Service Manager

SOFTWARE

This document contains summary information on new features, late-breaking product information, updates, and troubleshooting tips not covered in the Trimble® Service Manager documentation.

Introduction

These release notes describe the features and enhancements that are new in version 30.1.0.433 of Service Manager, for the following components only:

- Service Manager Desktop
- Service Manager Web Portal
- Service Manager Engineer

For further support information, go to http://mep.trimble.co.uk/support.

New features and changes

The improvements that have been made to the Service Manager software are summarised in the following table.

Upgrade procedure

Updates will be made available and automatically downloaded via Trimble LiveUpdate.

Version: 13.1.0
Date: 2017
Month: December

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ENHANCEMENTS AND FEATURES	
ID	**Description**
SERVMAN-624	Users added to Service Manager in error may now be deleted
SERVMAN-1307	The Contract Renewals routine now allows Contracts / Sites with a zero value to be renewed
SERVMAN-1356	Tasks within the Engineer app that have no additional data now display "No Additional Details" instead of the engineer being presented with a blank box
SERVMAN-1449	Period usage within the Response / Fix Time calculations has been improved
SERVMAN-1504	Converting a Quote to a job will now copy any notes and attachments made against the quote to the job
SERVMAN-1515	A Push Notification service for the Engineer app has been introduced to improve the notification delivery to engineers devices
SERVMAN-1533	Attachments are now stored in their own database to improve accessibility and reduce the size of the main database
SERVMAN-1536	The Connection Wizard has been simplified to aid in system setup
SERVMAN-1562	The Maps functionality has been changed to use ALK mapping data
SERVMAN-1642	The wording of Signoff process within the Engineer app has been updated to ensure customers know what they are being asked to sign for
SERVMAN-1644	Any existing Internal and Resolution notes are now displayed within the job details in the Engineer app. These notes are also displayed on the 'Accept / Decline' screen
SERVMAN-1647	Tasks displayed within the Engineer app that have no equipment item assigned now show as 'Service task' rather than showing any empty box
SERVMAN-1745	The single site Geolocation screen now allows you to manually place the site marker

BUG FIXES	
ID	**Description**
SERVMAN-886	Resolved an error that displayed when a user attempted to open an attachment that included one of the following characters in its title : **/\:*?"<>|**
SERVMAN-1185	Dates changed within the Contract Renewals routine are now correctly updated against the associated jobs within the Costing software
SERVMAN-1197	Invoice addresses are now correctly updated within the Costing software if edited against a Site in Service Manager
SERVMAN-1360	The Delete button is now disabled when viewing Purchase Orders or Requisitions in the Engineer app if there is nothing valid to delete
SERVMAN-1396	Resolved an issue which had prevented the software from displaying correctly if the font size was set over 100%

SERVMAN-1469	Additional logging has been added to track an issue where mobile licences are being revoked
SERVMAN-1470	Optimised the query used when filtering the Customer Web Site by Asset Tag
SERVMAN-1488	Resolved an InvalidCastException error that could display when planning a site visit on a job
SERVMAN-1492	Users without permission to view the Planner screen will no longer an incorrect error message if they try to access the Planner. (The Planner will not display)
SERVMAN-1499	Resolved a refresh issue that caused Engineers to 'disappear' after being added to a job
SERVMAN-1611	Rectified an issue that prevented the Job Status from being correctly updated from the Engineer app
SERVMAN-1631	Manually setting a Respond by or Fix by time against a job will now reflect correctly on the Planner if a job reaches it's Jeopardy limit
SERVMAN-1646	Resolved an issue that caused a 'fTotalHours' error to display on the Engineer Timesheets screen
SERVMAN-1648	Resolved an issue that caused a 'fRespondWithin' error to display on the Jobs screen
SERVMAN-1693	Rectified a problem that could cause the synchronisation to an Engineers mobile device to lock and fail
SERVMAN-1698	When a job is created within the Engineer app the Sites are now correctly filtered for the selected Contract
SERVMAN-1732	Generating schedules for services that have previously been created will no longer create duplicate services but will create any additional ones if the contract dates have been extended
SERVMAN-1743	The 'Add Additional Hours' screen within Engineer Timesheets has been optimised to reduce the time to open
SERVMAN-1751	Uploading a zero byte attachment to the Web Portal will no longer cause the software to crash
SERVMAN-1760	Unplanned Jobs (Blue Pin) will now display regardless of them having a response and fix time or not
SERVMAN-1777	Purchase Orders created in the Engineer app are now correctly allocated to the corresponding site job within Costing

New feature details

SERVMAN-1307 – Zero Value Contract Renewals

The Contract Renewals routine will now allow a Contract or Site to be renewed with a zero value.

When you edit the invoicing details you may set the Contract Value to 0

NOTE: The Invoice Frequency must be blank to be able to enter a 0 value. If an Invoicing Frequency is set you may click the dropdown and select the 'Clear' option. Failure to clear the Invoicing frequency will result in the following message:

New feature details

SERVMAN-1356 – SME Tasks "No Additional Details"

New feature details

SERVMAN-1449 – Response / Fix Time Periods

In previous versions of Service Manager all response time periods have calculated back to hours and therefore the 'Day' period was back calculated as 24 hours. This has understandably led to confusion by some users as a job for a site with restricted opening hours would not calculate as expected if a 1 day response was allocated to it.   To resolve this we have updated how each Reponse / Fix Period is calculated

All of the examples below assume the job is logged on Tuesday 12th December 2017 @ 16:30
Site Access hours are:
Mon   08:00 - 17:00
Tue   08:00 - 17:00
Wed   08:00 - 17:00
Thu   08:00 - 17:00
Fri   08:00 - 12:00
Sat   closed
Sun   closed

Hours
The current calculation remains the same for the Hours period (where access is available)
4 Hours =   Wednesday 13th December 2017 @ 11:30 (0.5 of an hour on Tuesday + 3.5 hours on Wednesday)

Note: All other Periods will calculate to the first available access time on or before the time logged + *n* Days/Weeks/Months/Years

Days   -   (Skip days that have no access)

Calculation for Days
1) Calculate plotted time + # days
2) Open at that time? GREAT!
3) Not open at all that day? Add another day, evaluate again
4) Open that day but not at the time calculated? Move forward to when it is next open, which may be the same day or a future day and plot there. I.e.:
    a) already closed that day? Move it forward to the start of the next open period.
    b) Not open yet that day? Move it forward to when it is open on that same day.

1 Day =   Wednesday 13th December 2017 @ 16:30
3 Days =   Friday 15th December 2017 @ 12:00 (last time accessible on the 3rd day)
4 Days =   Monday 18th December 2017 @16:30 (4th accessible day)

Weeks-

1 Week =	Tuesday 19th December 2017 @ 16:30
2 Weeks =	Tuesday 26th December 2017 @ 16:30

Months-   (Calendar months are used)

1 Month =	Friday 12th January 2018 @ 12:00
2 Months =	Monday 12th February 2018 @ 16:30

Years -

1 Year =	Wednesday 12th December 2018 @16:30
2 Years =	Thursday 12th December 2019 @ 16:30
3 Years =	Monday 14th December 2020 @ 17:00

New feature details

SERVMAN-1515 – Push Notifications to Service Manager Engineer

A 'Push' notification service has been introduced for the Service Manager Engineer app. This service will provide improvements to device battery life and ensure that important notifications are sent to your engineers in a timely manner

Old sync process
The old process was covered by two triggers for the sync process to start. The first was a timer that ran the sync at a defined interval. The second was when the engineer navigated to the list pages (visits and purchasing) within the app. In this scenario the device was in charge of triggering the sync process.

New push sync process
The new push notifications changes have resulted in the removal of the sync on timer and on navigation to the list pages.

The sync process is now triggered by both the device and the server in the following scenarios:

- Device trigger - Engineer logs into the device

- Device trigger - Engineer makes changes on the device.

- Device trigger - Engineer manually syncs from the settings page

- Server trigger - When a Job is sent to an engineer(s) on a visit or when the date/time for a visit is changed Service Manager will immediately send a message to the device to start syncing. The message may take up to 60 seconds to be received by the device. (Assuming that the device is online)

- Server trigger - When relevant data (see below) is changed the new polling service (installed with the web service) will send a message to the device to start syncing. The current polling interval of that service is set to two minutes.

Engineer specific data:
Contracts
Equipment
Service Schedules
Jobs
Engineer Permissions
Visits

If the device is offline when it wants to sync due to engineer changes the device will queue the sync requests. Any messages sent from the server to sync will be held until the delivery of the message is ultimately received. In both cases the sync will take place when connectivity is restored. This reduces the complexity while making the process more resilient.
NOTE: You will need to resave the settings in the 'Admin Portal' for push notifications to work correctly.
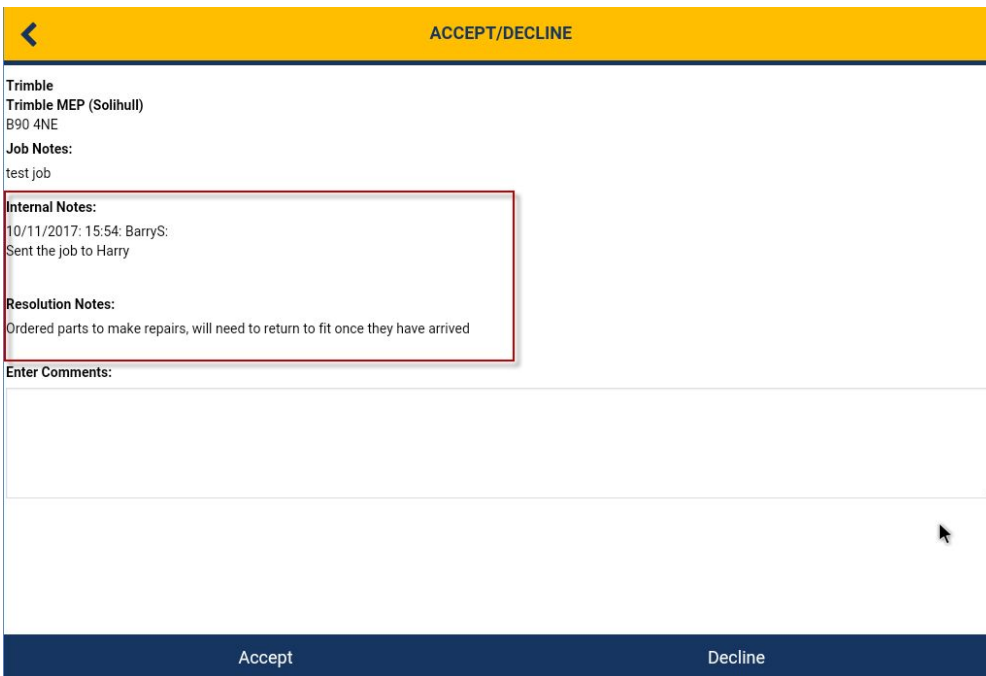
New feature details

SERVMAN-1644 – SME Internal & Resolution Notes

Any Internal Notes or Resolution Notes that already exist on the job are now sent to the engineers device. These notes will be accessible when viewing the job details.
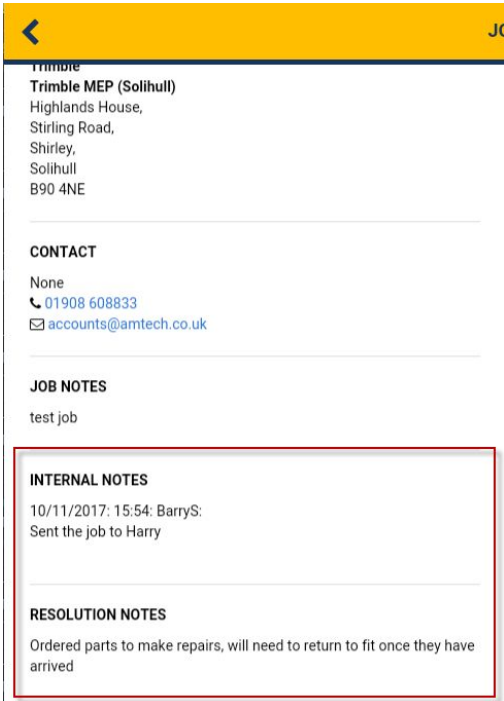
The additional notes are also displayed on the Accept / Decline screen

New feature details

SERVMAN-1647 – SME Default Task

Reactive jobs sent to the Service Manager Engineer app that do not have an Equipment item assigned to them will now show a default 'Service' task rather than an empty box.

PENDING TASKS

> **SERVICE**
> Reactive service

COMPLETED TASKS

None

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Release notice

This is the December 2017 release (Revision A) of the Release Notes. It applies to version 30.1.0.433 of the Service Manager software.