



ServiceWare Resources 8.0

Release notes

Release notes – Serviceware Resources 8.0

Introduction

Serviceware Resources version 8.0 is a fact!

The biggest change in this version is the introduction of the 'Serviceware Authenticator', our new identity provider and broker at the same time. With this, it is now also possible to log in with an ADFS or Azure AD account, or with an account of another linked provider such as Google. Of course, the mobile applications have also been adapted to work with this new authenticator, resulting in "Serviceware Resources for iPhone 8.0" and "Serviceware Resources for Android 8.0".

With the Serviceware Authenticator we are now also prepared for the connection to the Serviceware Portal, with which we want to serve both clients and employees in the near future with widgets that support their most common use cases. For the same reason, we've been converting our appointment widget to a portal-ready version 4.0. We have also been working on a new widget, which will allow clients to register themselves as 'arrived' once they have arrived at the location where their appointment will take place.

More preparations for the future, but in the area of integration with external systems, has led to the new 'Webhooks' functionality. Serviceware Resources is increasingly part of a complex architectural landscape at our customers, where it is no longer just about importing data from supplying systems, but also about sharing our output - such as appointments, registrations and orders - with receiving systems. With Webhooks, we have built the foundation for this.

Of course, improvements have also been made to existing functionalities. For example, the SRO and Map pop-ups have been sped up, following the MRO pop-up in version 7.14. On the session planning board, the performance of the client picker has been significantly improved and new filter options have been added. And the 'appointments to be scheduled' list has been revamped to better support the more common use cases.

Test and acceptance environments can be visually marked to better distinguish them from production. And for sharing appointments via Exchange, support for Office 365 has been added. Also, a number of bugs have been fixed again.

Finally, we have replaced the term 'service schedule' throughout with the now more common 'order'. Also, in terms of terminology, we no longer make a distinction between the healthcare market and the service market. A client, a "recipient of a service", is now called a client everywhere. Even where in Classic the term 'customer' was still used in some cases.

We hope you will appreciate this version. We would like to receive your feedback at any time. You can send this by e-mail (service@serviceware-benelux.com), or make a call to our Service Desk: +31 (0)71 568 03 10.

Leiden, February 28th, 2022

Serviceware Benelux

Part of Serviceware SE

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1 New: the Serviceware Authenticator

As of version 8.0, logging into Serviceware Resources is done via a new application, the "Serviceware Authenticator", which completely replaces the previous helpLine Identity Provider (hIP). This new application is based on a standard solution ("Keycloak") and has been implemented according to the latest security guidelines.

The Serviceware Authenticator functions not only as an identity provider, as the hIP was, but also as an identity broker. Therefore, it is now also possible to log in with an ADFS or Azure AD account, or with an account from another linked provider, such as Google.

With the Serviceware Authenticator in use, we are now also ready to connect to the Serviceware Portal, with which we want to serve both clients and employees with widgets that support their most common use cases. The appointment widget for clients was already a first example of this.

1.1 Log in to the web application

1.1.1 The SW Authenticator just as identity broker

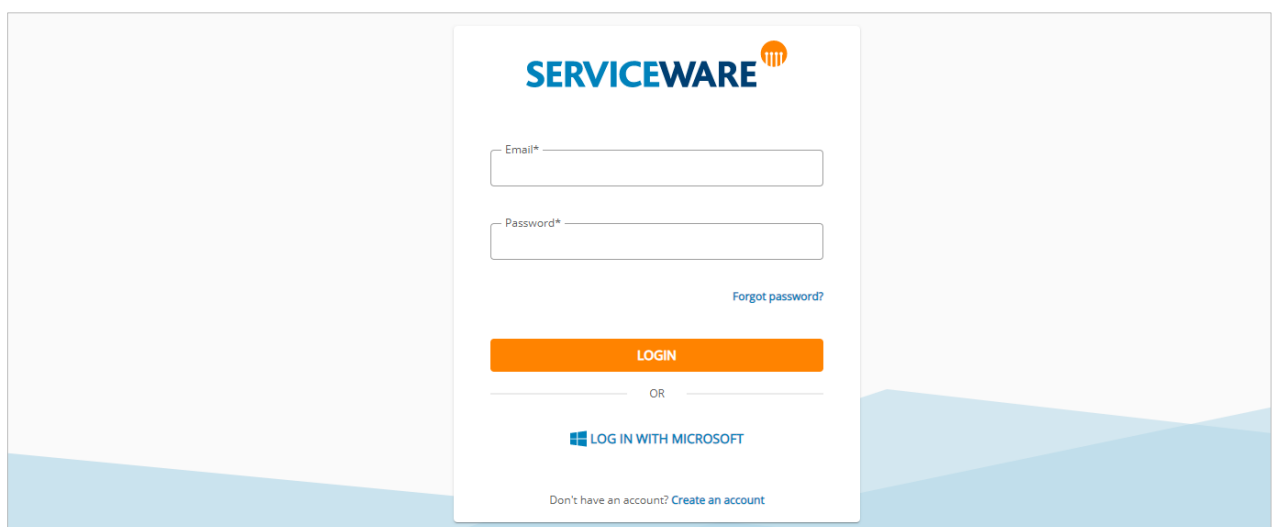
When the Serviceware Authenticator is deployed exclusively as an identity broker, then – when navigating to the Serviceware Resources website – one is directly redirected to the login page of the linked identity provider. If a user was already logged in with the linked provider (e.g. if he was already logged in to Windows), then it can even be the case that he is logged in in Resources directly, completely without login screens. The latter, however, depends on the settings of the linked identity provider.

Two-factor authentication

The use of two-factor authentication (2FA) in this case is the responsibility of the linked identity provider and does not lie with the Serviceware Authenticator, which in this scenario is only a 'forwarding system'.

1.1.2 The SW Authenticator as identity provider (and broker)

In case the Serviceware Authenticator itself serves as an identity provider, or when it is configured both as a provider and a broker, the user will see a new login page.



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Of course the familiar functionalities such as 'forgot password' and 'create new account' are available again. When the user is using a Serviceware Authenticator account, he will have to fill in his credentials in the email and password fields in the upper part of the screen.

If the user is allowed to log in through a linked provider, he will click one of the available links at the bottom of the login screen. He will then be redirected to that provider's login screen.

Two-factor authentication

The process around setting up and using two-factor authentication has not changed substantially, except that the screens look slightly different and the emails come from a different sender (noreply-rsc@serviceware.cloud).

Please note that two-factor authentication via text-messages(SMS) is no longer supported. An authenticator app should now always be used.

Forgotten password

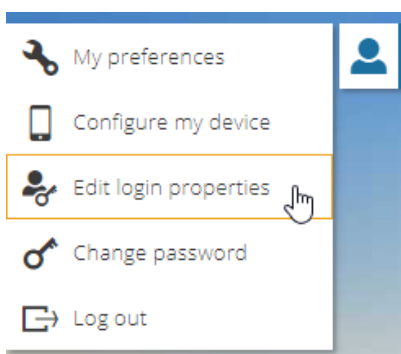
When requesting a new password something has changed. In that case the user is also asked to set up a new two-factor authentication.

Password policy

An important difference with the hIP is that with the Serviceware Authenticator there is now the possibility to set a time limit after which a password automatically expires. Of course this only applies to Serviceware Authenticator accounts, and not to accounts from linked providers. By default, the time limit is set to 365 days, but this can be adjusted per customer if desired.

The requirements for password strength can also be adjusted per customer. For now, these are kept the same as the requirements used in the hIP: min. 8 characters, 1 digit, 1 uppercase letter, 1 lowercase letter and 1 special character.

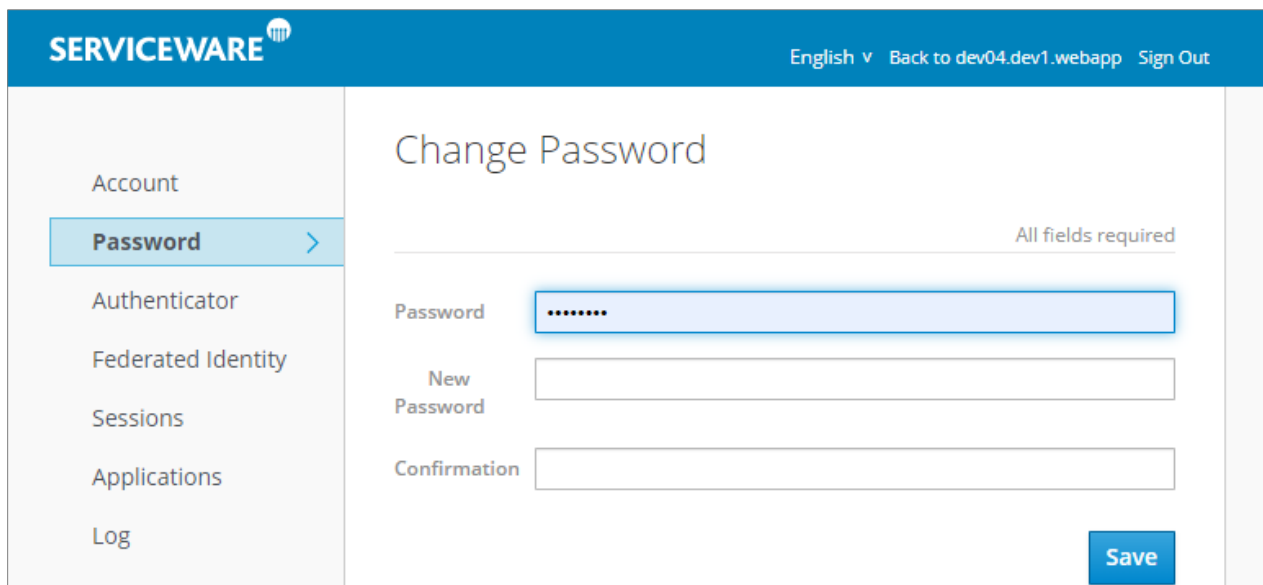
Managing your account



Each user can manage his account from within the application. This means that he can change his name, email and/or password. He can also - for example in case of a new device - 'remove' the set two-factor, after which he will have to set a new 2FA at the next login.

Previously, the user was redirected to the hIP for account management, but now this is done via the Serviceware Authenticator and looks slightly different. What is new is that these options are now all available from mobile as well.

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Please note that changing account details relates purely to the Serviceware Authenticator account, and never has any impact on the account of a linked provider.

1.2 Being logged out after too long inactivity

We have also used the transition from the hIP to the Serviceware Authenticator to make a number of improvements around the expiration of your so-called 'token' if you have been inactive in the web application for too long.

As before, a user is automatically logged out when there are browser tabs with Serviceware Resources open on which no work has been done for some time (30 minutes by default; adjustable per customer). What has changed however, is that the open tabs (with both Classic and NextGen pages) are now kept in sync. This means that it doesn't track *per tab* when you were last active, but it checks across all tabs. If you are logged out on 1 of the tabs, you will now automatically be logged out on all other tabs with Serviceware Resources after a few seconds. So a user is now either logged in or logged out, and not logged in on some tabs and out on others.

In addition, we have changed the behavior when the user logs in again on such an automatically logged out tab. Previously, users had to log in again on each tab individually. Now they only have to do so on one of the tabs. The other tabs will be automatically logged in again shortly after that. How long this takes exactly depends on the browser and on how long one was already logged out. By manually clicking on a tab and thus activating it, this process can be accelerated.

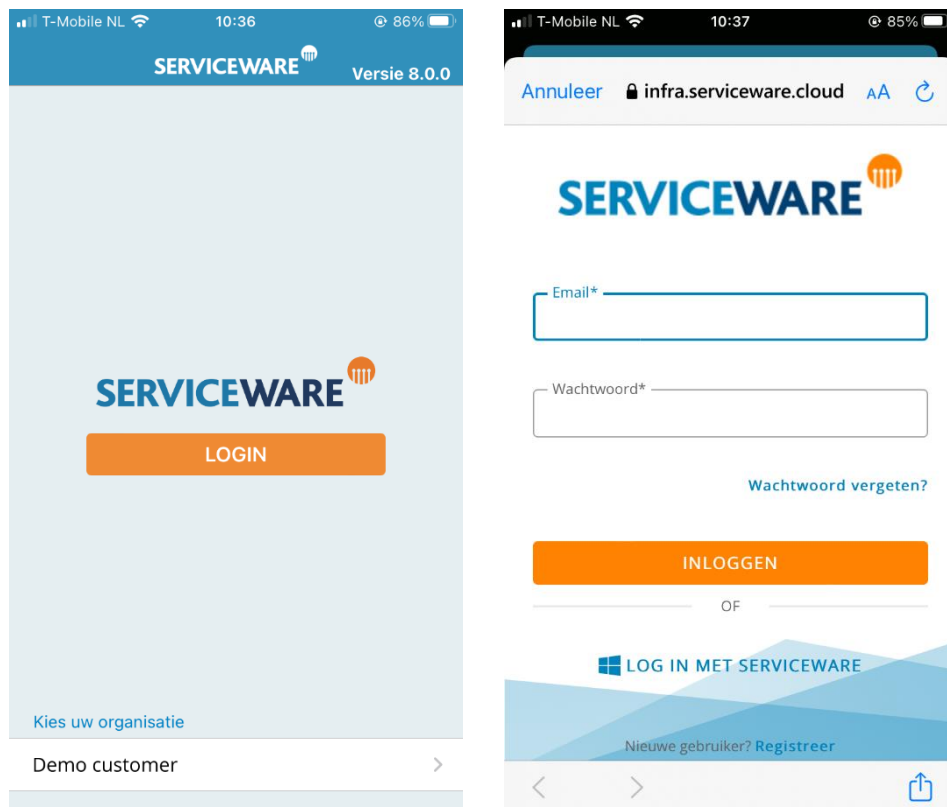
In addition, on each tab, the user is returned exactly to the page on which he was last working on before being logged out. So we tried to make the behavior after too long inactivity more consistent and user-friendly.

When the Serviceware Authenticator is configured exclusively as a broker, the user is always redirected directly to the linked identity provider when logging in again. This may be configured in such a way that, again, the entire login is skipped (because you were already logged in). If so, it may happen that - after first being automatically logged out - one is immediately automatically logged in again. In other words, it could appear as if you are never logged out.

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1.3 Logging into the mobile applications

Logging into the Serviceware Resources mobile apps is also done via the Serviceware Authenticator. The apps no longer have their own login page, but link the user to the web page of the Serviceware Authenticator. Or to the linked provider in case the Serviceware Authenticator is used as broker.



When the Serviceware Authenticator itself is the identity provider, mobile users will now also have to start logging in with a second factor. This is new. In practice this means that during the initial login, in addition to their email address and password, users must also enter a code generated in their authentication app.

After this, they will only be asked for this additional code if the user has not worked in the app for more than 30 days, if they choose to 'log in as someone else' or if the app has been uninstalled and then reinstalled again. Also, after the update to version 8.0, the 2FA code is also asked once. With later updates, this is no longer the case. Then access can simply be obtained with the set PIN or fingerprint, as one is used to.

It is now also possible to create an account for a new user entirely from the mobile phone, without first having to connect the device via the web application. Of course, to connect the user to an employee in Serviceware Resources, the email address used for the account needs to be the same one as the email address known at the employee. That hasn't changed.

1.4 Service user accounts

For the service user accounts, which are used for all services and links that connect to a Serviceware Resources environment, there are 2 important differences with previous versions.

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First, a separate service user is now created for each link or service in Serviceware Resources, where previously we only had 1 service user account for all links and services. As a result, different rights can now also be assigned to different service users.

In addition, for security reasons, no Serviceware Authenticator account is created for service users, and they therefore only exist in Serviceware Resources. This is different than with the hIP and it means that it is no longer possible to manually log into the application with an email + password combination of a service user.

2 Web application improvements

2.1 Visual distinction between test, acceptance and production environments

It is now possible in the web application, to visually mark test and acceptance environments for a clearer difference with the production environment. The marker is visible on every page, at the bottom of the screen on the action bar. Should this 'sticker' get in the way at any point, it can easily be clicked to temporarily hide it.

To show the marker, the name of the environment and the desired color of the marker should be specified in setting 67. Optionally, a short text can be added about the 'state' of the data on the particular environment, such as 'Anonymized data'.

The screenshot displays the 'My planning' web application interface. At the top, there's a navigation bar with 'My planning' and 'SESSIONS'. Below this, a table lists sessions for 'Week 40 2021' from Sun 3 Oct to Sat 9. The table has columns for days and time slots (8:00 AM - 5:00 PM). Below the table, three session details are shown: 'Sun 3 Oct | Leuke Sessie', 'Mon 4 Oct | Online session 2', and 'Wed 6 Oct | Leuke Sessie'. Each detail shows a grid for 'Clients' and 'Employees' with time slots from 08:00 to 08:45. At the bottom, an action bar features a green 'Acceptance' marker with the text 'Anonimized' and an orange 'Test omgeving' marker with the text 'Geanonimiseerde gegevens'. Search and view icons are also present.

2.2 Improvements around sessions

2.2.1 Client picker performance improved

After improving the performance when opening sessions on the session planning board in version 7.14.0, this version significantly speeds up the retrieval of clients and their orders (service schedules) in the client picker. As a result, searching for clients and planning with drag & drop from the picker now works more smoothly.

Also, it is now remembered whether the picker is open or closed and whether the clients or employees tab was active, so that the picker does not always jump back to its default value after navigating away and returning to the planning board. For example, this used to happen every time you made an appointment via the 'Add appointment' page.

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2.2.2 New filter options in the client picker

2.2.2.1 Filter on imported client info

New filters can be added to the picker based on imported client information (previously known as ‘client care info’). Until now, this type of client information was only available in the classic client module and on the info panel on the classic planning boards.

However, by adding it to a specific session planning board in the planning board management section, this type of information can now also be used as a filter in the client picker on the session planning board. This allows certain orders to be brought forward in order to plan them first, for example. Or to group them, and plan them all at the same session.

The screenshot illustrates the configuration of a session planning board to use imported client information as a filter. It shows three main components:

- Tab details configuration:** A window where the tab name is set to 'CLIENTS', validity dates are 22-06-2021 to 31-12-2099, and the 'Enable filter on client info' option is set to 'Specific values'.
- CHOOSE TYPES OF CLIENT INFO dialog:** A dialog where users can select which types of client information should be used as filters. In this case, 'Care Info Category A' and 'Care Info Category B' are selected.
- Main client picker interface:** The 'Clients' tab is active, showing filters for team, care info category a, care info category b, competence, preferred employee, and priority.

2.2.2.2 Filter on competence

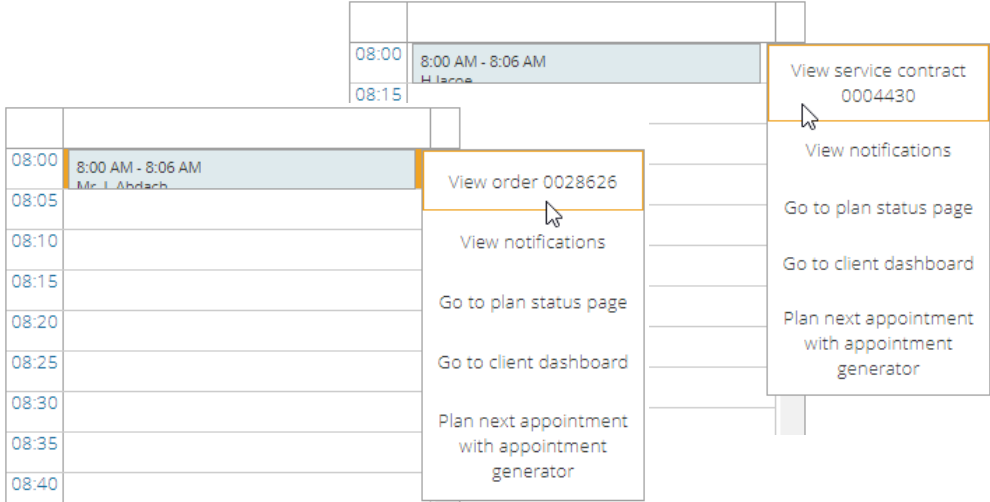
When a session is selected in the lower part of the planning board, the orders in the client picker are automatically filtered by service. This means that orders for services that cannot be delivered on this session are filtered out of the client picker.

But of course it can happen that the sessions themselves are hardly limited and allow all services. In such a case, the planned employee (or better: his/her competences) is in fact the limiting factor. To support this situation, a new filter has been added that allows orders in the picker to be manually filtered on one or more specific competences. When an order has one or more of the selected competences, it will be shown in the picker.

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2.2.3 Switch directly from session appointment to order overview

At the top of the right-click menu of a session appointment, an option has been added. This option allows you to quickly navigate to the order overview of that particular client, when it concerns an appointment based on an order. When the appointment is based on a service contract, this new option brings you to the client's service contract overview.



2.2.4 Creating an invalid appointment instead of returning the item to the picker

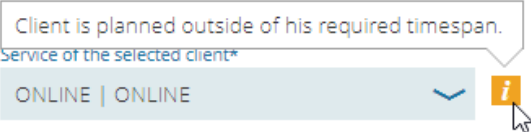
When planning a session appointment using drag&drop from the client picker, it sometimes happened that the picked up order or contract 'jumped' back into the picker and no appointment was created without it being clear why. This behavior occurred when the appointment would have been invalid after planning, and was first found in version 7.14.0.

On all other types of planning boards, an appointment in a similar situation is created but displayed in a red color. This has the advantage that you can show what exactly is wrong. In addition, it allows you to claim the time for an appointment while addressing the invalidity issue afterwards.

To keep the behavior consistent, this has now also been brought back to the session planning board.

2.2.5 Missing validation notifications on appointment pages

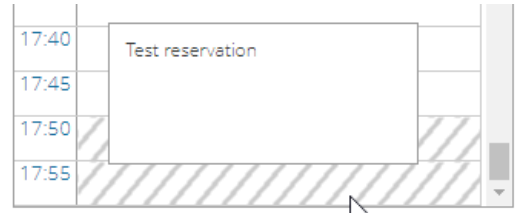
On the 'Appointment info' and 'Edit appointment' pages, certain alerts were no longer visible, for example that an appointment was planned outside of its required timespan, that the team of the planned order is invalid on the date of the appointment, or that the client's age at the time of the appointment does not meet the requirements as set by the service. This has been fixed, all notifications are displayed again.



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2.2.6 Mouse-over with description not correctly shown for reservation on last slot

The mouse-over info box with the description of the reservation was not displayed properly for reservations at the very end of the session. This has now been fixed.



2.2.7 Close button for sessions is sometimes shown over the 'i' symbol

For sessions with a longer name or for 'locked' sessions, it could happen that the button to stop showing the session at the bottom of the planning board was displayed over the 'i' symbol. This is now solved.



2.2.8 Issues with searching in sessions admin

There were two issues reported concerning searching for sessions in the sessions management section.

It sometimes happened that after adjusting the search criteria after an initial search, the correct sessions were shown as results in the table, but when opening one of those, it opened a session that still belonged to the initial search. This problem has been solved.

Also the search filter on a certain day did not work correctly when the list of options for that filter was not closed before clicking the blue search button at the bottom. This too has now been fixed.

2.2.9 PSE ignores first 'specific service time' on an already started session

When one or more specific time periods were defined within a session for a particular service, no suggestions were found by the PSE on the current day during some of these time periods. If the session had already started, the first upcoming service time period was ignored. And if only one service time period was defined, then no suggestions at all were given for that service on the current day. This issue is now fixed.

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2.3 Improvements around MRO, SRO and map

2.3.1 Faster loading of the SRO and map pop-up

As a follow-up to the performance improvements for the MRO pop-up in version 7.14.0, the loading of the pop-up for the SRO and for the map view has now also been accelerated. All required data is now retrieved smarter and more grouped. The performance gain is therefore greatest for large data sets.

2.3.2 Employees not available in MRO on the planning board of the schedule team

An employee with a schedule on another team (X) than his contract team (Y), was available in the picker of the planning board on which team X was configured, but did not appear on the selection tab in the MRO pop-up of this same planning board. When this employee was already planned, he did also not appear on the Route. This problem has been fixed.

2.3.3 Contract team instead of schedule team shown in 'employees with schedule'

When an employee has a schedule on a different team (X) than his contract team (Y), then in the MRO pop-up of the planning board on which team Y was configured, in the 'employees with schedule' category, not the team was listed on which the schedule existed but instead the contract team was displayed. This was confusing and also sometimes prevented the ability to filter by team. This problem has been resolved.

2.3.4 'Occupied block' from other planning board not shown in MRO pop-up

It was reported that an office task, planned on another planning board A and in terms of time only partly overlapping with the shift times on planning board B, was not shown in the MRO pop-up of planning board B. This is solved. The office task is now simply shown again as 'occupied block' in the MRO pop-up of planning board B.

2.3.5 Not possible to modify an existing MRO setting-set

When changes were made to the MRO settings for a particular planning board, and they were saved as an existing setting-set, an error occurred and the saving failed. It is now possible to edit existing setting-sets again.

2.3.6 Route on other planning board incorrectly ticked and shown with wrong label

In the route tab of the MRO pop-up, those employees are shown who already have a route on another planning board. When an employee was also planned on the day before or after, the wrong route label was shown here, namely the one of the day before or after. This also had an influence on whether or not the route was automatically ticked in the MRO pop-up. Both issues have been resolved. The fact that an employee is planned the day before or after now has no incorrect influence anymore on the selected day.

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2.4 Improvements around client management

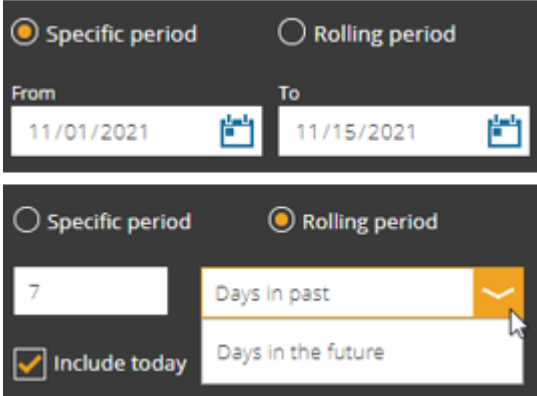
2.4.1 'To be planned appointments' list

By clicking on 'All still to be planned appointments' on the 'My clients' tile on the story page, you will be taken to a client-wide overview of all still unplanned orders. We have managed to speed up this overview considerably in this version. In addition, a number of functional changes have been made as well.

Previously, this list showed all unplanned orders with a validity that (partly) overlapped with the set period X. In other words, it was a list of orders that *could* be planned in period X. Now only the end date of the validity is compared with the set period X. As a result, it is now a list of orders that *must* be planned in period X. It has therefore really become a checklist.

By setting period X to lie in the past, an overview can also be obtained of all the orders that *should have been* planned last week, for example, but were not.

For the definition of period X, it is possible to choose a specific period, such as from November 1 to November 15, for example, or a rolling period. An example of a rolling period is always 7 days ahead from now. Today's day can be included or excluded. The set period is remembered per user, so that it is immediately active when the user returns tomorrow to view this list again.



In addition, it is now possible to filter the list on multiple teams, or on all teams minus some specific ones. Previously it was only possible to filter on 1 single team. Finally, a filter on priority has been added.

2.4.2 'My clients': number of results adjustable for information security purposes

When searching for clients on the 'My clients' page in NextGen, until now there was a maximum of 1000 results. This meant that after entering a search term or setting filters, results were only shown in the table if there were less than 1001 results found. If the filters and/or search term were not specific enough and more than 1000 results were found, a message appeared telling the user to search more specifically.

From an information security point of view, being able to view potentially a 1000 clients is still a lot. Therefore an option has now been added to setting 63 that allows the maximum number of clients to be configured (values between 0 - 1000). By default this setting is set to 50 clients.

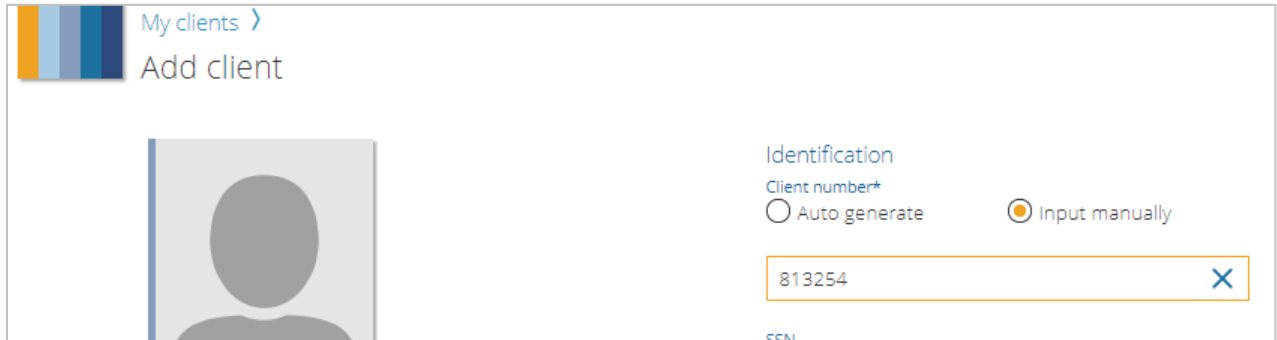
This means that you will see the information of fewer clients, but the downside is that you will have to search much more specifically. If more than 50 results are found, they will not be shown and the message to search more specifically will appear again. It is therefore a balance between information security on the one hand, and user friendliness on the other.

Note: the ability to limit search results does not affect the search for clients in the client module in the classic part of the application, since this module will be disabled in the near future.

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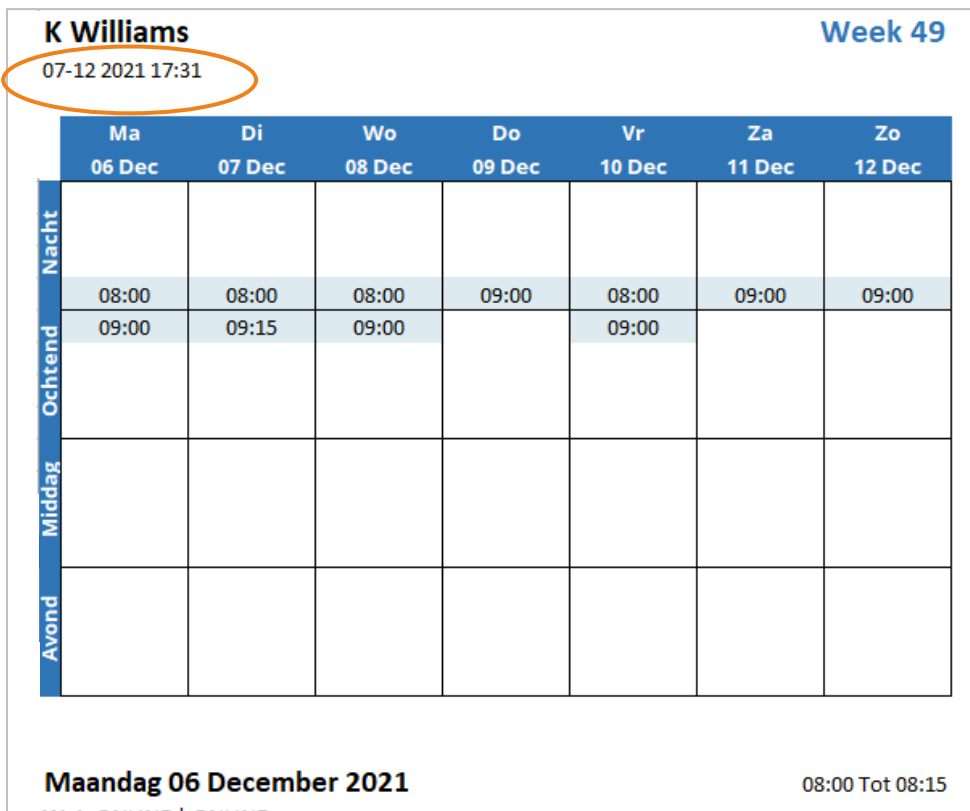
2.4.3 Possibility to choose a specific client number

When creating a new client, until now the client number was always generated automatically. As of version 8.0, it is possible to choose the client number yourself if desired. The default method – have it generated or choose it yourself – can be set in setting 62. This is then the default on the 'Add client' page in NextGen. However, you can always choose to deviate from this default per client.



2.4.4 Date and time of printing on client calendar printouts

The 'header' of the client calendar printout (both from classic and nextGen) has been expanded to include the date and time at the moment of printing. This will be visible on each of the printed pages, next to the name of the client.



		Ma	Di	Wo	Do	Vr	Za	Zo
		06 Dec	07 Dec	08 Dec	09 Dec	10 Dec	11 Dec	12 Dec
Nacht								
		08:00	08:00	08:00	09:00	08:00	09:00	09:00
Ochtend		09:00	09:15	09:00		09:00		
Middag								
Avond								

Maandag 06 December 2021 08:00 Tot 08:15

2.4.5 NextGen client calendar checked for wrong access-right

To open the client calendar in NextGen, right 6 is required. Unfortunately, instead of checking for right 6, it checked for right 6.9.1, which prevented some users from viewing the calendar. This error has been fixed.

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2.4.6 No clients with future orders found after searching on date of birth

When searching in the client picker in the Classic client module based on date of birth, no clients were found for which only future orders were open. This has been changed.

2.4.7 Date of birth of 9 characters found

After some clients were found with a 9-digit date of birth, the check on this has been reviewed and expanded. It is now no longer possible to import or create clients with a birthdate of more than 8 characters.

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2.5 Sharing Calendar via Exchange

2.5.1 Suitable for office 365/Exchange online

In addition to being able to export appointments to Outlook via Exchange, it is now also possible to export appointments to Office 365. The content of the appointment information is the same for both options.

Setting 41 has been extended with the option for Office 365.

41 Configure Exchange connection

Description
When it is desired to export Serviceware Resources appointments to an external calendar or to import external appointments into Serviceware Resources using Exchange (defined in setting 4), the Exchange connection has to be configured here.

Using:
 Exchange (on premise) Office 365

Client Id
[Alphanumeric string]

Tenant Id
[Alphanumeric string]

Client secret
[Dots]

Domains +
Description
Specify which domains should be used for retrieving the appointments from an Outlook calendar. For example: exampledomain.com

Domain
exampledomain.com

2.5.2 Appointment details expanded with the order description

The basic appointment information that is included in the export to Outlook or Office 365, contains the who-when-where information of the appointment. This means that the client name, the date and time of the appointment and the address where the appointment will take place are available.

In the appointment details, things like the services and activities to be delivered are included. The date of birth and the gender of the client are also available. From version 8.0 on, the order description is now also available in the appointment details.

2.5.3 'Copy to Outlook' on classic employee calendar no longer available

For security reasons, the 'Copy to Outlook' button is no longer available from the employee calendar in the classic section of the application. If an employee wants to show the appointments in his or her Outlook calendar, this should be done via Exchange or Office 365.

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2.6 Other solved issues

2.6.1 Unable to work in classic after a new employee contract

When a new, additional contract was added for an existing employee, then in some cases problems occurred when working with this new contract in the classic part of the application. This problem has been solved.

2.6.2 'Too many redirects' message for employees with multiple contracts

When an employee with more than 1 contract was logged in to the application, and he logged out or let his session expire (inactive for too long), there were problems when logging back in again. After entering his data on the login page a message would be shown with 'Too many redirects' and he could only login again after a complete restart of the browser. This issue has been resolved.

2.6.3 Ending an employee contract does not seem to have any effect

When ending an employee contract in NextGen by specifying the updated end date via the 'End' button, the action seemed to have no effect. This was because the page containing the contract data was not refreshed after the action. As a result, the original end date was still visible, even though the contract was actually updated with the new end date. The page is now refreshed after an 'End' action.

2.6.4 Only a round number of hours possible in the employee contract hours field

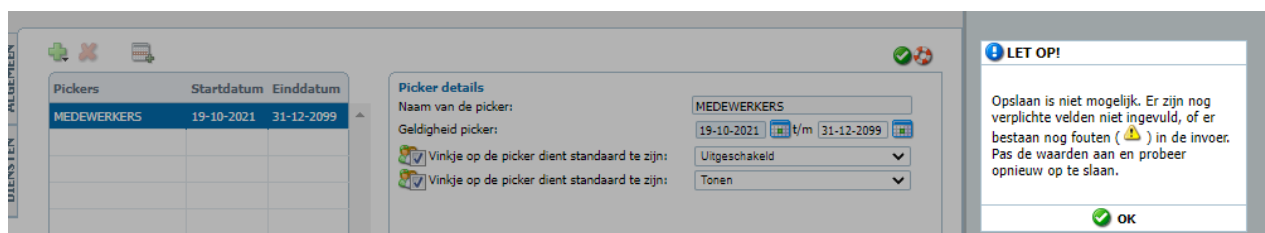
When entering the number of contract hours for a certain employee contract in the NextGen employee module, only a round number of hours were possible. This has been changed. It is now also possible to enter decimal numbers. The same problem was found when importing contract hours. This has also been changed.

2.6.5 Protocol code is not unique

Multiple protocols could exist with the same code, making it difficult in some cases to pinpoint the correct protocol. This is now no longer possible. When creating or modifying a protocol in the web application, it is checked whether the code is unique. If not, a message is shown and the protocol cannot be saved.

2.6.6 Changing picker details in planning board set up section is not possible

It was not possible to change the picker details for an employee or client picker in the planning board set up section of the Admin module in Classic. A message mistakenly appeared, talking about mandatory fields not being filled in. Therefore saving was not possible. This problem has been solved.



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2.6.7 Deleting employee schedules is a disruptively heavy action

The removal of employee schedules in the schedule module took a long time and proved to be a rather heavy burden on the system. Other processes, which also use schedule information, were hindered by this. This function is now performed in a different way so it requires less processing power.

2.6.8 Last location not visible in location picker on day planning board

When there are relatively many opening schedules defined for a certain location (room) on one and the same day, it could happen that at the very bottom of the location picker the last location(s) were not or only partially visible. The logic that calculates the required space in the picker per location has been modified and now takes into account the existence of many more rows per location. As a result, it is unlikely that this issue will occur again.

2.6.9 Changing location opening schedules causes planning problems

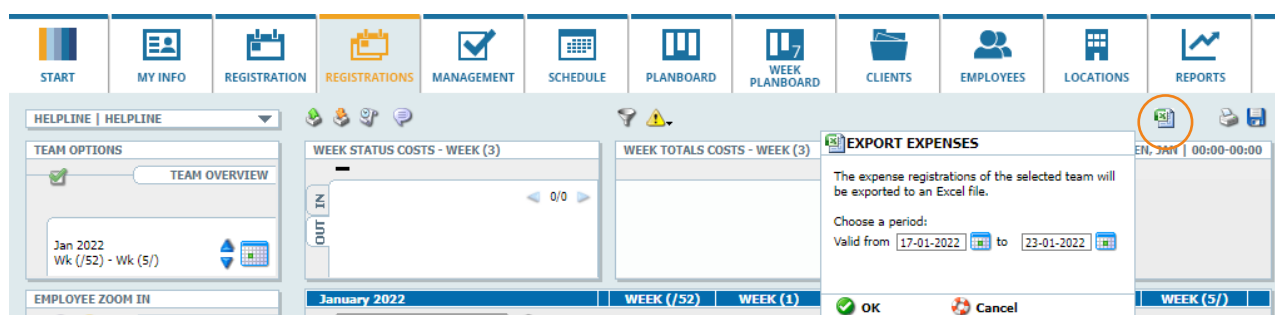
There were problems with not being able to plan location opening schedules on the classic day planning board after making changes in the opening schedule. The opening schedule did not appear in the picker anymore after the change and on the planning board itself it went wrong with the determination whether the appointment was valid or not. It specifically went wrong when the day on which the change was made was another day-of-the-week than the day of the opening schedule itself. This problem has been solved.

2.6.10 Location website field doesn't allow special characters

The website field for locations in the Classic location module could not handle any special characters, which made it appear that the entered URL was incorrect. However, in the database all entries were stored correctly. The input field has now been modified so that the entered and saved value is now correctly visible.

2.6.11 Export expenses button in registrations/management resulted in error

Clicking the button 'export expenses' in the registrations and management modules resulted in an error. This has been solved. It is now possible again to open the overview in Excel.



2.6.12 'Select action for this week' in management module sometimes not working

When working in the management module in Classic, sometimes the dropdown 'Select action for this week' on team level stopped working when you zoom in on someone's week, and then go back to team overview again. This issue is now fixed.

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2.6.13 Incorrect date of birth when viewing a dynamic form from Classic

After this problem was solved earlier in the mobile application, it was found again in the registrations/management module in the web application when a completed dynamic form was opened from there. A client with a birthdate of 01-07-1937 was shown there with a birthdate of 30-06-1937, so 1 day earlier. This issue is also solved now.

2.6.14 Error opening a dynamic form from a registration in Classic

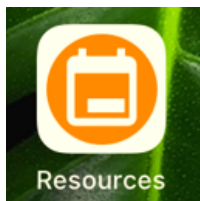
In some cases it could occur that a completed dynamic form would not open when clicked in the registration/management module in Classic. The message 'Oops an error occurred' was then visible. The cause has been found and the problem is now solved.

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3 Mobile

In addition to the new way of logging in, two more changes have been made in the mobile apps.

3.1 Small graphic adjustments



The old Serviceware (EN)/Careware (NL) logo in the mobile apps have been replaced with the new Serviceware Resources logo. Also, as of version 8.0, a new 'launcher' icon is being used.

In addition, there are some other small graphical differences noticeable in the iPhone app compared to previous versions. These adjustments anticipate on another project, in which we also want to offer the iPhone app through the Apple store.

3.2 Specific 'Go-to-URL' per order

Previously, a URL could be specified to which the user could link from an appointment on his calendar. The client number of the order on which the appointment was based was added to the URL, and this could then be used to open the relevant client information in the external application. However, no specific order information could be supplied, only client and employee number would be filled in for the user, so the user sometimes had to manually find the correct order in the external application.

It is now also increasingly common for Serviceware Resources to process orders from *multiple* source systems. The ability to specify a single 'Go-To-URL' for all orders is therefore no longer sufficient. That is why it is now possible to supply a URL *per order* when the order is imported. That link can then also include all the specific order related information needed to directly open a specific order in the external application. It can also be specified per order whether the opening of that URL should be included in the flow (e.g. start appointment, open URL, stop appointment), or whether it should only be an optional action. When no specific URL is known for the order, the system falls back on the default URL which can still be set.

When there are multiple orders linked to a single appointment, the user will be able to choose what external link they want to open.

This functionality can be used in combination with Serviceware Resources version 7.14.1 or higher.

4 Widgets

4.1 Appointment widget 4.0

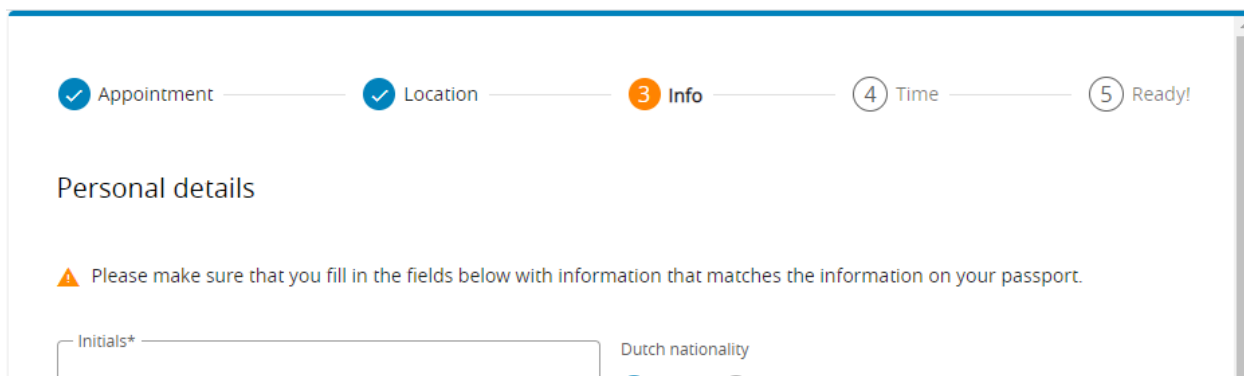
In combination with Serviceware Resources 7.14.1 and up.

4.1.1 Portal-ready

The appointment widget has been converted to a portal-ready widget. By this we mean that the widget, in addition to stand-alone, will also be able to be placed on the Serviceware portal that will soon be available. For this purpose, mainly the front-end has been modified so that the widget now looks slightly different. However, the layout of the screens and the functionalities have all remained the same, apart from some small fixes that are described in the next paragraphs.

4.1.2 Possibility to show an extra text above 'fill in data' page

When planning an appointment without an order, there is an option at the top of the page where the client has to fill in his or her data, to show an additional text. The content of the text is of course fully configurable, and can also be left empty.



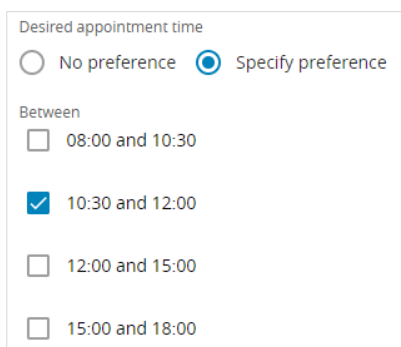
Appointment — Location — **3 Info** — 4 Time — 5 Ready!

Personal details

⚠ Please make sure that you fill in the fields below with information that matches the information on your passport.

Initials* _____ Dutch nationality _____

4.1.3 A set preferred time was still remembered after deselection



Desired appointment time

No preference Specify preference

Between

08:00 and 10:30

10:30 and 12:00

12:00 and 15:00

15:00 and 18:00

If on the first page, one or more preferred times were ticked, and later 'no preference' was chosen after all, the previously ticked preferred times were still remembered under water. These were then still used in determining the provided suggestions.

This issue has been fixed.

4.1.4 Re-planning appointment via widget impossible if client address is missing

In the re-plan widget, which allows an existing appointment to be rescheduled to another time, date or location by the client, there used to be a check whether an address was known for the client in Serviceware Resources. When this address was missing, it was impossible to re-plan the appointment using the widget.

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Since session appointments never take place at the client's own address, it is not per se necessary that a client's address is known. The check for address in the re-plan widget was therefore a bit too, and has been removed now.

Please note: To plan a client appointment with the PSE via the web application, it is still required that a client has an address. And also for planning client orders in Classic, an address is a requirement. We therefore recommend that a client's address is entered in the application at all times when creating a new client.

4.2 Pre-announcement: 'Register-as-arrived' widget

In combination with Serviceware Resources 8.0.0 and up.

For small locations where there is no central reception, it is now possible to use the register widget to have clients who arrive at the location register themselves as 'arrived'. After this, the appointment is shown on the planning board with a figure on the right, and it is visible which clients are waiting.

SERVICWARE

Register online

Welcome at Example hospital. Some intro text and an logo can be placed here in the top area. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse sodales diam eu vestibulum convallis. Donec nec magna rhoncus, eleifend nibh a, efficitur diam.

Location
Demo Location

Appointment
Please enter your appointment code
Appointment code*
LPXMAA

REGISTER

17:30	5:30 PM - 5:50 PM	
17:35	H Jacoe	
17:40	0002932 1/1/2020	
17:45	ONLINE ONLINE	
17:50	LPXMAA	

A link to this widget can be included in the appointment confirmation email the client receives after making the appointment. When the client has arrived at the location, the widget can be opened on the client's own phone. The location on which the appointment is planned and the appointment code are already filled in automatically. The client now only needs to check the location and click 'Register'.

Another option is that the link to the widget is communicated in the waiting room, for example by means of a QR code that can be scanned. This can already include the location, so that the register widget starts up after scanning the QR code and already prefills the location. In this scenario the client only needs to fill in his appointment code.

A third option is to run the widget on a central device in the waiting room, and have every client who comes in register himself on that device. The location can then be set once at startup and remains filled in at all times. Again, the clients only need to enter their appointment code.

Registration can take place within a time window of X minutes before the start time of the appointment up to Y minutes after the start time of the appointment, where X and Y are configurable.

5 Technical topics

5.1 Webhooks

With version 8.0, a new export mechanism is available. By means of so-called 'Webhooks' it is possible for the receiving party to subscribe to information from Serviceware Resources. This specifically concerns orders (former service schedules), appointments and/or registrations.

Immediately after an order, appointment or registration is created, modified or deleted, a message is created that is then 'pushed' to all subscribers. A subscriber subscribes to certain triggers, for example only to all events concerning appointments, or only to the 'create' triggers for both appointments and registrations.

The subscriber can be the receiving system itself, but if desired there can also be placed a (custom) interface in between to filter the information further, so that for example only all new appointments of a certain team or for certain services are received.

To configure Webhooks, it is first necessary to define system-wide for which triggers messages are generated. This can be done in setting 66. After that, the message subscriptions must be defined in the NextGen admin module.

Please contact one of our consultants for more information.

The image shows a screenshot of a web application interface. At the top, a dark header bar contains the text '66 Usage of the message broker' and two icons: a blue checkmark and an orange 'X'. Below this, a light blue box contains the 'Description' for setting 66: 'For which triggers should a message be placed in the message broker?'. To the left of the main content area is a sidebar with three sections: 'Appointments', 'Registration', and 'Service schedules'. Each section contains a list of events with a checked checkbox. The 'Appointments' section includes 'Appointment created', 'Appointment updated', and 'Appointment deleted'. The 'Registration' section includes 'Registration created', 'Registration updated', and 'Registration deleted'. The 'Service schedules' section includes 'Service schedule created', 'Service schedule updated', 'Service schedule deleted', and 'Include imported service schedules'. The main content area is a white dialog box titled 'Add message subscription'. It has a breadcrumb trail: 'Administration & setup > Message subscriptions > Add message subscription'. The dialog is divided into several sections: 'Identification' with a 'Name' field containing 'Demo'; 'Where to send' with a 'URL*' field containing 'https://urlofreceivingparty:test'; 'What to send' with a 'Triggers*' section containing three checked items: 'Appointment created', 'Appointment updated', and 'Appointment deleted'; 'Security method' with a checked 'Hmac' option; 'Application Id*' and 'Secret*' fields; 'Cipher strength*' set to '256'; and 'Custom headers' with a checked option and a '+' icon. At the bottom of the dialog, there are 'Key*' and 'Value*' fields. The dialog also has a blue checkmark and an orange 'X' icon at the bottom right.

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5.2 Open APIs

5.2.1 New open API to set appointment status to 'arrived'

There is a new open API available that can be used to set the status of planned appointments to 'arrived'. We use this open API ourselves for the upcoming 'Register-as-arrived' widget for clients, but it can also be used to link with another registration system.

[POST api/v2/appointments/arrived](#)

5.2.2 Improvements in open APIs for the PSE

It was already possible to plan a new appointment with our 'Plan Suggestion Engine (PSE)' via open APIs. Now we have added the ability to re-plan existing appointments as well.

The PSE now also provides suggestions when an order is entered that has already been planned and the corresponding appointment is specified. After choosing one of the suggestions, no new appointment is created but the existing appointment is updated with the new date, time and possibly location.

Also, for use via the open API, it is now possible to override the time used by the PSE to reserve suggestions with a different value than the Serviceware Resources web application itself works with. Also, the minimum reservation time has been lowered from 1 to 0 minutes, which means that the given suggestions are actually not reserved. However, unless there is a very specific use-case for it, the recommendation is still to set this to at least 1 minute.

[POST api/v2/plansuggestions](#)

[POST api/v2/plansuggestions/{requestId}/plan](#)

5.2.3 Open API work for Webhooks

For the Webhooks functionality an open API has been added with which all information of a registration can be retrieved using the ID of the registration. In addition, the performance of the already existing endpoint for retrieving appointment information using the ID has been improved.

[GET TimeRegistrationById_v2](#)

[GET AppointmentById_v2](#)

An overview of the message subscriptions, and the exact content per subscription, are also available. A new subscription can also be created or an existing one changed or deleted via open APIs.

[GET api/v2/webhooks/subscriptions](#)

[GET api/v2/webhooks/subscriptions/{id}](#)

[POST api/v2/webhooks/subscriptions/](#)

[PUT api/v2/webhooks/subscriptions/{id}](#)

[DELETE api/v2/webhooks/subscriptions/{id}](#)

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5.2.4 Open API work for performance improvements

To speed up the retrieval of client contracts and unplanned orders for the client picker on the session planning board, a new endpoint was created that is now also available as an open API. Precondition is right 22: being allowed to view session planning boards.

[POST api/v2/plannableresources/clients](#)

To improve the performance of the list of 'appointments to be planned' a similar endpoint was used, but from a slightly different perspective. This one can also be used as an open API. Precondition here is right 6: being allowed to view client information + scope.

[POST api/v2/serviceschedules/unplanned](#)

5.3 Audit information now stored in a compressed format

To be able to continue to manage the ever growing collection of audit information, we have been working on a way to store (part of) the information in a compressed format. This allows us to reduce the size of the audit information, and prepares us for the future, in which we will only have to audit more actions.

As of version 8.0, all new audit information will be stored in a compressed format. In addition, for each customer a process can be started to also compress the existing audit information. For some customers this has already started.

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6 Installation requirements

Below, the requirements for the installation of **Serviceware Resources 8.0** are listed. Please note that when 8.0 is installed, also version **8.0** of the connect server application (“helpLine.Connect”) should be installed. In order to make use of all the latest features, Serviceware Resources for iOS **8.0** and Serviceware Resources for Android **8.0** are advised.

- › For an update to version 8.0.0, the already installed version of Serviceware Resources should be minimal 7.14.0. For older versions of Serviceware Resources, extra steps need to be taken to be able to update to 8.0.0. Please contact one of our consultants for more information.
- › As of version 8.0.0, the Serviceware Authenticator is used as an identity provider and/or broker. It replaces the helpLine Identity Provider (hIP).
- › Client machines need to have the latest version of Chrome, Firefox or Edge installed. Note that Internet Explorer 11 is not supported anymore.
- › A complete overview of all hardware and software specifications can be found in the document “[Serviceware Resources - Hard- and Software specifications _EN_v80](#)”.

6.1 Compatibility matrix

Serviceware Resources	Authentication method	Connect	Mobile Services	iOS app	Android app	Appointment widget
7.10	Required; ≥v7	≥5.2.0	≥ 5.1.0	≥ 5.2	≥ 5.2	
7.11	Required; ≥v7	≥5.3.0	≥ 5.2.0	≥ 5.3	≥ 5.2	
7.12	Required; ≥v7	≥5.3.0	≥ 5.3.0	≥ 5.3	≥ 5.4	
7.13	Required; ≥v7	≥5.4.2	≥ 5.3.0	≥ 5.4	≥ 5.5	
7.14	Required; ≥v7	≥5.4.3	≥ 5.3.1	≥ 5.4	≥ 5.5.1	
8.0.0	Serviceware Authenticator	≥8.0.0	≥ 8.0.0	≥ 8.0.0	≥ 8.0.0	≥ 3.2