



ServiceWare Resources 8.5

Release notes



Release notes – Serviceware Resources 8.5

Introduction

With Serviceware Resources 8.5 it is now possible to create registrations and fill out dynamic forms via a widget on our Serviceware portal or from within the web application. Thus, a first part of our mobile functionality is now also available from a PC.

This new 'My registrations' module also provides for the desire to be able to correctly register an appointment planned in room 1 to room 2, 3 or 4 of the same main location without a lot of additional actions. With this we hope to better support the processes at larger locations.

The web application has been expanded with a new search function that allows a system-wide search for a particular order or appointment. The result is the order, the appointment and also the completed form, which can be opened immediately for viewing. Of course, you can also navigate from the results to the relevant planning board or to the client's order page.

In addition to searching for 1 specific order, an 'All client orders' overview is now also available. This overview replaces the 'Appointments to be planned' overview from NextGen, but it also supports new searches. For example, it can be searched for all orders requested by a particular contractor or all orders originating from a particular protocol. Not only the orders yet to be planned can be found here, but also already planned and even already registered orders.

The scheduling module has been extended with the ability to offer a required shift that has not yet been scheduled to a group of employees so that they can pick it themselves. For this purpose, the 'shift picking' widget is now available on the Serviceware portal.

Finally, we have added 'Activities' as master data in the 'Code Blue' part of the application and for a number of objects the allowed number of characters has been increased for easier integration with other systems. Also, Outlook appointments can be imported and displayed as occupied time at the employee on the planning boards in SW Resources. Lastly, the bug fixes can be found in section §2.8.

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), or make a call to our Service Desk: +31 (0)715680310.

Leiden, April 30st, 2025

Serviceware Benelux

Part of Serviceware SE

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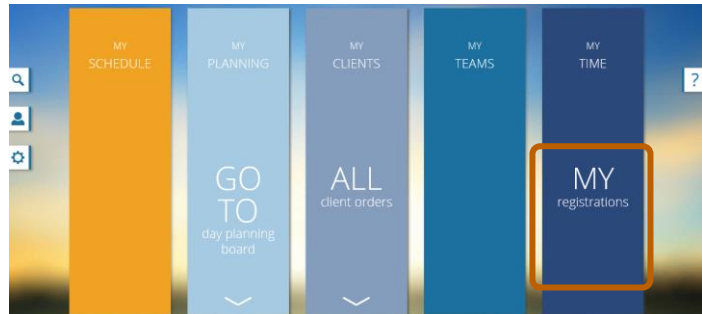
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1 'My registrations' widget: fill in forms via web

Until now, orders requiring a form to be filled out for registration could only be handled via our mobile apps. However, Serviceware Resources is increasingly being deployed at (hospital)locations as well, where employees are in one fixed place and usually work with a PC or laptop. This created a great need to be able to handle orders via a PC as well.

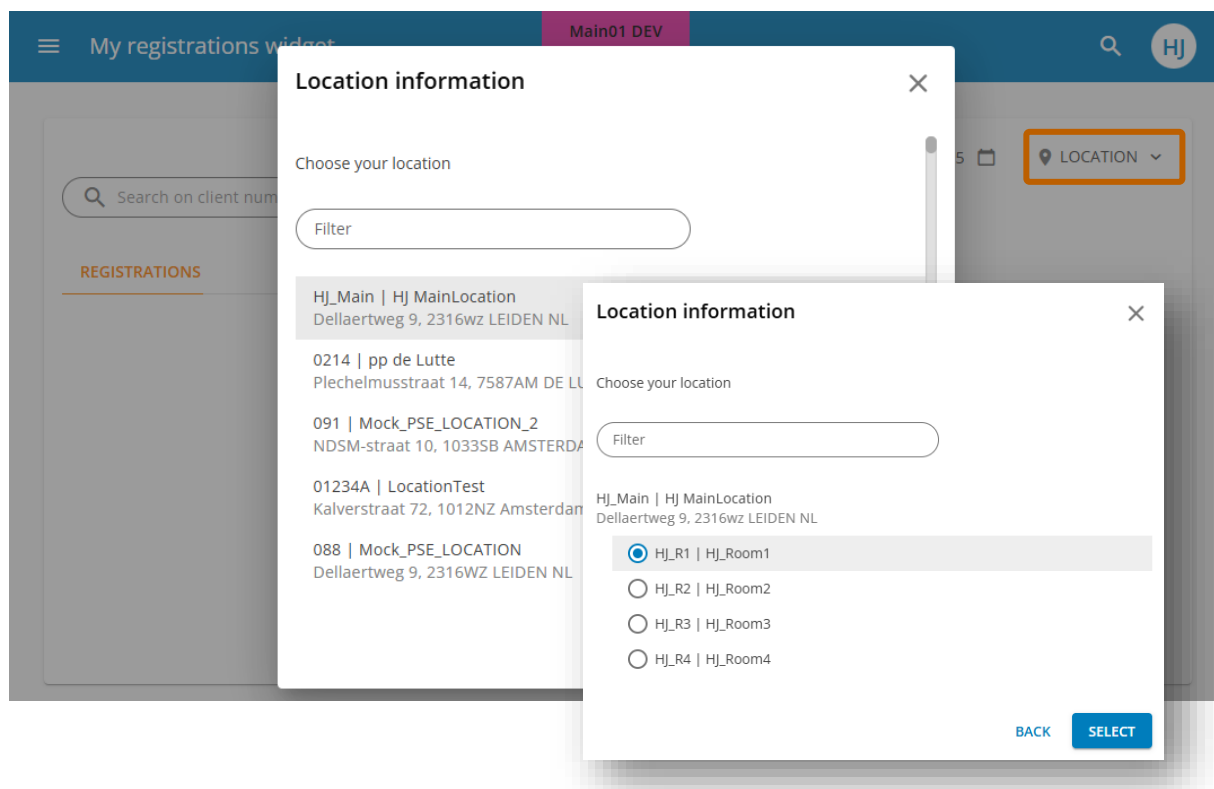
The new 'My registrations' widget meets this need. The widget is primarily intended for use from the Serviceware portal, but can also be opened from the SW Resources web application.



Choose location

When the employee opens the widget at the beginning of the workday, they will first be asked to choose the location at which they are working. The 3 last chosen main locations and rooms will be saved and shown at the top of the list in case the employee often works on the same location.

We assume that the location remains the same for that day, and so we do not ask for a location choice again until a new day. If the employee does switch to another location within the day, this can be changed at any time using the button at the top right. For subsequent orders added to the list, the newly selected location is then used in the registration.



Select contract

If the employee has multiple contracts, when opening the widget he will also be asked (once only) to select one of his contracts. The registrations the employee will make will then be linked to the selected contract.

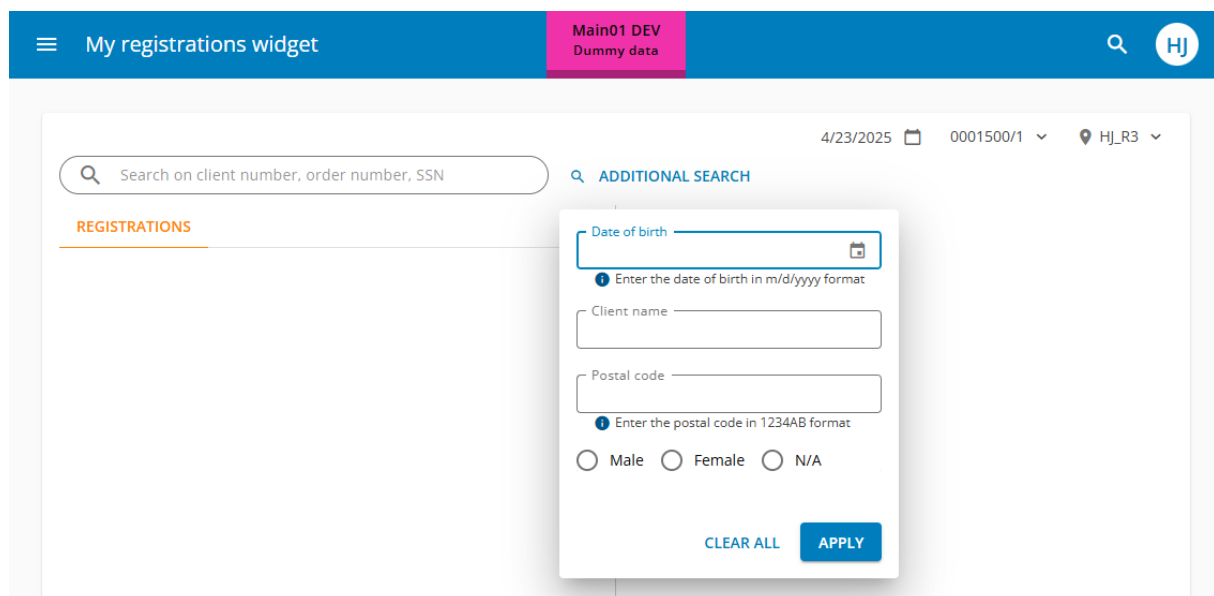
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Client search

Next, the widget still looks empty. This is because we do not (yet) display the initial planning for the employee, as is done in the mobile apps. Often the planning, especially at bigger locations, is not so important for the actual registration because the client is helped by one of the employees present in one of the open rooms, and often not exactly in the room where the client was planned. We have therefore chosen to focus first on the registration process itself.

The registration process begins by searching for the client that the employee welcomes in the room he is working in. In the search field at the top left, he enters the order number, the appointment code, the client number, the alternate client number (set up as a “tag” for some clients), or the client’s BSN. The search field can also be quickly provided with input by using a hand-held scanner that scans the order number, for example.

If none of these data are known because the client has just been transferred from elsewhere in the hospital, for example, and thus does not have an appointment and does not know an order number, there is still an advanced search option available. This always allows the client to be searched using his name and/or date of birth, possibly supplemented by zip code and gender.



The screenshot shows a web interface for 'My registrations widget'. At the top, there is a blue header with a menu icon, the text 'My registrations widget', a pink box with 'Main01 DEV Dummy data', a search icon, and a user profile icon 'HJ'. Below the header, the main content area has a date '4/23/2025', a location '0001500/1', and a room 'HJ_R3'. A search bar contains the text 'Search on client number, order number, SSN'. To the right, there is an 'ADDITIONAL SEARCH' section with a modal form. The modal form includes a 'Date of birth' field with a calendar icon and a hint 'Enter the date of birth in m/d/yyyy format'. Below it are 'Client name' and 'Postal code' fields, with a hint 'Enter the postal code in 1234AB format'. At the bottom of the modal are radio buttons for 'Male', 'Female', and 'N/A', and two buttons: 'CLEAR ALL' and 'APPLY'.

As a result, all clients are displayed that match the specified criteria. Depending on the search criteria used, one or more clients will be found. Usually only one is found which is automatically selected. With ENTER (or by clicking 'Next') one can quickly proceed to the next step in which the correct order must be selected.

Choose order

In case the initial search was on order number, the matching order is automatically selected in the order list. However, we also show other orders known for this client. This way, an employee can still decide to execute a 2nd order on the spot.

The list of orders is quite extensive compared to the list of client orders that we show at the 'add and start' functionality on mobile. We do not only show the currently valid, as yet unplanned orders, but we simply show all client orders within a configurable period (max 30 days in the past to max 30 days in the future).

Some of those orders have probably already been executed, some are not yet or no longer valid on 'today' and of course the order may not be allowed to be executed by the employee due to limited rights or because the employee does not have the required competencies.

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This is all neatly stated with the order. The reason for showing orders that cannot be selected is that in this way each order can always be found and it is then clear why no registration can be made on it.

If desired, the employee can change the filtering of the order list from all orders to only active ones. Then only the orders that can actually be selected will be shown. It may still be the case that when an order is finally selected, additional checks will still block picking up the order. All orders that do not match the initially entered search term are sorted by default on the start date of the order, but another sorting can be chosen in the configuration of the 'My registrations' widget. 'Out-of-scope' orders are always shown at the very bottom of the list. At the top, if necessary, it is also possible to search for a specific order within the list of orders, for example by service or contractor.

It can be configured which details are shown by default with each order. With the button 'Show more', more details of a specific order can be displayed.

The screenshot illustrates the 'Mijn registraties' (My registrations) interface. At the top, there is a search bar and a filter for 'Actieve orders' (Active orders). A search modal titled 'Zoekresultaten' (Search results) is open, showing a client selection screen with a highlighted entry for 'Mevr. H Jacoe' (22-12-2020, Elendstraat 12 333, 2518GD, Leiden, 00130261231234567890). Below this, two order detail modals are shown. The left modal displays a list of orders with a 'TOON MEER' (Show more) button highlighted for the first order (Order ID ZD2384729834 | 0090151, Service 088 | Bloed, Niet gepland). The right modal shows the expanded details for this order, including service information, team, requester, and duration, with a 'TOON MINDER' (Show less) button.

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Choose an order that is scheduled with a colleague

Furthermore, a registration can now also be started for orders planned at a colleague, thus making it possible to register in 'Room 1' a client who had an appointment in 'Room 2'. When that happens, the original appointment is automatically updated in the background to the session in Room 1, so that when registering, the executing employee is actually stored with the registration. The planned start time changes to the current time.

This functionality is not limited to sessions that take place simultaneously at the same main location. It is also possible to pick up orders that were originally planned at another main location and/or on another date at a colleague (or at the user himself).

It is even possible to start a registration for an order originally planned at a colleague on route, on the daily planning board. In these cases, the original appointment is deleted and an “unplanned registration” is created for the employee executing the order. These unplanned registrations are not visible on any planning board, although there is one exception:

If the employee *is working on a session during this unplanned registration*, then - for export purposes - the session plus the corresponding location are added to the registration as information. If desired, these unplanned registrations, i.e. those with a session link, can be made visible on the session planning board.

di 1 apr. | New in 2025

HJ_Room1

	Afname mw	
15:15		
15:20	Dhr. L Álvarez 15:20 - 15:30 0034256H 22-10-1941 ONLINE ONLINE O...	
15:25		
15:30		
15:35	Mw. L Everts 15:34 - 15:40	
15:40	Mw. A Correia 15:40 - 15:50 N90035368 2-9-1934 ONLINE ONLINE O...	
15:45		
15:50		
15:55		

Whether it is allowed to take over appointments from colleagues can be set. The period during which this is allowed and the type of appointments for which this is allowed can also be defined.

Starting the registration

Once one or more client orders have been selected, they can be added to the 'My registrations' list with 1 press of ENTER. This list, like the client and order list, can be operated entirely with the keyboard if desired.

What has just been added appears at the top of the list and is selected by default. The activities section is automatically expanded so that the tubes to be taken are immediately visible. If multiple orders for the same client are added in 1 action, the tubes for all those orders are immediately visible.

The form to be completed is immediately visible on the right. With TAB the focus jumps to the start button and with ENTER the registration can be actually started. The form can be completed from then on.

Filling out the form

For now, the form is displayed in a 1-column layout, as is common in the mobile apps. Because of this, all form definitions that are currently used on mobile can also be used in the 'My registrations' widget without any modification. In time, we plan to support a 2-column layout as well.

Barcode scanning is possible with a hand-held scanner connected via USB. Scanning multiple barcodes at once (a so-called 'barcode array') has also been made possible again via the widget.

A number of more advanced functionalities do not yet work. These include the 'signature' functionality, stopping registration while the form is still being edited and calculations performed with multiple fields within the form. The required tubes are displayed in the form in alphabetical order. This order cannot yet be configured.

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The screenshot shows the 'Mijn registraties' page. On the left, there is a registration card for 'Dhr. B Bouchard | 1-1-1988' with details like 'Order ID 0095654 | ONLINE2' and 'Aanvrager HT.V4 | Dr Revi van Hulten'. Below the card are 'Activiteiten' listed with barcodes and quantities. On the right, the 'DEMO FORM' is visible, containing sections for 'Gebruik materiaal t.b.v. wetenschappelijk onderzoek*', 'Vragen voorafgaand aan afname', and 'Afname prelabelled buizen'. A blue button labeled 'START SCANNEN' is highlighted with an orange box. At the bottom right of the form are buttons for 'RESETTEN' and 'VERSTUREN'.

The screenshot shows the 'Barcode scannen' modal window. It has a title bar with a close button. Inside, there is a 'Barcode' input field containing 'A12345678'. Below it, the 'Buizen' section shows '2 / 0 Gescande buizen' and a list of items: '400 - Grijs (DZ-barcode): Natrium fluoride 2 ml (GLUC) DZ12345678', '200 - Groen/Geel (BG-barcode): Lithium heparine 3.5 ml (LI-hep-C6) BG12345678', and '300 - Paars/Zwart (AJ-barcode): EDTA 3 ml (niet afdraaien) (Systmex)'. A red message 'Nog niets gescand' is displayed. The 'Afwijking' section includes a checkbox 'Akkoord met de afwijking' and a text area for 'Opmerking'. At the bottom are buttons for 'ANNULEREN' and 'BEVESTIGEN'.

Sending the form

While filling out a form, the information is temporarily stored in the browser. This is to overcome situations where the page is accidentally refreshed or the browser is closed before the form could be submitted.

After the form is completely filled out it can be sent. The registration is then automatically stopped. Afterwards, there is the possibility to edit the form and send it again, just as it was already possible on the mobile. It will be necessary to coordinate with our consultancy department how the export should handle this, because not all receiving systems can handle a form that is submitted for a 2nd time.

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View registration and form afterwards

The date picker can be used to navigate to a date earlier than today. On those days, the registrations made then and the corresponding completed forms can still be viewed. Up to how many days back one can still view registrations is adjustable.

Configuration of the widget

All settings around the 'My registrations' widget are bundled and can be found from the new admin section 'Widget configuration' in the Code Blue section of the web application.

The screenshot shows the 'Widget configuration' interface for the 'My Registrations Widget'. The page is divided into several sections:


- Left sidebar:** Contains navigation links for 'Start page', 'Scheduling', 'Planning', 'Registering', 'Clients', 'Employees', 'Locations', 'Administration', 'Admin classic', 'Masterdata', 'Masterdata nextgen', 'Settings', 'Widget configuration' (highlighted), 'Notification set-up', 'Forms', and 'Webhooks'.
- Header:** Displays 'SERVICEWARE', 'Widget configuration', and 'Main01 DEV Dummy data'.
- Settings menu:** Includes 'General settings', 'Order preferences' (selected), and 'Registration preferences'.
- Order preferences section:**
 - Searching for orders:** Includes checkboxes for 'Use same regexes as defined in setting 60 to speed up searching' and 'Use same filter as defined in setting 60 to filter out widget orders'.
 - Finding orders:** Includes input fields for 'Number of days before today for which expired order (moments) should still be retrieved and shown (between 0 - 30)*' (set to 3) and 'Number of days after today for which not-yet-valid order (moments) should still be retrieved and shown (between 0 - 30)' (set to 3).
 - Displaying orders:** Includes a dropdown menu for 'How to sort the order list by default' set to 'Order-moment start date'.
 - Info that is shown directly (without clicking on "View more"):** Includes checkboxes for 'External order number', 'Internal order number', 'Description', and 'Service provider'.
- Right sidebar:**
 - Allow taking over of already planned orders:** Includes a section for 'Allow picking up orders that have already been planned?' with radio buttons for 'Never', 'Only session appointments within same day, on same location', and 'Advanced...'. Below this is a section for 'Who's appointments may be taken over?' with radio buttons for 'Only appointments planned for me' and 'Appointments planned for me or my colleagues'.
 - Number of days before today from which appointments can be picked (between 0 - 30)*:** Includes an input field set to 3.
 - Number of days after today from which appointments can be picked (between 0 - 30)*:** Includes an input field set to 3.
 - Which types of appointments may be taken over?:** Includes checkboxes for 'Session appointments', 'Classic appointments', and 'No planning board' appointments (only exists on the calendar of an individual employee).
- Bottom right:** Includes 'UNDO CHANGES' and 'SAVE' buttons.

2 Wweb application enhancements

2.1 System-wide searching for order or appointment

From the new, 'Code Blue' section of the web application, it is now possible to search for a specific order or appointment using the search function on the blue bar at the top.

It combines old functionality from classic with new features, such as being able to navigate directly to the correct planning board, and being able to view the completed form with one click when the order is already registered. Being able to search for an appointment based on the appointment code is also new. Therefore, to find an appointment it is no longer necessary to first know the exact date and planning board on which the appointment is planned.

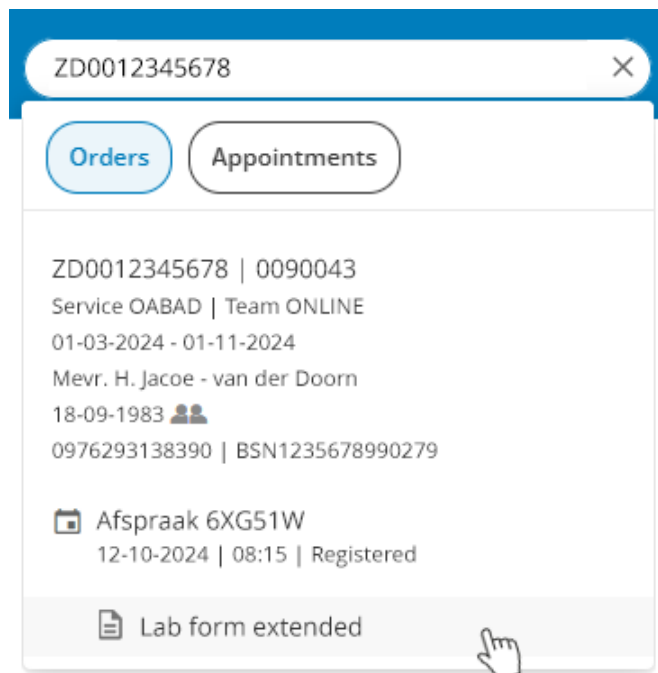
From the start page, the search button  on the left can be used to quickly jump to the 'Code Blue' part, and from there the search function in the blue bar at the top can be opened.

2.1.1 Searching by order number

To search for a specific order, either the entire external or the entire internal order number must be entered. Also, on the toolbar below the field the 'Orders' button must be activated.

Note: Search starts from the entry of a 3rd character. Orders created by the widget with order number '1' will therefore not be found. Use search by appointment code in such case, see §2.1.2.

A search is performed within all client orders that the user is allowed to view based on right 6 + all orders planned on a planning board to which the user has access. A search is performed within a period of 1 year in the past to 1 year in the future.



The result shows not only the order, but also the corresponding appointments (if any) and the completed forms (if order registered).

Setting 40 can be used to indicate whether the client's BSN should be shown in the result or not.

A click on the order opens the 'Orders' page of that client, where the order is selected. A click on an appointment opens the corresponding planning board on the planned date. The appointment will also be selected.

And a click on a form displays the completed form.

All navigation actions open a new tab.

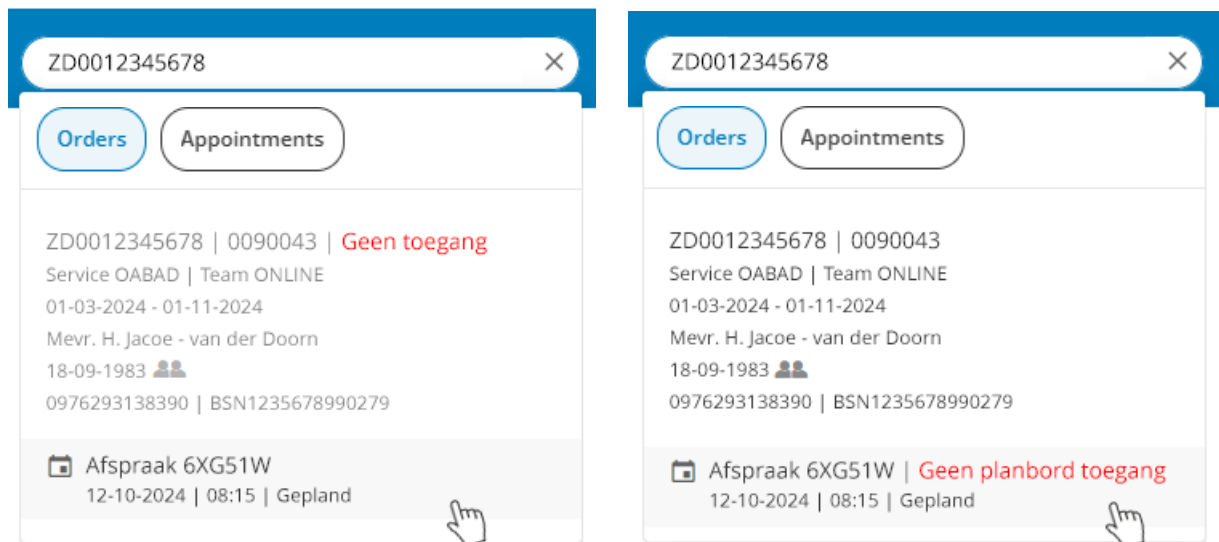
The system remembers which button (Orders or Appointments) each user last used. This button is automatically activated during the next search.

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In addition, the last result found is saved within the browser session, so that, for example, after navigating to the order, it is easy to navigate to the appointment without having to re-enter the order number.

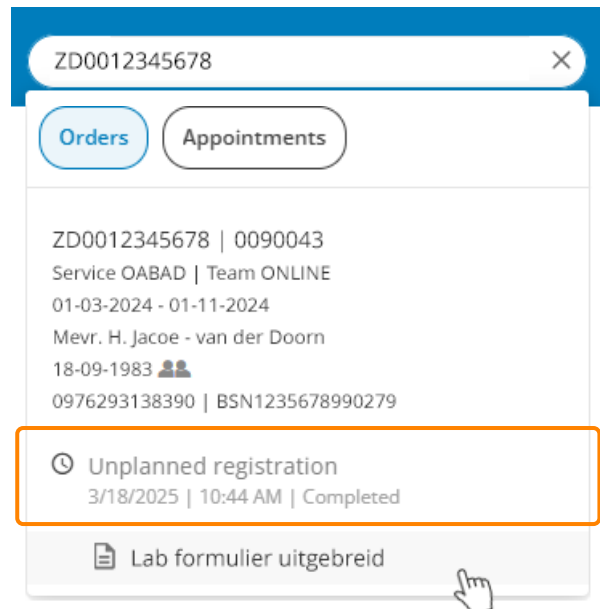
If the user does not have rights to the client via right 6, but does have rights to (one of) the associated appointments, they will be able to find the order, but will not be able to navigate to it.

The reverse is also possible. In that case, the order can be accessed, but the planning board on which the order is planned cannot be opened for this user. In that case, clicking on the appointment will open the *client calendar* instead of the planning board. A form can always be opened.



It can also happen that the user doesn't have access to both the order and the appointment. The system will indicate that the order exists, but no detailed information will be provided.

When a registration is created with the new 'My Registrations' widget on an order that was not planned, an 'Unplanned registration' will be displayed in the search results instead of the appointment.



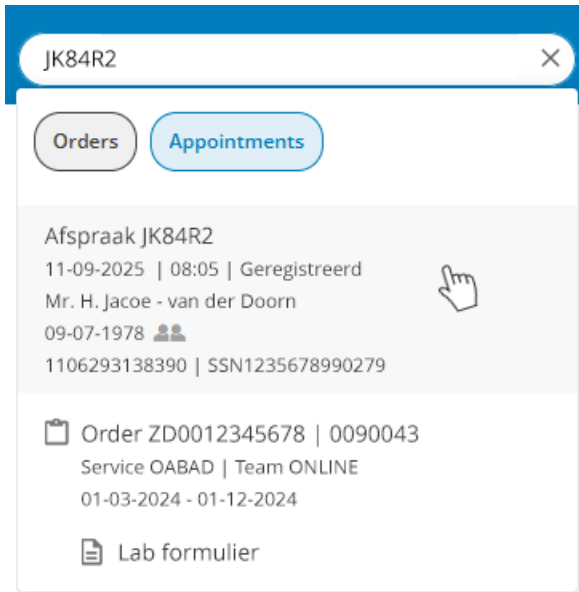
Every search action initiated from this search field is audited. The system records who searched, when, and which order number was used. The results found are also recorded.

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2.1.2 Searching by appointmentcode

To search for a specific appointment, the *entire* appointment code must be entered. The 'Appointments' button on the button bar below the field must also be activated.

The search will be performed within all appointments planned on a planning board to which the user has access + all appointments of clients that the user is authorized to view based on right 6. Here too, a search period of 1 year in the past to 1 year in the future is used.

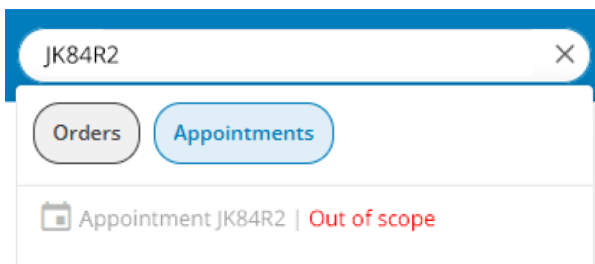


The screenshot shows a search interface with a search bar containing 'JK84R2'. Below the search bar are two buttons: 'Orders' and 'Appointments', with 'Appointments' being the active selection. The search results are displayed in a card format. The first card is titled 'Afspraak JK84R2' and contains the following information: '11-09-2025 | 08:05 | Geregistreerd', 'Mr. H. Jacoe - van der Doorn', '09-07-1978' with a person icon, and '1106293138390 | SSN1235678990279'. A hand cursor icon is positioned over the right side of this card. Below this card is another card titled 'Order ZD0012345678 | 0090043', which includes 'Service OABAD | Team ONLINE' and the date range '01-03-2024 - 01-12-2024'. At the bottom of the results is a card titled 'Lab formulier' with a document icon.

The result is the appointment, along with the order(s) or service contract(s) on which the appointment is based. If the appointment has been registered and a form has been filled in, this form will also be displayed here.

Clicking on an *appointment* takes the user to the planned date on the planning board on which the appointment is planned. The appointment is selected there. If the user does not have access to the planning board on which the appointment is scheduled, clicking on the appointment will take them to the client's calendar. Clicking on the *order* opens the 'Orders' page for the relevant client, where the order is selected. Clicking on a *form* displays the completed form.

If the user does not have the right to the appointment, either via the planning board or via the client via right 6, he will be informed that the appointment exists, but no detailed information will be provided.



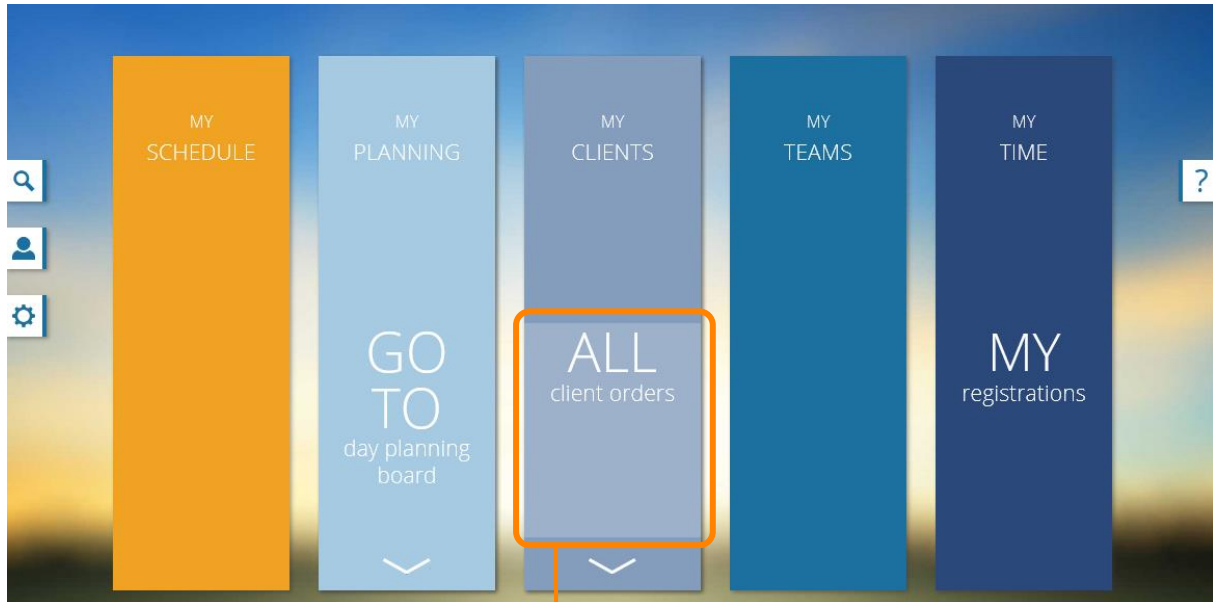
The screenshot shows the same search interface as above, but the search results are limited. The search bar still contains 'JK84R2'. The 'Appointments' button is active. The search results card is titled 'Appointment JK84R2 | Out of scope' and is displayed in a light grey color, indicating that the user does not have access to the appointment details.

Every search action initiated from this search field is audited. The system records who searched, when, and which appointment code was used. It also keeps track of the results found.

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2.2 'Appointments to be planned' overview has been moved and extended

The list of all appointments to be planned for clients within the user's scope has been moved to the new 'Code Blue' section of the application. The new list can still be opened using the old method, but it can also be accessed from the Code Blue menu on the left, under 'Clients'.



Name	Client date of bi...	Client Number	Intern...	External...	Source	State	Start	End	Service	Protocol	Service Provider	Contractor o...
<input type="checkbox"/> T Test-query		0019660H	0094666	local	Active	Mon, April 21, 2025	Sun, April 27, 2025	80324 Zwangerschapsc...	HPT Han's...	alone Dr-Alone	EV-TEST ED...	
<input type="checkbox"/> T Test-query		0019660H	0094666	local	Active	Mon, April 28, 2025	Sun, May 4, 2025	80324 Zwangerschapsc...	HPT Han's...	alone Dr-Alone	EV-TEST ED...	
<input type="checkbox"/> Mr. L. Duck	10/10/1965	0000475	0002245	local	Active	Wed, April 23, 2025	Wed, April 23, 2025	HT_ECG ECG for HT		987655 Dr. Janssen	1223456 H...	
<input type="checkbox"/> Mr. L. Duck	10/10/1965	0000475	0002245	local	Active	Mon, April 28, 2025	Mon, April 28, 2025	HT_ECG ECG for HT		987655 Dr. Janssen	1223456 H...	
<input type="checkbox"/> Mr. L. Duck	10/10/1965	0000475	0002245	local	Active	Tue, April 29, 2025	Tue, April 29, 2025	HT_ECG ECG for HT		987655 Dr. Janssen	1223456 H...	
<input type="checkbox"/> T Test-query		0019660H	0094668	local	Active	Mon, April 21, 2025	Sun, April 27, 2025	STOL Stolling	HPT Han's...	alone Dr-Alone	EV-TEST ED...	
<input type="checkbox"/> T Test-query		0019660H	0094668	local	Active	Mon, April 28, 2025	Sun, May 4, 2025	STOL Stolling	HPT Han's...	alone Dr-Alone	EV-TEST ED...	
<input type="checkbox"/> T Test-query		0019660H	0094669	local	Active	Mon, April 21, 2025	Sun, April 27, 2025	STOL Stolling	HPT Han's...	alone Dr-Alone	EV-TEST EDW...	JDK_12 Hepp...
<input type="checkbox"/> T Test-query		0019660H	0094669	local	Active	Mon, April 28, 2025	Sun, May 4, 2025	STOL Stolling	HPT Han's...	alone Dr-Alone	EV-TEST EDW...	JDK_12 Hepp...
<input type="checkbox"/> Ms. H Jacoe	12/22/2020	0013026123123...	0094709	local	Active	Tue, March 11, 2025	Wed, May 7, 2025	ADM Administratie		JBC Doctor JB	JDK_12 Hepp...	
<input type="checkbox"/> Ms. N van der Vaa	1/1/1983	0001090	0007647	123ABC	Import...	Active	Mon, April 21, 2025	Fri, April 25, 2025	Lab Bloedafname Lab	JBC Doctor JB	JBCO JB Heath...	LABS Labs
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096470	local	Active	Wed, April 23, 2025	Wed, April 23, 2025	Labn Bloedafname nuch...		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. B Bouchard	1/1/1988	0023027H	0095932	local	Registered	Sun, April 6, 2025	Sat, May 31, 2025	ONLINE2 Online 2		alone Dr-Alone	EV-TEST EDW...	ONLINE ONLI...
<input type="checkbox"/> Mr. C Client-Dan	12/22/1980	N90037736	0096257	local	Active	Wed, April 15, 2025	Wed, Decem...	ONLINE4 Online 4		alone Dr-Alone	EV-TEST EDW...	ONLINE ONLI...
<input type="checkbox"/> Ms. C Client-Orle	12/22/1980	N90037801	0096384	local	Active	Tue, April 1, 2025	Mon, June 30, 2025	ONLINE5 Online 6		alone Dr-Alone	EV-TEST EDW...	ONLINE ONLI...
<input type="checkbox"/> Ms. C Client-Orle	12/22/1980	N90037801	0096387	local	Planned	Tue, April 1, 2025	Mon, June 30, 2025	ONLINE5 Online 6		alone Dr-Alone	EV-TEST EDW...	ONLINE ONLI...
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096470	local	Active	Thu, April 24, 2025	Thu, April 24, 2025	Labn Bloedafname nuch...		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096470	local	Active	Fri, April 25, 2025	Fri, April 25, 2025	Labn Bloedafname nuch...		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096470	local	Active	Mon, April 28, 2025	Mon, April 28, 2025	Labn Bloedafname nuch...		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096470	local	Active	Tue, April 29, 2025	Tue, April 29, 2025	Labn Bloedafname nuch...		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096471	local	Active	Wed, April 23, 2025	Wed, April 23, 2025	TD Trombosedienst		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096471	local	Active	Fri, April 25, 2025	Fri, April 25, 2025	TD Trombosedienst		987655 Dr. Janssen	ONLINE ONLI...	
<input type="checkbox"/> Mr. R. A. Schipper		0000110	0096471	local	Active	Mon, April 28, 2025	Mon, April 28, 2025	TD Trombosedienst		987655 Dr. Janssen	ONLINE ONLI...	

In addition to the move to a new place, the new list also has a new name: 'All client orders'. We did this because the new list no longer only contains *unplanned* orders, but also orders that are already planned or even registered. This 'status' of the order can also be used as a filter criterion.

Whereas the old list only showed orders that would *expire* in the specified period, the new overview also allows you to find orders that *are valid at some point in the specified period*. They no longer *have to end* within the set period. In addition, canceled orders can now also be found.

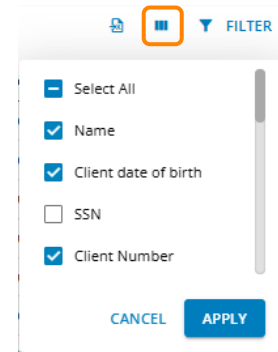
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The information in the table has been expanded with the following new columns:

- internal order number
- external order number
- client's date of birth
- contractor
- contractor's organisation
- protocol
- state of the order
- external source of the order
- preferred employees
- whether the order is cancelled or not

Which columns you want to be visible and which you want to hide can be easily configured at the top of the table. This is saved per user. The column order and column widths can also be adjusted and these are also saved per user.

In setting 40, you can define for the entire organization whether the social security number column should be displayed or not. Searching by SSN is always possible, even if the column is not displayed.



Filter

The filter panel has also been expanded to help you find the order(s) you want. Filters have been added for all information in the new columns.

For example, you can now search for all client orders requested by one (or more) specific contractor(s), or for all orders that *do not* come from a specific external source. You can also search for all orders that resulted from the application of one or more specific protocols.

To find all orders from a specific client, a specific filter for date of birth has been added to the existing filter for name, number, and social security number.

Due to the large number of orders, it is not possible to simply request *all* orders from all clients in your scope. The criteria specified must be specific enough to actually start the filter action. If this is not the case, a message will be displayed.

It is also possible that the filter action can be started, but that so many results are found that you will be asked to refine the criteria you entered.

Every filter action started from the filter panel is audited. The system stores who started a filter action and when, the criteria used, and the orders that were returned as a result.

When the filter action has been successfully executed, the panel closes and the filters applied are displayed in small print above the table. This makes it easy to see how the list of orders has been filtered and allows filters to be quickly removed. The filters applied are also saved for each user.

The filter field at the top left of the table can be used to search further *within* the orders found. This filtering is *not* remembered between sessions and is not audited.

Actions

The actions that were available on the former 'Appointments to be planned' list have also been made available here again. These include changing an order (series or moment) and transferring an order to the Plan Suggestion Engine ('PSE') to plan an appointment for it.

One new action has been added: 'Export to Excel'.

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2.3 Outlook appointments displayed as 'occupied' blocks for the employee

2.3.1 Outlook → SW Resources

For central planning processes, where a planner makes appointments for others, it is important that the planner is aware of the availability of employees. The problem here was that some of the employees' (non-client) appointments were often made in Outlook. This meant that planners in SW Resources had an incomplete picture, resulting in duplicate appointments or gaps in the planning.

As a first step towards solving this problem, employees' Outlook appointments can now be imported into SW Resources.

These appointments then appear as occupied blocks for the employee on the planning board or session on which the employee is planned.

Apart from the times of the appointment and the fact that it is an appointment from Outlook, no further appointment information is available.

The screenshot shows the 'Spreekuren' (sessions) table and a calendar view for Week 50 2024. The table lists locations like HJ MainLocation, SK location, and HJ_Room1 with their respective codes and addresses. The calendar view shows appointments for SK location on Thursday, Dec 12 and Friday, Dec 13. One appointment on Dec 12 is highlighted as 'ONLSK'.

The screenshot shows a calendar view for Thursday, Dec 12 and Friday, Dec 13. A large blue block represents an 'ONLSK' appointment at SK location Botplein 15, 1317SK, ALMERE. Other appointments include 'Mr. J Bastiaanse ONLINE' and 'Outlook Appointment Luna Parker'. A pop-up window for the 'Outlook Appointment' shows the date 'Thursday, December 12, 2024' from 9:10 AM to 9:25 AM, with participants 'Clients' and 'Employees Luna Parker'.



The imported Outlook appointments are also displayed in the employee's own calendar. At present, these are only 'blocked' time slots and no further appointment information from those Outlook appointments is available from within SW Resources.

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2.3.2 SWR → Outlook: improvements

The option to export appointments from SW Resources to an external calendar such as Outlook already existed, but until now this was an 'all or nothing' principle. With the new setting 81, it is now possible to export only certain types of appointments to Outlook.

In addition, the option has now been added to treat appointments from SW Resources in Outlook purely as time blocks. In Outlook, only a fixed label is displayed as the subject for all appointments that come from SW Resources. In that case, the content of the appointment is not shared.


81 Preferences for exporting appointments to an external calendar  

Description
When sharing SW Resources appointments with an external calendar, what types of appointments need to be included? And what should be displayed as the title of the appointment in the external calendar? Please note that the configuration of what exact appointment details are shared per appointment type is done separately in templates.

Types of appointments that should be shared

<input checked="" type="checkbox"/> Classic client appointments	<input checked="" type="checkbox"/> Sessions
<input type="checkbox"/> Classic office task appointments	<input checked="" type="checkbox"/> Client appointments on a session
<input checked="" type="checkbox"/> Classic location appointments	<input checked="" type="checkbox"/> Client appointments on a location (session nor event)
<input type="checkbox"/> Event appointments	

Shared appointment information

A generic placeholder text 

Placeholder text to use as appointment title

Serviceaware Resources

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2.4 Extention related to scheduling: shift picking

In addition to the schedule module which was new in 8.4, a first version of the 'shift picking' functionality is now available. This allows the scheduler to offer work or on-call shifts that have not yet been scheduled to specific teams or specific (groups of) employees.

Multiple 'phases' can also be defined in an offer by, for example, first offering the shift to a select group of employees within a team and only then to the entire team. Or first to permanent employees and only then to flex employees.

The screenshot shows the 'Vereiste diensten' (Required services) section of the interface. A dialog box titled 'Bied diensten aan voor 'shift picking'' is open, allowing users to assign shifts to specific teams or groups. The dialog includes a list of 'Lijst van ontvangers' (List of recipients) with columns for 'Van*' (From), 'Tot*' (To), 'Teams*' (Teams), 'Specificaties' (Specifications), and 'Tags*'. Two entries are visible: one for team 1233 with 'Fulltime' tags, and another for teams 678, 1233 with 'flex' tags. Buttons for 'ANNULEREN' (Cancel) and 'OPSLAAN' (Save) are at the bottom right.

Employees can then accept (or reject) shifts themselves using a new widget on the Serviceware portal. When they accept a shift, it is automatically scheduled for them.

The screenshot shows the 'Shift Picking' widget on the Serviceware portal. The title is 'Te kiezen diensten' (Shifts to choose). Below the title, there are three tabs: 'ALLE TE KIEZEN DIENSTEN (2)' (All shifts to choose (2)), 'GEACCEPTTEERD (0)' (Accepted (0)), and 'AFGEWEZEN (0)' (Rejected (0)). The main content area displays two shift offers:

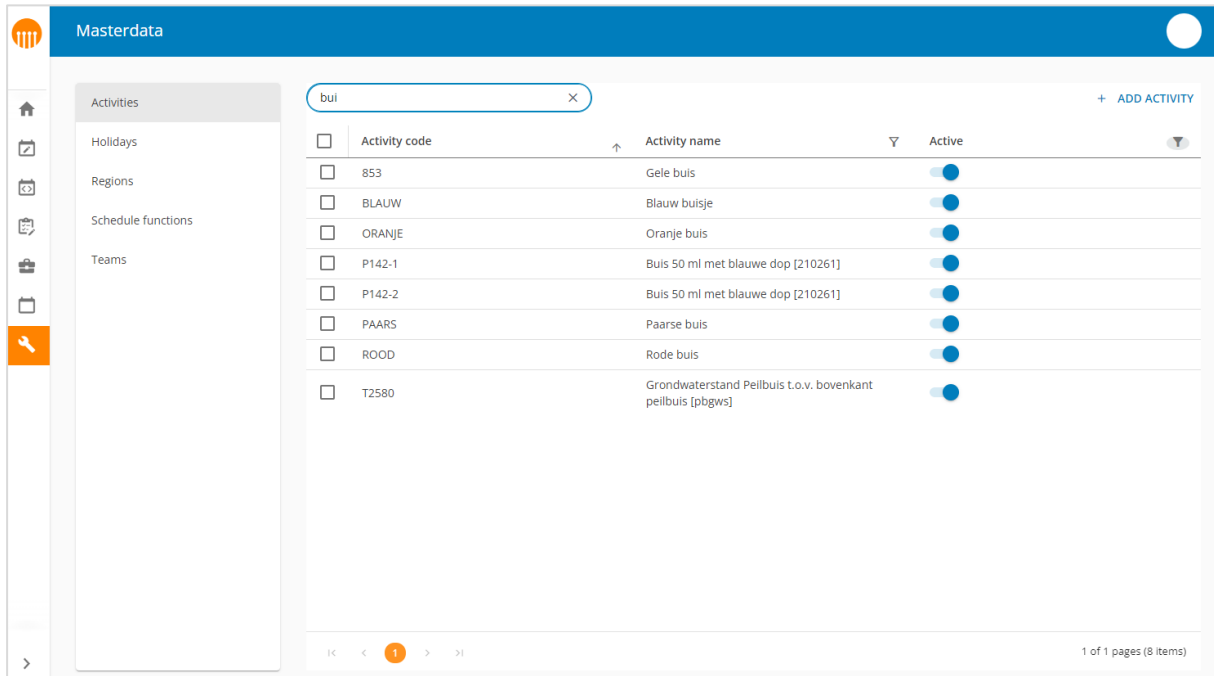
- vr, december 13, 2024 | 12:00 p.m. - 5:00 p.m.**
1217 | Werk
Kies binnen 10 dagen
- za, december 14, 2024 | 12:00 p.m. - 5:00 p.m.**
1217 | Werk
Kies binnen 6 dagen

Each offer has a red 'X' icon and a green checkmark icon to the right, indicating the options for accepting or rejecting the shift.

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2.5 New masterdata: Activities

The masterdata section of the admin module in the new 'Code blue' part of the web application has been expanded with a sub-section for creating and managing activities. Activities are currently mainly used as blood-tubes.



2.6 Max. number of characters increased

For the following objects, the maximum number of characters allowed has been increased:

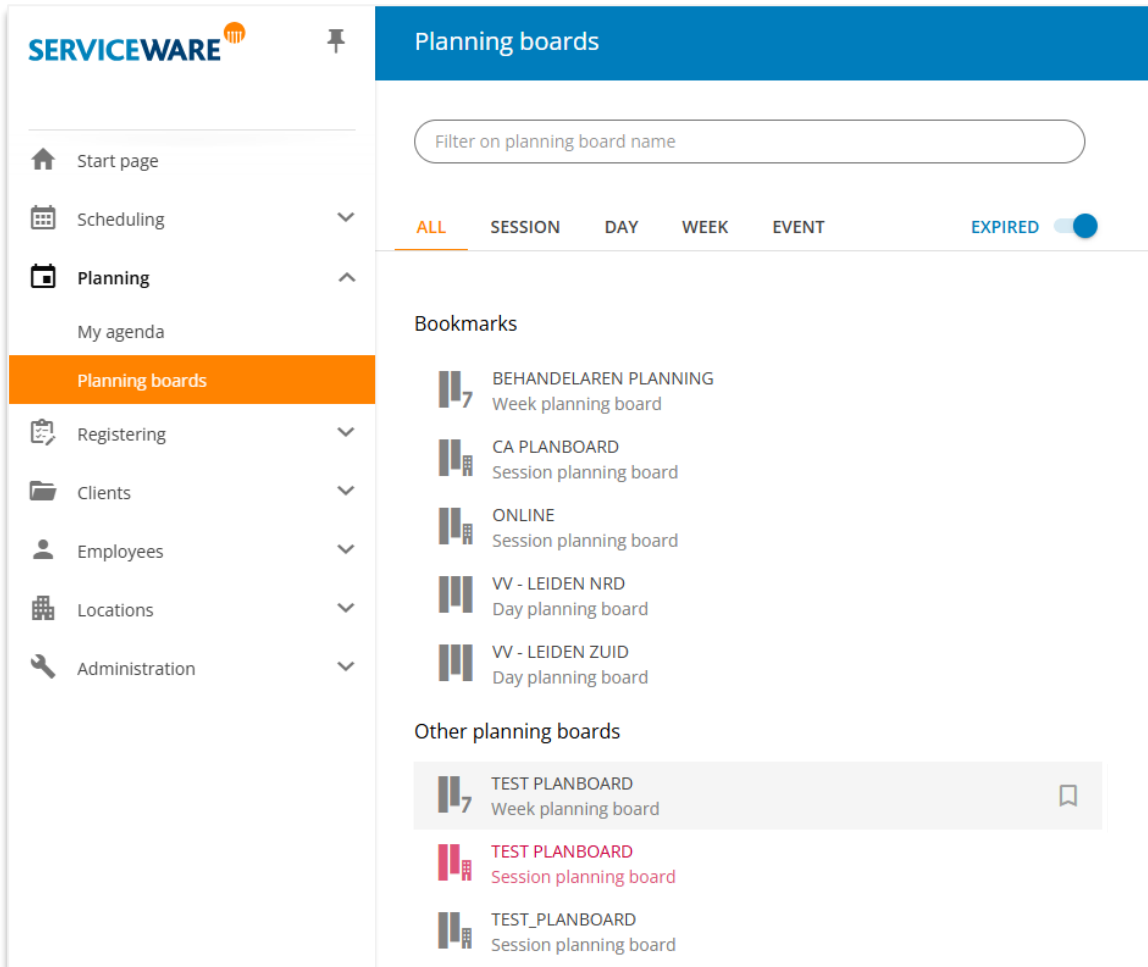
- **Client number** from 12 to 20 characters
Please note: Appointment widget version 4.4.1 is required to support longer client numbers.
- **Internal order number** from 12 to 20 characters
- **Contractor code** from 10 to 20 characters
- **Protocol code** from 10 to 20 characters
- **Location code** from 12 to 20 characters

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2.7 ‘My planning’ has moved

The overview of planning boards that you as a user are allowed to access is now also available from the Code Blue section of the application. The old overview in NextGen, accessible via the 'My Planning' tile on the start page, can still be used but will be discontinued in one of the upcoming versions.

The new overview shows all planning boards within the user's scope. The list can be filtered by type or by the name of the planning board. If desired, expired planning boards can also be made visible.



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2.8 Bug fixes

2.8.1 Issues concerning notifications

2.8.1.1 3x 'do not wish to receive' and notifications still sent

When the values for email, SMS, and letter were all set to 'do not want to receive' for an order, notifications were still sent using the communication defaults at client level. This turned out to be an outdated fallback scenario and has now been removed.

2.8.1.2 Notification issue when a sending condition was set

In scenarios with a send condition, such as 'only send SMS if no email address is known', things went wrong when an appointment was made specifically via the PSE. If 'do not want to receive' was entered in the email field in step 2 of the PSE, an email was still sent instead of the expected SMS. This problem has been resolved.

2.8.1.3 Subject of the order was not filled in notifications

In both the order- and appointment confirmation notifications, the subject of the order always remained empty. This has been fixed.

2.8.1.4 Issues with notifications after 'client merge'

When two clients were merged after an appointment had already been planned, the notifications were already transferred to the facts of the 'new' client. However, a 'cancel' message was still sent to the 'old' client. This was undesirable and has now been resolved.

2.8.1.5 Cancel notification still sent after 'replace widget order'

If an appointment is made via the appointment widget, the underlying dummy order in the mobile apps can be replaced by the real order. In this scenario, appointment confirmation notifications were already prevented from being sent again from the new appointment. Unfortunately, a 'cancellation' message was still being sent from the initial appointment. This has now been prevented.

2.8.1.6 SMS messages sent to 'Do not wish to receive'

Some SMS providers were sending SMS messages to the number: 'do not wish to receive'. This obviously made no sense. We have now ensured that this can no longer happen.

2.8.2 Employee related bugs

2.8.2.1 Incorrect notification about employee schedule not covering appointment

When an appointment was opened from, for example, the client calendar in NextGen, a notification was incorrectly shown at all assigned employees about having a work shift that's not sufficient for the appointment in question. This has been fixed.

2.8.2.2 Auto-generating employee numbers does not check for uniqueness

When creating a new employee in SW Resources, you can choose an employee number yourself or have one generated automatically. If the latter option was chosen, it was possible for a number to be generated that already existed because it had been created previously using the 'choose your own number' option.

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The auto-generate function now checks the uniqueness of the number before saving it. This was already working for clients, but has now also been implemented for employees.

2.8.2.3 Problems in Classic due to terminated employee contract

When an employee contract was terminated in NextGen, not only the date was saved, but also the time, which was unintended. This caused problems in the classic employee module. This problem has been resolved.

2.8.3 Client related bugs

2.8.3.1 Client order overview not accessible if there is not at least one valid order

If a client only had old, expired orders, the user was immediately redirected to the 'Add order' page after clicking on the 'Orders' tile on the client dashboard. This made it impossible to view expired orders if there was no currently valid order for that client. This issue has been resolved.

2.8.3.2 Orders sometimes still shown as plannable, even though appointment exists

One-time orders were sometimes incorrectly given an extra 'moment' if the validity of the order was updated after the order had already been planned. This happened when the new validity fell completely outside the old validity. The extra moment that this created was no longer linked to the appointment that had already been made and was therefore seen as still unplanned.

Additional logic has been added to prevent this scenario in the future.

2.8.4 Issues that involve sessions

2.8.4.1 Session appointment misses order activities that were added after planning

When an order was planned on the session planning board and activities were then added to the order, these were no longer added to the already planned appointment. This issue has now been resolved.

2.8.4.2 'Plan' button from session management opened an invalid planning board

When a session was selected in the session management module and then 'Plan' was clicked, the user could be directed to a planning board that was no longer valid on the date of the selected session. The 'include/exclude services' setting for each planning board was also not checked, which meant that a session was sometimes opened on a session planning board where the relevant session could not be found. Both problems have been resolved.

2.8.4.3 Inactive 'failed reasons' still displayed when registering a session appointment

When registering an appointment from the session planning board, failed reasons that had been deactivated in the master data could still be selected for the 'Failed' status. This has been resolved. Only *active* failed reasons can now be selected.

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3 Installation requirements

Below, the requirements for the installation of **Serviceware Resources 8.5** are listed. In order to make use of all the latest features, Serviceware Resources for iOS **8.5.1** and Serviceware Resources for Android **8.4.2** are advised.

- › For an update to version 8.5.0, the already installed version of Serviceware Resources should be minimal 8.4.0. For older versions of Serviceware Resources, extra steps need to be taken to be able to update to 8.5.0. 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_v84”](#).

3.1 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
8.5	Serviceware Authenticator	8.5.0	8.5.0	8.5.1	8.4.2	4.4.1