



# **ServiceWare Resources 8.2**

**Release notes**

## Releasenotes – Serviceware Resources 8.2

### Introduction

Version 8.2 of Serviceware Resources is dominated by structural performance and stability improvements in order to support larger numbers of concurrent users. We've been focusing on the session appointment generator, which is used both for "planning with the PSE" from within the web application and for (re)scheduling appointments via the appointment widget.

In addition to the performance work, some functional improvements were made based on customer feedback and a number of bugs were fixed.

Furthermore, a new set of open APIs is again available that allows a location to be created and edited from outside the application. In addition, we now support applying and closing a protocol to a client via our imports.

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](mailto:service@serviceware-benelux.com)), or make a call to our Service Desk: +31 (0)71 568 03 10.

---

Leiden, October 17<sup>th</sup>, 2022

**Serviceware Benelux**

Part of Serviceware SE

# Releasenotes – Serviceware Resources 8.2

## Index

- 1 Performance improvements ..... 4
  - 1.1 Performance appointment widget and session appointment generator ..... 4
  - 1.2 Moving multiple appointments on classic planning boards made less heavy ..... 4
- 2 Functional improvements and solved issues ..... 5
  - 2.1 'Confidential information' pop-up after login..... 5
  - 2.2 PSE related ..... 6
    - 2.2.1 'Are-you-sure?' pop-up after a cancel action in the PSE-wizard..... 6
    - 2.2.2 Reset all input after selecting another client on PSE-page 1 ..... 6
    - 2.2.3 Description, subject and activities were lost when navigating back ..... 6
    - 2.2.4 Location versus address issues in the 'Where' section on PSE-page 2 ..... 6
    - 2.2.5 Check on invalid team has been removed ..... 7
    - 2.2.6 PSE no longer ignores the entire session if 1 service may not be delivered ..... 7
    - 2.2.7 Multiple unavailabilities were not accepted when using the PSE via open API ..... 7
    - 2.2.8 Appointment code on 'Overview of planned appointment' and 'Appointment info' pages ..... 7
  - 2.3 Session planning related ..... 8
    - 2.3.1 Shorten appointment duration not possible via the 'Edit appointment' page ..... 8
    - 2.3.2 Mouse-over not shown correctly in case of a very short session ..... 8
    - 2.3.3 Devices were not counted in the bottom part of the planning board ..... 8
  - 2.4 Client module related ..... 9
    - 2.4.1 Contractor now available in the table on the 'Orders' page of a client ..... 9
    - 2.4.2 Issues while searching for a client via 'My clients' ..... 9
    - 2.4.3 Client calendar print showed days of the week in German ..... 9
  - 2.5 Classic topics ..... 10
    - 2.5.1 Day- and week charts in the past not reachable after contract expires ..... 10
    - 2.5.2 Open client calendar from classic planning boards, always opens current week..... 10
    - 2.5.3 Route sorting in MRO pop-up ..... 10
    - 2.5.4 Inconsistency Classic-NextGen around max. characters for certain information ..... 10
- 3 Mobile application..... 11
  - 3.1.1 Label printing as part of the flow on the iPhone ..... 11
  - 3.2 Print all labels for the entire route..... 11
- 4 Widgets ..... 12
  - 4.1 Pre-announcement: Employee calendar portal widget..... 12
- 5 Technical topics..... 13
  - 5.1 Assigning and ending a protocol via the imports..... 13
  - 5.2 Open API's concerning locations ..... 13
- 6 Installation requirements ..... 15
  - 6.1 Compatibility matrix ..... 15

### 1 Performance improvements

#### 1.1 Performance appointment widget and session appointment generator

*In combination with appointment widget 4.1.*

The focus of the performance optimizations this version was on the session appointment generator, also called the 'PSE', which is used both for 'planning with the PSE' from within the web application and for (re)scheduling appointments via the appointment widget. The goal was to make it more stable, and thus better support large numbers of concurrent users.

When working with the PSE, calculating suitable, available options is the heaviest action performed. Until now, this took place on the database server, where there was limited computing power available. When there were many concurrent PSE users working, for example during peak widget hours, sometimes too little CPU was left for other actions by other users in the application. Also, requesting appointment suggestions themselves could then take longer.

The PSE calculations have now been rewritten and optimized, and also moved from the database server to the application server where more processing power is available for the PSE. This also reduces the load on the database server and prevents the severe load spikes we sometimes saw. Even with many simultaneous (PSE) users. The different types of users are now less in each other's way.

#### 1.2 Moving multiple appointments on classic planning boards made less heavy

Moving multiple appointments on the day- or week planning board in classic is one of the heavier actions in the application. This piece of code has now been optimized to reduce the load on the system when this action is performed.

*Concerns: `spMoveMultipleAppointments`*

## 2 Functional improvements and solved issues

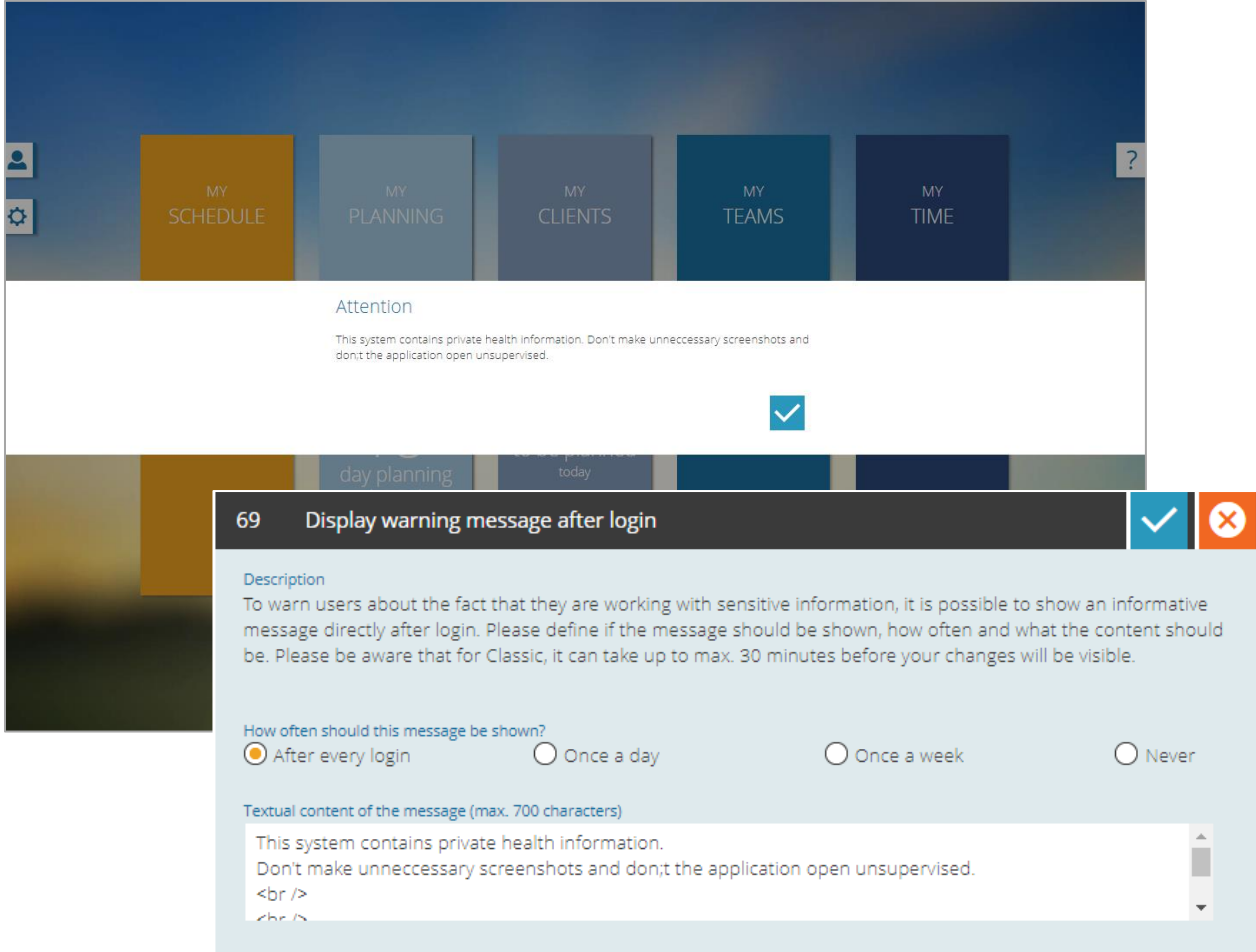
### 2.1 'Confidential information' pop-up after login

According to the NEN7510 standard, an application that processes personal health information must inform its users that confidential information is being handled.

Serviceware Resources is primarily concerned with healthcare logistics and in that sense is not a health information system pure and simple. Nevertheless, confidential (health) information can also be found within our application, such as client contact information and orders to be planned.

In this version, we have therefore made it possible to show a notification after logging into the web application. The content of this notification can be defined in the new setting 69, as well as the frequency in which it should be shown: after every log in, 1x per day, 1x per week or never. To enable the frequencies 1x per day and 1x per week, a record is kept for each user of when the 'OK' button was clicked to close the notification.

For the mobile applications, this functionality will follow at a later date.

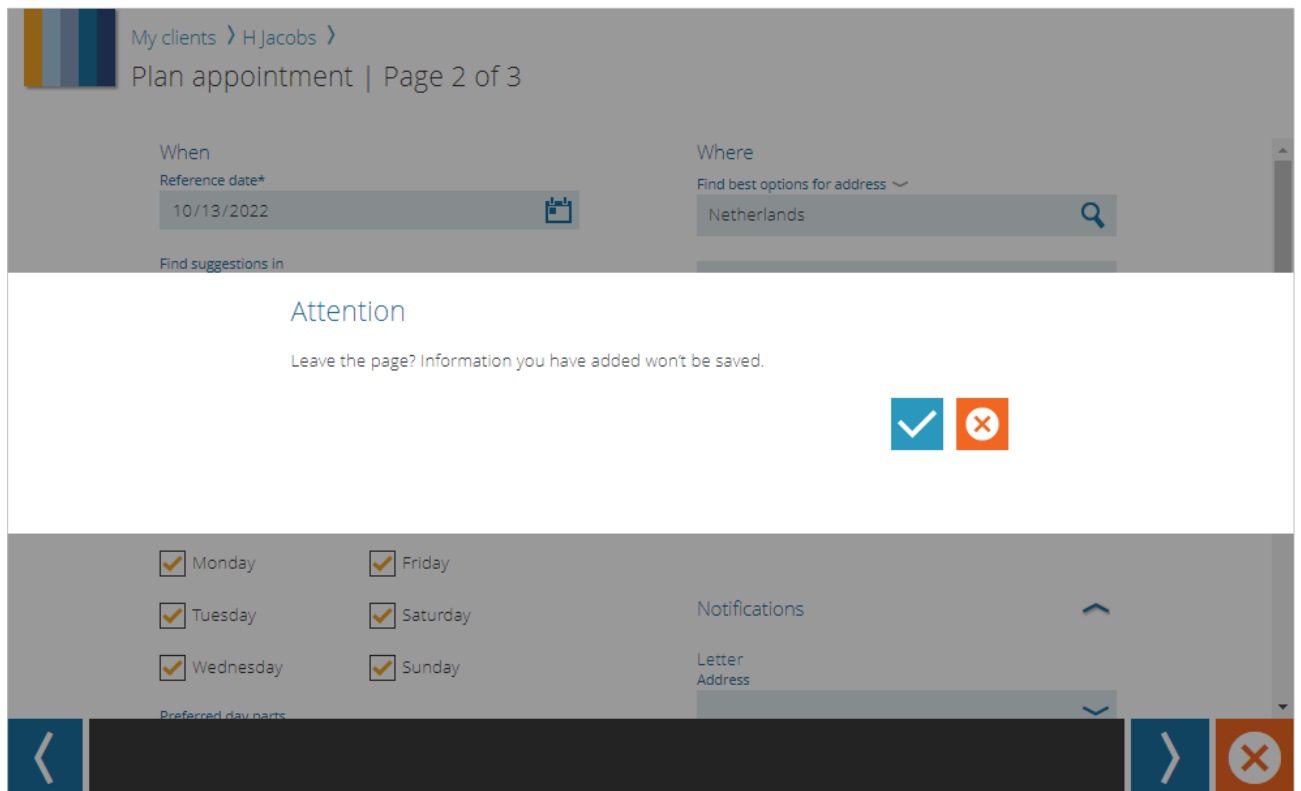


## Releasenotes – Serviceware Resources 8.2

### 2.2 PSE related

#### 2.2.1 ‘Are-you-sure?’ pop-up after a cancel action in the PSE-wizard

When 'Cancel' is clicked in the PSE Wizard in the bottom right corner of pages 1, 2 or 3, a pop-up now appears first to confirm whether one indeed wants to abort the PSE Wizard. This pop-up has been added to prevent *accidental* cancel actions, after which all entered information is lost.



#### 2.2.2 Reset all input after selecting another client on PSE-page 1

When the PSE was started for client A but halfway through the wizard the user decided to navigate back to page 1 to switch to client B, then not all entries for client A were always cleared correctly.

This has now been changed. All input fields return to their default value when selecting another client on PSE page 1.

#### 2.2.3 Description, subject and activities were lost when navigating back

If on page 1 of the PSE, information was added in the 'Services' section (such as a description, the subject, or activities), this information would disappear again when navigating to page 2 and then back again to page 1. This has been fixed.

#### 2.2.4 Location versus address issues in the ‘Where’ section on PSE-page 2

After adding a setting in version 8.1 to determine whether a location or an address should be entered by default in the 'Where' section, a few more imperfections were found. For example, the label was not always displayed neatly,



## Releasenotes – Serviceware Resources 8.2

### 2.3 Session planning related

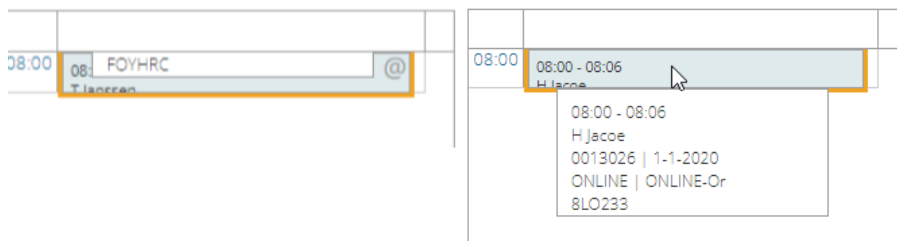
#### 2.3.1 Shorten appointment duration not possible via the 'Edit appointment' page

It was not possible to shorten the duration of an appointment planned on a session via the 'Edit appointment' page. However, the appointment block on the planning board could still be made smaller by dragging its borders.

The problem has been fixed, and now it is possible again to shorten the duration via the edit page as well.

#### 2.3.2 Mouse-over not shown correctly in case of a very short session

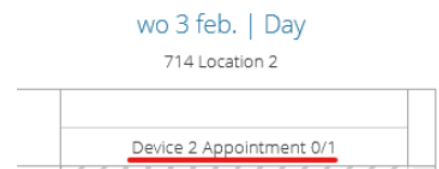
For very short sessions, with for example only 1 appointment, the mouse-over with the appointment information was not displayed correctly. This is now fixed.



#### 2.3.3 Devices were not counted in the bottom part of the planning board

If an X number of appointment-bound devices are defined for a session, this information is considered when planning appointments via the PSE. There are not planned any more appointments requiring this device on this session, than the number of devices present. Also, while manual planning, it checks whether there are still enough devices available to add an extra appointment requiring this device. The counter that keeps track of this is visible at the top of the session.

In the previous version, this counter mistakenly always remained at '0 appointments planned'. This has now been fixed.



## Releasenotes – Serviceware Resources 8.2

### 2.4 Client module related

#### 2.4.1 Contractor now available in the table on the 'Orders' page of a client

When a contractor is known for an order, it is now also shown in a separate column in the table on the overview page with all the client's orders. The column shows the code and name of the service provider. The data of the 'parent' service organization under which the service provider may fall, is not shown in this column. However, this is available on the 'Order info' and 'Edit order' pages, as was already the case.

The column can be moved to a different position as desired. More to the left if the grid view is on and the contractor information is used a lot, or more to the right if the info is not used. The chosen position is remembered per user.

	Number	Service	Team	Contractor	Duration	10	11	12	13	14	15	16	17	18	19	20	21
<input type="checkbox"/>	0000189	1010   Fysiotherap... helpLine BV		1234   Name of the service provider	0:30												
<input type="checkbox"/>	0001201	HT110A   HT110 P... HT 1 Okt			0:30												

#### 2.4.2 Issues while searching for a client via 'My clients'

When searching for a client from the table view of 'My Clients', based on team + client number, it took a very long time until results were displayed. Much longer than when searching by client number alone. If it was a very large team, it could even happen that no results were returned at all.

Another problem was found when first searching by date of birth, and then adding a name to the search criteria. The date of birth was then ignored.

Both problems have been solved.

#### 2.4.3 Client calendar print showed days of the week in German

When printing a client calendar from NextGen, it could happen that certain texts were printed in the wrong language. The language of the server appeared to influence this. This issue has been solved.

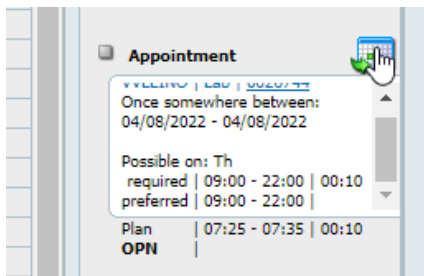
## Releasenotes – Serviceware Resources 8.2

### 2.5 Classic topics

#### 2.5.1 Day- and week charts in the past not reachable after contract expires

In the registration(s) and management modules, it was not possible to view day- and week charts with registrations of employees whose contracts had since expired. Also weeks and days in the past, on which the contract was still valid, could not be reached. This problem has now been solved.

#### 2.5.2 Open client calendar from classic planning boards, always opens current week



When an appointment was selected on the day- or week planning board in the past or future, then after navigating to the client calendar in the NextGen client module, the current week was always opened.

This is not how it was intended. The behavior has been modified and now the week in which the selected appointment is planned is opened.

#### 2.5.3 Route sorting in MRO pop-up

After running the MRO, the route labels of the resulting routes are changed. If the MRO pop-up was started again after this, the routes already present on the planning board were shown in an order that corresponded to a sorting by route label. However, it is preferred to see a sorting that corresponds to the order that the existing routes already have on the planning board. This has now been implemented.

The routes in the pop-up are now first sorted by planning board (routes coming from another planning board or another shift are not mixed with routes from the current planning board shift). Then they are sorted by route number and if new routes are created by the MRO, they'll appear at the end.

#### 2.5.4 Inconsistency Classic-NextGen around max. characters for certain information

The classic part of the application used a smaller number of maximum characters for some person- and address properties than the NextGen part and the imports. As a result, on rare occasions it could happen that certain information was imported without error, but then caused an error on for example the classic planning boards.

We have now aligned the number of characters allowed. This includes the following properties:

- **Title:** from NVARCHAR(100) --> to NVARCHAR(200)
- **Street name:** from NVARCHAR(80) --> to NVARCHAR(100)
- **City:** from NVARCHAR(80) --> to NVARCHAR(100)
- **Country:** from NVARCHAR(80) --> to NVARCHAR(100)
- **Postal code:** from NVARCHAR(10) --> to NVARCHAR(15)

## Releasenotes – Serviceware Resources 8.2

### 3 Mobile application

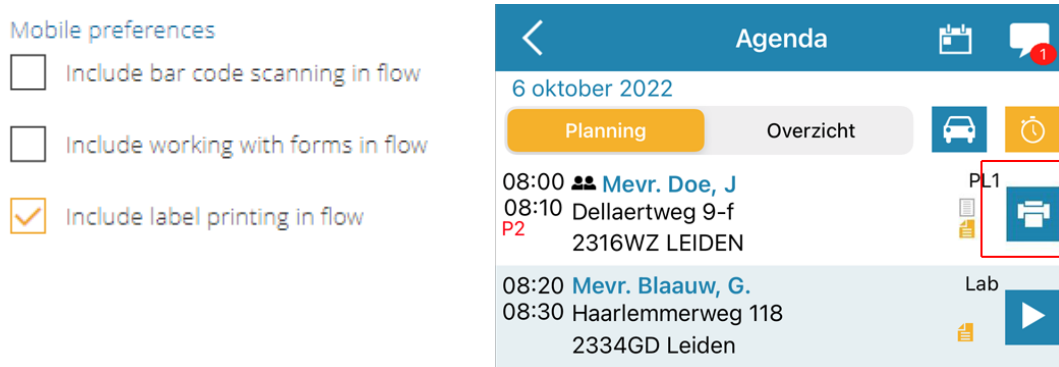
For the *Serviceware Resources for iPhone* app, two features have been added around mobile label printing.

#### 3.1.1 Label printing as part of the flow on the iPhone

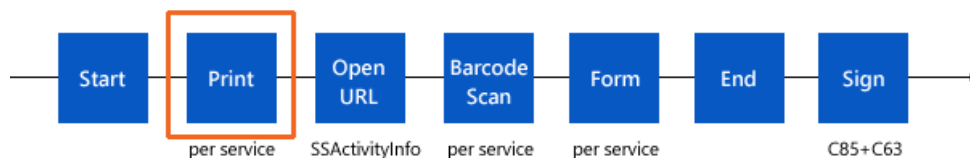
*Serviceware Resources for iPhone 8.2, in combination with Serviceware Resources version 8.2 and up.*

In the web application, under admin > master data, it can now be indicated *per service* whether the printing of labels should be a step in the workflow when registering a client appointment via the iPhone app.

If this is checked, then after starting an appointment for that service, the print button will be shown and labels for that particular appointment can be printed immediately.



After printing, other actions may appear in the flow. What these are depends on the configuration per service (scan barcode and open dynamic form), but also on the information present at the appointment (a specific URL to link to), and finally on organization-wide settings (signing).



#### 3.2 Print all labels for the entire route

*Serviceware Resources for iPhone 8.2, in combination with Serviceware Resources version 7.14.1 and up.*

In addition to being able to print labels from within the flow, an option has been added that allows all labels for the entire route to be printed at once. The 'Print all labels' option in the menu opens a screen showing all appointments from the route for which labels need to be printed. By default, only those appointments are checked for which labels have not already been printed (e.g. already from the flow), but reprinting is also possible of course.

## Releasenotes – Serviceware Resources 8.2

### 4 Widgets

#### 4.1 Pre-announcement: Employee calendar portal widget

*In combination with Serviceware Resources version 8.2 and up.*

In the first version of the new employee calendar, all appointments from all types of planning boards are combined and displayed in a week-, month- or list view. For each appointment, information concerning the who, what, where and when of the appointment is available and for imported appointments, a scannable barcode is also displayed.

The widget is *not* a public widget and is therefore intended for use on the Serviceware portal, where the user must first log in to be able to see any data. If the user is already logged into the Serviceware Resources web application, logging in again is not necessary.

The screenshot shows the Serviceware Employee Calendar widget. The header includes the Serviceware logo and a user profile icon. The main area displays a weekly calendar for October 10-16, 2022. A detailed appointment card for Ms. J. Doe is overlaid on the calendar. The card displays the following information:

- Ms. J. Doe** (0000282 | SSN 111222333 | 01/01/1985)
- Barcode: ON27c7516b4a-1
- Date: Friday, October 14, 2022, 8:35 AM - 8:45 AM
- Location: Dellaertweg 9 f, 2316WZ, LEIDEN
- Lab: Bloedafname Lab
- Appointment code: OHRURK
- Priority: Low

In addition to being able to use this widget through the portal, this employee calendar will also become a module within the web application in the future. Until this is ready, the employee calendar can now also be made available on a separate URL, to which the user links directly from Resources.

Since you need to be logged in at all times to access the employee calendar, it is not possible to run this widget stand-alone.

### 5 Technical topics

#### 5.1 Assigning and ending a protocol via the imports

*In combination with the DB importer (hl7) 3.7.0, or the CSV importer (SI) 3.5.0.*

Since version 7.6, it has been possible within Serviceware Resources to group various orders into a standard ‘protocol’ and then assign them to different clients over and over again.

From now on, this protocol assignment can also be triggered from an external application, assuming that the protocol is already defined in Serviceware Resources. We have created a new option via our DB importer (hl7), and also extended and aligned the already existing (basic) option via the CSV importer (SI).

Assigning a protocol to a client ultimately results in the creation of a set of orders for that client. In addition to assigning a protocol, a previously assigned protocol can also be terminated via the import.

At the same time, a number of issues have been fixed around assigning protocols in the application itself, which is why we recommend importing protocol assignments and/or terminations via one of the importers, to be used in combination with Serviceware Resources version 8.2 and up.

#### 5.2 Open API’s concerning locations

New open APIs are available that allow adding a new location or modifying an existing location from outside the application. It is not possible to delete a location. Instead, it must be closed with an end date. There are also some APIs that allow only certain specific information of a location to be changed.

- **Adding a new location:**

`POST api/v2/locations/`

- **Modifying an existing location:**

`PUT api/v2/locations/{id}`

- **Modifying the collections: `locationTypes`, `services`, `teams en photos`:**

*Example:*

<code>PUT api/v2/locations/{id}/locationTypes/</code>	– overwrite the entire collection <code>locationTypes</code>
<code>POST api/v2/locations/{id}/locationTypes</code>	– add 1 item to the collection <code>locationTypes</code>
<code>DELETE api/v2/locations/{id}/locationTypes/{id}</code>	– delete 1 item from the collection <code>locationTypes</code>

- **Modifying the collections: `emails`, `phoneNumbers`, `addresses`, `contacts`, `availabilityDefinitions*`:**

*Example:*

<code>PUT api/v2/locations/{id}/emails/</code>	– overwrite the entire collection <code>emails</code>
<code>POST api/v2/locations/{id}/emails</code>	– add 1 item to the collection <code>emails</code>
<code>PUT api/v2/locations/{id}/emails/{id}</code>	– <i>edit</i> 1 item in the collection <code>emails</code>
<code>DELETE api/v2/locations/{id}/emails/{id}</code>	– delete 1 item from the collection <code>emails</code>

## Releasenotes – Serviceware Resources 8.2

A number of new open APIs are also available for *retrieving* location information. One API with which the basic information of a certain location can be retrieved and two additional APIs for more specific information. The latter category will be further extended in upcoming versions.

- **Retrieve basic information of a specific location:**

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

- **Retrieve additional information of a specific location:**

[GET api/v2/locations/{id}/hierarchy](#)

– all parents and children

[GET /v2/locations/{id}/availability?periodStart&periodEnd](#) \* – all resulting opening times in a certain period

\* The 'availabilityDefinitions' and 'availability' refer to the definitions of the NextGen opening times and their resultants on concrete dates. It is not possible to retrieve, add or modify the Classic location schedules via open APIs.

## Releasenotes – Serviceware Resources 8.2

### 6 Installation requirements

Below, the requirements for the installation of **Serviceware Resources 8.2** are listed. In order to make use of all the latest features, Serviceware Resources for iOS **8.2** and Serviceware Resources for Android **8.1** 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\\_v82](#)”.

#### 6.1 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
8.2	Serviceware Authenticator	≥8.0.1	≥ 8.2.0	≥ 8.2.0	≥ 8.1.0	≥ 4.1