers will be provided with and will wear Personal Protective Equipment (PPE) for the duration of the work conducted. Supervision will be always present and any required signage used during the work will be removed upon completion. I am aware of all company procedures and the penalties for non-conformance including the immediate suspension/stop of work among other penalties.I understand my rights to view relevant records and legislation pertaining to any potentially toxic materials or harmful physical agents. If I, or anyone in my team, have not received training on the safe handling of a specific substance, I agree to advise my supervisor immediately.	
Sign Off: As the person in charge of the work, I confirm that I have read and understand the contents of the procedures related to PTW. I confirm that the above location has been assessed and all safety precautions have been or will be taken to control all potential risks and hazards, both to members of the public and works team.I agree to actively partake in the efforts established to maintain a safe and healthy workplace. I understand my right to refuse to perform work that would violate any occupational safety or health standard without jeopardising my employment.	

The default Report does not include the 'Acknowledgement' and 'Sign Off' sections. These can be included if required, and the content text can be changed (via the HTML Template) to suit requirements. There is also a version available with 'Signature' and 'Date', designed to be printed.

Required Documents:	**Associated Risks:**

Acknowledgement:

All workers will be provided with and will wear Personal Protective Equipment (PPE) for the duration of the work conducted. Supervision will be always present and any required signage used during the work will be removed upon completion. I am aware of all company procedures and the penalties for non-conformance including the immediate suspension/stop of work among other penalties.I understand my rights to view relevant records and legislation pertaining to any potentially toxic materials or harmful physical agents. If I, or anyone in my team, have not received training on the safe handling of a specific substance, I agree to advise my supervisor immediately.

Sign Off:

As the person in charge of the work, I confirm that I have read and understand the contents of the procedures related to PTW. I confirm that the above location has been assessed and all safety precautions have been or will be taken to control all potential risks and hazards, both to members of the public and works team.I agree to actively partake in the efforts established to maintain a safe and healthy workplace. I understand my right to refuse to perform work that would violate any occupational safety or health standard without jeopardising my employment.

_____ _____

Signature Date

For more information about these Permit To Work Report enhancements, contact your SWG Account Manager.

Stock Enhancements

Introduction

A number of minor enhancements are made to stock, as follows.

- The size of Part Description field is increased.
- Change in behaviour around the usage of Stocked/Non-Stocked Adhoc Parts (affects the Parts screen, Parts Import/Export, Stock Import/Export and Web requisitions).
- Ability to limit when a user may see or update Part Requisition information on QFM Web.

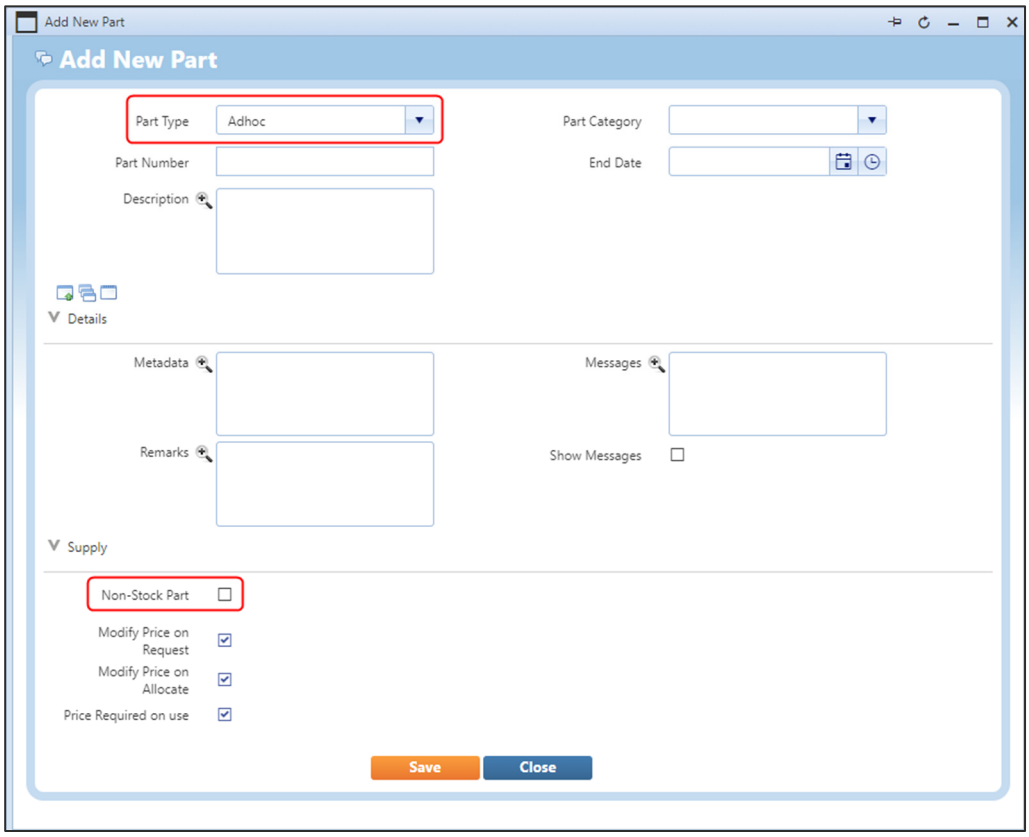
Note: Changes to Adhoc Part functionality mean that it is important for any existing clients who are using Adhoc Parts functionality from v3.3 or later; when upgrading to 4.1 will need to update the Adhoc Part records to 'Non-Stock Part' to retain existing functionality.

Part Description Field Size Increased

The Part 'Description' field is now increased to 260 characters, throughout QFM Web for clients who cannot function with shorter descriptions. This affects the Parts screen and the various Lists and Lookups. It is provided only for those clients who are not using Stock on the QFM Desktop system.

Part Screen

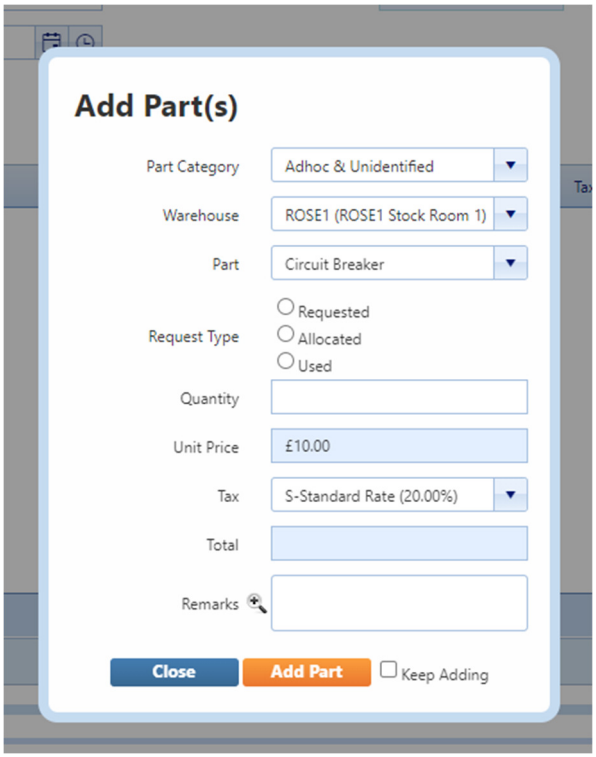
When adding/editing Parts, users are now able to set the 'Non-Stock Part' indicator for an 'Adhoc' Part.



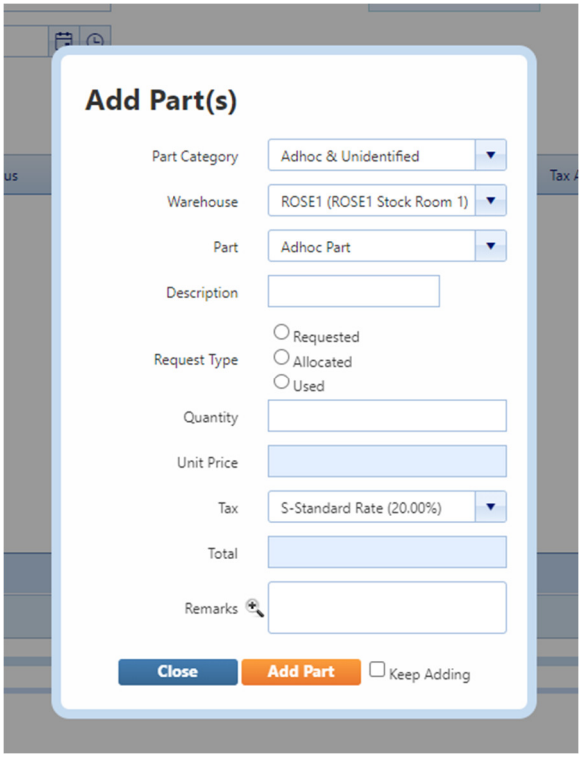
Part Requisition Screen

When requesting an 'Adhoc' Part, the system no longer requires a 'Description' to be entered if the Part is stocked (i.e. not marked as a 'Non Stocked Part'). Additional changes have been made so that the system does not manage or show Stock quantities for these Adhoc parts. These changes make Adhoc Parts a good choice for scenarios such as recording Adhoc items purchased from a shop for a specific Event, or as a way to have some standard non-stock items, such as consumables which only need quantities and/or costs, to be supplied on use.

Refer to the examples below.



Stocked Part



Non-Stocked Part

Limiting Control Over Web Requisitions

A new Workflow attribute 'WebParts' is created to provide control over the ability to update Part requisitions, at different Event Statuses.

There is no change to existing default functionality, however the option to apply restrictions by Event Status is available. For example, the system could be set so that Parts cannot be updated at Event 'Started' status and beyond.

Note: Workflow configuration is considered a specialist task which should only be carried out by trained SWG personnel. Please contact your SWG Account Manager for further information.

Extended Data Available for Dynamic Forms Reporting

Overview

Dynamic Forms may be associated with their own Custom Report Template (existing feature). The data properties available to include on the reports have been extended so clients may reference more contextual information. The information available relates to the 'Based On' entity. For example, if a form is based on a 'Visit' then it may be able to access more information from the specific Visit or related Event.

For more information contact your SWG Account Manager.

Features and benefits include:

- More configurable entity related data can be added to Dynamic Form Reports.

Available tags are listed below:

Report Tags

Event Based Tags

Column Name	Tag
Client Contract Prefix	{{Event.ClientContractPrefix}}
Event Reference	{{Event.EventReference}}
Event Type	{{Event.EventType}}
Work Type	{{Event.WorkType}}
Alert Level	{{Event.AlertLevel}}
Priority Name	{{Event.PriorityName}}
Reported By	{{Event.ReportedBy}}
Charge Type Name	{{Event.ChargeTypeName}}
WF Status	{{Event.WFStatusName}}
Division	{{Event.Division}}
Status	{{Event.Status}}
Geography Name	{{Event.GeographyName}}
Event Status No	{{Event.EventStatusNo}}
Serial	{{Event.Serial}}
Service Group	{{Event.ServiceGroup}}
Service	{{Event.Service}}
Equipment Reference	{{Event.EquipmentReference}}
Model	{{Event.Model}}
Equipment Group	{{Event.EquipmentGroup}}
Contractor	{{Event.Contractor}}
Reported Date Time UTC	{{Event.ReportedDateTime}}
Notified Date Time UTC	{{Event.NotifiedDateTime}}
Due Date Time UTC	{{Event.DueDateTime}}
Started Date Time UTC	{{Event.StartedDateTime}}
Complete 1 Date Time UTC (if configured then typically 'Made Safe')	{{Event.Complete1DateTime}}
Complete 2 Date Time UTC (if configured then typically 'Temp Fix')	{{Event.Complete2DateTime}}
Completed Date Time UTC	{{Event.CompletedDateTime}}
Service OK Date Time UTC	{{Event.ServiceOKDateTime}}
Cancelled Date Time UTC	{{Event.CancelledDateTime}}
Instructions	{{Event.Instructions}}
Remarks	{{Event.Remarks}}
Event ID	{{Event.EventID}}
Contact Phone	{{Event.ContactPhone}}
Extension	{{Event.Extension}}
Notes	{{Event.Notes}}
Client Name	{{Event.ClientName}}

Insert Stamp	{{Event.InsertStamp}}
Insert User	{{Event.InsertUser}}
Update Stamp UTC	{{Event.UpdateStamp}}
Update User	{{Event.UpdateUser}}
Project No	{{Event.ProjectNo}}
Potential Liability	{{Event.PotentialLiability}}
Potential Liability ID	{{Event.PotentialLiabilityID}}
Extra Person 1	{{Event.ExtraPerson1}}
Extra Person 1 ID	{{Event.ExtraPerson1ID}}
Extra Person 2	{{Event.ExtraPerson2}}
Extra Person 2 ID	{{Event.ExtraPerson2ID}}
Reported How	{{Event.ReportedHow}}
Reported How ID	{{Event.ReportedHowID}}
Priority ID	{{Event.PriorityID}}
Reference	{{Event.Reference}}
Rep Reference	{{Event.RepReference}}
Works Order No	{{Event.WorksOrderNo}}
WF Status Tag	{{Event.WFStatusTag}}
WF Tag	{{Event.WFTag}}
Client Contract ID	{{Event.ClientContractID}}
Service Group ID	{{Event.ServiceGroupID}}
Barcode Reference	{{Event.BarcodeReference}}
Inventory ID	{{Event.InventoryID}}
Model ID	{{Event.ModelID}}
Service ID	{{Event.ServiceID}}
Assigned To	{{Event.AssignedTo}}
Assigned To Email	{{Event.AssignedToEmail}}
Reported By Email	{{Event.ReportedByEmail}}
On Behalf Of Email	{{Event.OnBehalfOfEmail}}
On Behalf Of	{{Event.OnBehalfOf}}
Extra Person 2 Display Name	{{Event.ExtraPerson2DisplayName}}
Extra Person 2 Name	{{Event.ExtraPerson2Name}}
Extra Person 1 Display Name	{{Event.ExtraPerson1DisplayName}}
Extra Person 1 Name	{{Event.ExtraPerson1Name}}
Potential Liability Name	{{Event.PotentialLiabilityName}}
Reported How Name	{{Event.ReportedHowName}}
Cost Code	{{Event.CostCode}}
Cost Allocation Code	{{Event.CostAllocationCode}}
Is Next Action	{{Event.IsNextAction}}
Next Action Date	{{Event.NextActionDate}}

Next Warning Date	{{Event.NextWarningDate}}
Action Status From	{{Event.ActionStatusFrom}}
Action Status To	{{Event.ActionStatusTo}}
Count Down Mins	{{Event.CountDownMins}}
Event Type Category ID	{{Event.EventTypeCategoryID}}
Agent ID	{{Event.AgentID}}
Priority Code	{{Event.PriorityCode}}
Agent Email	{{Event.AgentEmail}}
Chargeable	{{Event.Chargeable}}
Event Type ID	{{Event.EventTypeID}}
Alternate Site Contact ID	{{Event.AlternateSiteContactID}}
Departments ID	{{Event.DepartmentsID}}
Department	{{Event.Department}}
Characteristic 1	{{Event.Characteristic1}}
Characteristic 1 Description	{{Event.Characteristic1Description}}
Characteristic 2	{{Event.Characteristic2}}
Characteristic 2 Description	{{Event.Characteristic2Description}}
Characteristic 3	{{Event.Characteristic3}}
Characteristic 3 Description	{{Event.Characteristic3Description}}
Characteristic 4	{{Event.Characteristic4}}
Characteristic 4 Description	{{Event.Characteristic4Description}}
Characteristic 5	{{Event.Characteristic5}}
Characteristic 5 Description	{{Event.Characteristic5Description}}
Characteristic 1 Name	{{Event.Characteristic1Name}}
Characteristic 2 Name	{{Event.Characteristic2Name}}
Characteristic 3 Name	{{Event.Characteristic3Name}}
Characteristic 4 Name	{{Event.Characteristic4Name}}
Characteristic 5 Name	{{Event.Characteristic5Name}}
Reported (Site Date Time)	{{Event.ReportedSiteDateTime}}
Notified (Site Date Time)	{{Event.NotifiedSiteDateTime}}
Complete (Site Date Time)	{{Event.CompleteSiteDateTime}}
Due (Site Date Time)	{{Event.DueSiteDateTime}}
Completed 1 (Site Date Time)	{{Event.Completed1SiteDateTime}}
Completed 2 (Site Date Time)	{{Event.Completed2SiteDateTime}}
Cancelled (Site Date Time)	{{Event.CancelledSiteDateTime}}
Started (Site Date Time)	{{Event.StartedSiteDateTime}}
Completed (Site Date Time)	{{Event.CompletedSiteDateTime}}
RTS (Site Date Time)	{{Event.RTSSiteDateTime}}
Charge Type ID	{{Event.ChargeTypeID}}
Division ID	{{Event.DivisionID}}

Division Name	{{Event.DivisionName}}
Client Contract Name	{{Event.ClientContractName}}
Client ID	{{Event.ClientID}}
Client Contract Contact Person ID 1	{{Event.ClientContractContactPersonID1}}
Client Contract Contact Person ID 2	{{Event.ClientContractContactPersonID2}}
Client Contract Contact Person 1 Email	{{Event.ClientContractContactPerson1Email}}
Client Contract Contact Person 2 Email	{{Event.ClientContractContactPerson2Email}}
Estimated Cost	{{Event.EstimatedCost}}
Action From	{{Event.ActionFrom}}
Next Action	{{Event.NextAction}}
Site ID	{{Event.SiteID}}
Region ID	{{Event.RegionID}}
Region	{{Event.Region}}
Site	{{Event.Site}}
Location	{{Event.Location}}
Unit	{{Event.Unit}}
Partition	{{Event.Partition}}
Geography ID	{{Event.GeographyID}}
Site Contact Email	{{Event.SiteContactEmail}}
Site Contact 2 Email	{{Event.SiteContact2Email}}
Site Type ID	{{Event.SiteTypeID}}
Site Type Name	{{Event.SiteTypeName}}
Site Post Code	{{Event.SitePostCode}}
UPRN	{{Event.UPRN}}
Next Action Name	{{Event.NextActionName}}
Parent Event ID	{{Event.ParentEventID}}
Dest Site Id	{{Event.DestSiteId}}
Dest Site	{{Event.DestSite}}
Dest Location	{{Event.DestLocation}}
Dest Unit	{{Event.DestUnit}}
Dest Partition	{{Event.DestPartition}}
Destination Geography Name	{{Event.DestinationGeographyName}}
Site Contact Main Email	{{Event.SiteContactMainEmail}}
Misc Contact Name	{{Event.MiscContactName}}
Misc Contact Email Address	{{Event.MiscContactEmailAddress}}
Misc Contact Preference ID	{{Event.MiscContactPreferenceID}}
Misc Contact Preference	{{Event.MiscContactPreference}}
Completed Date UTC	{{Event.CompletedDate}}

Asset Based Tags

Column Name	Tag
Inventory ID	{{Asset.InventoryID}}
Serial	{{Asset.Serial}}
Equipment Reference	{{Asset.EquipmentReference}}
Equipment Group	{{Asset.EquipmentGroup}}
Model	{{Asset.Model}}
Site	{{Asset.Site}}
Location	{{Asset.Location}}
Unit	{{Asset.Unit}}
Partition	{{Asset.Partition}}
Warranty Contractor	{{Asset.Contractor}}
Geography Name	{{Asset.GeographyName}}
Warranty Start Date UTC	{{Asset.WarrantyStartDate}}
Warranty Stop Date UTC	{{Asset.WarrantyStopDate}}
End Date UTC	{{Asset.EndDate}}
Quantity	{{Asset.Quantity}}
Install Date UTC	{{Asset.InstallDate}}
Cost	{{Asset.Cost}}
Marker Address	{{Asset.MarkerAddress}}
Supplier Address	{{Asset.SupplierAddress}}
Vendor	{{Asset.Vendor}}
Manufacturer	{{Asset.Manufacturer}}
Criticality	{{Asset.Criticality}}
Asset Type	{{Asset.AssetType}}
Division	{{Asset.Division}}
Department	{{Asset.Department}}
Characteristic 1	{{Asset.Characteristic1}}
Characteristic 2	{{Asset.Characteristic2}}
Characteristic 3	{{Asset.Characteristic3}}
Characteristic 4	{{Asset.Characteristic4}}
Cost Code	{{Asset.CostCode}}
Remarks	{{Asset.Remarks}}
Messages	{{Asset.Messages}}
Show Messages	{{Asset.ShowMessages}}
BMS Reference	{{Asset.BMSReference}}
Asset Description	{{Asset.AssetDescription}}
Location Status	{{Asset.LocationStatus}}
Registration Number	{{Asset.RegistrationNumber}}
Expiry Date UTC	{{Asset.ExpiryDate}}

Additional Description	{{Asset.AdditionalDescription}}
Make Model	{{Asset.MakeModel}}
Latitude	{{Asset.Latitude}}
Longitude	{{Asset.Longitude}}
Structural Code	{{Asset.StructuralCode}}
Structural Path	{{Asset.StructuralPath}}
Structural Description	{{Asset.StructuralDescription}}

Visit Based Tags

Column Name	Tag
ID	{{Visit.ID}}
Event Related Tags	
Event ID	{{Visit.EventID}}
Event Type	{{Visit.EventType}}
Contact Phone	{{Visit.ContactPhone}}
Extension	{{Visit.Extension}}
Notes	{{Visit.Notes}}
Project No	{{Visit.ProjectNo}}
Event Status No	{{Visit.EventStatusNo}}
Instructions	{{Visit.Instructions}}
Remarks	{{Visit.Remarks}}
Reference	{{Visit.Reference}}
Reported Date Time (UTC)	{{Visit.ReportedDateTime}}
Notified Date Time (UTC)	{{Visit.NotifiedDateTime}}
Due Date Time (UTC)	{{Visit.DueDateTime}}
Started Date Time (UTC)	{{Visit.StartedDateTime}}
Completed Date Time (UTC)	{{Visit.CompletedDateTime}}
Service OK Date Time (UTC)	{{Visit.ServiceOKDateTime}}
Cancelled Date Time (UTC)	{{Visit.CancelledDateTime}}
Rep Reference	{{Visit.RepReference}}
Works Order No	{{Visit.WorksOrderNo}}
Event WF Status	{{Visit.WFStatusTag}}
Complete 1 Date Time UTC	{{Visit.Complete1DateTime}}
Complete 2 Date Time UTC	{{Visit.Complete2DateTime}}
Alert Level	{{Visit.AlertLevel}}
Service Group	{{Visit.ServiceGroup}}
Service	{{Visit.Service}}
Reported By Email	{{Visit.ReportedByEmail}}
On Behalf Of Email	{{Visit.OnBehalfOfEmail}}
On Behalf Of	{{Visit.OnBehalfOf}}

Potential Liability Name	{{Visit.PotentialLiabilityName}}
WF Status	{{Visit.WFStatusName}}
Work Type	{{Visit.WorkType}}
Service Provider	{{Visit.ServiceProvider}}
Priority Code	{{Visit.PriorityCode}}
Priority Name	{{Visit.PriorityName}}
Chargeable	{{Visit.Chargeable}}
Reported (Site Date Time)	{{Visit.ReportedSiteDateTime}}
Notified (Site Date Time)	{{Visit.NotifiedSiteDateTime}}
Complete (Site Date Time)	{{Visit.CompleteSiteDateTime}}
Due (Site Date Time)	{{Visit.DueSiteDateTime}}
Cancelled (Site Date Time)	{{Visit.CancelledSiteDateTime}}
Started (Site Date Time)	{{Visit.StartedSiteDateTime}}
Service OK/RTS (Site Date Time)	{{Visit.ServiceOKSiteDateTime}}
Reported By	{{Visit.ReportedBy}}
Region	{{Visit.Region}}
Site	{{Visit.Site}}
Location	{{Visit.Location}}
Unit	{{Visit.Unit}}
Partition	{{Visit.Partition}}
Status	{{Visit.Status}}
Site Type Name	{{Visit.SiteTypeName}}
Geography Name	{{Visit.GeographyName}}
UPRN	{{Visit.UPRN}}
Site Contact Main Email	{{Visit.SiteContactMainEmail}}
Misc Contact Name	{{Visit.MiscContactName}}
Misc Contact Email Address	{{Visit.MiscContactEmailAddress}}
Misc Contact Preference	{{Visit.MiscContactPreference}}
Asset Related Tags	
Equipment Group	{{Visit.EquipmentGroup}}
Barcode Reference	{{Visit.BarcodeReference}}
Equipment Reference	{{Visit.EquipmentReference}}
Inventory ID	{{Visit.InventoryID}}
Serial	{{Visit.Serial}}
Model	{{Visit.Model}}
Visit Related Tags	
Visit Completed Date UTC	{{Visit.VisitCompletedDate}}
Visit Completed Time UTC	{{Visit.VisitCompletedTime}}
Visit Return Date UTC	{{Visit.VisitReturnDate}}
Visit Return Time UTC	{{Visit.VisitReturnTime}}

Visit Remarks	{{Visit.VisitRemarks}}
Visit Insert Source	{{Visit.VisitInsertSource}}
Visit Insert Stamp UTC	{{Visit.VisitInsertStamp}}
Visit Update Source	{{Visit.VisitUpdateSource}}
Visit Last Update Stamp UTC	{{Visit.VisitUpdateStamp}}
Visit Scheduled Visit Date	{{Visit.VisitScheduledVisitDate}}
Visit Note	{{Visit.VisitNote}}
Visit External WF Tag	{{Visit.VisitExternalWFTag}}
Visit Earlies Date Start UTC	{{Visit.VisitEarliesDateStart}}
Visit Latest Date End UTC	{{Visit.VisitLatestDateEnd}}
Visit Started Date Time UTC	{{Visit.VisitStartedDateTime}}
Visit Completed Date Time UTC	{{Visit.VisitCompletedDateTime}}
Visit Return Date Time UTC	{{Visit.VisitReturnDateTime}}
Visit WF Status Caption	{{Visit.VisitWFStatusCaption}}
Visit Skill	{{Visit.VisitSkill}}
Visit Reason	{{Visit.VisitReason}}
Visit Rejected Date UTC	{{Visit.VisitRejectedDate}}
Visit Rejected Until (if provided on mobile)	{{Visit.VisitRejectedUntil}}
Visit Scheduler Remarks	{{Visit.VisitSchedulerRemarks}}
Visit Estimated Return Duration (if provided on mobile)	{{Visit.VisitEstimatedReturnDuration}}
Visit Return Remarks	{{Visit.VisitReturnRemarks}}
Visit Return Skill ID	{{Visit.VisitReturnSkillID}}
Visit Complete 2 Date Time UTC (typically 'Temp Fix' date – if configured and relevant	{{Visit.VisitComplete2DateTime}}
Visit Status No	{{Visit.VisitStatusNo}}
Visit Started (Site Date Time)	{{Visit.VisitStartedSiteDatetime}}
Visit Completed (Site Date Time)	{{Visit.VisitCompletedSiteDateTime}}
Visit Site Complete 1 (Site Date Time) (typically 'Make Safe' date – if configured and relevant	{{Visit.VisitSiteComplete1DateTime}}
Visit Site Complete 2 (Site Date Time) Date Time (typically 'Temp Fix' date – if configured and relevant)	{{Visit.VisitSiteComplete2DateTime}}
Visit Return (Site Date Time)	{{Visit.VisitReturnSiteDateTime}}

Minor Enhancements and Changes

The v4.01.00.55 release addresses issues highlighted in the product. Details are as follows:

SWG Reference	Description
33877	Events - when the 'Instructions' field is updated, the new comment is now added on a new line and no longer appended to the existing data.
39354	QFM Web has been adjusted to allow contractor names to be up to 100 characters, for clients who are obliged to use long names. The use of these longer names is not supported on the QFM Desktop system. Using names longer that 50 characters should be avoided by clients who are still using the QFM Desktop system. Usage of longer contractor names is generally discouraged, as it affects the display in some areas, giving a below-optimal user experience.
40048	Warehouse Rights - the multi-select feature does not work well with the content filtering feature of the ‘Warehouse’ field drop-down. To use simple filtering, characters may be entered and one or more matches from the filtered results can be selected. However, if there were already some items selected prior to doing this then those items are still considered selected. It is advised to use the 'Check All' check box to unselect all items before making use of content filtering options.
40052	Events - issues affecting the ‘Billing Contract’ field are now resolved. Filtering is now applied to the Contractor Name and the drop-down content is now clearly displayed.

Known Issues

This section details system issues which are identified in v4.01.00.55. These will be rectified at the earliest opportunity.

Please contact your SWG Account Manager for further details.

SWG Reference	Description
39354	QFM Web has been adjusted to allow contractor names to be up to 100 characters, for clients who are obliged to use long names. The use of these longer names is not supported on the QFM Desktop system. Using names longer that 50 characters should be avoided by clients who are still using the QFM Desktop system. Usage of longer contractor names is generally discouraged, as it affects the display in some areas, giving a below-optimal user experience.
40048	Warehouse Rights - the multi-select feature does not work well with the content filtering feature of the ‘Warehouse’ field drop-down. To use simple filtering, characters may be entered and one or more matches from the filtered results can be selected. However, if there were already some items selected prior to doing this then those items are still considered selected. It is advised to use the 'Check All' check box to unselect all items before making use of content filtering options.
41882	Stock Parts - When updating the ‘Request Type’ or ‘Use Later’ option for a Used Part record, users should ensure they manually clear the 'Used Quantity' value before they change the ‘Request Type’ and save the updated Requisition row.
41901	New Event screen - the ‘Equipment ID’ field value may not be retained in the drop-down after selection in some cases where Structural Code is used. Users can simply reselect the Equipment ID.

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.

SQL 2019: Any clients who are utilising SQL 2019 need to ensure that their database compatibility version is set to SQL 2012 to prevent potential issues occurring when using QFM.