



# **ServiceWare Resources 8.3**

## **Release notes**



## Release notes – Serviceware Resources 8.3

### Introduction

This new version of Serviceware Resources introduces 2 new widgets for employees to view their own and their colleagues' schedules. For the scheduling process itself, 3 changes have been made to the schedule module in classic, see §1.3. In addition, a start has already been made in the background on modernizing the schedule module. Some new endpoints are already available in this version, see §3.3.2 and 3.3.3.

Preparations for the future have also started on the front end. We are taking the new UI into use for the first time with this version. For now, only the employee agenda can be found there, see §1.2, but this will be further optimized and expanded in future versions.

Version 8.3 also provides a number of new endpoints around the registration of session appointments that support our mobile ambitions. We are working hard to also be able to register and fully process all session appointments from the mobile applications. A first basic version, with which the appointments on a session can be *viewed* and *started&stopped*, is already available for Android devices together with the 8.3 release (Resources for Android 8.2). The basic version for iPhone will follow soon.

After that, we will focus on the more complete registration of session appointments, using also attachments, barcodes and dynamic forms.

In the web application (and partly also mobile) the logging has been further expanded. In addition to the manipulation of data, the *search for* and *access to* certain information is now also logged. More on this in §1.1.

Furthermore, improvements have been made around appointment notifications (§1.4) and a number of reported issues have been solved for the PSE (§1.5), the MRO (§1.6) and around working with sessions (§1.7).

Finally, the CSV and DB importers have been extended with new functionality. Besides preferred employees at order level, they can now also be imported at client level. In addition, repetitive orders can now also be imported via the DB importer. This addition makes it possible to also import the possible days of the week for an order.

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.

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Leiden, June 5<sup>th</sup>, 2023

**Serviceware Benelux**

Part of Serviceware SE

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### 1 Webapplication

#### 1.1 Logging expanded

In addition to logging concerning the creation, modification and deletion of data, a start has now been made with recording who has *viewed* which information and when.

##### 1.1.1 Accessing client data

With respect to viewing client information, the following actions are now also logged:

- **Searching clients**

It logs when and by whom a search was performed on the *My Clients* page in NextGen or in the *client module* on mobile. This includes logging which search terms were used and which clients were returned as results. Searches in Classic are not logged.

- **Viewing client information**

It tracks when and by whom a particular client's *Dashboard* was opened in NextGen and whether from there any further clicks were made to the *Personal info*, *Addresses* or *Contacts* pages. The dashboard itself plus these 3 subsections are all considered to be viewing basic client info.

Also, from the mobile applications it is logged when and by whom the basic information of a particular client has been viewed *from the client module*. So, this is only tracked for clients accessed *outside* of the employee's agenda.

- **Viewing client contract information**

In addition to viewing basic client information, it is *separately* logged when and by whom the *Service Contracts* page in NextGen was opened for a particular client.

- **Viewing client order information**

It is also *separately* logged when and by whom the *Orders* page in NextGen was opened for a particular client.

##### 1.1.2 Accessing planning boards

With regard to viewing information around the planning of clients, the following is now also logged:

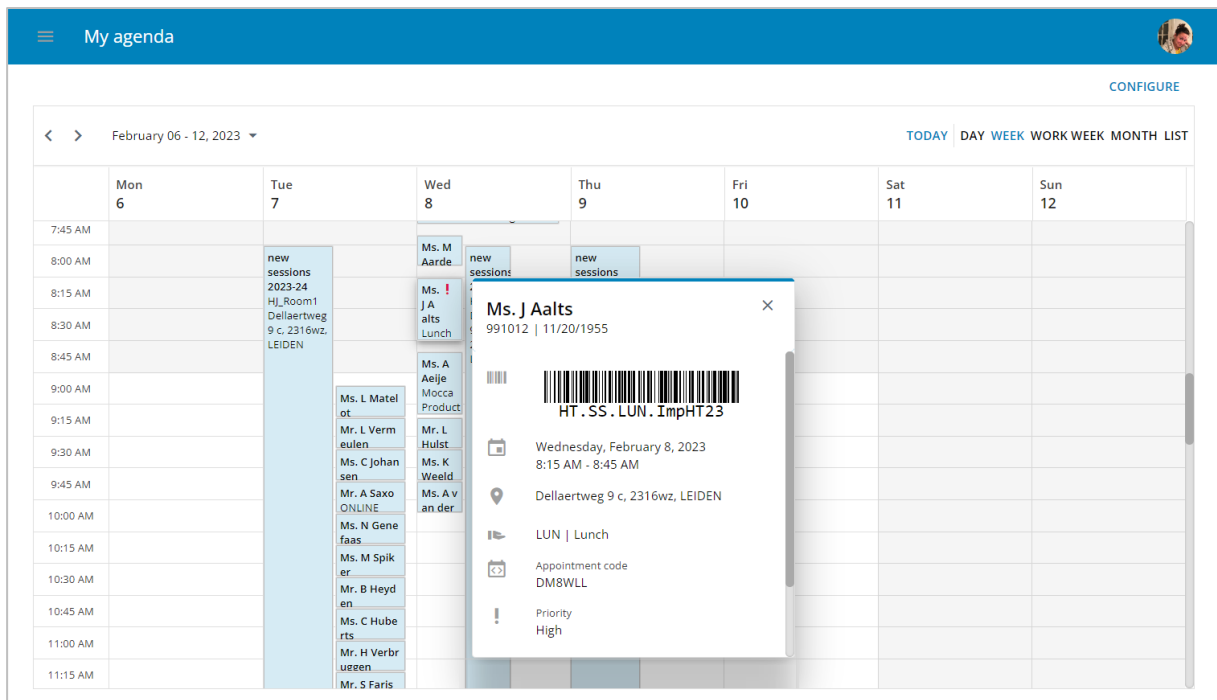
- **Visiting planning boards**

Who opened when, which day-, week-, session- or event-planning board, and was able to view both planned appointments and client orders still to be planned?

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## 1.2 ‘My agenda’ part of the webapplication

The agenda for employees, which was already delivered as a portal widget in version 8.2, is now also available as part of the web application. By clicking on the 'My agenda' tile from the 'My planning' page in NextGen, the user is no longer redirected to the old employee agenda in Classic, but is now taken to the new employee agenda.



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The employee agenda is also the first functionality offered in our new user interface. In future versions, more modules will be added here and the UI will be further optimized.

With the option 'Start page' in the menu you can navigate back to the start page in NextGen.

The screenshot displays the 'My Agenda' view in the Serviceware Resources 8.3 application. The interface features a top navigation bar with the 'SERVICWARE Resources' logo and a user profile icon. Below the navigation bar, there is a 'CONFIGURE' button and view options: 'TODAY', 'DAY WEEK', 'WORK WEEK', 'MONTH', and 'LIST'. The main content area shows a weekly calendar grid from Tuesday (7) to Sunday (12). The left sidebar contains a 'Help' button and a 'My Agenda' button (highlighted in orange). The calendar grid shows various events for each day, including 'new sessions 2023-24' and individual employee names like Ms. M. Aarde, Ms. L. Matelot, Mr. L. Vermulst, Ms. C. Johansen, Mr. A. Saxo, Ms. N. Genefaas, Ms. M. Spikker, Mr. B. Heyden, Ms. C. Huberts, Mr. H. Verbruggen, Mr. S. Faris, Ms. M. Aaeije, Mr. L. Hulst, Ms. K. Weeld, Ms. A. Vander, Ms. S. Hoes, Mr. K. Willy, Ms. P. Bakker, Ms. L. Adriaansen, Ms. D. Meeus, Ms. A. Flynn, Ms. E. Wolfswinkel, Ms. S. Leemout, and Ms. A. Tuijl.

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### 1.3 Additions to the schedule module in Classic

Three changes were made to the schedule module in the Classic part of the web application.

#### 1.3.1 Who changed which shifts and when

Records are now kept of which shifts have been created or modified, and which shifts have been deleted. It also records when and by whom the action was performed. This also applies to shifts created or changed using bulk actions such as loading a basic schedule.

#### 1.3.2 Marking holidays

When holidays are defined, they are now marked with a red color at the top of the schedule module on the date bar. In addition, days can also be defined as 'bridge days'. This is not an official day off, but a day on which many people take a day off, such as the Friday after Ascension Day. When bridge days are defined, they are marked with an orange color. As always, the current day is still marked in green.

May Wk 3 (20)				ma 15-05	di 16-05	wo 17-05	do 18-05	vr 19-05	za 20-05	zo 21-05
Team 2	Employee, Second 0003151/1	24:00	B	-						
	Employee, Sixth 0003171/1	12:00	-	-						
	Employee, Fifth 0003170/2	04:00	A	5						
.im 1	Employee, Third 0003152/2	08:00	B	-						
	Employee, Fifth 0003170/3	04:00	A	5						

Holidays and bridge days can at the moment only be added by our consultants. In the next version, a user interface will be created for this, so that holidays can be defined in the web application just like other master data.

#### 1.3.3 Schedule no longer editable on already exported days

When the schedule is exported, it can be specified in this export that all affected days are 'locked' afterwards. This means that no more shifts can be changed or deleted on those days, nor can any new shifts be added.

These days are highlighted in grey at the top of the schedule module.

Feb Wk 4 (8) - Mar Wk 3 (11)				ma 20	di 21	wo 22	do 23	vr 24	za 25	zo 26	ma 27	di 28	wo 01	do 02	vr 03	za 04	zo 05	ma 06	
.im 1	Employee, Third 0003152/1	48:00	GEN	apple															

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### 1.4 Improvements for notifications

#### 1.4.1 New elements

A number of elements have been added to the notification model. These allow new conditions to be defined for the notification scenarios (when should the letter/email/sms be sent or not?) and they can be used as well as part of the notification text.

New elements:

- **External ID of the order**  
An example of use in a notification template: Print the external ID as a QR code on the letter so that it can be easily scanned by the employee and the order in the source system can be found more quickly.
- **Organizational unit (team) of the order / service contract**  
An example of use in a condition: Clients with an order in team A will receive notification A and clients with an order in team B, will receive notification B.
- **Number of minutes until the start of the appointment**  
An example of use in a condition: Do not send update notifications when the appointment changed within X minutes before the start of the appointment.
- **Location type(s)**  
An example of use in a condition: Clients with an appointment at a location that has (among others) type 'Wheelchair accessible', will receive notification X (e.g. with a more detailed description of what door to use) and clients with an appointment at locations without this type will receive notification Y.
- **Description of the location that is linked to the appointment / order**  
An example of use in a notification template: Print a brief description of, for example, where the location (room) is situated within the main location ('3rd floor, second door on the left').
- **Description of the address of the appointment / order / client**  
An example of use in a notification template: Printing a short route description to the address of the location where the appointment is planned.

#### 1.4.2 Existing elements added to the condition tool

Some existing elements were still missing in the dropdowns of the condition tool. These have now been added as well:

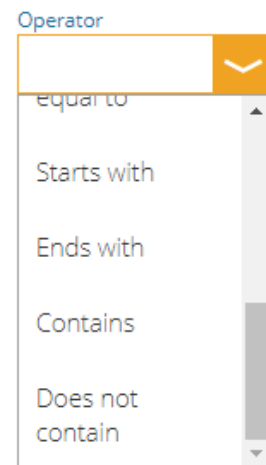
- LocationChanged
- StartDateChanged
- StartTimeChanged
- EndDateChanged
- EndTimeChanged

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### 1.4.3 New operators in the condition tool

In addition, a number of new "operators" have been added to the condition tool that can be used for textual elements (such as names, types, codes, the subject and the description):

- **Starts with**  
Example: @Model.ServiceSchedule.ExternalID.**StartsWith**("ZD")
- **Ends with**
- **Contains**  
Example: @Model.Location.Description.**Contains**("Wheelchair")
- **Does not contain**  
Example: @Model.Location.Type.Names.**DoesNotContain**("Hospital")



### 1.4.4 Other types of barcodes possible in addition to QR codes

Until now, we could display certain data as a QR code in the notification letter or email. Here now the ability to display other types of barcodes has been added.

The following types of barcodes are now supported:

Code 128	Code 93	Code 39 (Extended / Full ASCII)
Code11	EAN-8	FIM (Facing Identification Mark)
UPC-A	UPC-E	Pharmacode
MSI	PostNet	Standard 2 of 5
ISBN	Codabar	Interleaved 2 of 5
ITF-14	Telepen	UPC Supplemental 2
JAN-13	EAN-13	UPC Supplemental 5

### 1.4.5 Delete already generated notifications after death of a client

In version 8.1, a check was added to prevent notification messages from still being *generated* after a client dies. However, notification messages may have already been generated at the time of death. To prevent these from still being sent, a check has now been built in for this as well.

### 1.4.6 Appointment notifications showed start and end date order as 01-01-0001

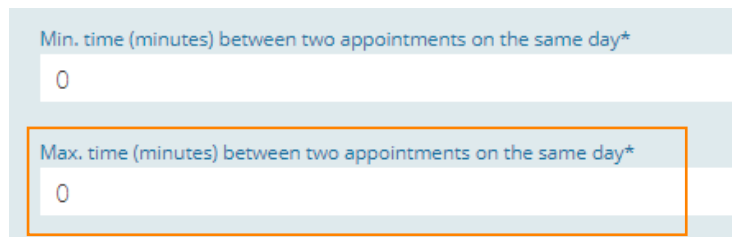
When generating notification messages for an (order-based) appointment, the start- and end date of the order could be included as an element in the message, but unfortunately these were always filled with the incorrect date 01-01-0001. This has now been fixed.

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### 1.5 Solved issues concerning the Session appointment generator (PSE)

#### 1.5.1 Max. time between appointments on same day on '0' gave strange options

When in setting 24, the maximum time between 2 appointments on the same day was set to 0 minutes, this caused the calculation of the score to go wrong and 'weird' suggestions were offered. Setting this setting to at least 1 minute temporarily got around this problem, but now this issue has actually been resolved. A '0' can now be entered again if desired.



Min. time (minutes) between two appointments on the same day\*

0

Max. time (minutes) between two appointments on the same day\*

0

#### 1.5.2 Suggestions always orange, instead of only those outside preferred times

After the major PSE performance changes in version 8.2, an error crept in when offering the various suggestions on page 3 of the PSE. Not only suggestions outside the selected preferred times were highlighted in orange, but all suggestions were shown in orange. This problem has now been fixed.

#### 1.5.3 Offered appointment suggestions not in chronological order

In some cases, (part of) the suggestions were not offered in chronological order, but were listed in a random order in terms of time. This appeared to be due to incorrect scoring of the suggestions, and this was due to an error in determining the free space available (the time slots without appointments) for planning the new appointment. This problem has been fixed and the suggestions are now displayed in order again.

#### 1.5.4 Not selecting any suggestion results in an error in the background

When no suggestion was selected on page 3 of the PSE but the confirm button  was clicked, an error occurred in the background. For the user, it seemed as if nothing happened, but when he finally did select a suggestion, or retrieved new suggestions with the 'next' button for example, this action got stuck. In such a case one could only navigate back to page 2 and from there forward to step 3 again.

This problem has now been solved. A message is now shown at the top of the screen when no suggestion is chosen. Without selecting a suggestion, one cannot proceed to the next step.

#### 1.5.5 Suggestions selectable, but not plannable after reservation expired

After the reservation of the displayed suggestions expired (after X minutes, adjustable in setting 24), the suggestions remained on screen as usual and could still be selected. However, an error would then occur during the actual planning of the appointment on the late selected suggestion.

To prevent this, the displayed suggestions and the 'next suggestions' button are now no longer displayed after the reservation expires. The user will have to click 'Search again' to request new suggestions.

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### 1.5.6 No suggestions with a reference date in the past

In some browsers, a past reference date could be mistakenly entered on page 2 of the PSE. As a result, suggestions were never displayed on page 3.

It has now been made impossible to enter a date in the past.

### 1.5.7 Overnight dayparts should not be possible

The PSE cannot deal with dayparts whose end time is earlier than the start time, or in other words with overnight dayparts. However, it was possible to define such dayparts in setting 26.

This has now been made impossible. It is now checked whether the end time is later than the start time, and if not, saving is blocked. After saving, the dayparts in setting 26 are now also sorted by start time.

### 1.5.8 PSE trips over double occupancy rates for the same session

When two appointments were planned on the same session shortly after each other, the newly calculated occupancy rate for this session was added twice to the database. The PSE could not handle this and got stuck when this session appeared in the offered appointment suggestions. This problem is now fixed.

### 1.5.9 Data entered on step 1 was not retained when navigating back and forth

In the previous version (8.2), a fix had been made for an issue around remembering the description, subject and/or activities added on page 1 of the PSE. When the user advanced to page 2 and then returned to page 1, this information was gone.

However, the fix did not appear to be the actual solution in all cases. It has now been looked at again and after a new adjustment, we are now no longer seeing this problem.

### 1.5.10 Locating appointment opens the wrong session planning board

When locating an appointment just made with the PSE, a planning board was opened showing the relevant location, but not the session in question.

It can be configured per planning board to show only certain sessions within a specific location. This is done on the basis of the services that may be provided at the session. The logic behind the 'Locate' button did not take these additional conditions into account and thus opened the wrong planning board. This is now fixed.

### 1.5.11 Incorrect duration when planning multiple services at the same session

When planning multiple services simultaneously using the PSE, it sometimes occurred that the duration of one service was adopted as duration by the other service(s). This issue only occurred when all services were planned on the same session. The problem has now been resolved.

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### **1.5.12 Plan direction used as a restriction for all services in a combination**

When planning an appointment combination using the PSE, after the update in 8.2, the plan direction of the session on which the 2nd, 3rd, etc. service was planned, was incorrectly also included as a constraint. This made finding options for the appointment combination almost impossible.

It has now been changed back to how it was before the update: the plan direction is only included as a constraint when finding a possibility for the first appointment in a combination.

### **1.5.13 Wrong setting used when determining time between 2 suggestions**

When planning multiple appointments, the wrong setting was used during the determination of time between 2 appointment suggestions. Instead of looking at the weight of 'as much as possible on the same day and location', the weight set under 'preferred day of the week' was used. This has now been changed.

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### 1.6 MRO&SRO fixes

#### 1.6.1 SRO plans for employee, over existing appointments on other planboard

*Also available as hotfix for versions 8.1 & 8.2.*

When an employee is planned on two planning boards simultaneously, one planning board displays so-called "occupied" blocks on the time slots when the employee already has an appointment on the other planning board. This makes it very visible when the employee still has time.

However, the SRO appeared to move appointments within the route to time slots that were already occupied by an appointment on the other planning board. This has been looked into and this problem has been solved.

#### 1.6.2 MRO problem when preferred employees were defined for a location

In the case where a location (and not a location schedule) was planned multiple times on a particular planning board, an error occurred while running an MRO when preferred employees were defined for that location.

This issue has been resolved.

#### 1.6.3 Routes are shown in random order next to the map

In the map pop-up, and in the map tab of the MRO pop-up, routes were displayed in seemingly random order to the left of the map. This was inconvenient.

The routes next to the map are now sorted by route number.

#### 1.6.4 MRO wrongly checks still for competences that have become invalid

The MRO should take into account the employee competences that are required to perform a service. However, it turned out that it even considers competences that had been set to 'inactive' in the master data. This left certain client appointments unplanned in the picker.

This has been adjusted.

#### 1.6.5 Street name of employee address shown twice on the 'Route' tab

In the MRO pop-up, in the 'Route' tab, after selecting a route in the top table, the contents of that route were shown in the bottom table. When an employee was planned on the route, that employee's address was showing the street name twice.

This has been fixed.

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### 1.7 Solved issues concerning sessions

#### 1.7.1 Improving performance when revalidating sessions

*Also available as hotfix for versions 7.14.1, 8.1 & 8.2.*

While redefining the validation status of a session, a certain component in the code appeared to be unnecessarily slow. We were able to speed this up from 1 - 2 seconds to a few milliseconds.

#### 1.7.2 List of service access time exceedings missed certain items

*Also available as hotfix for version 8.2.*

The session dashboard shows a list of service-location combinations on which there is no room for a new appointment within a set number of days (to be defined per service).

Because breaks and reservations within sessions were erroneously seen as free time slots in the access times calculation, the possibilities for making an appointment on that session seemed greater than they really were. As a result, it was calculated that the client could be seen the same day, for example, and this location-service combination did not appear in the list of exceeded access times.

This issue has been fixed. Breaks and reservations are now no longer counted as free slots.

#### 1.7.3 Selected sessions in admin module taken along to the planning board

After viewing or changing sessions (in bulk) in the administration module, the sessions that had just been viewed/changed were automatically opened when returning to the planning board, even though the 'Plan' button had not been clicked. This was not as it supposed to work, as this would cause the selection of sessions that had been opened manually on the planning board to be lost.

This problem has been solved. The admin module now keeps track of which sessions were last selected, separately from the planning board. Unless the user uses the 'Plan' button in the admin module, viewing/changing sessions in the admin module will no longer affect which sessions are opened on the planning board.

#### 1.7.4 Many specific service times led to messy and erroneous display

*Also available as hotfix for version 8.2.*

When many different specific times were defined per service, and there were also several services linked to a session, then when changing specific time ranges within a session, the times were displayed in a messy fashion. They were not displayed in chronological order and in some cases were displayed under the wrong service.

This problem has been solved. The specific times are now displayed correctly per service, and in chronological order on both the edit and view pages.

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### 1.7.5 Incorrect 'invalid appointment' mark in session admin module

In the 'Sessions' admin module, the 'invalid appointment' icon was sometimes incorrectly displayed for a session in the table. This happened when an appointment on this session was planned at a time that overlapped 2 or more specific service times. For example, the appointment was planned from 10:20 - 10:40 while specific times were defined for this service from 10:00 - 10:30 and from 10:30 - 11:00.

On the planning board this problem did not occur. The issue in the 'Sessions' admin module is now fixed.

### 1.7.6 'Employee available' for session looks at date, not time

When an employee was planned on a session in the morning, this same employee was no longer seen as available for a session on the same date in the afternoon or evening. Only when the checkbox "Employees without other appointments only" was unchecked could this employee be found.

The availability check appeared to only look at the date and not the time. This has now been improved.

### 1.7.7 Appointments couldn't be registered via start/stop on the planning board

When registering an appointment via the session planning board, the registration could be started, after which an orange clock appeared, but could not be stopped. The orange clock briefly changed to a gray-colored clock, meaning 'registration complete', but then jumped back to orange. Also, through the register page, a started registration could not be set to complete. Saving was not possible.

This problem is now fixed.

### 1.7.8 Submitting and approving in Classic also affected NextGen registrations

When a day (or week) was handed in or (dis)approved in the Classic registration or management module, this status of the day- or week-chart was also sent to NextGen. Here it also unintentionally affected session appointments and event registrations. For example, appointments on the session suddenly appeared with a 'lock' icon.

This has now been adjusted. The submit and approve actions in Classic now only affects Classic registrations, and no longer affect NextGen appointments as well.

### 1.7.9 Still issues with mouse-over on appointment on session planning board

In the previous version there was an issue with the info popup that appears as mouse-over on an appointment on the session planning board. The contents were not (fully) readable in case of a very short session with for example only one appointment planned.

However, the adjustments made did not solve the problem in all cases. In this version we invested more time and made the behavior around the popup more stable.

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### 1.8 Other

#### 1.8.1 Contractor without a parent organization causes when editing an order

*Also available as hotfix for version 8.2.*

When viewing or editing an order, the contractor was not shown on the page when no parent organization was known for that contractor. Then, when something was changed for the order, unrelated to the contractor, the contractor was saved as 'empty'.

This issue has been resolved. It now works again as it should, even for contractors without an organization.

#### 1.8.2 Expired alternative address was still shown on plan status page

For the 'appointments yet to be scheduled' on a client's plan status page, the alternate address was still shown even though it had already expired.

This has been resolved. The correct address is now shown.

#### 1.8.3 Client agenda opens wrong week when navigating there from appointment

In the previous version, an issue was fixed around opening the client agenda from a selected appointment on the day or week planning board. Regardless of the appointment date, the current week was always opened.

Unfortunately, the solution still proved incomplete. Another change has now been made to fix this problem.

#### 1.8.4 Changing location opening schedules made them invalid

*Also available as hotfix for versions 8.1 & 8.2.*

When a location opening schedule was changed in Classic, the change saved an incorrect start date of the validity for the opening schedule. This caused the location schedule to become invalid on planning boards, in pickers, on mobile and in registrations.

This problem is now fixed.

#### 1.8.5 Location end date change in NextGen does not update all correct in Classic

When the end date of a location was changed in NextGen, the end date of the location was correctly updated in Classic, but the end date of the (invisible) room 'R1' under that location was not. This retained its old value. As a result, it could happen for example, that despite extending a location validity, no opening schedules appeared in the picker after the original end date.

This problem has been fixed.

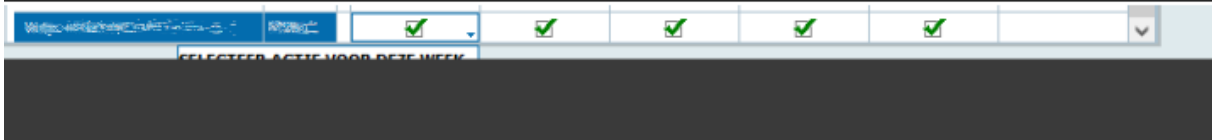
#### 1.8.6 Admin messages can be resent over and over again

After sending an admin message from the admin module in Classic, the green send button remained available. This allowed sending the same message over and over again. This is no longer possible.

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### 1.8.7 Menu unusable at last row in team overview registration & management

For teams with many employees, the quick menu on the last row was unusable because it was displayed behind the black bar at the bottom.



This error has now been corrected. The quick menu can now be used again for the weeks on the bottom row.

### 1.8.8 User by whom access-set was modified not always saved correctly

When modifying an access-set in the admin module in Classic, the 'by whom' was not always updated correctly. This sometimes made the change appear to have been made by someone completely different.

This has been fixed.

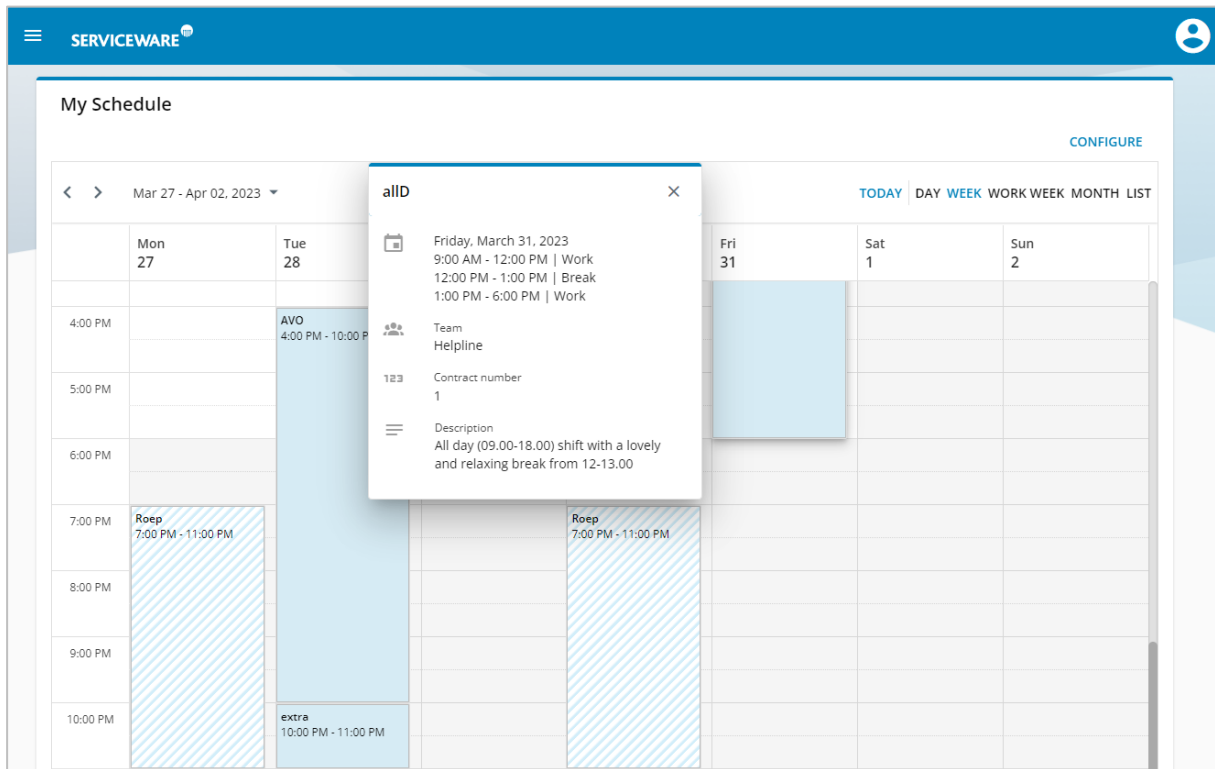
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## 2 Widgets

### 2.1 New: 'My schedule' widget

*Required: Serviceware Resources version 8.3.*

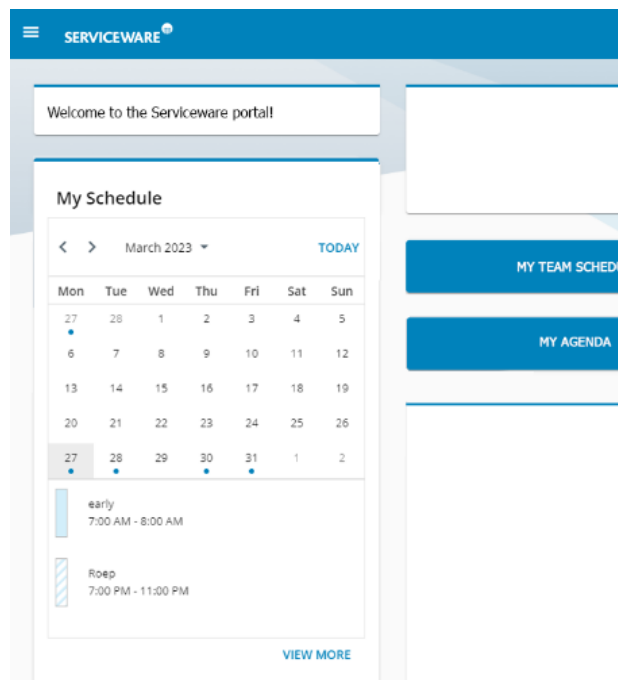
A new widget is available that allows any employee to view the shifts scheduled for him in a week-, month- or list view. For each shift, more information is available in a pop-up.



This basic widget will be extended in due course with functionality to exchange shifts, and possibilities to report (un)availabilities. Eventually the shifts will also be shown in the 'My agenda' widget, as a kind of 'watermark' under the planned appointments.

This widget is *not* a public widget and is therefore intended for use on the Serviceware portal, for which one must first log in.

As a shortcut to this widget, a so-called 'teaser' version of the 'My schedule' widget is also available for usage on the 'Home' page of the Portal.



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### 2.2 New: 'My team schedule' widget

*Required: Serviceware Resources version 8.3.*

In addition to viewing your own schedule, the - also new - 'My team schedule' widget can be used to see who else is working on a particular date. Or who is not working and might be approached to take over a shift. Again, more information about a shift is available in a pop-up.

This widget is available to anyone who logs into the Serviceware Portal and has right 25, or is allowed to access the schedule module (right 14).

'You' are always at the top, so you can always see your colleagues' schedule next to your own. You further see all colleagues you are in a team with. If you have multiple valid contracts linked to different teams, you will see the colleagues of all these teams, up to a maximum of 10 teams.

In a future version it will also be possible to lend employees to another team for a longer period of time, without the need to change the contract. This widget is already prepared for this, and will also show the colleagues of the teams to whom you have been loaned for a longer period of time.

What is not part of this first version is that you will also see all colleagues from a team to which you do not belong according to your contract, and to which you have been loaned only on an occasional basis.

It is easy to search for the right colleague using the search field. The list of colleagues can also be filtered by team or function. Information about the team and function of each colleague can be made visible in 2 additional columns with one click, unless the widget is accessed on a mobile device.

The screenshot displays the 'Mijn Team Rooster' widget. The top part shows a calendar view for the week of March 27th to April 2nd, 2023. The calendar is titled 'Mijn Team Rooster' and includes a search field for 'Collega naam' and navigation controls. The calendar grid shows shifts for various colleagues, with some shifts highlighted in blue and others in grey. A red box highlights the search field and navigation controls.

The bottom part of the screenshot shows a detailed view of the 'Mijn Team Rooster' widget. This view includes a search field for 'Collega naam' and a table with columns for 'College', 'Team', 'Functie', and 'Shift'. The table lists 14 colleagues, including 'Me' and 'Collega 1' through 'Collega 14'. The 'Team' and 'Functie' columns are highlighted with a red box. The 'Shift' column shows the date and time of the shift, such as '27 Mrt., Maandag early | 07:00 - 08:00'.

College	Team	Functie	Shift
Me	Helpline	ALLRND, Allrounder	27 Mrt., Maandag early   07:00 - 08:00 +1 meer
Collega 1	Ergotherapie	Allround employee	
Collega 2	Helpline	Allround employee	27 Mrt., Maandag CL95S   09:00 - 17:00
Collega 3	Helpline	onbekend	
Collega 4	Ergotherapeuten	Allround employee, Allrounder, a...	27 Mrt., Maandag CLR   08:30 - 17:00
Collega 5	Helpline	Allround employee	
Collega 6	Helpline	Allrounder	
Collega 7	Helpline, ONLINE, EXTRAMURAAL, ...	Aloha, Allrounder, Allround emplo...	
Collega 8	Helpline	Allround employee	
Collega 9	Helpline	Aloha	
Collega 10	Helpline	ALLRND	27 Mrt., Maandag Holid   08:00 - 18:00
Collega 11	Helpline	Allround employee	
Collega 12	Location 1	External doctor	27 Mrt., Maandag AVO   16:00 - 22:00
Collega 13	Location 2	External doctor	27 Mrt., Maandag AVO   16:00 - 22:00
Collega 14	Location 2	External doctor	

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### 2.3 'My agenda' widget improvements

#### 2.3.1 User preferences are now remembered

In the 'My agenda' widget, the start day of the week, the zoom level plus the number of subslots, and the view (day/week/month/etc) are now remembered per user. For example, when logging in again a day later - possibly from another device - one will see these preferences again immediately.

#### 2.3.2 Minor improvements regarding translations, layout and display on mobile

For this widget a collection of small issues have been solved. These were mainly missing translations and information that was not nicely displayed, e.g. in the case of PROX appointments. For event appointments, some information was still missing, which has also been fixed.

In addition, improvements have been made to the layout, especially for use on a mobile device. For very short appointments, a minimum height is now applied in the daily and weekly view so that they remain selectable despite their short duration.

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### 3 Technical topics

#### 3.1 Importing preferred employees on client level

*Required: CSV importer version 3.6.0 or DB importer version 3.8.0 and Connect 8.3.0.*

From the Serviceware Resources web application, preferred employee(s) could already be defined at the client level. Now it is also possible to *import* this information. Both via the DB importer and the CSV importer.

#### 3.2 Importing day(s) of the week for 'once' orders

*Required: DB importer version 3.8.0 and Connect 8.3.0.*

The DB importer has been extended with the possibility to import not only one-time orders, but also recurring orders. The complete 'recurrence model' is now also part of this import and - also for one-time orders - things like 'possible day(s) of the week' can be imported.

With the CSV importer it was already possible to import recurring orders. Nothing has changed in this respect.

#### 3.3 New open APIs

##### 3.3.1 Endpoints concerning the registration of session appointments

In preparation for registering session appointments via the mobile applications, the following endpoints have been developed:

Create NextGen registration	POST <a href="#">api/v2/recordedtimegroups</a>
Edit NextGen registration	PUT <a href="#">api/v2/recordedtimegroups/{recordedTimeGroupId}</a>
Delete NextGen registration	DELETE <a href="#">api/v2/recordedtimegroups/{recordedTimeGroupId}</a>
Add barcode to NextGen registration	POST <a href="#">api/v2/recordedtimes/{recordedtimeid}/barcodes</a>
Delete barcode from NextGen registration	DELETE <a href="#">api/v2/recordedtimes/{recordedtimeid}/barcodes/{barcodeid}</a>
Add attachment to NextGen registration	POST <a href="#">api/v2/recordedtimes/{recordedtimeid}/attachments</a>
Delete attachment from NextGen registration	DELETE <a href="#">api/v2/recordedtimes/{recordedtimeid}/attachments/{attachmentid}</a>
Add dyn. formulier to NextGen registration	POST <a href="#">api/v2/recordedtimes/{recordedtimeid}/forms</a>
Delete dyn. formulier from NextGen registration	DELETE <a href="#">api/v2/recordedtimes/{recordedtimeid}/forms/{formid}</a>

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### 3.3.2 Endpoints concerning scheduling

For the 'My schedule' and 'My team schedule' widgets, and also in preparation for a new version of the schedule module, the following endpoints have been developed:

Create shift template	POST <a href="#">api/v2/shifts/templates</a>
Edit shift template	PUT <a href="#">api/v2/shifts/templates/{shiftTemplateId}</a>
Delete shift template	DELETE <a href="#">api/v2/shifts/templates/{templateId}</a>
Get the info of 1 specific shift template	GET <a href="#">api/v2/shifts/templates/{templateId}</a>
Get the info of all shift templates	POST <a href="#">api/v2/shifts/templates/search</a>

Plan shift at an employee-contract	POST <a href="#">api/v2/shifts/employeecontract/{id}</a>
Edit (/personalise) shift at employee-contract	PUT <a href="#">api/v2/shifts/{shiftId}</a>
Delete shift at employee-contract	DELETE <a href="#">api/v2/shifts/{shiftId}</a>
Undo personalisation of a specific shift at an employee-contract	PUT <a href="#">api/v2/shifts/{shiftId}/personalization/undo</a>

Temporary link employee-contract to team for scheduling purposes	POST <a href="#">api/v2/schedules/link/employees</a>
Delete temporary link from employee-contract to team	DELETE <a href="#">api/v2/schedules/link/employee</a>
Get all teams to which employee-contract is linked temporarily	GET <a href="#">api/v2/schedules/link/employees/{employeeId}</a>

Get all shifts for 1 specific employee within a certain period	POST <a href="#">api/v2/schedules/employee/{id}</a>
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Create a 'request ID' for scheduling purposes	POST <a href="#">api/v2/schedules/request</a>
Get all employees based on this request ID	GET <a href="#">api/v2/schedules/request/{requestId}/employees</a>
Get all shifts based on this request ID	GET <a href="#">api/v2/schedules/request/{requestId}/shifts</a>
Get all statistics based on this request ID	GET <a href="#">api/v2/schedules/request/{requestId}/totals</a>

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### 3.3.3 Endpoints for masterdata: Holidays & Regions

For public holidays, a new structure has been defined in which holidays can differ per region. It is then defined per employee to which region he/she belongs.

This structure will be used in the new version of the schedule module. The following endpoints have already been developed for this purpose:

#### Holidays

Create new holiday(s)	<a href="#">Post api/v2/masterdata/holidays/</a>
Edit 1 specific holiday	<a href="#">Put api/v2/masterdata/holidays/{id}</a>
Delete 1 specific holiday	<a href="#">Delete api/v2/masterdata/holidays/{id}</a>
Get the info of 1 specific holiday	<a href="#">Get api/v2/masterdata/holidays/{id}</a>
Get the info of all holidays within a certain period	<a href="#">Post api/v2/masterdata/holidays/search</a>
Link 1 region and 1 holiday	<a href="#">Put api/v2/masterdata/holidays/{holidayId}/region/{regionId}</a>

#### Regions

Create new region	<a href="#">Post api/v2/masterdata/regions</a>
Edit (/deactivate) 1 specific region	<a href="#">Put api/v2/masterdata/regions/{id}</a>
Get the info of 1 specific region	<a href="#">Get api/v2/masterdata/regions/{id}</a>
Get the info of all regions	<a href="#">Get api/v2/masterdata/regions/</a>

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### 4 Installation requirements

Below, the requirements for the installation of **Serviceware Resources 8.3** are listed. In order to make use of all the latest features, Serviceware Resources for iOS **8.2.1** and Serviceware Resources for Android **8.2** are advised. The latest features in the imports require Connect **8.3.0**.

- › For an update to version 8.3.0, the already installed version of Serviceware Resources should be minimal 8.2.0. For older versions of Serviceware Resources, extra steps need to be taken to be able to update to 8.3.0. 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”](#).

#### 4.1 Advised versions

Serviceware Resources	Authentication method	Connect	Mobile Service	iOS app	Android app	Appointment widget
7.14	hIPv7	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	8.1.1	8.1.0	3.2
8.2	Serviceware Authenticator	8.0.1	8.2.0	8.2.0	8.1.0	4.1
8.3	Serviceware Authenticator	8.3.0	8.3.0	8.2.1	8.2.0	4.2