



# **ServiceWare Resources 8.4**

**Release notes**



# Release notes – Serviceware Resources 8.4

## Introduction

With Serviceware Resources 8.4, we are introducing a completely updated, future-proof scheduling module with many new features. One of the biggest improvements is scheduling based on predefined ‘required shifts’. Being able to create a draft schedule without this being immediately visible to all employees is also a major enhancement. In addition, it is now possible to link a location to a shift with which the workplace can already be defined in the scheduled shifts.

In support of the new scheduling module, a completely new section has also been developed in which it can be defined how many employees with a certain function are needed on a certain date, at a certain location, and between what times. These ‘required shifts’, together with a new place to manage the standard shift templates, make up the new ‘Shifts’ module.

Furthermore, additional masterdata sections have been added to support the new scheduling functionalities, and the mobile apps, a number of widgets, and the employee pickers on all of the planning boards have been updated to match the new scheduling possibilities. All of the new modules can be found in the newest section of the application called ‘Code Blue’.

Chapter 2 contains the improvements made around the management and planning of sessions (using the PSE). All changes were made in response to direct feedback from our customers. If you use the order and/or appointment widget in your organization, please read §2.3.1 carefully, as it affects the displayed appointment suggestions in the widget.

Also described in chapter 2 is a number of bug fixes in other parts of the web application.

Finally, a nice number of new features is available in the latest versions of our Android and iPhone apps. Among others, a possibility has been added with which orders can be enriched from within the mobile app, especially for walk-in scenarios. In addition, some improvements have been made for barcode scanning in dynamic forms. Chapter 3 contains a detailed description of all the new mobile features.

We hope you will appreciate this version. We would like to receive your feedback at any time. You can of course send this by e-mail ([service@serviceware-benelux.com](mailto:service@serviceware-benelux.com)), or make a call to our Service Desk: +31 (0)715680310.

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Leiden, July 3<sup>rd</sup>, 2024

**Serviceware Benelux**

Part of Serviceware SE

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## 1 New scheduling module

With Serviceware Resources 8.4 we are introducing a completely renewed, future-proof scheduling module with many new functionalities compared to the scheduling module in classic, as well as possibilities to support more modern scheduling processes in the near future where the employee himself will be more 'in-control' of his own schedule.

In the following paragraphs, a number of functionalities that are already available *now* are explained in more detail. One of the biggest improvements is scheduling based on predefined 'required shifts'. Being able to create a draft schedule without it being immediately visible to all employees is another major enhancement. Not to mention the ability to link a location to a shift with which the workplace can already be defined in the scheduling phase.

Employee	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29	Sun 30	Σ C	Σ W	Σ SB
TEST_Team 1								0:00	0:00	0:00
Arend Arts			HV	08:00-12:00				-20:00	4:00	0:00
Bernhard Arts	*K_F0916 (01234)	K_OV2303				K_F1922		-2:00	9:45	0:00
Nico de Boer								-0:00	0:00	0:00
Anna Doctor		K_OV2303	K_F1922					-5:00	7:00	0:00
Barbara Doctor	K_F1922	K_F0916	K_F0916		K_S0811			12:00	19:00	0:00
Christof Doctor	K_F1922	K_F0916	K_F0916			K_FU2001		10:00	25:00	8:00
Dan Doctor		EM	K_S0811				R_0914 (2 locations)	-4:00	11:30	4:00
Emanuel Doctor			R_0914 (2 locations)					-3:00	4:30	0:00
Fritz Doctor	HV		*K_F0916 (01234)	K_F0916	K_OV2303			6:30	17:30	0:00
Eileen Employee			HZ					-2:00	0:00	0:00

Required Shifts	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29	Sun 30
K_F0916 - 9:00 AM - 4:00 PM	3		1	2	1		
K_F1922 - 7:00 PM - 10:00 PM	2	2	3	1	2	1	1
K_FU2001 - 8:00 PM - 1:00 AM	1	1		1	1		1
K_OV2303 - 11:00 PM - 3:00 AM				1		1	
K_S0811 - 8:00 AM - 11:00 AM	2		1		2	1	1

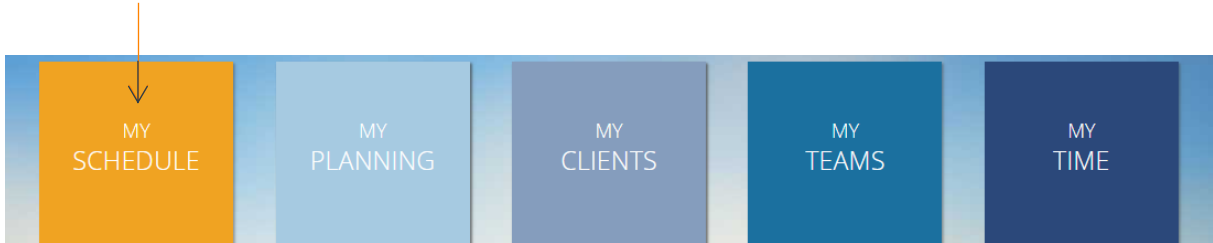
In addition to the scheduling module itself, a new module has also been developed in which standard shift templates and required shifts can be created and managed. A required shift basically determines how much capacity is needed. It defines how many employees with a certain function are needed on a certain date, at a certain location, and between what times. The defined required shifts then form the stock of 'to-be-scheduled-shifts' in the scheduling module.

Furthermore, additional masterdata sections have been added to support the new scheduling functionalities, and the mobile apps, a number of widgets and the employee pickers on all planning boards have been updated to match the new scheduling possibilities.

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The new scheduling module, the 'Shifts' module, and the new masterdata sections can all be found in the newest section of the application called 'Code Blue'.

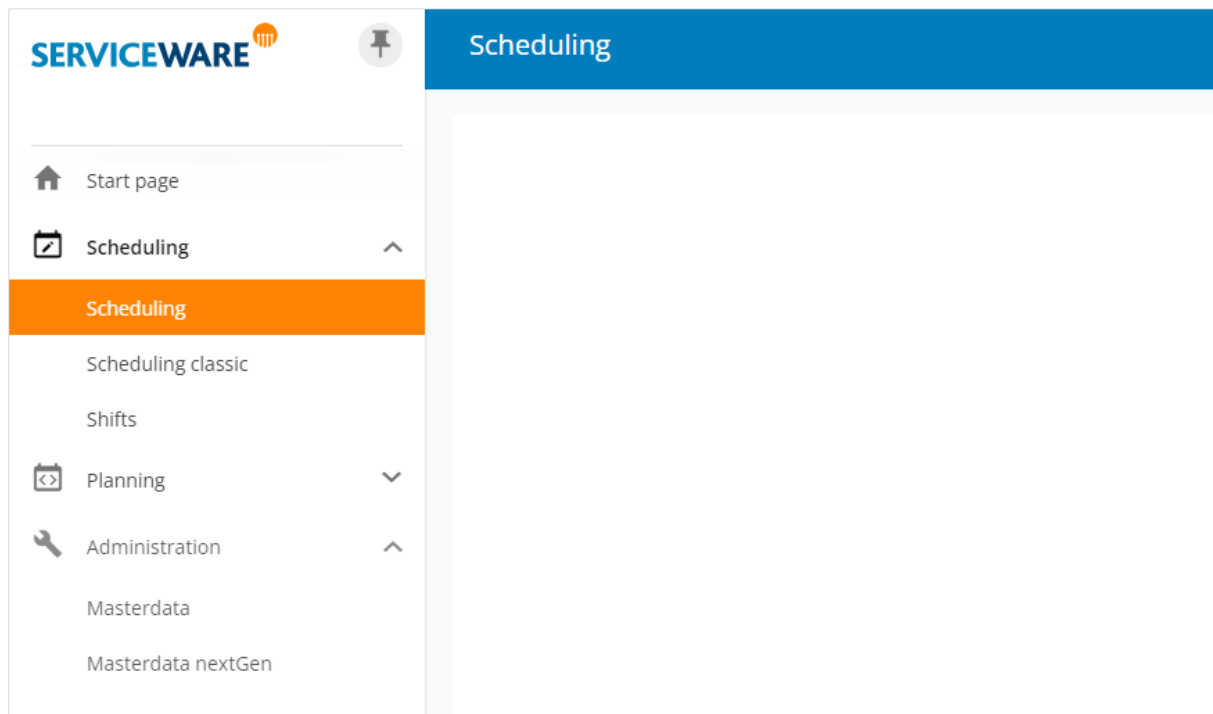
To access the new scheduling module, setting 72 must be set to 'Yes'. Also, as a user, you must have at least access right 14. After that, the module can be accessed from the start page, via the orange 'My Schedule' tile.



In Code Blue, at the very top left of the blue bar, in front of the title of the opened module, a button is available with which the navigation menu can be opened.



The menu is divided into main categories. Under 'Scheduling', both the new and old scheduling modules can be found (provided both are turned on). The shifts module also falls under scheduling. The new masterdata sections can be found under the 'Administration' category. From here you can also quickly navigate to the other masterdata sections, which are still in nextGen.




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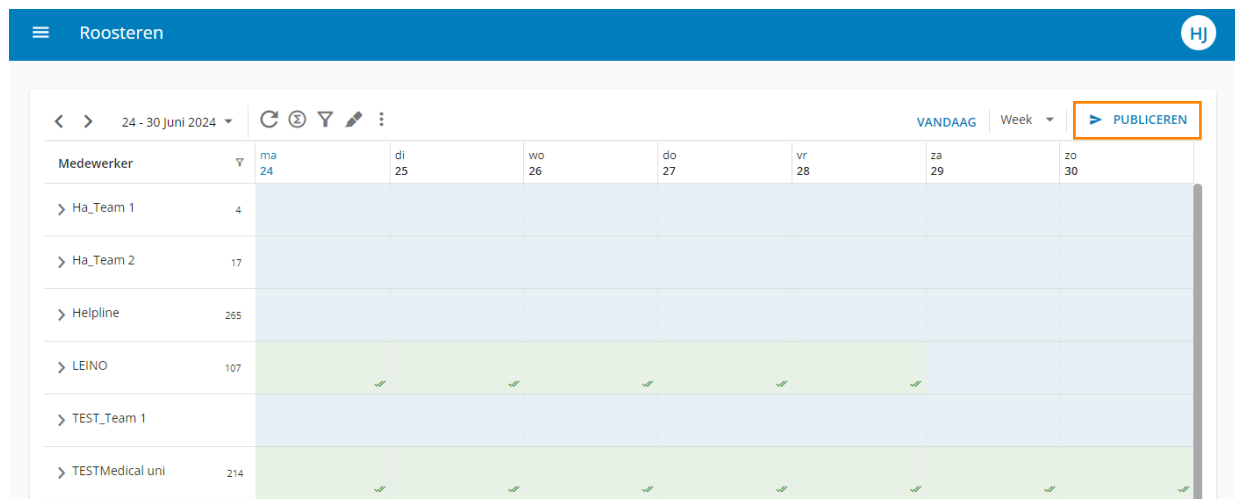
## 1.1 New scheduling functionalities

### 1.1.1 Schedule 'state': Draft, published and locked

In the new scheduling module, it is possible to first build a schedule in a 'draft' mode visible only to the scheduler, and then publish it and make it visible to everyone. This requires an additional right: **14.4**.

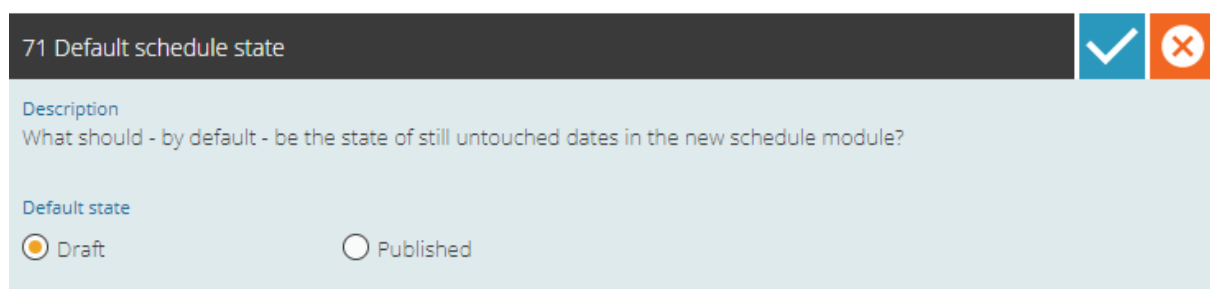
Publishing is done *per team*, on a *per day* basis (and not per shift). Days without a shift can therefore also be published, allowing the employee to assume that he *does not* have to work that day.

Published dates are displayed in the scheduling module by coloring the background of the cell on the team row green and with an  icon.



To work with this new process, 'Draft' must be defined as the default status in setting 71. This setting is only available if the new scheduling module is turned on, see setting 72.

If the new scheduling module is on, but the actual scheduling activities are still done from the scheduling module in classic, setting 71 is set to 'Published' and all shifts will still be visible to everyone immediately after scheduling.



In addition to 'Draft' and 'Published', there is also the status 'Locked'. On days with the status 'Locked', no more shifts can be added, deleted or changed. The status 'Locked' can only be set from the export, and then only for days that have already been published. This means that days with the status 'Locked' are always visible to everyone.

In version 8.3 we already offered the option to lock days after export, but this was only possible for the entire organization as a whole. It is now possible to set this per team.

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### 1.1.2 Scheduling based on predefined 'required shifts'

Besides scheduling with predefined 'shift templates' (like the classic scheduling module worked, see also §1.2.1), it is now also possible to schedule based on so-called 'required shifts'. This makes it possible to not only schedule on the basis of what is *possible*, but also on the basis of what is *required*.

Prior to actual scheduling, series of shifts can be defined in the 'Shifts' module that *must* be scheduled on certain dates and performed by a certain team, at certain locations, and by employees with specific functions. See §1.2.2 for more details on setting up and managing these required shifts.

When all the required shifts have been created, they appear - after expanding a particular team - as schedulable blocks at the bottom of the new scheduling module. The blocks are grouped by row, which represents the shift template on which each of the required shifts is based. For example, all required shifts based on the shift template 'Morning Early 06:00-10:00' are displayed on the same row, regardless of whether there is a slight deviation in the times, whether there is a particular location attached to it, and what is defined as the required function.

Shift Template	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
HV - 8:00 AM - 12:00 PM	1	1	1	1	1	1	1
HZ - 8:00 AM - 12:00 PM	1	1	1	1	1		
K_F0916 - 9:00 AM - 4:00 PM	3		2	2	1		
K_F1922 - 7:00 PM - 10:00 PM	2	2	3	1	2	2	1
K_FU2001 - 8:00 PM - 1:00 AM	1	1		1	1	1	1
K_OV2303 - 11:00 PM - 3:00 AM				1	1	1	
K_S0811 - 8:00 AM - 11:00 AM	2		1		2	1	1
K_S1217 - 12:00 PM - 5:00 PM	1	1	1	1	1	2	2
R_0914 - 9:00 AM - 2:00 PM	1	1		1	1	1	1

Each block represents a shift that needs to be scheduled for the expanded team on that particular day. If the number on the block is higher than '1', the required shift specifies that several employees must work that shift that day. The block can then be dragged to the scheduling grid multiple times to place the shift at different employees.

When the shift is scheduled as many times as the number of employees needed, the block disappears from the bottom section. In this way, the entire bottom should end up entirely empty. All abstract, required shifts are then converted into concrete shifts at actual employees.

A block without a fill color but with a colored border means that the required shift differs slightly in times from the shift template on which the required shift was based. See more in §1.2.2.

In addition to the detailed display of what still needs to be scheduled at the bottom of the scheduling module, a counter at team level is also provided, showing how many shifts still need to be scheduled. This counter is also displayed when the team is not yet expanded, so it can be used as a tool to see for which team there is still work to do for the scheduler. When all required shifts have been scheduled, this counter disappears.

Employee	Count
> Helpline	265
> TEST_Team 1	70

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### 1.1.3 Specific employee ‘function’ for scheduling

Especially for the scheduling process, a new property has been introduced for an employee at contract level: the 'schedule function'. The different schedule functions can be defined and managed via the masterdata section in the administration module (see §1.4.1), and then assigned to an employee-contract in nextGen (see §1.3.1).

Subsequently, the assigned schedule function is visible at the corresponding employee-contract in the new scheduling module by a color to the left of the employee name, and also written out in the column 'Function'. This column can be made visible by enlarging the left employee part with the drag handle at the top.

Medewerker	Functie	di 19	wo 20	do 21	vr 22	za 23	zo 24
TEST_Team 1							
Arend Arts 0003562/1 (24:00)	Test_Dokter						
Bernhard Arts 0003563/1 (12:00)	Test_Dokter						
Anna Doctor 0003550/1 (12:00)	Test_OogDokter						
Barbara Doctor 0003551/1 (08:00)	Test_Dokter						
Christof Doctor 0003552/1 (24:00)	Test_Dokter-plus						
Dan Doctor 0003553/1 (20:00)	Test_Dokter						
Vereiste diensten							
K_F0916 - 09:00 - 16:00		3	2	2	2	1	
K_F1922 - 19:00 - 22:00		2	3	1 3	1	2	1
K_FU2001 - 20:00 - 01:00		1	1	1	1	1	1
K_S0811 - 08:00 - 11:00		2		1		2	1

The color is designed to quickly link the required shifts that require a particular schedule function on the one hand, and the employees who possess a certain schedule function on the other hand.

### 1.1.4 Semi-permanent hiring of employees

Just like in the classic scheduling module, employees from another team can be temporarily added to the team for which a schedule is currently being made. To do this, the employee needs right **14.3**, within his scope the teams from which he is allowed to lend employees. A temporarily added employee M will disappear again from team T, when no more shifts exist for M in the period shown (a week, month, 4 weeks or 6 weeks).

In addition to this temporary lending-in of employees, the new scheduling module now also offers a somewhat more permanent form. Via the right-click menu, a lend-in employee M (marked with an \* before its name) can now also be pinned to team T. This keeps M part of team T regardless of whether there are shifts for him in team T in a given period.

In the new scheduling module, it has also been made possible to open a team on the scheduling grid to which no employee-contract is attached at all. This, together with the pinning of employees, makes it possible to 'pin' a team together from within the scheduling module, without the need for all kinds of dummy contracts.

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Employee	Function	Tags
TEST_Team 1		
Arend Arts 0003562/1 [24:00]		
Bernhard Arts 0003563/1 [12:00]		K_F0916, K_OV2303
* Nico de Boer 000840/1		
Anna Doctor 0003550/1 [12:00]		K_OV2303, K_F1922
Barbara Doctor 0003551/1 [08:00]		K_F1922

### 1.1.5 Define multiple tags per employee-contract, per team

By increasing the width of the employee part on the left, the 'Tags' column can be made visible. This shows the tags that the scheduler has assigned to an employee-contract. Unlike in classic, where only 1 'comment' of max. 5 characters was possible per employee-contract, now multiple tags can be assigned, and the restriction of 5 characters no longer applies.

Employee	Function	Tags
TEST_Team 1		
Arend Arts 0003562/1 [24:00]	Test_Dokter	flex, car
Bernhard Arts 0003563/1 [12:00]	Test_Dokter	bike, student
* Nico de Boer 000840/1		bike, flex
Anna Doctor 0003550/1 [12:00]	Test_Oog Dokter	flex

Adding a tag to an employee-contract can be done using the right-click menu.

In the 'Set tags' popup, existing tags can be selected or a new tag can be defined on the spot.

The tags added to an employee-contract apply only to the team from which the employee-contract was selected. If the same employee-contract is loaned to another team, the defined tags will *not* travel along.

Employee	Function	Tags
TEST_Team 1		
Arend Arts 0003562/1 [24:00]		
Bernhard Arts 0003563/1 [12:00]		K_F0916, K_OV2303
* Nico de Boer 000840/1		
Anna Doctor 0003550/1 [12:00]		K_OV2303, K_F1922
Barbara Doctor		K_F1922

Employee	Mon 24
TEST_Team 1	Filter employees

With the 'filter employees' feature the tags can be used to filter the employee list.

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### 1.1.6 Assign location to (part of) a shift

An important addition in comparison to the classic scheduling module, is the ability to assign a location to a shift. This can be done *prior* to the actual scheduling by specifying the location in the required shift. However, it can also be done *afterwards*, after a shift has been assigned to an employee on a specific date.

By changing the scheduled shift (right-click on the shift > edit), the location that came along with the required shift can still be changed. It is also possible to add a specific location to a shift that was based on a shift template (and therefore had no location linked to it yet at all).


Times (9:00 AM - 4:00 PM) + ADD TIMES

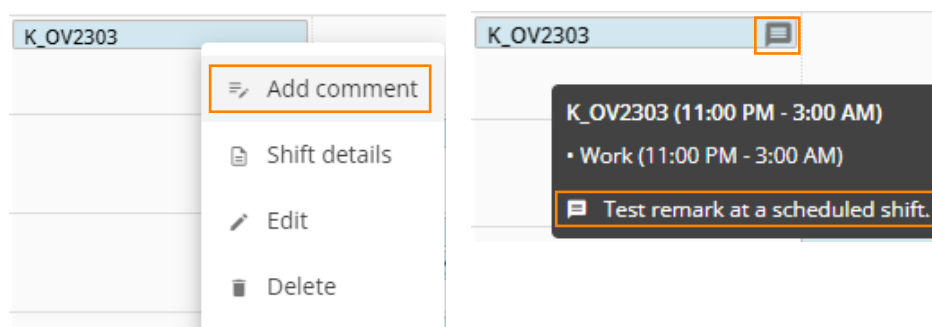
Type* Work	Start time 9:00 AM	End time 11:30 AM	Location 01234   LocationTest
Type* Break	Start time 11:30 AM	End time 12:00 PM	Location
Type* Work	Start time 12:00 PM	End time 4:00 PM	Location

CANCEL **SAVE**

The location is always linked to a specific time block within the shift. So, in theory, multiple locations can be linked to a single shift.

### 1.1.7 Adding a comment to a shift

By right-clicking on a scheduled shift, a comment can be added. Afterwards, an  icon appears on the shift, so that it is easy to find on which shift a comment has been placed. In the hover over the shift, the comment can be read.



The posted comment is also readable by the employees that will execute the shift when they view their shift via one of the scheduling widgets or via the mobile app.

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### 1.1.8 More than 2 shifts per cell

In the new scheduling module, there is no longer a maximum of 2 shifts per day per employee-contract, as was the case in the classic module. In principle, as many shifts can now be added as one wishes.

Christof Doctor 0003552/1 [24:00]	K_F1922	K_F0916	K_F0916
		*K_F1922	K_F1922
		K_OV2303	K_FU2001
			+1 meer
Dan Doctor 0003553/1 [20:00]		EM	K_S0811
		K_FU2001	

The schedule grid view can be customized to reserve space for 1, 2, 3 or 4 shifts per cell by default. Of course, the more space reserved per row, the fewer employees will fit on the screen, so the recommendation is to set the view to the average number of expected shifts per cell. If more shifts are then still planned in a cell, they are still available via the '+N more' button at the bottom.

### 1.1.9 Overlap between work and standby shifts allowed

In principle, all checks during scheduling are aimed at preventing overlapping shifts. However, there is now 1 exception to this rule: it is allowed in the new scheduling module that a shift of type 'standby' overlaps in time with a shift of type 'work'.

### 1.1.10 Warning when shifts are placed too close together

When multiple shifts are scheduled for the same employee on the same day, a check is made that these shifts are not scheduled too close together. This means that there would be too little time to travel from one location to the other.

Note that no travel time is calculated during scheduling. However, a minimum duration required between 2 shifts can be specified in setting 75. When a shift is placed in a cell, less than the specified duration away from the already scheduled shift, a warning is displayed to inform the scheduler. Despite this warning, the shift can still be scheduled. For example, because it takes place at the same or a nearby location.

### 1.1.11 Display of holidays

Holidays can also be displayed on the new schedule grid. These are the holidays (and bridge days) defined as masterdata in the admin module, see §1.4.3.

The holidays do not automatically apply to the entire organization, but are linked to certain regions. These regions are also set up as masterdata. Each employee is then linked to a region, see §1.3.2. The region is therefore the link between a set of holidays and an employee.

As a result, there may be differences on the schedule grid within one team at the individual level regarding holidays. This will only occur with cross-regional teams, such as an international team.

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Employee	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30	Sat 31	Sun 01
TEST_Team 1							
Arend Arts 0003562/1 [24:00]							
Bernhard Arts 0003563/1 [12:00]							
* Nico de Boer 0000840/1 [40:00]		Public holiday					
Anna Doctor 0003550/1 [12:00]					Bridge day		
Barbara Doctor 0003551/1 [08:00]							
Christof Doctor 0003552/1 [24:00]							
Dan Doctor 0003553/1 [20:00]							
Emanuel Doctor 0003554/1 [08:00]							

It is of course also just possible to define only 1 region for the whole organization. The displayed holidays are then the same for everyone.

### 1.1.12 Display of days/dayparts unavailable

*This functionality is currently only available together with Serviceware Processes.*

When information about an employee's unavailability is received by Serviceware Resources from another system, it is displayed on the schedule grid. We distinguish here between a whole day unavailable and just part of the day unavailable.

Marwan Boender HT_6026/1 [10:00 - 20:00]						
Ching Breeman HT_6014/1 [10:00 - 20:00]		Partially unavailable Employee non available from 8:00 AM to 4:00 PM				

Please note that unavailability is a visual aid, but doesn't block the scheduler from planning a shift anyway, if he decides that is needed.

There is currently no way to enter unavailabilities in SW Resources itself. For this, we have partnered with Serviceware Processes, where that information can be entered via a widget on the portal, possibly followed by an approval step by the scheduler or manager.

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### 1.1.13 Detail (audit) info per shift

Right-clicking on a scheduled shift reveals the 'shift details' option. The popup that appears shows all the information of the shift in question.

In case the scheduled shift times differ from the shift template times, the original times of the shift template can be viewed here if desired.

And if the shift times differ from those of the scheduled required shift, then the original times of the required shift can also be viewed here.

Finally, at the bottom, the 'Audit info' section can be popped open if one is specifically interested in who created this shift when, or who last changed this shift and when.

#### Shift details: \*K\_F0916 [01234] on 6/26/24

**Times**  
9:00 AM - 11:30 AM [Work] | LocationTest  
11:30 AM - 12:00 PM [Break]  
12:00 PM - 4:30 PM [Work] | LocationTest

**Original times of the required shift** ▾  
9:00 AM - 11:30 AM [Work]  
11:30 AM - 12:00 PM [Break]  
12:00 PM - 4:00 PM [Work]

**Original times of the shift template** ▾

**Address**  
LocationTest [01234]  
Kalverstraat 72, 1012NZ Amsterdam

**Employee, Fritz Doctor** | 0003555/1  
Test\_Dokter  
TEST\_Team 1

**Required shift**  
Demo-10 | K\_F0916 | KVH1

**Required schedule function**  
Test\_Dokter

**Audit info** ▲

**Created on**  
6/26/2024 at 9:30 AM

**Created by**  
Walter Worker

**Edited on**  
6/26/2024 at 9:31 AM

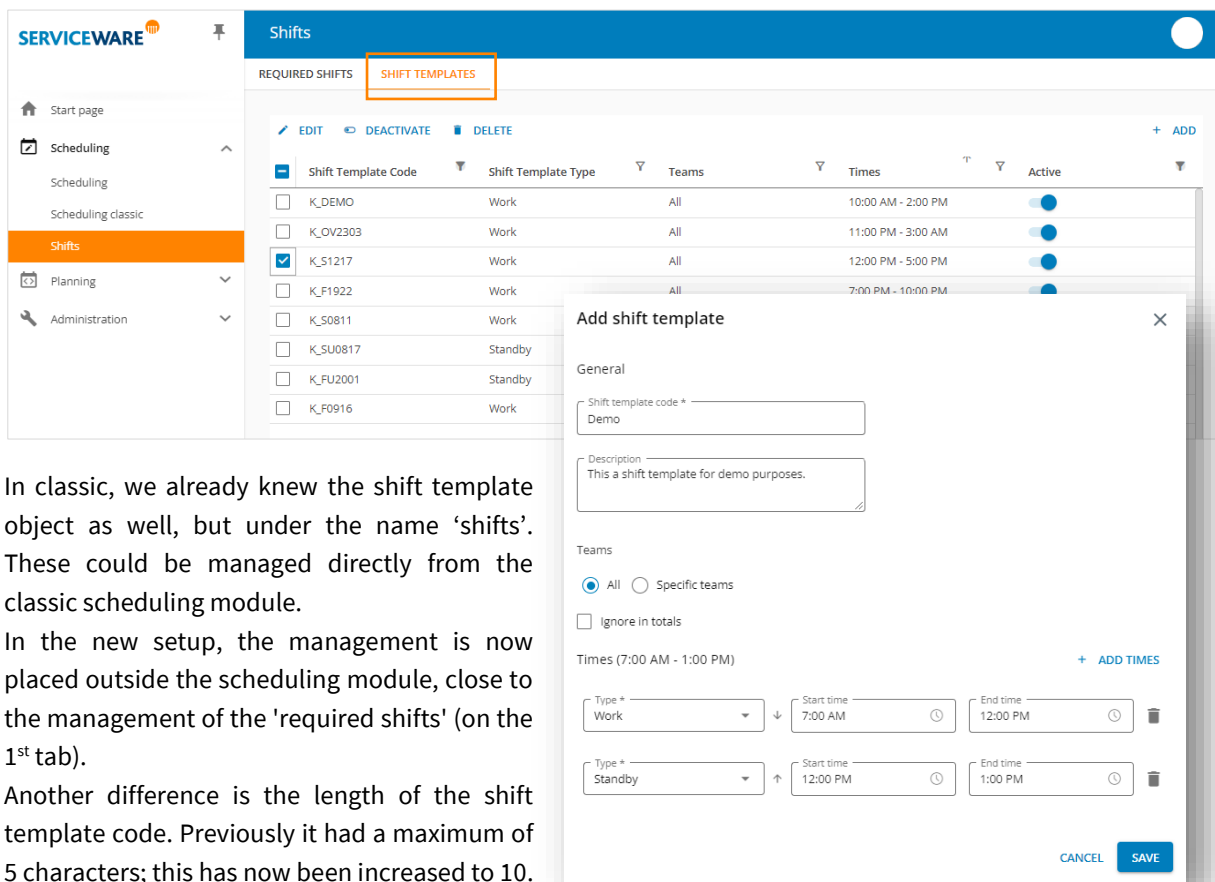
**Edited by**  
Esther Employee

## 1.2 Definition of shifts

### 1.2.1 Shift templates

In the 'Shifts' section, part of the new scheduling module, the 2<sup>nd</sup> tab allows the creation and management of 'shift templates'. These shift templates represent the standard shift templates an organization works with, and are really nothing more than one or multiple time-blocks, each with a type, start and end time, and a code to identify the shift template.

Optionally, the shift template can be made available exclusively to certain teams. When working with Scheduling = Registration, setting 74 can be used to make the 'service' field visible per time block. By default, the service field is not shown.

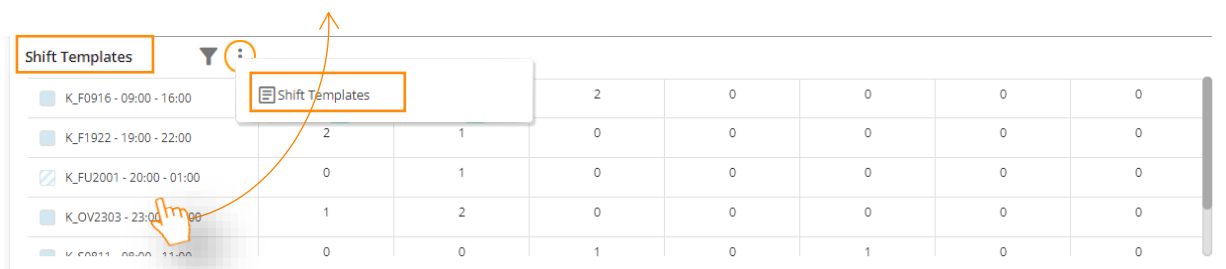


In classic, we already knew the shift template object as well, but under the name 'shifts'. These could be managed directly from the classic scheduling module.

In the new setup, the management is now placed outside the scheduling module, close to the management of the 'required shifts' (on the 1<sup>st</sup> tab).

Another difference is the length of the shift template code. Previously it had a maximum of 5 characters; this has now been increased to 10.

An employee must have the new right **14A** to view, create and edit shift templates from the 'Shifts' section. Shift templates that have been created can of course be viewed and used by schedulers from within the scheduling module. To do this, the view at the bottom must be set to 'shift templates'. By picking up a shift template and releasing it on a particular cell on the schedule grid, a shift can be created directly based on this shift template without having to define a required shift first. An alternative method is to use a right-click on a cell and then select the 'Add shifts' option.



# Release notes – Serviceware Resources 8.4

## 1.2.2 Required shifts

Once shift templates are defined, required shifts can be created. A required shift is in fact a shift template, but enriched with additional information and provided with a concrete date. The addition of the date makes a required shift something that *has* to be scheduled, unlike the shift template, which *can* be scheduled.

Team	Shift Template	Co	Name	Shift Type	Fun	Recu	No	Locatio	Days	Time	Valid	Valid
K_1   TEST_Team 1	K_S0811	8D0L5	K_S0811   KVH1	Work	Test...	Weekly	2, 1, 2		Mo, Wed, Fri	8:00 AM - 11:00 AM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_F0916	Demo-10	K_F0916   KVH1	Work	Test...	Weekly	3, 2, 2, 2, 1		Mo, Tue, Wed, T...	9:00 AM - 4:00 PM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_F1922	Demo-11	K_F1922   KVH1	Work	Test...	Weekly	1, 2, 1		Wed, Sat, Sun	7:00 PM - 10:00 PM	2024-01-31	2025-01-31
K_1   TEST_Team 1	K_FU2001	Demo-12	K_FU2001   KVH1	Standby	Test...	Weekly	1, 1, 1, 1, 1		Wed, Thu, Fri, Sa...	8:00 PM - 1:00 AM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_FU2001	Demo-13	K_FU2001   KVH1	Standby	Test...	Weekly	1, 1		Mo, Tue	7:00 PM - 1:00 AM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_S0811	Demo-14	K_S0811   KVH1	Work	Test...	Weekly	1, 1		Sat, Sun	8:00 AM - 11:00 AM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_F1922	Demo-15	K_F1922   KVH1	Work	Test...	Weekly	2, 3, 3, 1, 2		Mo, Tue, Wed, T...	6:00 PM - 10:00 PM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_S1217	Demo-17	K_S1217   KVH1	Work	Test...	Weekly	1, 1, 1, 1, 1...		Mo, Tue, Wed, T...	12:00 PM - 6:00 PM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_OV2303	Demo-60	K_OV2303   KV...	Work	Test...	Weekly	1, 1, 1		Thu, Fri, Sat	11:00 PM - 3:00 AM	2024-01-01	2024-12-31
K_1   TEST_Team 1	HV	NVLHT	HV   KVH1	Holiday	Test...	Weekly	1, 1, 1, 1, 1...		Mo, Tue, Wed, T...	8:00 AM - 12:00 PM	2024-03-26	2025-03-26
K_1   TEST_Team 1	R_0914	O7YCI	mult. locs	Work	Test...	Weekly	1, 1, 1, 1, 1...	Werfgebouw, ...	Mo, Tue, Wed, T...	9:00 AM - 2:00 PM	2024-03-20	2025-03-20
K_1   TEST_Team 1	HZ	XV8E7	HZ   KVH1	Ill	Test...	Weekly	1, 1, 1, 1, 1		Mo, Tue, Wed, T...	8:00 AM - 12:00 PM	2024-03-26	2025-03-26

An employee must have the new access right **14B** to view, create and edit required shifts from the 'Shifts' section. On the 1<sup>st</sup> tab, the already defined series of required shifts are shown in a table overview. A new definition can be added using the 'add' button at the top right.

**Add required shift**

**General**

Team \*

Shift Template \*

Code \*

Name \*

Description

Location

*This location will be used as the default one for your time blocks*

**Date**

Start date \*

Recurrence

Repeat every  Weeks

Repeat On

End

Exclude

**Employees**

Required function

*Employee must hold at least one of the chosen functions*

Function color

Number of employees

Monday

Tuesday

Thursday

Friday

**Times (7:00 AM - 1:00 PM)**

**+** ADD TIMES

Type \*  Start time  End time  Location

Type \*  Start time  End time  Location

CANCEL SAVE

## Release notes – Serviceware Resources 8.4

A required shift is always created for 1 specific team. This determines *which group of employees* the shift should be performed by.

In addition, the required shift is always based on an existing shift template. This basically determines the *what is to be delivered*. Once a template is chosen, the time blocks at the bottom of the popup are also filled in immediately. Of course, changes can be made to the times afterwards. For example, because the standard 'morning shift' for this time should take an hour longer or start earlier. Additional time blocks can also be added if necessary.

Next, the required shift can define *where* the shift should be performed. This can be done by specifying a location for each time block. If a location is to be added to all time blocks, this can also be accomplished with the 'location' field at the bottom of the 'General' section.

In the 'General' section, if desired, a self-selected code and name can be specified for the required shift. By default, a code is generated, and the name is automatically prefilled with a combination of the team and shift template used.

In the 'Date' section, it is possible to specify *when* the service is to be performed. Here you can choose once on a specific date, or weekly on the chosen days of the week. If desired, holidays can be skipped when creating the actual required shifts on the specific dates. For this purpose, the holidays linked to the region defined at the team for which the required shift is created are used.

In the 'Employees' section it can be specified *by which schedule function* the shift is to be performed. Here multiple functions can also be selected, but note that this is an OR construction: the shift must be performed by an employee with schedule function A *or* schedule function B. When multiple functions are selected, the desired color can be determined manually. When only a single schedule function is selected, the color follows automatically.

Finally, the *number of employees* must be specified. The number of employees may vary for each day of the week in the case of a weekly recurrence.

After creating a required shift series, then from the table, it can be opened in calendar view. From here, if necessary, a shift on a specific date can be removed from the series or modified, for example because fewer employees are needed on a specific date.

The screenshot displays the 'Shifts' management interface. At the top, there are tabs for 'REQUIRED SHIFTS' and 'SHIFT TEMPLATES'. Below the tabs is a table of shift series with columns for Team, Shift Template, Code, Name, Shl, Fu, Recu, No, Location, Days, Time, Valid, and Valid. The first row is selected, and an arrow points from the 'SHOW IN CALENDAR' button in the table to a calendar view below. The calendar view shows a grid for the week of July 01 - 07, 2024. The first row of the calendar shows the days of the week. The second row shows the shift series 'X4WMT' with 'Demo | K\_1' as the team and 'Demo' as the shift template. The calendar cells for Monday, Tuesday, and Thursday show the shift series and the number of employees (0/2, 0/1, 0/1 respectively). A context menu is open over the Thursday cell, showing options for 'Required shift details', 'Edit', and 'Delete'.

Team	Shift Template	C	Name	Shl	Fu	Recu	No	Location	Days	Time	Valid	Valid
K_1   TEST_Team 1	Demo	X4WMT	Demo   K_1	Work	Test...	Weekly	2. 1. 1. 1	LocationTest	Mo, Tue, Thu, Fri	7:00 AM - 1:00 PM	2024-07-01	2025-07-01
K_1   TEST_Team 1	HV	NVLHT	HV   KVH1	Holiday		Weekly	1. 1. 1. 1...		Mo, Tue, Wed, T...	8:00 AM - 12:00 PM	2024-03-26	2025-03-26
K_1   TEST_Team 1	HZ	XV8E7	HZ   KVH1	Ill		Weekly	1. 1. 1. 1. 1		Mo, Tue, Wed, T...	8:00 AM - 12:00 PM	2024-03-26	2025-03-26
K_1   TEST_Team 1	K_F0916	Demo-10	K_F0916   KVH1	Work	Test...	Weekly	3. 2. 2. 2. 1		Mo, Tue, Wed, T...	9:00 AM - 4:00 PM	2024-01-01	2024-06-30
K_1   TEST_Team 1	K_F0916	Demo-30	K_F0916   KVH1	Work		Weeklv	3. 2. 2. 2. 2		Mo, Tue, Wed, T...	9:00 AM - 4:00 PM	2024-07-01	2024-12-31

Code	Name	Shift Template	Monday, 01	Tuesday, 02	Wednesday, 03	Thursday, 04	Friday, 05	Saturday, 06	Sunday, 07
X4WMT	Demo   K_1	Demo	Demo 0/2 K_1   TEST_Team 1 7:00 AM - 1:00 PM 01234   LocationTest	Demo 0/1 K_1   TEST_Team 1 7:00 AM - 1:00 PM 01234   LocationTest		Demo 0/1 K_1   TEST_Team 1 7:00 AM - 1:00 PM 01234   LocationTest	Demo 0/1 K_1   TEST_Team 1 7:00 AM - 1:00 PM 01234   LocationTest		

## Release notes – Serviceware Resources 8.4

### 1.3 New employee properties to support the scheduling processes

#### 1.3.1 Set schedule function on employee-contract level

On employee-contract level it is now possible to define the schedule function. This schedule function is completely separate from the 'function' property that already existed on employee-contract-extension level, and is only used in the new scheduling module and when defining required shifts.

My teams > E Employee > Contracts >  
Edit contract

0000910  
9 Dellaartweg 9c  
2316WC Leiden  
Netherlands  
E Employee

General  
Number  
1  
Contract type\*  
Parttime  
CLA

Scheduling  
Function for scheduling processes  
PRI | Prikster

Validity  
Valid from\*  
21/01/2020  
Valid to\*  
31/12/2030

Competences  
136\_Competence 5  
Valid from  
21/01/2020  
Valid to  
31/12/2030  
And  
Competences  
136\_Competence 6  
Valid from  
21/01/2020  
Valid to  
31/12/2030

The schedule function cannot yet be imported together with the employee-contract. However, a schedule function can be assigned to an employee-contract from Serviceware Resources at any time, even if it is an imported contract. All schedule functions set up as masterdata can be selected.

#### 1.3.2 Define region at employee level

A 'region' can now be defined at employee level. The region determines which holidays apply to this employee. These holidays are then displayed for the employee on the schedule grid within the new scheduling module.

My teams > E Employee >  
Edit personal info

E Employee

Name  
Initials\*  
E  
First name  
Prefix last name  
Last name\*  
Employee  
Prefix partner name  
Partner name

Identification  
Employee number  
0000910  
SSN  
Gender  
 Male  Female  Unknown  
Date of birth  
mdd/yyyy  
Is of multiple births\*  
Unknown



Phone  
Home  
Email  
Private  
Additional  
Marital status  
Unknown  
Nationalities  
Languages  
Region  
Limburg

All existing employees will automatically receive the default region with the installation of version 8.4.0. If desired, this default region can be renamed via the masterdata section in the Code Blue admin module.

## Release notes – Serviceware Resources 8.4

If there are indeed different sets of holidays within your organization, additional regions can be created and the employees can then be re-routed to one of those new regions.

For imported employees, it must be allowed first in setting 36 that the region can be set from Serviceware Resources. Note that the region cannot yet be imported along with the employee.

36 Add/set information for imported employees  

**Description**  
Is it allowed to set/create additional information for imported employees from within Serviceware Resources? Note that information that was imported should never be edited in Resources, because it will be overwritten again after the next import. Also note that information that was added in Resources won't be sent back to the employee's source system.

**Allow adding additional**

- Addresses
- Contracts
- Phone numbers
- Email addresses

**Allow to set**

- Region

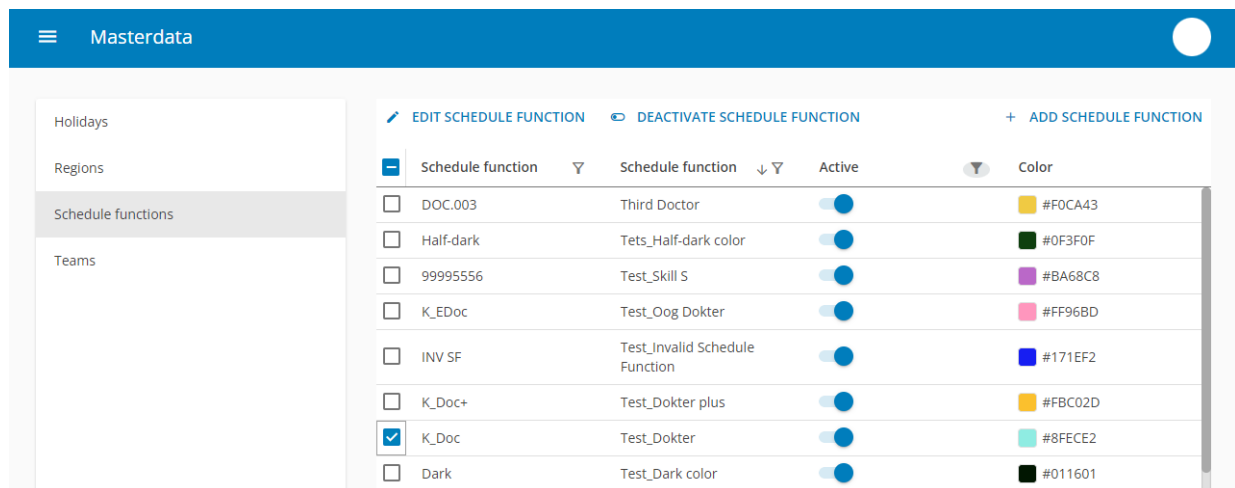
## Release notes – Serviceware Resources 8.4

### 1.4 New masterdata to support the scheduling processes

#### 1.4.1 Schedule functions

Schedule functions are used in the new scheduling module and also in the definition of required shifts.

For each schedule function, a code, name and also a color can be defined so that a link can easily be made in the scheduling module between the required shifts, where a certain schedule function is required, and the employees, who own a certain schedule function.



The screenshot shows the Masterdata interface with a sidebar on the left containing 'Holidays', 'Regions', 'Schedule functions', and 'Teams'. The main content area displays a table of schedule functions with columns for 'Schedule function', 'Active', and 'Color'. The table includes the following data:

<input type="checkbox"/>	Schedule function	Schedule function	Active	Color
<input type="checkbox"/>	DOC.003	Third Doctor	<input checked="" type="checkbox"/>	#F0CA43
<input type="checkbox"/>	Half-dark	Tets_Half-dark color	<input checked="" type="checkbox"/>	#0F3F0F
<input type="checkbox"/>	99995556	Test_Skill 5	<input checked="" type="checkbox"/>	#BA68C8
<input type="checkbox"/>	K_EDoc	Test_Oog Dokter	<input checked="" type="checkbox"/>	#FF96BD
<input type="checkbox"/>	INV SF	Test_Invalid Schedule Function	<input checked="" type="checkbox"/>	#171EF2
<input type="checkbox"/>	K_Doc+	Test_Dokter plus	<input checked="" type="checkbox"/>	#FBC02D
<input checked="" type="checkbox"/>	K_Doc	Test_Dokter	<input checked="" type="checkbox"/>	#8FECE2
<input type="checkbox"/>	Dark	Test_Dark color	<input checked="" type="checkbox"/>	#011601

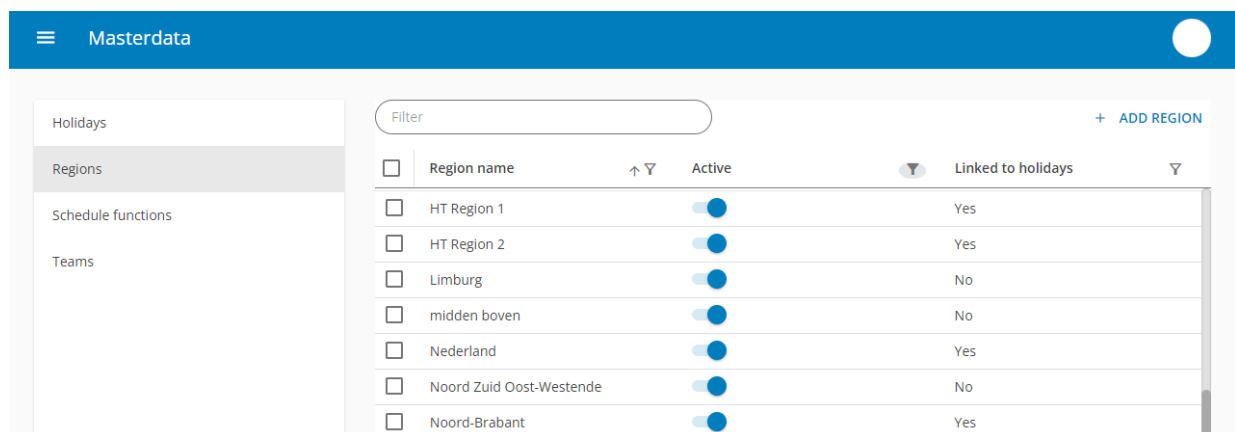
When a schedule function is no longer to be used, it can be set to inactive. The schedule function can then no longer be selected for a new employee-contract or a new required shift. This phases out the schedule function. An inactive schedule function does not invalidate an existing employee-contract or an existing required shift.

Note that schedule functions cannot yet be imported.

#### 1.4.2 Regions

Regions are used as a link between holidays and employees.

A region has only a name and a link to a number of holidays. To phase out a particular region, it can be set to inactive. For the included, default region this is not possible, as it is used for all new employees entering the system. However, the name of this default region can be changed if desired.



The screenshot shows the Masterdata interface with a sidebar on the left containing 'Holidays', 'Regions', 'Schedule functions', and 'Teams'. The main content area displays a table of regions with columns for 'Region name', 'Active', and 'Linked to holidays'. The table includes the following data:

<input type="checkbox"/>	Region name	Active	Linked to holidays
<input type="checkbox"/>	HT Region 1	<input checked="" type="checkbox"/>	Yes
<input type="checkbox"/>	HT Region 2	<input checked="" type="checkbox"/>	Yes
<input type="checkbox"/>	Limburg	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	midden boven	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Nederland	<input checked="" type="checkbox"/>	Yes
<input type="checkbox"/>	Noord Zuid Oost-Westende	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Noord-Brabant	<input checked="" type="checkbox"/>	Yes

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### 1.4.3 Holidays

In the masterdata section 'Holidays' all holidays can be defined. Here you can choose between 2 types: an actual public holiday or a so-called 'bridge day' (not an official holiday, but a day on which many people are free).

Furthermore, when creating a new holiday, you can specify whether it should be repeated annually. If this checkbox is checked, the holiday is immediately created for 7 years ahead on the same date. Note that in this case 7 separate holidays are created. Editing multiple holidays simultaneously is not supported. However, multiple holidays can be deleted simultaneously.

Finally, holidays and bridge days must be linked to a region. The holiday in question can be linked to one or more regions from within the holiday itself. But it is also possible to open a certain region and assign 1 or more holidays to that region from there.

Holidays that should no longer be used can simply be removed from the system. They automatically disappear from the regions to which they were linked.

The screenshot shows the 'Add holiday' dialog box in the Masterdata section. The dialog is titled 'Add holiday' and has a close button (X) in the top right corner. It is divided into several sections:

- General:** Contains a text input field for 'Holiday name\*' with the value 'Carnaval' and a dropdown menu for 'Type\*' with the selected option 'Public holiday'.
- When:** Contains a date input field for 'Date\*' with the value '2/2/2025' and a checkbox for 'Repeat yearly' which is currently unchecked.
- Link regions:** This section is divided into two panes:
  - Regions:** A list of regions including HANLAND2, HT Region 1, HT Region 2, Hessen DE, Limburg, Menorca, Nederland, and Noord Zuid Oost-Westende. The 'Limburg' region is currently selected.
  - Linked regions:** A list of regions that are linked to the holiday, currently containing 'Noord-Brabant'.

At the bottom right of the dialog, there are two buttons: 'CANCEL' and 'SAVE'. The background shows the Masterdata interface with a sidebar on the left and a table on the right with a 'Linked to regions' column containing 'Yes' entries.

### 1.4.4 Teams

Creating and managing teams has been moved from nextGen to the new masterdata section in Code Blue. Also, the property 'region' has been added to the team object.

This property is only used when defining a required shift series, to exclude certain holidays and/or bridge days when creating the individual required shifts. Which holidays should be excluded is determined via the region set at team level.

# Release notes – Serviceware Resources 8.4

laboratoria × + ADD TEAM

<input type="checkbox"/> Teams code	↑ ▾ Teams name	↑ ▾ Linked Region	▾ Parent	▾ External Source	▾ Valid from	▾ Valid to	
<input type="checkbox"/> LAB	Laboratoria	Nederland			1/1/2013	12/31/2099	
<input type="checkbox"/> LAB Noord	LAB Noord	Nederland	Laboratoria		1/1/2014	12/31/2099	
<input type="checkbox"/> LAB NW	LAB Noord-West	Nederland	Laboratoria		1/1/2014	12/31/2099	
<input type="checkbox"/> LAB Oost	LAB OOST	Nederland	Laboratoria		1/1/2014	12/31/2099	
<input type="checkbox"/> LAB West	LAB WEST	Nederland	Laboratoria		1/1/2014	12/31/2099	
<input type="checkbox"/> LAB Zuid-2	LAB Zuid	Nederland	Laboratoria		1/1/2015	12/31/2099	
<input type="checkbox"/> LAB ZW	LAB Zuid-West	Nederland	Laboratoria		1/1/2014	12/31/2099	

All existing teams will automatically receive the default region with the installation of version 8.4.0. Note that the region cannot yet be imported along with the team.

# Release notes – Serviceware Resources 8.4

## 1.5 Transfer and swap of published shifts by employees themselves

*This functionality is currently only available in combination with Serviceware Processes.*

From the 'My team schedule' widget, an employee can submit a request to transfer a shift (or part of a shift) planned for him to a colleague. If necessary, he can then transfer another shift of that colleague back to his own schedule. This is referred to as swapping a shift. It is also a possibility to offer a shift to the entire team.

The screenshot displays the 'My Team Schedule' interface. A calendar grid shows shifts for various colleagues from Monday, July 1st, to Sunday, July 7th, 2024. A specific shift for 'Me Myself' on Thursday, July 4th, from 6:00 AM to 12:00 PM is highlighted. A 'Request shift transfer' modal is open, showing details for the offered shift: Thursday, July 4, 2024, Team JDK\_12 | Helpline, Shift FLO\_123 | 6:00 AM-12:00 PM. The user has selected 'Part of shift' and specified a transfer from 6:00 AM to 9:00 AM. The reason provided is 'Could you please take over the first half of my shift?'. The shift is being offered to 'Mo Adourian' as an employee. A 'FLO\_123' popup provides additional details: Thursday, July 4, 2024, 6:00 AM - 12:00 PM | Work | HGC, HGC | Heeg GZentrum, Tolleweide 113, 8621 CX, Heeg, Team Helpline, Contract number 0001500/1, and Description Test.

Because transferring and swapping shifts basically always requires the approval of the scheduler or manager, this functionality was built in cooperation with Serviceware Processes, where this approval workflow can be set up completely as desired.

The approval or rejection itself is done via a widget on the Serviceware Portal.

## Release notes – Serviceware Resources 8.4

### 1.6 Effects on other parts of the application

#### 1.6.1 Employee pickers on all planning boards

When working with the different statuses 'draft' and 'published' in the new scheduling module, this will affect the employee pickers on all planning boards in both classic and nextGen, as these now only show employee schedules on dates that have been published.

Note: Publishing is per day and per team. Therefore, it is possible that for team A, a certain date is already published while for team B this is not yet the case.

#### 1.6.2 MRO

As a result of allowing overlapping times between a work and a standby shift, see §1.1.9, the following has changed for the MRO popup:

If two shifts of type 'work' and type 'standby' on one day, for 1 employee-contract, overlap with each other, the standby shift is ignored in its entirety in the MRO popup. It is then not shown there.

If the times do *not* overlap between a work and a standby shift on the same day for the same employee-contract, then both shifts are visible in the MRO popup. The standby shift is unchecked by default, as before. Nothing has changed here.

Is there only a standby shift for an employee-contract on a certain date? Then also the standby shift is shown in the MRO popup. Again, nothing has been changed for this scenario.

#### 1.6.3 Widget changes

The 'My schedule (teaser)' widgets and the 'My team schedules' widget have been adjusted to only show shifts on published days. When still working with the classic scheduling module, all days are considered to be published immediately, so also then it will still work correctly.

In addition, additional information is now shown at a scheduled shift, such as the name and address of the location that can now be attached to the shift via the new scheduling module, and any comment placed at the shift is shown as well.

Finally, also pinned employees are now visible to colleagues from that same team in the 'My team schedules' widget.

#### 1.6.4 Mobile apps

The scheduling module in the mobile app(s) has also been updated to reflect the new features in the scheduling module. For more details, see §3.1.

## Release notes – Serviceware Resources 8.4

### 1.7 What can't be done yet?

The new scheduling module provides a good basis for further developments. We mainly want to give the employee more control, with new widgets around picking shifts and, for example, reporting absences. Many preparations have already been made for this, but these widgets are not yet part of this 8.4 release. The exchange of shifts from a widget has already started, see §1.5.

In addition, the new scheduling module is meant to replace the current scheduling module in the classic part of the web application in the near future. In 8.4, however, the classic module can still be used if desired. This is mainly because the new module does not yet offer all the functionalities available in the classic module. In the new scheduling module, it is not yet possible to save and load a basic schedule and it is not yet possible to copy scheduled shifts. Also missing is the functionality around CLA checks.

However, mixing the classic and the new scheduling modules is not an option. If necessary, the scheduling module in classic can remain 'on' during the transition phase to the new module, but this should be purely for viewing purposes. Creating and editing shifts should always be done in one of the two modules, never in both.

## 2 Improvements and fixes in the web application

### 2.1 Session admin

#### 2.1.1 Remove service from session in bulk adds it to sessions without by mistake

When trying to remove a certain service from multiple sessions at the same time (bulk edit), the service was correctly removed from sessions that indeed had this service, but at the same time the service was also *added* to the sessions that didn't had this service before. This is solved now.

#### 2.1.2 Services are missing after changing the session times in bulk

When a session was modified using a bulk action, and the new session times (e.g. 14:00 – 17:00) were completely outside the original session times (e.g. 12:00 – 14:00), then the specific service times of all the included services got lost because they didn't fit in the new session times anymore. And without a specific service time, a service is no longer part of the session.

We fixed this issue for the standard scenario: whenever a service is added to a session that runs from 12:00 – 14:00, then the specific service times for that service are by default also set from 12:00 – 14:00. If these specific service times are still equal to the session times when the session times are changed, then we now assume that the specific service times for this service still needs to be equal to the session times, but now to the new ones.

However, when the specific service times of a service are *manually changed* into something else than the default (e.g. from 12:00 – 12:15 in a session that runs from 12:00 – 14:00), then it's not so clear what to assume. In previous versions, this time block would have been **deleted** after a change of the session times to 14:00-17:00 and with that, the particular service would not be part of the session anymore. From this version onwards, we changed this. A service that's left with no specific service times at all anymore after changing the session times, is now **automatically re-linked to the session again**, with specific times that cover the entire session. This way, at least no services get 'lost' anymore after an edit-in-bulk action.

#### 2.1.3 Filter on specific day(s) of the week not remembered after an edit action

When the table in the session admin module was filtered on a specific day of the week, it could happen that the filter was 'lost' after an edit action was performed on a certain session. After the edit action, the session overview was reloaded, but without the weekday filter being applied again.

This issue has been resolved. Even if the blue 'search' button at the bottom of the search panel is used while the dropdown list of the weekday filter is still open, the checked weekdays are now correctly included and remembered, also after an edit session action.

#### 2.1.4 Period setting was always reset after adding a session

When a specific period was entered in the search panel in the session admin module, and a new session was subsequently created, the period in the search panel was always reset to the current week, even if the (start) date of the newly added session did not fall in the current week.

This has been changed. When the start date of the new session falls within the set period, the period stays untouched. When the new session does *not* fall within the set period, the period is adjusted to the first week from the start date of the new session, so that the just created session will always be in view.

## Release notes – Serviceware Resources 8.4

### 2.2 Session planning board

#### 2.2.1 Appointment block: Show client name first, times on 2nd row

By popular demand, the order of the information on the appointment block on the session planning board has been changed. Instead of the appointment times, the client's name is now shown first, at the very top. This keeps it legible at all times, even with zoom levels of 30 or 60 minutes when the appointment is usually only shown on 1 cell.

13:15		12:30	
13:20	Dhr. D. Duck 13:20 - 13:40	13:00	Dhr. D. Duck 13:20 - 13:40
13:25	0033280H   9-6-1934	13:30	
13:30	ONLINE   ONLINE-Or	14:00	
13:35	TD1T2A	14:30	
13:40	Subject of Donald Duck	15:00	

#### 2.2.2 Searching for sessions, based on a collection of employees

On the session planning board, it was already possible to search for sessions on which a specific employee was planned. This functionality has now been expanded so that also multiple employees can be specified in the search panel. The result of such a search is that it finds all sessions at which at least one of the specified employees is planned. All other sessions are hidden from the top grid of the planning board.

In the example below, the grid shows only those sessions where at least Bastiaan Bosch is scheduled OR Ben Hofman OR Felecia Adriaense. A session on which, for example, Bastiaan Bosch AND Jan Jansen are scheduled, will also be found.

The screenshot shows the 'My planning' interface for 'ONLINE' sessions. On the right, a search panel is visible with the following fields and options:

- Service: [Search]
- Location: [Search]
- Client: [Search]
- Employee:  Bastiaan Bosch,  Ben Hofmann,  Felecia Adriaense
- From: 24/03/2024, To: 14/07/2024

The main grid displays sessions for Week 17 (25 Apr - 30 Apr) and Week 18 (1 May - 7 May). The grid shows sessions for SKN, HJ\_R1, and BLD-L1 locations. A session for HJ\_R1 is highlighted in blue, indicating it matches the search criteria.

The same change has been made to the search panel in the session admin module. From now on, you can also search there for sessions based on multiple employees.

In addition, not quite the same but similar changes have been made to the 'Appointments to be planned' overview. See section §2.4.1.

## Release notes – Serviceware Resources 8.4

### 2.2.3 ‘Arrived’ indicator (dis)appeared randomly on the appointment block

There was a problem with the little 'puppet' icon that is shown on an appointment to indicate that the particular client has arrived. When the appointment was set to 'arrived', sometimes the icon would appear immediately, but sometimes it would not, and then it would not be displayed again until the planning board was refreshed (either manually or automatically after every 30 seconds).

The problem has now been found and fixed. The icon is now shown again consistently after the appointment is set to 'arrived'.

### 2.2.4 Today's sessions are automatically scrolled to 'now'

After a refresh action (F5), all sessions that were open on the lower half of the planning board were always scrolled all the way back to their start time. This has now been changed for sessions that take place on the current day: they are now automatically scrolled to the current time after a refresh action, and upon opening such a session.

## Release notes – Serviceware Resources 8.4

### 2.3 Planning using the PSE

#### 2.3.1 PSE suggestions now sorted on start time, instead of on location(room)

When in multiple rooms (e.g. 2), there were similar sessions set up, that (partially) overlapped in time while both took place at the same main location, the suggestions returned by the PSE were always sorted by room. This meant that all suitable time slots for room 1 were always suggested first, before suggestions were shown for room 2, even if the options in room 2 were earlier in time.

We have now changed the order of the appointment suggestions so that they are sorted by the suggestion's start time. The suggestion with the earliest start time is thereby shown first, regardless of which room it is on. This is especially more logical when the sessions involved are not completely empty anymore, but just a few time slots are left.

However, to avoid that the PSE now always suggests the same time slot twice (in case of 2 rooms), an option has also been added with which suggestions on exactly the same **date+time+mainLocation** as other suggestions will score lower, or even can be left out of the suggested options all together. This option is available as a new "penalty" in setting 25:

Penalties

Penalty for suggestions on the same location as other suggestions [0-20]\*  
0

Penalty for suggestions on the same date+day part as other suggestions [0-20]\*  
0

Penalty for suggestions on the same date+time+location as other suggestions (only room differs) [0-20]\*  
1  Don't offer such suggestions at all

When planning an *appointment combination*, the penalty (if > 0) is applied to each individual appointment that will be planned. If it is chosen not to offer identical suggestions (where only the room differs) at all, then in the case of appointment combinations, the entire combination will not be suggested.

#### 2.3.2 Force the use of preferred employees while planning via the PSE

Until now, in setting 26, it was possible to determine whether a checkbox at the 'preferred employees' field was available on the first page of the Plan Suggestion Engine (PSE) or not.

When the checkbox was available, the user could indicate that the appointment must be planned at one of the preferred employees. So, by checking the checkbox, the *preference* effectively changes into a *requirement*.

Based on customer feedback, there are now more options available for this checkbox than just showing and not showing. It is now also possible to show the checkbox and have it automatically checked by default. Additionally, the checkbox can also be displayed as checked but read-only at the same time. This can force the appointment-to-be, to always be planned at one of the preferred employees.

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26 GUI configuration of the wizard

Description  
Configure the GUI preferences for the session appointment generator wizard and specify which day parts will be available.

Input pages  
Pregnancy related services

Show activities field  
 Yes  No

Show 'Fasting required' check box on input page  
 Yes  No

Show duration field  
 Yes  No

Show preferred employees field  
 Don't show  Show, with checkbox unchecked  
 Show, with checkbox checked  Show, with checkbox checked and disabled

Make contractor required for 'create new' scenario

My clients > HJacoe >  
Plan appointment | Page 1 of 3

Client Name\*  
HJacoe

Personal info  
0013026 | 1/1/2020

Notes  
Client notes  
Background  
Specific disorder X  
1/1/2022 - 12/31/2030

Services (1)  
+

Service 1: 771\_New Service  
Service of the selected client\*  
771\_New Service

Order info  
0089210 | 4/24/2024 - 5/31/2024 | 30 min

Activities

Duration  
0:30

Subject  
test order

Description

Preferred employees  
Anna Doctor  
Christof Doctor  
 Must be planned at one preferred employee

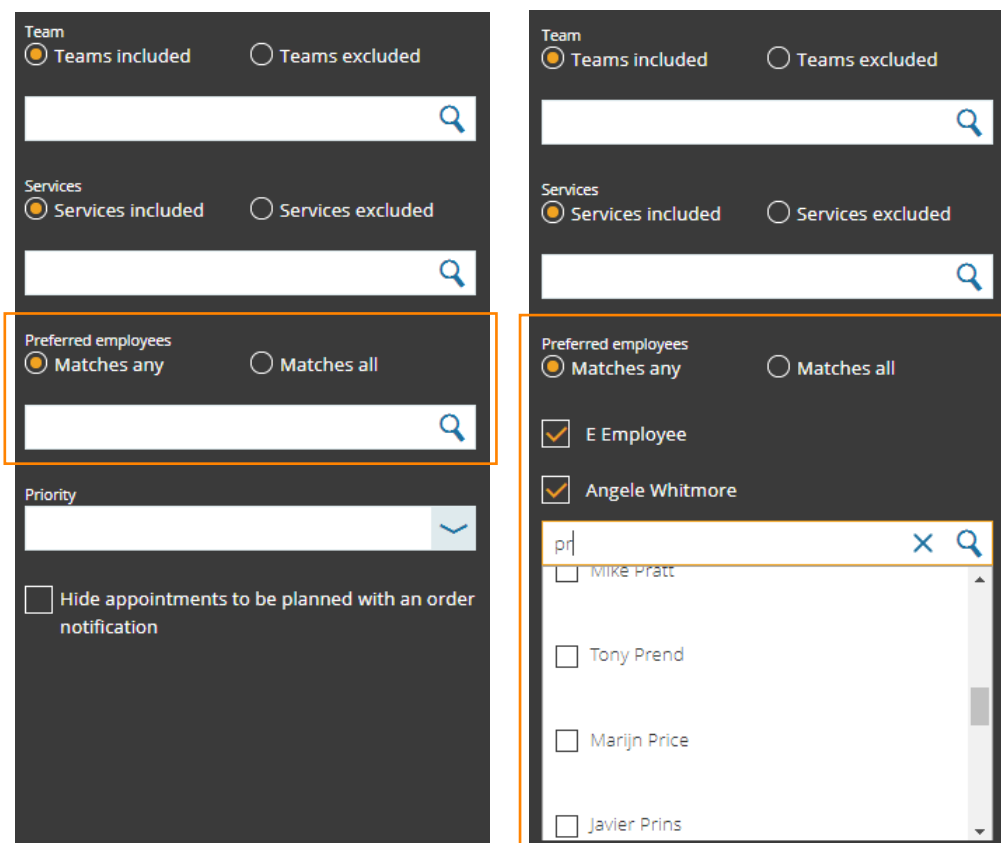
## Release notes – Serviceware Resources 8.4

### 2.4 Appointments to be planned

#### 2.4.1 Search order using preferred employees

On the 'Appointments to be planned' overview, an option has been added in the search panel that allows searching for orders based on the preferred employee(s).

When multiple employees are entered in the search panel, the 'Match any'/'Match all' switch allows you to choose whether the orders should have (*at least*) one selected employee as preferred employee or *all* of the selected employees. Orders for which no preferred employee is known, not even at client level, won't appear in the results.



#### 2.4.2 Pending and sent messages: number of results increased to 10000

Until now, the list of notifications ("pending and sent messages") always showed a maximum of 250 messages. The logic behind retrieving the message has been accelerated and also somewhat "smartened," so the maximum number of messages can now be increased to 10000.

If very few search criteria are provided at a time when the system is quite busy, it can still happen that the loading of results takes (too) long. To improve this further, another (somewhat more drastic) improvement is planned for the next version.

#### 2.4.3 Addresses with a validity of 1 day couldn't be saved in nextGen

When adding or editing a client-, employee- or location address in nextGen, it wasn't possible to save the address if the address validity was just a single day. This issue has been fixed.

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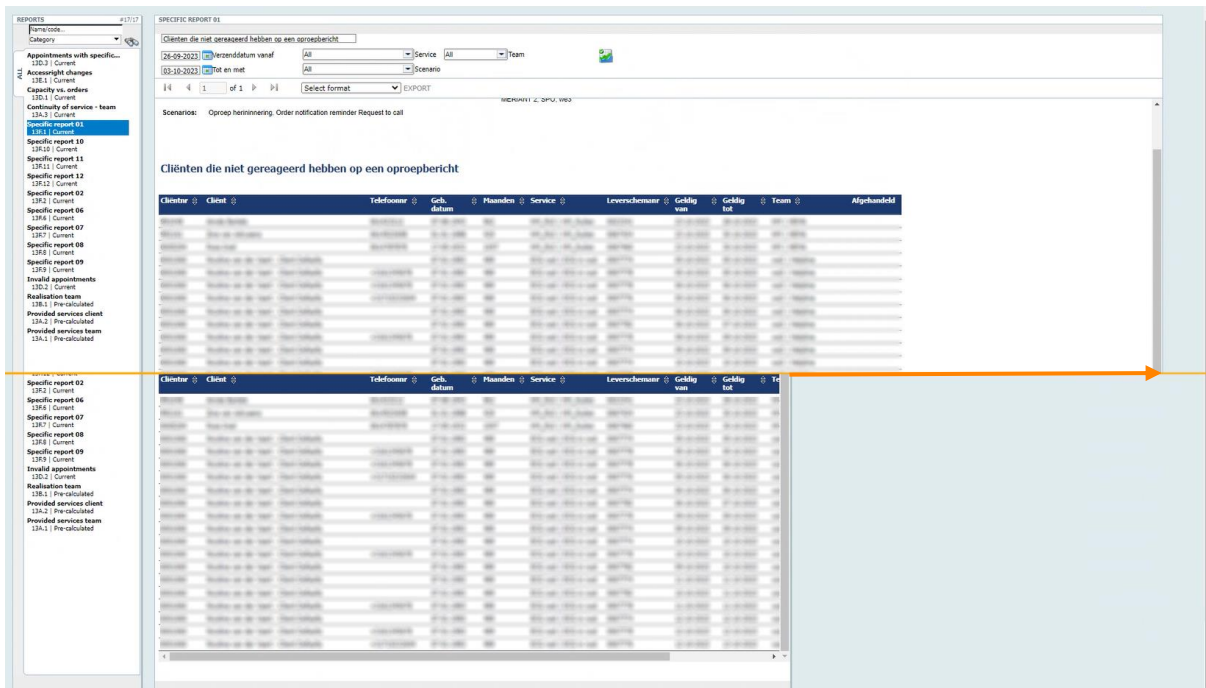
### 2.4.4 Wrong date format in dynamic forms section of admin module

In the forms section of the admin module in nextGen, the 'added on' date was shown in an English format despite the browser being in Dutch. This has been fixed.

## 2.5 Classic bugfixes

### 2.5.1 Reports module now makes better use of available screen width

Until now, the reports module in the classic part of the application used a rather "old-fashioned" width for displaying reports. This has now been changed so that this module can make better use of the actual available space. As a result, extensive reports now require less scrolling horizontally.



### 2.5.2 Planner notes sometimes could not be viewed, edited or deleted

When a planner note was created by an employee of which the contract has since expired, that note could no longer be viewed, edited or deleted by another employee. This issue is now fixed. If the note was indeed created by an expired employee-contract, a '-' is now shown as the name of the note creator.

### 2.5.3 Planner notes were shown multiple times

A planner note at appointment level was shown multiple times in the info panel after being created. There appeared to be a relationship with how many planners had already read the note. This link with the number of planners has now been removed, so the message is just shown once again.

### 2.5.4 Alternative client address created in nextGen not removable via classic

When an alternative address was created for a client in nextGen, this address could not be deleted from the client module in classic. This has been solved. Deleting is now possible from both nextGen and classic.

## Release notes – Serviceware Resources 8.4

### 2.5.5 MRO&SRO popup

#### 2.5.5.1 MRO popup does not open when an address is missing for a client

It can happen that for certain clients no address is known in SW Resources. When such a client then appears in the collection of clients that the MRO tries to show in the popup, this resulted into problems. In that case, the MRO popup would not open at all.

To prevent 1 missing address from stopping the entire planning process, now, when opening the MRO popup, the address from setting [R052: Address for office tasks or clients without address](#) is used as a safety net. The client where the address is missing will then get the address set in that setting during that MRO run.

#### 2.5.5.2 Competences on location level were not taken into account by the MRO

When a required competence was defined for a particular location, the MRO then ignored this competence requirement. This could result in the location being planned at an employee who did not possess the required competence. This problem has been solved. The MRO now takes the competences on location level into account again.

## Release notes – Serviceware Resources 8.4

### 3 Mobile application

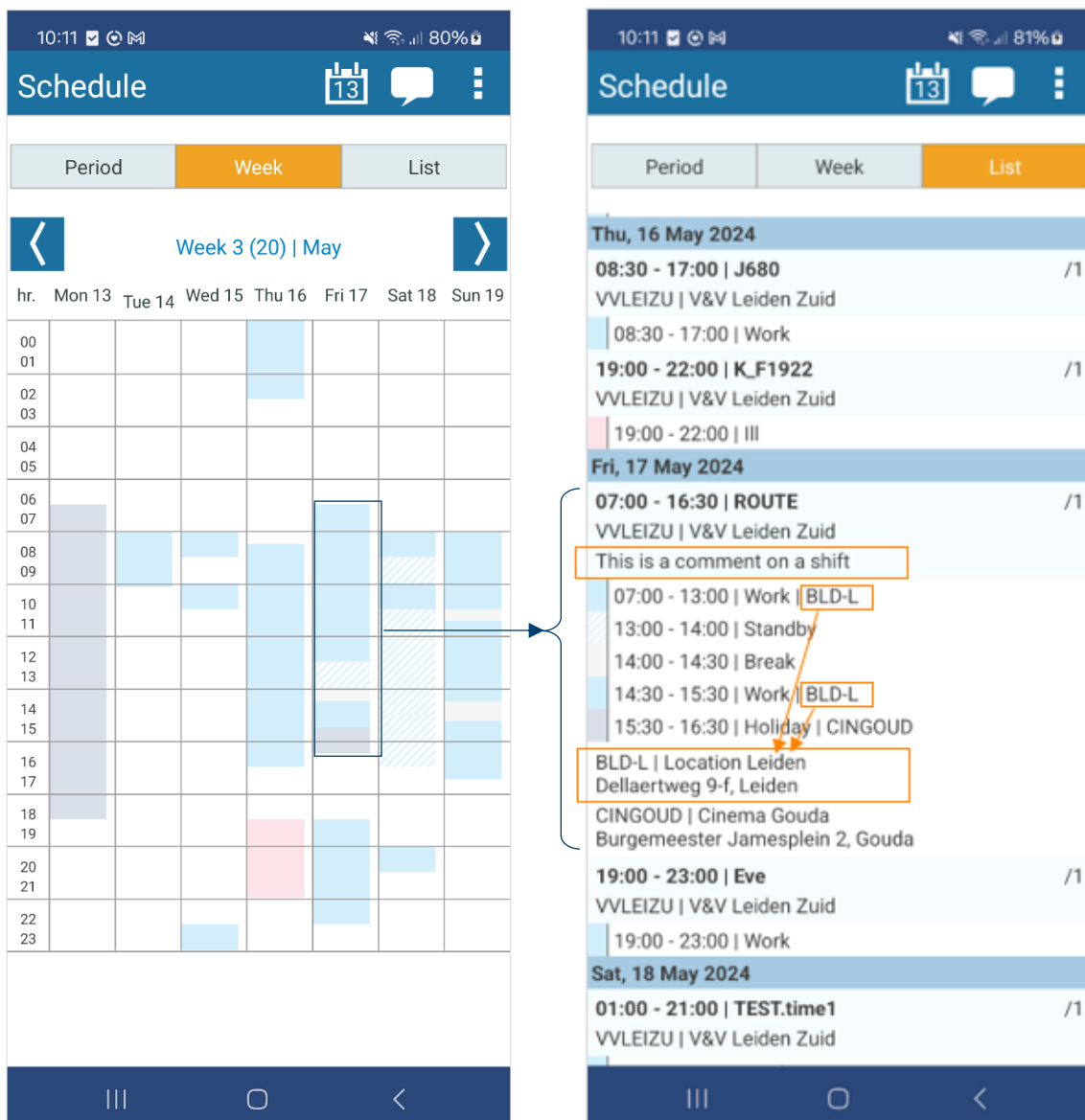
#### 3.1 Improvements in the scheduling module

*Available with SW Resources 8.4 and up + Mobile Service 8.4 and up*

Following the new options in the new scheduling module in Serviceware Resources 8.4, the scheduling module in the mobile app has also been updated.

Firstly, schedules will only be shown in the mobile app if the date has been **published**. In addition, the **team** for which it is scheduled is now also shown per shift, and when there is one the shift **comment** is also displayed. If a **location** is linked to (part of) the shift, this is displayed per time block. The name and address of the location(s) are listed at the bottom of the shift.

Finally, an option has been added for employees with **multiple contracts**, which allows them to combine the schedules for all their contracts in one overview (on the list tab). If this option is enabled, the contract number (e.g. /1) on which the shift is scheduled is shown.



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### 3.2 ‘Enrichment-on-demand’ for session appointments

Available with SW Resources 8.4 and up + Mobile Service 8.4.0 and up.

It is now possible to define *for each order* whether it should be enriched or not. In the 'enrichment', which is carried out after an order is planned but before the order is actually executed, the appointment information is supplemented with additional information. In a laboratory scenario, this is for example information about which tubes needs to be filled during the blood-withdrawal appointment. The employee then can see at the appointment in the mobile app which tubes need to be filled and how many of each type.

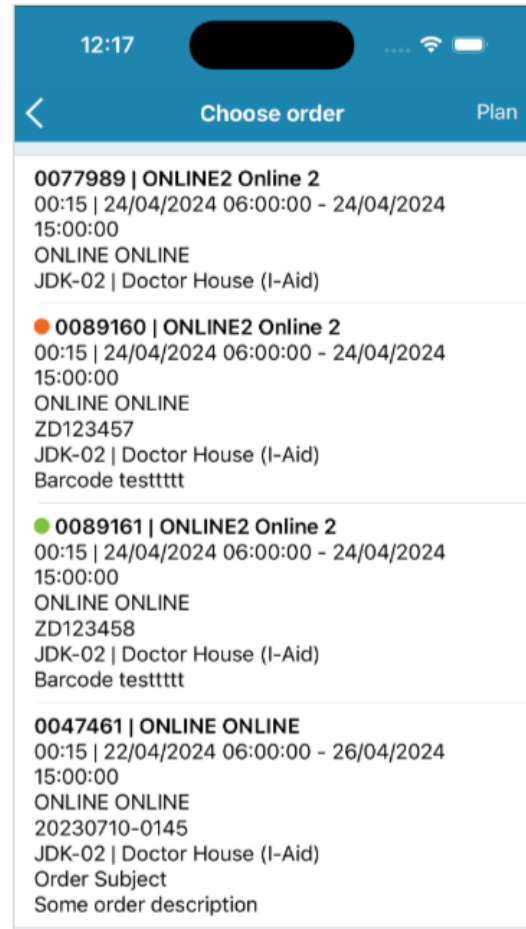
Sometimes the order has not yet been planned, but the client still needs his blood to be taken. In such a 'walk-in scenario', the order is not yet enriched.

Because it is now determined at order level that the order needs to be enriched, and because we keep track of whether the order is already enriched or not, we can now also perform the enrichment, exactly when needed, when selecting the order from the mobile phone. In this way, the employee also has the correct information in walk-in scenarios.

The picture on the right illustrates:

- Order needs to be enriched, but isn't yet
- Order needs to be enriched, and has been already

No mark means that it isn't known for this order if it should be enriched.

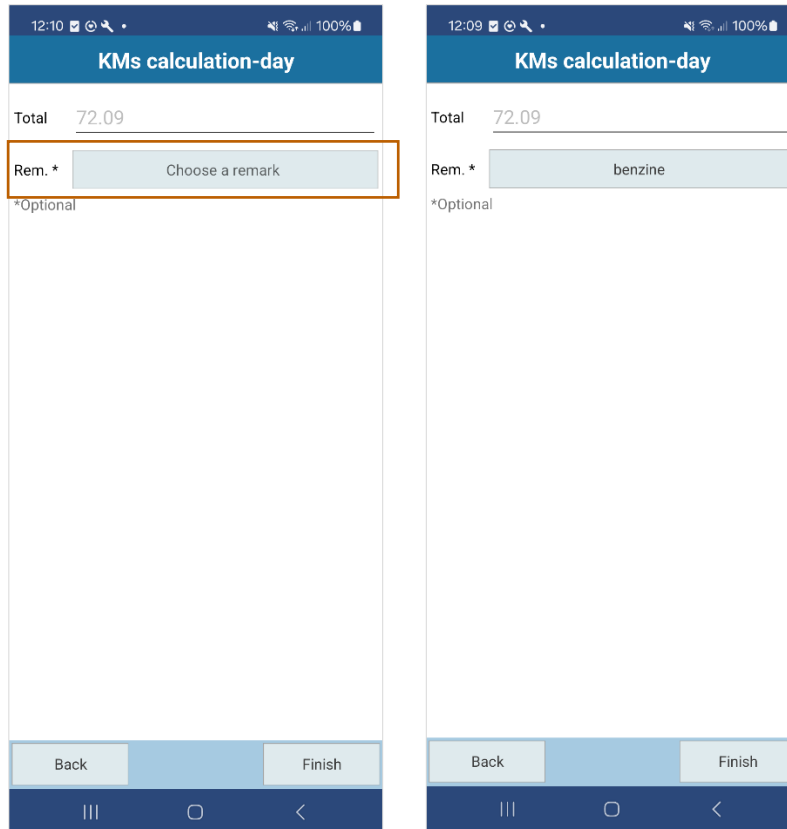


## Release notes – Serviceware Resources 8.4

### 3.3 Option to add a remark to automatic kilometer registrations

When, at the end of the working day, the automatic kilometer calculation is started on the mobile phone, a remark field is now added to that page. The remark entered here will, after saving, be added to each cost registration resulting from the automatic kilometer calculation.

In this way you can easily add for example for each trip on that day what vehicle and/or fuel type the trip was driven with. Of course, the comment per trip can be changed or deleted afterwards.



The last remark entered on this screen is remembered and already filled in when the next time an automatic kilometer calculation is started (e.g. on the next day). This is just a convenience. Of course, you can always enter a different remark.

## Release notes – Serviceware Resources 8.4

### 3.4 Optimizations for searching clients - setting 60 extended

Available with SW Resources 8.4 and up + Mobile Service 8.4.0 and up.

Setting 60 has been expanded with 2 options to improve client and/or order search in the mobile apps:

1. **Search optimization:** Searching for orders can be accelerated by defining the structure of the most commonly used order numbers in this setting. This so-called 'regex' defines for example, that an order number always starts with the letters 'ZD' followed by 6 characters. When a search term meets 1 of the specified regexes, then the search will only be performed on order number and not on all other checked properties from setting 60, such as BSN, date of birth or client number. This gives the user significantly faster results on his search.

Order numbers that do not fit within one of the defined regexes will still be found; the search is then performed as usual within all checked properties.

60 Searching for clients

Description  
When searching for a client in the mobile apps, which properties may be included in the search? Please be aware that the App Pool of the mobile API must be recycled after changing this setting.

Searching for clients

<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Address
<input checked="" type="checkbox"/> Complete client number	<input checked="" type="checkbox"/> Date of birth
<input checked="" type="checkbox"/> Part of client number	<input checked="" type="checkbox"/> Year of birth
<input checked="" type="checkbox"/> SSN	<input checked="" type="checkbox"/> Order number

Search optimization  
Please define the expected order number formats (regex) that can be used to speed up searching. Note that when a search term matches one of these regexes, searching will only be done on order number and not on any of the other above checked boxes anymore.

Order number regex

Order number regex  
 +

2. **Search filter:** When working on mobile with the 'Add and start' or 'Replace' functionalities, there is now an option to filter out clients created via the widget from the result so that only 'real' clients can be chosen.

Widget clients can be filtered out based on their external source, or based on the prefix preceding their client number. Multiple values of both can be specified.

## Release notes – Serviceware Resources 8.4

**Search filter**  
When using the 'add&start' or 'replace' functionality in the mobile apps, it's possible to filter out the clients that were created through the appointment widget. To do so, please enter the name of the source that's being used by the widget for new clients. It's also possible to filter out clients based on the client number prefix that's used by the widget.

Name of the source, used by the widget  
 +

Client number prefix, used by the widget

Client number prefix, used by the widget  
 +

### 3.5 Check on barcode uniqueness – now organization-wide using setting 76

In the previous mobile versions (the iPhone app 8.4.0 and the Android app 8.3.0), a setting had been added on the device that allowed a check of a scanned barcode for uniqueness to be turned on. By providing this setting on the device, it could be used immediately, even with older versions of Serviceware Resources. The downside, however, is that the check must be enabled on a per-user basis, and there is no way to verify that it is actually 'on' for everyone.

With Serviceware Resources 8.4.0, it is now possible to enable or disable this check centrally, and thus for the entire organization. This can be done using setting 76 in the web application. Once the mobile app is used in conjunction with SW Resources 8.4.0, the setting will no longer be available on the device.

The screenshot shows the 'My info' screen of a mobile application. The screen is divided into several sections: 'Contract' and 'System' (highlighted in orange), 'System info' (Internet: WIFI, Application version: 8.3.0, Environment: Demo), 'Language' (English), 'Change password' (Open your account page), 'Attachments' (Download automatically), and 'Barcode verification' (Verify duplicate scanned barcodes on same day, checked). The 'Barcode verification' section is highlighted with an orange border.

### 3.6 Scanning barcodes with external peripherals

If no barcodes are scanned with the mobile device itself but an external scanner (connected via Bluetooth) is used, then until now only one barcode at a time could be added, and only after selecting the input field. It is now possible, directly from the camera screen, to scan several barcodes one after the other and save them all in one go. In this way, the scanning process with an external scanner can be accelerated.

## **Release notes – Serviceware Resources 8.4**

### **3.7 Extra barcodes for barcode array can now also be validated**

It was already possible to add extra barcodes next to those that were required in a barcode array field in a dynamic form. But any extra barcode was accepted, regardless of any validation. It is now possible to explicitly specify validation that each of the extra barcodes must adhere to, or simply state that it needs to match with at least one of the configured match options in the forms. The existing dynamic forms in your organization need to be updated to make use of this feature.

### **3.8 Anonymous calling - now also from Android**

It was already possible to make anonymous calls from the iPhone app. Now this is also possible from the Android app. Users can enable this in the 'My info' section, on the 'System info' tab.

## Release notes – Serviceware Resources 8.4

### 4 Installation requirements

Below, the requirements for the installation of **Serviceware Resources 8.4** are listed. In order to make use of all the latest features, Serviceware Resources for iOS **8.5.0** and Serviceware Resources for Android **8.4.0** are advised.

- › For an update to version 8.4.0, the already installed version of Serviceware Resources should be minimal 8.3.0. For older versions of Serviceware Resources, extra steps need to be taken to be able to update to 8.4.0. 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
8.4	Serviceware Authenticator	8.3.1	8.4.0	8.5.0	8.4.0	4.2