



ServiceMax Release Notes

ServiceMax Spring '15 (Apr, 2015)

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Note: Any unreleased features referenced in this release notes, other press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

About ServiceMax Release Notes

This document provides a brief summary of enhancements, modifications, and resolved issues in the ServiceMax Spring '15 release of the ServiceMax suite of applications.

It includes

- Brief, high-level description of the functionality
- Key setup information
- Best practices to ensure your continued success
- Reference to detailed help documentation as applicable

The release notes also identify all other changes and provide details about how those changes might affect your organization.

Resources and Links

You can find out how to set up, upgrade, and use the ServiceMax Suite application at <http://userdocs.servicemax.com>.

Training and Webinars

ServiceMax offers extensive training and posts videos in [ServiceMax Community](#) for the ServiceMax Suite application. To sign up for or to receive information about our training services, contact training@servicemax.com.

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Release Notes Changes

April 3rd, 2015

First version

What's New in ServiceMax Spring '15?

The Spring '15 release of ServiceMax comes with these exciting and useful features, significantly enhancing the usability, productivity, and functionality of the ServiceMax suite:

SFM Admin Usability enhancements:

- Ability to edit custom SFM processes, instead of cloning, to add/remove child objects.
- Ability to open a process associated with an SFM wizard step in appropriate editor, from SFM Wizard Designer.

Dispatch Console features:

- New filter options to filter by assigned technicians or scheduled events for work orders displayed in the grid, and by technicians matched on multiple criteria.
- New event attributes to view & record overhead times at the start and end, and drive time at the end of Work Order events.

ServiceMax Linx for ServicePower enhancements:

- Push Notifications to receive real-time schedule updates from ServicePower: GA.
- Holidays in customer's Access Hours and Event Management enhancements.

ServiceMax Spring 15 for iPad features:

- Support for all-day events and multi-day events.
- Support for events longer than 14 days, for long-term project management.
- Sample sync status reports in the ServiceMax Suite, covering client version status, initial, configuration, & incremental data sync, sync history & failures.

ServiceMax Mobile For Laptops features:

- Manual data purge.
- Increased detail window size.

ServiceMax Spring 15 for iPhone features:

- Lists (SFM Search): Online Search with Download On Demand.
- Work Order features: Self-dispatch and Troubleshooting (Knowledge Base articles).
- SFM features: Multiple SFM View Processes, Lookup Form-Fill, and Attachments.
- Barcode scanning in SFM lookup & text fields and search keyword field in Lists.

ServiceMax Spring 15 for Android enhancements:

- Barcode Scanning support: Text type fields and search keyword field in Lists.
- Manual data purge.

License Management enhancements:

- The newly introduced ServiceMax User flag can be enabled when creating user records, to auto-assign permissions & ServiceMax package license.
- No impact for existing ServiceMax customers on upgrade.

Spring '15 Feature Summary and User Impact

The Spring '15 SP Feature Summary and User Impact table shown below identifies the enhancements and indicates setup requirements.

ServiceMax Suite

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
SFM Admin Usability Enhancements	✓		
Dispatch Console – Technician Filter	✓		
Dispatch Console – Advanced Technician Search Filter	✓		
Dispatch Console – Event Management Enhancements		✓	
ServiceMax Linx for ServicePower Enhancements		✓	✓
License Management Enhancements		✓	
Sample sync status reports for ServiceMax Spring 15 for iPad app		✓	

ServiceMax Spring 15 for iPad

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
All-Day events and Multi-Day events	✓		
Greater than 14-days events		✓	

Mobile For Laptops

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Manual Data Purge	✓		
Increased Detail Window Size	✓		

ServiceMax Spring 15 for iPhone

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Online Search and DOD	✓		
Self-Dispatch		✓	
Troubleshooting (KB articles)		✓	
Multiple SFM View Processes	✓		
Lookup Form-Fill		✓	
Attachments		✓	
Barcode Scanning	✓		

ServiceMax Spring 15 for Android

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Barcode Scanning – Text type fields and Search keyword field	✓		
Manual Data Purge	✓		

Backward Compatibility Matrix

ServiceMax Suite versions supported for Spring 15 Mobile App versions

Mobile App Version	Supported ServiceMax Suite Versions
Android (15.30.001)	Spring 15
iPad (15.30.005)	Spring 15
iPhone (15.30.001)	Spring 15
Mobile for Laptops (15.30.001)	Spring 15
Offline Client (14.20.0.1)	Winter 14 to Spring 15

ServiceMax Mobile App versions supported with Spring 15 ServiceMax Suite

Mobile App	Supported ServiceMax Mobile app Versions
Android	Spring 15
iPad	Spring 15
iPhone	Spring 15
Mobile for Laptops	Spring 15
Offline Client	Offline Client 14.20.0.1

ServiceMax Suite

SFM Admin Usability Enhancements

Transactions & Docs Designer

SFM Designer now allows editing of custom SFM transactions to add/remove child objects. This enables making updates to the list of child objects, without the need for cloning transactions.

This enhancement is NOT supported for SFM transactions of type 'to generate an Output Document for a header record with/without its child records' (Smart Docs).

When you add/remove child objects, you can update the page layout associated with the transaction itself, if that page layout is not associated with any other transaction. Else, you must create a new page layout or select another existing page layout with matching target objects.

Another enhancement is the prompt you will see when trying to save any SFM transaction without associating a page layout (or document template in the case of Smart Docs).

- In response to the prompt, if you choose to proceed with the save after associating a page layout or document template, the transaction's status will be set to Complete.
- If you choose to proceed with the save without associating a page layout or document template, the transaction's status will be Incomplete.



For more details about editing SFM transactions, refer to [Online Help](#)

Wizard Designer

SFM Wizard Designer now enables you to open a process associated with an SFM wizard step in appropriate editor. An Edit link is provided for each wizard step. Clicking this link opens the associated SFM transaction, Inventory process, or SFM custom action in a new tab, using SFM Designer, Inventory Configuration screen, or Configure SFM Custom Actions screen respectively. This provides an efficient mechanism to view the accessible standard processes and edit the custom processes related to wizard steps.

Another usability enhancement is the display of the Process Id of the associated process for each wizard step. This helps you to quickly identify a process using the unique process id, as multiple processes might have the same process name.



For more information on SFM Wizard Designer, refer to [Online Help](#)

Dispatch Console Features

Filter by assigned technicians / scheduled events

This feature enables dispatchers to filter technicians based on assignment or events related to the work orders displayed in the work order grid. This allows customers to use the dispatch console in a project-style view mode, and filter technicians and their calendar events based on the following criteria:

- Which technicians are assigned to the set of work orders that constitute a project (for instance, associated with a case or parent work order)?
- Which events have been scheduled for technicians for the set of work orders that constitute a project (for instance, associated with a case or parent work order)?



For more information about this feature, refer to [Online Help](#)

Advanced Technician Search

This feature enables dispatchers to filter technicians based on multiple criteria (MCTM – Multi Criteria Technician Match). This helps find the best matching technicians for the job.

The criteria available for matching are listed below:

- List of **Skills** from work order Skill Set, to be matched with technicians' Expertise
- Work order's **Product**, to be matched with technicians' Products Served
- Technicians matched on **Technician Eligibility** criteria
- **Preferred Technician** from work order, work order's Account, and work order's Component (Installed Product), in that order

Separate searches are performed for each criteria type, and the results are aggregated from each separate search, and presented as a ranked results set.

You can launch this filter by clicking the **Advanced Technician Search** icon, after selecting a work order in the grid.

Weight values are applied for all the criteria, based on global configuration settings under module OptiMax, submodule Dispatch Calculations.

The matched technicians are displayed in the tree grouped by match %, with the highest match % grouped at the top of the tree.

You can view and modify the criteria, by clicking the **Configure Advanced Technician Search** icon. It opens the **Advanced Search Control Panel** dialog box.

On-the-fly editing made in Preferred Technicians / Skills tab are persisted on the selected work order. However, the choices made to include / exclude any criteria are not persisted.



For more information about this feature, refer to [Online Help](#)

New Event attributes of Work Order events

The following new Event attributes have been introduced in Create/Edit Work Order event window:

- **Drive time** at the end of work order service can be captured and displayed.
- **Overhead time** at the start and end of work order service can be captured and displayed.
- **Break time** during the work order service can be displayed.

Overhead time and Break time can be enabled by setting the associated group [configuration settings](#) (SET003 and SET004 under Dispatch Management – Event Management) to True.

The total duration of a Work Order event is calculated as follows:

End Date Time – Start Date Time = Service time + Drive time before + Drive time after + Overhead time before + Overhead time after + Break time.

There is no out-of-the-box functionality related to capturing Break time / displaying it in Gantt in this release.



For more information about Work Order events, refer to [Online Help](#)

Manage Multiple Assignment window enhancements

It is now possible to capture and display all the event attributes, including the new attributes introduced in this release, in the Block Edit pop-up of Manage Multiple Assignments window. The attributes supported are service duration, driving duration before & after, and overhead time before & after, and break time.

Navigation Enhancements

Find Technicians, Find Service Teams, & Configure Search icons and the **search keyword text box** have been moved from top of the Work Order Grid to the top of Team/Tech Tree.

Expand all and **Collapse all** icons have been converted into hyperlinks and displayed above the Team/Tech tree.

Add Event and **Delete Event** icons have been moved to the right of the Select Time Zone (globe) icon.

The icon to **launch map in a separate browser window** has been moved from above the Gantt section (next to Show/Hide Map icon) to the top right part of the map section itself.

The following **icons have been changed**, with **no change in functionality**:

- Find Technicians, Find Service Teams, Configure Search, Reset
- Zoom in, Zoom out, Refresh, Select Time Zone, Add Event, Delete Event
- Show/Hide Map

ServiceMax Linx for ServicePower Enhancements

Push Notifications (GA)

When any schedules are created or updated in ServicePower, they are synchronized to ServiceMax in real time through push notifications. These push notifications are sent to ServiceMax on creation of new schedules, schedule updates due to continuous optimization by the ServicePower optimizer, manual updates to schedules, earmarking of schedules/breaks, and creation/update of non-Work Order events.

If the push notification fails at ServicePower or ServiceMax for any reason, the SP Scheduler pulls the latest work order schedules during the subsequent scheduler execution.

This feature is being made generally available in this release, after addressing the known gaps in the previous (beta) release. The key gap addressed is the pulling of non-Work Order event updates from ServicePower, by the SP Scheduler.

Holidays in Access Hours

When customer's access hours are sent to ServicePower, holidays defined are now sent marked as closed hours. This is to ensure that technician is not scheduled on a holiday.

Event Management enhancements

When a break event is synchronized from ServicePower to ServiceMax, break event's subject is set to 'BREAK-<name of the break as created in ServicePower>'.

When a non-Work Order event is created/updated in ServiceMax without an Activity Type, Activity Type is set to a configurable default value based on the value of group configuration setting SET011 (under Dispatch Management – Linx for ServicePower), instead of a hardcoded value, before it is sent to ServicePower.

Note: By default, this setting value is blank. It must be set to a valid numeric value, based on the values configured in ServicePower system.



For more information on Linx for ServicePower, refer to [Online Help](#)

License Management enhancements

To enable faster provisioning of ServiceMax application to users as per the applicable ServiceMax license*, following enhancements have been introduced:

A checkbox field named **ServiceMax User** is introduced in User object. This field must be added to the User page layout.

If you check this field when creating/updating users, the requisite permission set licenses, permission sets, and app license are automatically assigned to the user.

- The permission set license assigned to the user is to enable access to Product and Pricebook objects.
- Permission set assignment covers Product and Pricebook access and access to key ServiceMax objects.
- The above default behavior can be controlled through the use of 4 [global configuration settings](#) under module **Common** and submodule **User License Provisioning**.

Additionally, a new set of **Titanium (Platform)** profiles are created, for use as samples for ServiceMax users with **Salesforce Platform** license (which does not have profile-level access to Case, Product, Pricebook objects).

One new object named **Service Request** has been introduced, to store data from third party CRM system, when Case object is not used by your organization.

***Note:** Check the information displayed at the bottom of ServiceMax Setup home page, to know the type of license used by your organization.

ServiceMax Spring 15 for iPad

This section provides a brief overview of enhancements to the ServiceMax Spring 15 for iPad app in this release.

All-day events and Multi-day events

Events spanning the entire day and events stretching across multiple days are now displayed in the ServiceMax Spring 15 for iPad app calendar, in Day View, Week View, and Month View. Events are displayed on all the days in the event span.

It is possible to reschedule/edit these events in the same way as single-day events. However, drag and drop after long press is not supported. Creation of multi-day events is also supported.

Greater than 14-days events

Events created on the Salesforce calendar are currently limited to a maximum length of 14 days. Customers with long-term projects require creating events that can be up to 12 months in duration. This is addressed in Dispatch Console using global configuration setting GBL025 (Module: Common, Submodule: Global Settings, Setting Name: Object to use for event creation).

When this setting is set to ServiceMax Event and configuration sync is done, ServiceMax Spring 15 for iPad app supports the following:

- New events are created as ServiceMax Events if Enable Scheduling is checked in Technician record.
- When retrieving the events from the local database for display in calendar view, both Salesforce and ServiceMax events are considered. So, no events are lost.
- This has no impact when viewing / editing events using the View and Edit options available in Day View and Week View.
- Events spanning the whole day or multiple days are displayed in Day, Week, and Month View.

Sync status reports

Sync status reports for ServiceMax Spring 15 for iPad app are available in the new reports folder **ServiceMax Mobile for iPad** in server.

The reports are created on **ServiceMax Job Log** object. To enable capturing of data related to sync, enable the option **Capture synchronization time logs** in the Other Settings tab of Mobile Configuration screen and do a configuration sync.

These reports are created using the custom report type **Sync Reports**. As ServiceMax Job Log object is a generic object, its field labels are generic and the custom report type maps them to labels applicable to sync status data attributes. These reports can be modified in subscriber orgs, as per business requirements.

To create new sync reports, the sample reports can be cloned, or new reports can be created using the custom report type Sync Reports.

The table below lists the sample reports and their purpose.

Report Name	Description
Client Version – iPad	Client application version of users, organized by profile.
Initial Sync – iPad	Initial syncs of users, organized by profile and includes sync times.
Incremental Data Sync – iPad	Incremental data syncs of users, organized by profile with sync times.
Configuration Sync – iPad	Configuration syncs of users, organized by profile with sync times.
Sync Count History – iPad	Sync count for all sync types, organized by profile and date.
Sync History By User – iPad	Syncs of users with count, client version, timestamp, and status.
Sync Failures – iPad	Incomplete syncs for all sync types, organized by profile.
Sync Failures By User – iPad	Incomplete syncs of users with count, client version, and timestamp.

Other Changes/Enhancements

- Drilling down to child records from the header record view process is now possible, by tapping the newly introduced '**Details >**' option.
For instance, from a view process which has Installed Product or Case as the header and Work Order as the child, you can drill down to Work Order record. Tapping '**Details >**' opens the Work Order record using its recent view process.
- '**Details >**' option is now displayed in Calendar Day View for events related to records other than work orders, enabling drill down to any record.
- Signature ink color has been changed from red to black in Smart Docs.
- The Navigation Bar now slides out (disappears) automatically after user makes a choice or taps another part of the screen.

ServiceMax Mobile For Laptops

Manual Data Purge

Manual purging of old, unused data is now allowed as configured in Mobile Configuration screen. You can initiate this by clicking the **Purge Data** button in the application's Sync screen.

You need **connectivity** to start data purge. During data purge, you will see the **progress and status messages displayed**. If you lose connectivity any time when data is being retrieved, data purge will be aborted. After data retrieval, data purge will complete successfully irrespective of connectivity status.

You cannot perform any operation when data purge is in progress, as the **app is locked** till data purge completes. However, you will have the **option to cancel** data purge when data is being retrieved. If you cancel, no data is purged.

Scope of the purged data is the same as that for ServiceMax for iPad app, and includes events & related records, download & advanced download criteria records, and attachments.



For more information about the scope of purged data, refer to [Online Help](#)

Increased Detail Window Size

The size of the detail window (lines sections) in SFM Edit process screens is now dynamically increased, to show up to 20 records, without the need to scroll vertically within the SFM screen. This applies to Attachments section also. This improves usability, by enabling the user to view more data in one screen and with reduced scrolling.

ServiceMax Spring 15 for iPhone

Lists – Online Search and Download On Demand

You can now include online results for a search by tapping the **Continue Search Online** button, when you have connectivity.

You can then download any specific record returned from online. For this, tap the download icon to view the details of the record, and then tap the **Download** button in the search detail screen. You can cancel a download in progress, by clicking the **Cancel Download** button.

Once downloaded, you need to tap the Actions menu item **Refresh from Salesforce** to get any updates to the record in online to iPhone. If the downloaded record meets Download or Advanced Download criteria, then the record is automatically synchronized during regular (interactive or scheduled) incremental data sync.

Self-Dispatch

You can now self-dispatch work orders from Lists screen. This enables you to pick a new work order from server, download it to iPhone, and schedule it in your calendar.

For this feature, the configuration required to be done by the administrator is as follows:

1. Create a custom SFM wizard for Work Order.
2. Add an SFM wizard step to the above wizard, for the standard SFM transaction **Create New Event From Work Order**.

Choose the standard SFM transaction with the SFM Transaction ID (Wizard Step ID) **WO_EVT_001** and the description 'This SFM transaction is used to create new Event record from Work Order'.

After the above configuration is done, you can do configuration sync and follow these steps for self-dispatch:

1. Search for the work order in **Lists** screen and tap it to see the details in a matching View Record process screen.
2. Invoke the Actions menu.
Section **Create Event** will be displayed at the top.
3. Tap the menu item **Create New Event From Work Order** in the Create Event section.
It will launch the Work Order event-creation SFM screen, with **Related To** automatically set to the selected work order's number.
4. Populate the other details such as event subject, start and end date time, and so on, and tap Save to schedule the work order to self.

When a work order event in the calendar is tapped and Actions menu is invoked, the menu item **Create New Event From Work Order** will be listed in a custom section, as configured by the administrator. This helps create any additional event required for the work order.

Troubleshooting

Troubleshooting option is available as an **Actions** menu item in Work Order View Processes, if configured in SFM Designer. It lists the **Knowledge Base articles*** related to the work order's product.

***Note:** This is a proprietary ServiceMax feature for the iPhone app and different from Salesforce Knowledge.



To know how to create Knowledge Base articles, refer to [Online Help](#)

When there is connectivity, all the applicable articles are listed. Articles not yet downloaded to iPad are displayed with **download** (cloud) icon and downloaded articles are displayed with size.

Tap any article to open it. If it is not already downloaded, it will be downloaded first and then opened. When download is in progress, option will be available to **cancel the download**.

You can swipe a downloaded article from right to left, to display the **Delete** button. Tapping this deletes the article only from the device, thus saving disk space. The deleted article will be displayed with the download icon; you can download it again when needed.

Multiple SFM View Processes

Actions menu now displays all the view processes available for an object in the last section titled **View Processes**. You can tap any listed view process, to view the details of the current record using the new view process. This helps you to view the data of other relevant fields / child records / sections, as configured by the administrator. If your current record does not meet the qualification criteria of any view process you select, app displays a message to that effect and does not switch to the new view process.

Similar to iPad app, the last view process you select explicitly is remembered as the '**recent view process**' and is used as the default to open all the records accessed subsequently. If a record does not match the qualifying criteria of the 'recent view process', the first-matching view process is used.

Lookup Form-Fill

Any form-fill configured for a lookup field is now applied, both for header and line records. Lookup form-fill refers to auto-filling of other fields in the form (screen), with the values of the mapped fields from the lookup record you select. The mapped fields must be included in the list of Display fields in lookup configuration.

For instance, when you select an installed product to fill the IB Serial Number field in Work Detail line, you can use lookup form-fill to auto-fill the Part field in Work Detail with the Product field value from the selected installed product.

Attachments

You can now download, view, and upload attachments. Configuration required for enabling this feature is similar to that for iPad app and comprises the following:

- Enable **Attachments in SFM Designer** for View processes and Edit processes.
- Configure **Advanced Download Criteria** to download attachments for records (for instance work orders) related to scheduled calendar events.

Downloading and viewing attachments:

- Only the list of attachments is downloaded automatically during initial and data sync; attached files are not automatically downloaded.
- Attachment list is displayed in two sections, **Attached Documents** and **Attached Images and Videos**, and the number of attachments displayed with the section title.
- After navigating to the required section, tap the download icon to download an attachment.
 - Progress bar below the file name shows the download status
 - You can cancel the download when it is in progress
- Tap a downloaded attachment to view it (iOS platform determines file types supported for viewing)
- Actions menu item **Select** enables you to **share** one or more downloaded attachments from View or Edit process, using the iOS Share Sheet feature.
- Actions menu item **Select** enables you to **delete** one or more downloaded attachments from Edit process, after confirmation.
 - If you click Save after confirming delete, the selected attachments are deleted from the server on next data sync.
 - If you click Cancel after confirming delete, the selected attachments are deleted only from the device. You can download them again if needed. This feature helps you free up space in the device.

Uploading attachments using Edit process:

- Only images and videos can be uploaded.
- Maximum size supported for uploaded file is 25 MB.
- Tap the Actions menu item **Add** in Attached Images/Videos section, to upload a file. The options available are:
 - Add from Camera Roll
 - Take new picture
 - Take 120 seconds video
- The uploaded files are synchronized to server on save / next data sync.

Note that iPhone app must have access to the device's camera and microphone, to use the above options.

Barcode Scanning

iPhone app now supports in-built Barcode scanning capabilities to allow fast and effective capture of data related to products and parts. Since many products and parts carry barcode labels, ability to scan barcodes avoids technicians having to identify and enter the serial numbers manually. Scanning the serial number attached identifies the product / part quickly and uniquely.

Note: Bluetooth based Barcode scanning devices can also be paired with iPad to better utilize this functionality. Please refer to the scanning device's help for compatibility and configuration instructions.

Supported Barcode Formats:

Codabar, CODE39, CODE93, CODE128, EAN8, EAN13, GS1-128, QR Code Model 2, UPC-A, and UPC-E are the formats supported.

How to use Barcode Scanning:

In the required SFM data entry / SFM search screen, tap the relevant text / lookup / search field to launch the keyboard.

Tap the Barcode Scanning icon .

Focus on the Barcode, shake the device slightly and wait for auto-focus to complete. The scanned output is auto-filled in the text / lookup field

Note:

You need to allow the iPhone app to access the device's camera, to use this feature. If this access is not allowed, then you will see only a black screen with Cancel and 'i' options.

Scanning might not be successful for fuzzy/damaged barcodes or under low light.

Other Changes/Enhancements

- Signature ink color has been changed from red to black in Smart Docs.
- Tap target area for the map button has been increased for better usability.

ServiceMax Spring 15 for Android

Barcode Scanning Support – Text Fields and SFM Search

Barcode scanning is supported for text type fields in SFM data entry screens. To launch Barcode Scanning, tap the icon next to the text type field (text, text area, and long text area fields), in an SFM create/edit process. The scanned barcode is automatically filled in the text type field, and user can edit this value if needed.

Barcode scanning is also supported in Lists (SFM Search) screen in the search keyword fields. To launch Barcode Scanning, tap the icon next to the search keyword field, after launching the required search. The scanned barcode is automatically filled in the search keyword field, and user can edit this value if needed.

The supported barcode formats are:

CODABAR, CODE_128, CODE_39, CODE_93, DATA_MATRIX, EAN_13, EAN_8, ITF, PDF417, QR_CODE, RSS_EXPANDED, RSS14, UPC_A, UPC_E.



For more information about this feature, refer to [Online Help](#)

Manual Data Purge

Manual purging of old, unused data is now allowed as configured in Mobile Configuration screen. You can initiate this by tapping the **Purge Data** button in the app's Tools screen, when you have connectivity.

Data purge operation blocks you from using the app. However, you can cancel it when identification of data to be purged is in progress.

Scope of the purged data includes events & related records and download & advanced download criteria records.



For more information about this feature, refer to [Online Help](#)

Issues fixed in this release

ServiceMax Suite

Defect Number	Description
SMX013935	After a technician was moved from one service team to another, the Expertise records of the technician continued to be associated with the old service team.
SMX014265	When a case was created from installed product using SFM from within Salesforce Service Console, the new tab generated was not drawn properly initially; it was redrawn after automatic refresh, causing a few seconds of latent time. Additionally, the Knowledge sidebar and highlights panel were not displayed.
SMX014844	Datetime type formula fields included in SFM transactions used to display GMT values instead of values as per the logged in user's time zone.
SMX015222	When the Expanded Event Edit window was collapsed, the updates made to the Work Order field values and Event field values in that window were not getting saved.
SMX015238	Record Type fields displayed Salesforce ID instead of Record Type label. Record type-based picklists displayed all the values instead of the allowed set of values.
SMX015689	In Dispatch Console event hover information, datetime fields used to display incorrect date value when the date format was 'm/d/yyyy'.
SMX016957	ServicePower Calendar View Booking Window screen was not fully translated into all the languages supported by ServiceMax.
SMX018234	Days of the week displayed in the Gantt area of Dispatch Console were not translated in languages other than Japanese. Note: This fix applies to all the languages supported out of the box by ServiceMax, except Dutch, Italian, and Swedish.
SMX018246	After Linx for ServicePower was activated, pre-existing customization failed with the exception 'System.QueryException: Non-selective query against large object type' in managed package code. This resulted in follow-up work orders not getting created by the custom code.

ServiceMax Spring 15 for iPad

Defect Number	Description
SMX012197	When connectivity was low, sometimes PDF document was not generated in the server, after the user generated the smart document in iPad and synchronized it to server.
SMX013163	Evaluation of SFM Wizard criteria expressions on text type fields was case-sensitive, resulting in incorrect enabling and disabling of Actions menu items.
SMX014633	After a successful initial login as a non-English language user, if the app was killed and restarted, or put in the background mode and brought to foreground, app switched to displaying all the labels in English. Doing a configuration sync at this stage resulted in previously synchronized data no longer being available. This happened in some orgs.
SMX014969	In create and edit screens, all the header sections were not being displayed by default. Only the first section was displayed and user had to tap the option 'Show All' to see all the sections.
SMX015117	In view and edit screens, fields were not being displayed in the order in which they were configured in SFM Designer page layout.
SMX015129	Some lines section records were not being displayed if their qualifying criteria included Record Type field. This happened in some upgrade scenarios where the qualifying criteria expressions had been created in SFM Designer many releases ago.
SMX015230	When multiple lines section records were added in offline mode and smart document was generated, datetime fields in all the records displayed the values entered by the user for the last record.
SMX015382	In Explore screen, there was difference in the search result fields between online and offline search. On tapping the download icon for any online search result record, the field labels and field values displayed in the Download pop-up did not match.
SMX015422	When the locale or language on the iPad device was changed after initial sync, the iPad app crashed on re-launch.
SMX015456	If any installed product at a scheduled work order's location did not have associated Product, the app crashed during initial sync at step 5 of 6. On launching the app again, it used to crash immediately.
SMX015542	Pictures uploaded or taken on the iPad while offline did not get synchronized to server after going online and performing a data sync.
SMX015599	When images were uploaded from gallery or captured using the iPad camera, the size of the images increased considerably when synchronized to server. All the photos were being converted to 'PNG' format.
SMX015681	Numeric fields were defaulting to 0 instead of blank value.

Defect Number	Description
SMX015682	<p>It was not possible to tap an event associated with a work order to view the work order details or launch any work order action from calendar.</p> <p>In Day View, Work Order Summary and 'Details >' option were not displayed.</p> <p>In Week View, error message 'No view process available for the logged in user' was displayed, though there was a view process available.</p>
SMX015703	<p>If State was blank in technician's address, launching the map made the app unresponsive.</p>
SMX015741	<p>When generating a custom service report, the app displayed the error message 'Getting NSInvalidArgumentException: data parameter is nil'.</p> <p>This happened if the custom report template did not include all the target child objects configured for the smart document.</p>
SMX015797	<p>When GPS Location Tracking was enabled and configured for Technician record update, Technician record's longitude field was updated with incorrect value.</p>
SMX016922	<p>Attachments uploaded from iPad app were being marked as Private, preventing the non-admin users from being able to view the attachments.</p>
SMX017840, SMX018070	<p>Incremental data sync did not complete successfully, or got completed after a long time.</p> <p>This happened when the value of configuration setting SET011 was 40 and the number of Advanced Download Criteria records was high.</p>

ServiceMax Mobile For Laptops

Defect Number	Description
SMX014248	Login to the application in Windows on virtual machine failed with the error 'An unexpected error has occurred while connecting to Salesforce. Re-login to proceed.', when there was no connectivity.
SMX015350	In a corporate network with proxy which allowed access to Salesforce only, login to the application failed even when there was connectivity. The error message displayed was 'Unable to connect to ServiceMax online. Please ensure your computer is connected to the internet.'
SMX015552	Advanced lookup filter returned records having a numeric field value equal to 0 also, though it had been configured to return only records with the numeric field value greater than 0.
SMX015869	Lines section records which meet the qualifying criteria were not displayed in view or edit screens, when the criteria expression included Is Null or Is Not Null check on a date field.
SMX015891	Lines section records which did not meet the qualifying criteria were displayed in view and edit screens, when the criteria expression was based on a formula field of numeric type.
SMX015907	Smart document generation failed with the error 'You can not generate a document until this record has synced'. This happened when smart document generation was invoked for a locally created record, before the record was synchronized with the server.
SMX017840	Incremental data sync did not complete successfully, or got completed after a long time. This happened when the value of configuration setting SET011 was 40 and the number of Advanced Download Criteria records was high.
SMX018124	Opening the lookup search window from the lookup field or by clicking the multi-add button made the application unresponsive or close. This happened when one of the display fields (such as Product) configured for a lookup field (such as Installed Product in Case Line object) was a reference field, but the reference object was not downloaded to the mobile app.

Known Issues/Limitations

This section lists known issues/limitations in the new features and enhancements released in the Spring '15 release of ServiceMax.

Dispatch Console

- In Advanced Technician Search, combination of required & optional skills returns technicians that match either all the required skills OR any of the optional skills, instead of technicians matching all the required skills AND zero or more optional skills
- In Advanced Technician Search, the absolute match % is less than the actual match % in some cases; however, the relative match % values are accurate
- In Advanced Technician Search, turning off Eligibility match / Preferred Technician match does not work as expected

ServiceMax Spring 15 for iPhone

- Troubleshooting screen does not support searching for Knowledge Base articles based on keywords
- Troubleshooting screen does not support Product Manuals or Chatter

Appendix

Configuration Settings introduced in this release

Common – User License Provisioning

Setting Id & Name	Setting Value and Details
SET001 Automate ServiceMax app provisioning as and when user is created/ updated.	<p><u>Default Value:</u> True</p> <p><u>Details:</u></p> <p>This global setting enables the process to automate ServiceMax app provisioning in subscriber environment as and when user is created/ updated. This provisioning is achieved using a trigger on User object.</p> <p>This is a master setting, which must be True for settings SET002 to SET004 below to be considered.</p>
SET002 Auto Assign Permission Set Licenses	<p><u>Default Value:</u> True</p> <p><u>Details:</u></p> <p>This global setting enables or disables automatic assignment of Permission Set Licenses.</p>
SET003 Auto Assign Default Permission Sets	<p><u>Default Value:</u> True</p> <p><u>Details:</u></p> <p>This global setting enables or disables automatic assignment of Default Permission Sets. This setting is used in conjunction with (requires) SET002.</p>
SET004 Auto associate ServiceMax License	<p><u>Default Value:</u> True</p> <p><u>Details:</u></p> <p>This global setting enables or disables automatic association of ServiceMax License.</p>

Dispatch Management – Dispatch Console Flex

Setting Id & Name	Setting Value and Details
SET066 Enable filtering by technicians assigned/scheduled to the listed work orders.	<p><u>Default Value:</u> True</p> <p><u>Details:</u></p> <p>If this group setting is set to True, filter technicians buttons will be visible in Dispatch Console. They allow filtering of technicians listed in the tree, to show only the technicians who have been assigned to or show only the events associated with the list of work orders displayed in the grid.</p>

Setting Id & Name	Setting Value and Details
SET067 Enable Advanced Technician Search (MCTM) in Dispatch Console	<u>Default Value:</u> True <u>Details:</u> If this group setting is set to True, Advanced Technician Search buttons will be visible in Dispatch Console. They allow filtering of technicians listed in the tree, to show only the technicians matching the multiple criteria defined in Advanced Search Control Panel, for the work order selected in grid.

Dispatch Management – Linx for ServicePower

Setting Id & Name	Setting Value and Details
SET010 Enable processing of real time updates from ServicePower's Push Client Service	<u>Default Value:</u> True <u>Details:</u> When this global setting is set to True, it enables processing of real time updates and dispatch message sent from ServicePower system, provided the Push Client Service is configured. When set to False, the messages from ServicePower system will be ignored..
SET011 Default ServicePower Standard Activity Type for non-Work Order events	<u>Default Value:</u> <Blank> <u>Details:</u> The value of this group setting is used as the default Standard Activity Type for non-Work Order events, which have a blank value in Type field. The event will be created/updated only in ServiceMax and not in ServicePower, if the value of this setting is blank and event's Type is blank.

Dispatch Management – Event Management

Setting Id & Name	Setting Value and Details
SET003 Enable overhead times for work order events	<u>Default Value:</u> False <u>Details:</u> This group setting indicates whether overhead times at the start and end of the work order service are captured and displayed in Dispatch Console for work order events.
SET004 Enable break time for work order event	<u>Default Value:</u> False <u>Details:</u> This group setting indicates whether break time during the work order service is displayed in Dispatch Console for work order events.

Configuration Settings updated in this release

Dispatch Management – Linx for ServicePower

Setting Id & Name	Setting Value and Details
SET001 ServicePower Promise Set	<p><u>Default Value:</u> PD</p> <p><u>Details:</u></p> <p>This group setting specifies the Promise Set to be used to fetch a list of appointments from the Appointment Booking System in ServicePower.</p> <p>The type of this setting has been changed in this release from Picklist to Text. There is no impact because of this setting on upgrade.</p>