



ServiceWare Resources 8.1

Release notes

Release notes – Serviceware Resources 8.1

Introduction

After the extensive version 8.0, Serviceware Resources 8.1 is a smaller version with the main goal of reducing the load on the system leading to a more stable level of performance. We have identified the components that cause the greatest load, and have optimized about ten of them in this version.

This will continue to be the main issue in the next version, with a major project around the performance of the PSE and thus indirectly parts of the appointment widget as well.

Furthermore, a number of reported issues have been solved and some minor functional improvements have been implemented. The most important to mention is the new possibility to set 'location' as default option for the 'Where' block on page 2 of the PSE, see §2.1.

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.

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Serviceware Benelux

Part of Serviceware SE

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1 Performance improvements in the web application

1.1 Number of locations limited when planning with the PSE

Also available as a hotfix for 7.14.1 and 8.0.0.

When using the session appointment generator (or ‘PSE’) from within the web application, and choosing to have suggestions searched around a given address, the possible time slots of *all* locations in Serviceware Resources were determined. Then the suggestions found were evaluated, among other things, on the distance from the location to the specified address, and suggestions further away (beyond the maximum number of kilometers from setting 24) were filtered out of the results.

We see that the number of locations in production systems keeps increasing, which also increases the load on the whole system when searching for suggestions around an address. Therefore, we have moved the distance determination to an earlier moment in time: before searching for suggestions at all, all locations further away are already filtered out of the possibilities. This greatly reduces the number of locations, and therefore the number of sessions that are considered by the PSE.

In the hotfix for 7.14.1 and 8.0.0, only the 10 closest locations are now included by default.

The solution in 8.1 is slightly more sophisticated. Here the number of locations is not hard limited to 10, but also takes into account setting 24. Optionally, it can still also be limited to a fixed number of locations (per customer; to be set by our consultants). For example: Consider all locations within a 5 km radius of the specified address, with a maximum of 8 locations.

24 Session appointment generator logic

Description
Various settings for the logic of the session appointment generator.

Number of shown appointment suggestions*
30

Max. time (minutes) that suggestions should be reserved for*
5

Time before which a fasting-required service should be planned*
08:00

Max. distance (meters) between the entered address and the location of the suggestion
50000

Max. number of days around the reference date in which suggestions can be searched*

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1.2 Searching for clients by name or number accelerated

Also available as a hotfix for 7.14.1 and 8.0.0.

In large organizations with a lot of clients in the system, searching for a particular client in the web application (and also in the mobile apps) was quite a heavy action and therefore slow for the user. This was because it was possible to search even on *a part* of the name, SSN or client number and this prevented the use of indexes when searching through all clients.

For this reason, we have now somewhat limited the search options. Where previously the system placed wildcards before and after each search term (*ohnso* was interpreted as **ohnso** and this allowed *Johnson* to be found), this is no longer done. This allows indexes to be used, the load to be lower, and the application giving faster results.

Searching by name now always looks from the beginning of the surname or partner name to see if there is a match:

Searching for **Bolleboom**

- Bolleboom → result
- Bol → result
- Oll → no result
- Boom → no result

Searching for **Janssen – de Vries**

- Janssen → result
- Jans → result
- Ssen → no result
- Ans → no result
- Vries → result
- Vri → result
- Ies → no result
- Rie → no result

When **searching by client number**, it now looks from the beginning and from the end. Any leading zeros are allowed but not required to be typed in.

Searching for **0001234567**

- 0001234567 → result
- 000123 → result
- 123 → result (this is the start when ruling out the leading zeros)
- 4567 → result
- 345 → no result

For **searching by SSN**, there must always be a 100% match. This was not yet the case everywhere in the application and is now made more consistent.

Searching for **682611475**

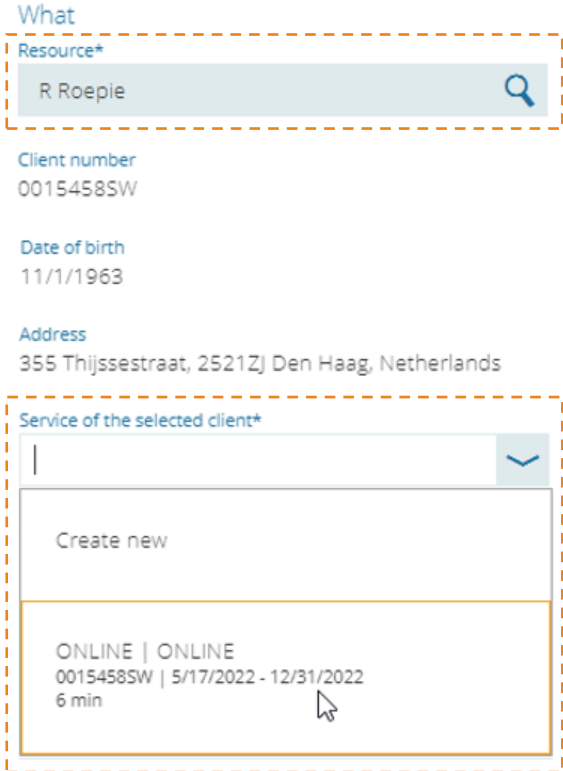
- 682611475 → result
- 6826 → no result
- 1475 → no result

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1.3 Retrieval of plannable resources accelerated on PSE & 'Add appointment'

On the first page of the session appointment generator (PSE) and on the 'Add appointment' page opened from the session planning board, we have sped up the retrieval of all plannable orders and service contracts for a particular client. The dropdown field 'Service of the selected client' will now give faster results.

With this, the two heaviest parts on these pages (this and the acceleration around the client search, see §1.2), have been addressed and accelerated.



1.4 Avoiding searches in the session client picker after selecting appointment

When a client appointment is selected on the session planning board, the client picker (when open) automatically displays all other still unplanned orders for that client. The retrieval of these unplanned orders is done in the background via the client ID.

Previously, this client ID followed from a search action on client number. However, searching for a client is a relatively heavy action in organizations with a lot of clients. In addition, the client ID is already known at the selected appointment.

We now run the logic for retrieving unplanned orders directly via the client ID of the selected appointment, thereby avoiding a search every time an appointment is selected.

1.5 Check for updating appointments after an order update accelerated

Also available as a hotfix for 7.14.1 and 8.0.0.

After an order is updated, either via the import or in Serviceware Resources itself, a check is always executed to see if any appointments exist based on this order. If they do, then the appointments found are updated to use the latest, changed information in the order. This check proved to be quite a heavy burden on the system. It has now been rewritten and can therefore be performed much faster.

Concerns: spSaveServiceScheduleMoments

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1.6 Migration of access rights and scopes accelerated

Also available as for hotfix on 7.14.1.

When assigning an access set to a new employee or when the access rights and/or scopes of existing employees are changed, all rights and scopes are migrated from the Classic part to the NextGen part of the application.

In this particular section of the migration, one part was still based on outdated technology. This part was rewritten, which allowed us to significantly speed up the migration of access rights and scopes.

1.7 Indexes possible on type of object in the migration from NextGen to Classic

In the migration from NextGen to Classic, indexes could not be added on a certain column. It concerned the column with the type of object that will be migrated. The information in this column is often requested in customer specific reports, which sometimes had a significant impact on the performance of the system.

The data type has now been changed, allowing the use of indexes.

Concerns: MigrationItems.ClassType

1.8 Preventing time-outs when opening the MRO pop-up

When the MRO pop-up is opened, the "items to be planned" are determined in the background. Hereby the deliberately excluded services (defined in the client picker) and the possibly invalidated services are filtered out. During this filtering process things sometimes went wrong and it could happen that it took more than 30 seconds to collect the information for the pop-up. At such a moment a time-out would occur.

By performing this filtering from a different place and in a different order, we have tried to avoid time-outs in the future.

Concerns: spMroGetServiceScheduleMomentIdsButNotAllowedServicesInstead

1.9 Load reduced when retrieving planned appointments on classic boards

Retrieving all appointment information when opening a day or week planning board, appeared to be one of the heavier loads on the system.

We have now optimized this piece of code to reduce the load.

Concerns: spPlanbordZopProduct_select

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1.10 Updating statistics in schedule module accelerated

Retrieving the information for the horizontal and vertical statistics in the schedule module in Classic was slow. This also caused slowness during the scheduling itself, because when a shift was placed on the grid, all statistics were updated again.

The statistics retrieval has been accelerated.

Concerns: spECScheduleGridStatistic_select

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2 Functional improvements in the web application

2.1 Default choice for address vs. location for PSE page 2 now adjustable

When an order has a specific location defined, then on the 2nd page of the PSE the option 'Location' is always selected. The relevant location is then already filled in.

However, when no specific location is known for an order, when a new order is created on the spot, when a service contract is planned or when a combination of these situations occurs, then by default the option 'Find the best option for address' was selected.

The latter is now configurable so that now also 'location' can be set as default.

Where
Find best options for address
Netherlands
2521 PL
123
Thijssestraat
Den Haag
Addition

'Where block' default in case none of the selected orders require a specific location, or when it concerns a mixture of different locations and no location.

Location Find best options for address

'Where block' default in case of a 'create new' scenario or in case service contracts are selected.

Location Find best options for address

In setting 26 it is now possible to choose which option should be selected *by default* when there is no specific location known for the selected order. Or when - in case of multiple orders - a mix of different locations or a mix of yes and no location applies.

A separate default can be set for the situation where new orders have been created in the PSE, or when service contracts have been selected.

2.2 Pre- or post-fix option for generated client numbers

When choosing to have the client number generated automatically when creating a new client, a pre- or post-fix of up to 2 characters can now be added to this number if desired. Setting 62 has been extended for this purpose. With this addition, this setting can now only be changed by our consultants.

62 Client number creation

Description
Each new client that is created in Serviceware Resources needs its own client number. This number could be generated automatically by the system or it can be entered manually. In case the number will be generated, should a pre- or postfix then be added to the client number?

Default value
 Auto generate Input manually

Add a pre- or postfix
 No pre- or postfix In front of the number Behind the number

Character to add (max. 2)**
SW

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3 Solved issues

3.1 Order notifications

3.1.1 Order notification reminder not generated

Also available as a hotfix on 7.13.1 and 7.14.1.

A problem was found with the order notification reminder. When it was supposed to be sent in letter form, those letters were not created if at the time of generation, the order had already started. For email and text messages, this did go well.

A change has now been made specifically for letter generation. Instead of checking if the order is valid *already*, it now checks if the order is *still* valid, now and 48 hours from now. Those 48 hours are to avoid sending letters for an order that has already expired by the time the letter actually arrives at the client's home address.

3.1.2 Order notifications still generated for orders that had become invalid

In addition to the reminder letter *not* being generated, some order notifications *were* in fact generated when they shouldn't have been. These were notifications for orders that had become invalid due to one of the following reasons:

- The order was cancelled (is_valid = true),
- The order started after the parent service contract was closed,
- The order started after the 'termination of services' date specified with the client, or
- The client died.

This issue has now also been resolved.

3.2 'My clients' table

3.2.1 Deceased client not marked in red

In the table on the 'My clients' page, deceased clients were no longer shown in red. This has been fixed. The client is now displayed in red again if the date of death + the value in setting 35 is smaller than the current date.

A similar problem was found for a client with a 'termination of service' date defined. When this date is less than or equal to the current date, the client should be displayed in red, and the client should no longer appear in the 'valid only' filter. This however did not happen. These issues have now been fixed as well.

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3.2.2 Unexpected results when searching based on team

Searching based on team in the table on the 'My clients' page gave incorrect results for clients linked to multiple teams. The client was only found in one of the linked teams. When searching on any of the other teams to which the client was linked, the client did not show up in the results.

Also, after searching based on team, the value shown in the 'Team' column was filtered. The column only showed the team that was searched for. Because of this, it was not clear that the client was linked to multiple teams. Both issues are now solved.

3.3 Orders starting at midnight not shown in picker on session planning board

Client orders for which the required time was set as all day, so from 00:00 - 23:59, were – incorrectly – not shown in the client picker on the session planning board. And if they were planned, for example via the widget or using the PSE, an orange warning was displayed – again erroneously. This affected both the appointment block on the planning board and the 'Appointment info' and 'Edit appointment' pages.

These issues are now solved. The order is now correctly displayed in the client picker and the warning is no longer shown.

3.4 Competence requirements were sometimes ignored by the MRO

Also available as a hotfix on 7.14.1 and 8.0.0.

It sometimes happened that an order requiring certain competences was not planned by the MRO for an employee who actually possessed those competences. This problem has been solved.

3.5 Quarterly overview of registrations always showed 00:00 contract hours

In the registration(s) and management modules in the Classic part of the application, the contract hours of the employee were not correctly displayed on the quarterly overview. Both the min and max hours were wrongly shown as 00:00. This problem is now fixed.

3.6 Client with special characters in name was not found in Classic

Searching for clients with a special character in the name worked differently in Classic than in NextGen. For example, client 'Álva' could not be found in Classic if one simply searched for 'Alva', whereas in NextGen it could. This has now been equalized. In the client picker in the Classic client module, and in the pickers on the day and week planning boards, this client is now found when one searches on 'Alva' as well.

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4 Technical topics

4.1 Open APIs for the purpose of working via the Serviceware portal

A new open API has been developed that "translates" a user logging into the Serviceware portal into an employee in the Serviceware Resources application. Based on the claim issued by the Serviceware Authenticator after login, this API returns the user account and employee ID in Resources.

[GET api/v2/useraccounts/me](#)

With this data, another open API can then be called to retrieve the basic information of this employee. The output of this includes the valid contracts of the employee.

[GET api/v3/employees/{id}](#)

Both APIs are preparations for the employee calendar widget that is currently being developed. This widget will retrieve planned appointments based on the employee contract and display them in the calendar.

4.2 Webhooks export connector

To start replacing the current, quite heavy dynamic forms export with one that runs through our new 'Webhooks' (introduced in 8.0), a 'Webhooks export connector' has been developed. This connector subscribes to certain information from Serviceware Resources (appointments, orders and/or registrations) and then collects the information, compares it to previous incoming information, filters it if desired, adjusts the format if necessary, and then forwards it to the receiving party.

Another modification in Serviceware Resources was necessary to be able to send dynamic forms and attachments with the registrations in the Webhooks message. This adjustment is also part of 8.1.

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5 Installation requirements

Below, the requirements for the installation of **Serviceware Resources 8.1** are listed. Please note that when 8.1 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 **8.1.1** and Serviceware Resources for Android **8.1.0** are advised.

- › For an update to version 8.1.0, the already installed version of Serviceware Resources should be minimal 8.0.0. For older versions of Serviceware Resources, extra steps need to be taken to be able to update to 8.1.0. 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](#)”.

5.1 Compatibility matrix

| Serviceware Resources | Authentication method | Connect | Mobile Services | iOS app | Android app | Appointment widget |
|-----------------------|---------------------------|---------|-----------------|---------|-------------|--------------------|
| 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 | Serviceware Authenticator | ≥8.0.0 | ≥ 8.0.0 | ≥ 8.0.0 | ≥ 8.0.0 | ≥ 3.2 |
| 8.1 | Serviceware Authenticator | ≥8.0.0 | ≥ 8.1.0 | ≥ 8.1.0 | ≥ 8.1.0 | ≥ 3.2 |