# MobileTech 2022 (9.0) Readme

**Release Version: 9.0** 

Release Date: November 2022

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# **Installing MobileTech**

# Upgrading to 9.0 from a previous version

You can upgrade to MobileTech 9.0 from version 8.5 or higher.

- Before you upgrade from a previous version of MobileTech:
  - Make sure that all mobile devices have been synchronized to the host system. If you've made changes to views or stored procedures in previous versions of MobileTech, those changes will be overwritten during the upgrade.
  - IMPORTANT: Inactivate any active Woodford projects prior to running the upgrade.
- You'll be prompted to install database objects the first time you log into MobileTech Administration after upgrading. You must do this for each company. If you're not prompted to install database objects, go to Tools > Create MobileTech Objects and select Process. For more information, see Log into MobileTech Administration in the Installation & Administration Guide<sup>1</sup>. For additional upgrade notes, see Upgrading MobileTech (page 1) in the Installation & Administrative Guide. Installing database objects during an upgrade does not remove any data from the middle tier.
- Re-enable any options that were enabled in Woodford. For example, if you've disabled the ability for your technicians to be able to delete their time-in, you would need to update the Offline HTML variable allowDeleteTimeIn to equal false in the MobileTech Woodford Project.

# Installing MobileTech for the first time

You can install and set up MobileTech as described in the Signature MobileTech Installation & Administration Guide<sup>2</sup>.

# **Installation Components and Compatibility**

- MobileTech Components to Install (page 2)
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<sup>1</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488310/Installation+Administration+Guide

<sup>2</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488310/Installation+Administration+Guide

### **MobileTech Components to Install**

To set up and implement MobileTech, you must install these components:

- MobileTech Server 9.0.75 (includes Resco Woodford v15.2.1.825, Publish Version 15.1
- MobileTech 9.0.75.Woodford (included in installation) or MobileTech with Inspections 9.0.75.Woodford
- Resco Mobile CRM 15.2.2 or higher (from device App Store)

### **Important Notes**

- Microsoft announced on May 24, 2024, that they are deprecating Bing Maps. Customers using Bing Maps for Enterprise Basic or Free license will no longer be able to use Bing Maps for Enterprise services beyond June 30, 2025. To continue using Mapping in MobileTech, you will need to obtain a Google Maps API key at https://cloud.google.com/maps-platform/pricing/. (You will need an API key that includes Maps and Routes. You do not need Places.) See Enter the Google Maps API Key<sup>3</sup>.
- As App Stores are increasing their security requirements, HTTPS (with Trusted SSL Certificates) will soon become
  a requirement across all device types. Therefore, it is our recommendation that you transition your MobileTech
  environment to use SSL with a trusted certificate.
- Do not install MobileTech server components on your SQL Server machine.
- Install MobileTech Administration on the MobileTech web server.
- Verify the eTimeTrack Web Service current release version matches the installed version of Signature. For
  installation instructions for each component, see the <u>Installation & Administration Guide</u><sup>4</sup>.

# **Compatibility**

To find a complete list of system requirements across all the Signature modules, refer to the <u>System Requirements</u><sup>5</sup> document.

This table lists the tested and supported compatible versions for MobileTech 9.0.

Software or Device	Compatible Versions	
Operating Systems	<ul> <li>Android 11, 12, 13</li> <li>iOS 15, 16</li> <li>Windows 10, 11</li> </ul>	
■ IMPORTANT  If you are upgrading to Signature 18.05b07, you must upgrade to MobileTech 9.0. However, if you are only upgrading MobileTech to version 9.0, you can be on any of these compatible Signature versions.	<ul> <li>Signature 18.05b07</li> <li>Signature 18.04b06</li> <li>Signature 2018 R3 (18.00b03)</li> <li>WennSoft's mainstream support for Signature 2018 R3 ends on January 10, 2023. See the Lifecycle Support Policy at <a href="https://www.wennsoft.com/wsportal">https://www.wennsoft.com/wsportal</a> for more information.</li> </ul>	

<sup>3</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489544/Enter+the+Google+Maps+API+Key

<sup>4</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488310/Installation+Administration+Guide

<sup>5</sup> https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7507956/System+Requirements

# **Incompatibility**

- Flexible Forms is not compatible with Microsoft Windows 11.
- Servers running Cylance script control.
- MobileTech inventory transactions do not support Microsoft Dynamics GP Inventory Lots.

# **Obtain a Google Maps API Key**

To use the Mapping feature on any device, you will need to obtain a Google Maps API key at https:// cloud.google.com/maps-platform/pricing/. You will need the Maps JavaScript API (Maps > Dynamic Maps) and Geocoding (Places tab). Geocoding is required for setting coordinates. See Enter the Google Maps API Key<sup>6</sup>.



A Microsoft announced on May 24, 2024, that they are deprecating Bing Maps. Customers using Bing Maps for Enterprise Basic or Free license will no longer be able to use Bing Maps for Enterprise services beyond June 30, 2025.

### **Installation Notes**

- After upgrading MobileTech 9.0:
  - If you have set up password complexity, you will need to set this up again as the MobileTechAdmin.exe.Config file is overwritten.
  - · You will need to go to launch MobileTech Setup Options so that updated setup option records are added to the Integration Sync.
- You will need to add the IIS APPPOOL\RescoCloud user to the SQL Server Reporting Services Home Folder permissions page. For instructions on adding the user, see <a href="https://docs.microsoft.com/en-us/sql/reporting-">https://docs.microsoft.com/en-us/sql/reporting-</a> services/install-windows/reporting-services-configuration-manager-native-mode?view=sqlallproductsallversions. You can filter the instructions to your SQL Server version.
- The Job Summary Timesheet report no longer prints automatically when a technician completes a job appointment with billable transactions on the appointment. If your company would like to continue to have this report automatically generated, you can remove the comment lines from Offline HTML:



Enabling the automatic timesheet generation after completing a job appointment:

- a. In Woodford, select the MobileTech Woodford project and then select Edit from the menu bar.
- b. From the left navigation, select **Offline HTML**.

<sup>6</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489544/Enter+the+Google+Maps+API+Key

- c. Double-click **Entity** to open.

  Double-click **Appointment** to open.
- d. Select **appointment-form\_complete-job.html** and then select *Edit* from the menu bar.
- e. Scroll down to FORM EXECUTIONS.
- f. Locate //,generateTimesheetReport(appointment) //Uncomment line to turn on automatic generation of timesheets.
- g. Remove the preceding //, and succeeding //Uncomment line to turn on automatic generation of timesheets so that the line only displays the following.

  generateTimesheetReport(appointment)
- h. Select Save.
- i. Select *Save* from the menu bar.
- j. *Publish* the project.

### **IMPORTANT**

### **Deprecation Note:**

The legacy UseXOi feature has been deprecated and is no longer available as a setup option in MobileTech Administration.

# **New Features**

- General (page 5)
- Resco Inspections (page 22)

# General

Case #	New Feature
MTW-1493	Technicians can now view open service calls in the Call History list by selecting the new Include Open Calls checkbox. Before this new feature, only completed or closed service calls displayed.
MTW-1534	Users can now view the Fault Details for equipment before creating the service call or service request. The Fault Details view includes the fault name, priority and fault status icons. Faults are sorted to display "In fault" rules at the top of the list and then sorted by Priority. Users can narrow the displayed list by searching for any displayed information (like status, etc.). Select the fault to display the timestamp, description, issue type(s), status, system effect, and recommendations. From the specific fault display, users can create a service call or service request for that fault, or they can close the view to proceed without creating a call/request. See <u>Create a Service Call or Request from BOB Dashboard or Tab</u> 7.
MTW-1550	Service Area has been added to the MobileTech Schema for custom needs. The read-only servicearea field (limited to 15 characters) is now available on the Location table.

<sup>7</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489173/ Create+a+Service+Call+or+Request+from+BOB+Dashboard+or+Tab

Case #	New Feature
MTW-1640	We've added a new Appointment Details section to the New Service Call form where technicians can add the appointment start date, estimated hours, description, and status.
	<ul> <li>Start Date: The default date is the current date/time.</li> <li>Estimated Hours: The default value is 1 and can be incremented by .25.</li> <li>Description: The maximum length is 50 characters.</li> <li>Status: The default value is DEFAULT. The COMPLETE and DEFAULT values do not display as a status to select in the drop-down.</li> <li>If AutoStatusUpdate is set, this will be the status that defaults in this field. See Mobile Device Global Settings<sup>8</sup>.</li> <li>If TimeLogStatusUpdate is set, while this status is available in the status list, when selected, technicians will be prompted to synchronize their device. This status can only be selected when the technician is ready to time into the appointment, not when creating the appointment. See Time Log Settings<sup>9</sup>.</li> </ul>
	The service call and appointment display as "Pending Service Call" and "Pending Appointment" until the technician has synced the device. If the pending service call is deleted, this also will delete the pending appointment and appointment status change timestamp.
	If you don't want the Appointment Detail fields to display on the New Service Call form, you can update the SetAppointmentDetailsOnNewCall option to <i>false</i> in SQL.

 $<sup>8 \</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488360/Mobile+Device+Global+Settings \\ 9 \ https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488398/Time+Log+Settings$ 

# Case # **New Feature** MTW-1691 We've added refrigerant tracking to the appointment validation that applies only if: UseRefrigerantTracking = True 2. The service call has equipment assigned to it where the equipment has a Refrigerant Equipment Type other than 0 - Not Applicable. 3. The service call does not have any refrigerant tracking records for at least 1 of the assigned pieces of equipment. When completing the appointment, Add Refrigerant Tracking now displays in the Missing Recommended Data window. Missing Recommended Data Complete Tasks Add Refrigerant Tracking Complete the Appointment Cancel This validation checks if the current user has not entered a refrigerant tracking record for at least 1 of the assigned equipment on the service call. Users can still select to complete the appointment without entering the refrigerant information. • If only one piece of equipment is on the call with the appropriate requirements, when Add Refrigerant Tracking is selected, the Equipment form opens to the Refrigerant tab where users can enter and save information. • If more than one piece of equipment matches the requirements, when Add Refrigerant Tracking is selected, the Service Call form opens to the Equipment tab with the equipment displays. The user will need to select the equipment and then select the Refrigerant tab to enter and save the refrigerant information. MTW-1715 In MobileTech Admin, we've added a Send Test Email button in the Setup Options window so that you can test your SMTP server settings in the Report Settings section. If successful, a "Test Email sent to Admin Email Address" message displays. If unsuccessful, an error message displays the system error(s). See Report Settings<sup>10</sup>. The email layout is as follows: · From: if UseSMTPAuthentication then from SMTP username, otherwise AdminEmailAddress To: AdminEmailAddress • Subject: MobileTech Admin Test Email • Body: You have requested to send this test email from MobileTech Admin.

<sup>10</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488502/Report+Settings

Case #	New Feature
MTW-1718, MTW-1953	Event-based syncing now includes creating equipment and adding purchase order lines (see the note below for purchase orders). After saving the equipment or purchase order, technicians are prompted to sync their device if they have UseEventBasedSync turned on. See <a href="Mobile Device Global Settings">Mobile Device Global Settings</a> .
	To use event-based syncing after adding a PO line, you will also need to update Offline HTML to set the "usePOEventBasedSync" = <b>true</b> . The default for this variable is set to <b>false</b> . This variable is found in file entity\purchaseorderdetail\purchaseorderdetail-form.html in the MobileTech Woodford project.
MTW-1807	If you do not want your technicians to be able to create appointments in MobileTech, you can remove the Create permission from the Appointment entity in the MobileTech Woodford project. See <u>Turn Off Appointment Creation (optional)</u> <sup>12</sup> .
MTW-1812	The departmentid and positionid read-only columns in the middle-tier Employee table are now populated during a Load Data or integration sync.
MTW-1825	Technicians can now view read-only historical task responses on an MCC (maintenance contract computer-generated) service call from the Task form by selecting the new Task Response History tab and then selecting the Redisplay icon within the expanded section to retrieve the task response history. Internet connectivity is required. This displays the task label and response for historical service calls on the contract. The number of historical service calls displayed is determined by the <a href="MobileTech Company-Specific Settings">MobileTech Company-Specific Settings</a> setup option HistoryCount. The technician can collapse/expand the entire list or individual service calls. The historical responses remain on the device until the next device sync. See <a href="Complete Tasks for a Service Call">Complete Tasks for a Service Call</a> This option requires internet access.

<sup>11</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488360/Mobile+Device+Global+Settings

<sup>12</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488362/Turn+Off+Appointment+Creation+optional

<sup>13</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488495/MobileTech+Company-Specific+Settings

<sup>14</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488491/Complete+Tasks+for+a+Service+Call

### Case # **New Feature** MTW-1826 We've added the ability for technicians to see other technicians scheduled for the same service call or job by selecting the new Related tab on the Appointment form and then selecting the Redisplay icon. Technicians can see the appointment status, technician name, appointment date/time, appointment description, and completion date. The list of appointments can be sorted by start date or appointment and/or the list can be filtered. This option requires internet access. • Service appointments automatically show all appointments on the service call. • Job appointments show only the appointments for the selected date range. The default date range is +/- 1 day. You can select any date range, however, be aware the larger the range the longer it may take to retrieve the data. C Related Appointments Start Date Q Search 4/18/2022 2:00 AM 220420-0001:0001 STATUS: COMPLETE COMPLETION: 4/18/2022 TECHNICIAN: ALICE DESCRIPTION: Flushed hose and cleaned drain. 4/21/2022 2:00 AM 220420-0001:0003 STATUS: OPEN TECHNICIAN: ANDY MTW-1827 We've added a UseReplacementParts option in Equipment Settings to utilize replacement parts that are added to equipment in Signature. When set to True, the Parts tab is added to the Appointment Completion form for service appointments. When selected, replacement parts are listed and grouped by equipment assigned to the service call. The technician can select and add the replacement part as an inventory transaction. The information displayed on the Replacement Parts form includes the item number, description, quantity needed for replacement, and unit of measure. The quantity refers to the quantity added for the replacement part in Signature. For information on using the Replacement Parts tab, see <u>Create a Replacement Parts Inventory</u> <u>Transaction</u><sup>15</sup>. Replacement parts for equipment are added in the Replacement Parts window in Signature. See Assigning Replacement Parts to Equipment<sup>16</sup>. If UseReplacementParts is true, then UseTaskMaterials in the Task Settings<sup>17</sup> section must be false. We have added the ability to track the time and mileage taken to travel to or from an appointment. MTW-1828, MTW-2029 Travel can be started, paused, ended, or deleted. This option is available if UseLabor, UseTimeLog,

and UseTravelTimeLog are all set to True in MobileTech Admin. See <u>Labor Settings</u><sup>18</sup> and <u>Time Log</u>

<sup>15</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489641/Create+a+Replacement+Parts+Inventory+Transaction

<sup>16</sup> https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7510273/Assigning+Replacement+Parts+to+Equipment

<sup>17</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489309/Task+Settings

<sup>18</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488367/Labor+Settings

### Case # **New Feature** Settings<sup>19</sup>. To view more information on how to use the new feature, see Time In and Out of Travel<sup>20</sup>. Depending on setup: • Travel can be required before a technician can work on an appointment. • The technician can be automatically timed in to the appointment when ending travel. • The appointment status is automatically set when beginning or ending travel. • Minimum travel time and mileage can be set. MTW-1829 We've added the six equipment user-defined fields to the bottom of the Equipment form. This includes the user-defined 1-5 (char(31)) and user-defined 9 (datetime) fields. For information about setting up the user-defined labels, see Labeling User-Defined Fields<sup>21</sup> in the Service Management User Guide. Ext Warranty Type Click To Select Î Ext Warranty Exp None Fåe Ref. Equipment Type 0 - Not Applicable USER-DEFINED ACTIVE USER DETI USER-DEFINED ACTIVE USER-DEF SER DEFINED ACTIVE USER-DERI ACTIVE USER-DERI ACTIVE USER-DERI SER DEFINED ISER DEFINED ACTIVE USER DEFI ACTIVE USER-DEFI ACTIVE USER-DEFI ACTIVE USER-DEFI USER-DEFINED ACTIVE USER-DEF USER-DEFINED None ACTIVE USER-DEF ACTIVE USER-DEF 圍 몺 MTW-1831 Technicians can now add attachments to any labor expense transaction from the new Attachments tab on the Time Entry form. The transaction does not have to be saved before the attachment is added. The attachment name includes the transaction number. If the transaction is not fully saved or deleted before being synced, the attachment is also deleted. Once the device has been synced, the attachment is available in the Signature Time Card Entry window and attached to the transaction number. When adding work crew transactions, if an attachment is added at the initial creation of the time entry, the attachment is only added to that transaction. After the work crew time entries have been created, an attachment (same or different) can be added to each transaction. See Adding Attachments to Time Entry<sup>22</sup>.

<sup>19</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488398/Time+Log+Settings

<sup>20</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488458/Time+In+and+Out+of+Travel

<sup>21</sup> https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530447/Labeling+User-Defined+Fields

<sup>22</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488789/Adding+Attachments+to+Time+Entry

Case #	New Feature
MTW-1832	Technicians can now update their own passwords via devices. Password reset policies can be enforced on a timed basis (30, 90, 180 days, or 1 year). You have the option to require technicians to create their own password in MobileTech after they've entered the temporary password that you've assigned. You can assign a different password to each technician or you can assign the same password to multiple technicians. See <u>Set Technician Passwords with Admin Console (optional)</u> <sup>23</sup> . If you want to set up a Password Complexity and Lockout Plan, see <u>Setup Password Complexity and Lockout Policy</u> <sup>24</sup> .
MTW-1833	We've added a contract indicator that displays to the left of equipment that indicates the equipment is on a contract. This icon displays on the Location Equipment tab, Service Call Equipment tab, New Service Call form, and the BOB Equipment dashboard.  ■ 0000000001 - ROOF TOP UNIT  T4100 12358A982GB  ROOF TOP UNIT TRANE  0000000003 - ELEVATOR-PASSENGER  D6000 12ROI203590134  ELEVATOR-PASSENGER DOVER
MTW-1835	MCC (maintenance contract computer-generated) service call task notes are now available in the Task form as read-only. The technician can select the Task Note tab to expand the form to view the note. See <u>Complete Tasks for a Service Call</u> <sup>25</sup> .

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 $<sup>23\,</sup>https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489041/Set+Technician+Passwords+with+Admin+Console+optional\\ 24\,https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489819/Setup+Password+Complexity+and+Lockout+Policy$ 

<sup>25</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488491/Complete+Tasks+for+a+Service+Call

# Case # **New Feature** MTW-1841, You can now add a custom statement that displays above the signature box on the Timesheet MTW-2162 Signature form and is displayed on the Time Sheet Report. The character limit is 4000 characters. Keep in mind that longer statements will require technicians to scroll through the statement on their devices. The optional custom text is entered in <u>Signature Settings</u><sup>26</sup>. ⚠ To use this feature, you will need to deploy the updated Timesheet report. For information on deploying reports, see the Signature Reports Guide. **Timesheet Signature** < I hereby certify that, to the best of my knowledge, the provided information is true and accurate. Time Sheet Report ort Creation Date: 04/13/2022 Service Calls ACCURATE-12500 CLEVELAND Hourly Pay Code AVE Labor Category 1 220412-0000 10-11am CST 10:00 AM 04/12/2022 to 11:00 AM 04/12/2022 1.00 Total for TUESONY 4/12/2022 220413-0002 ACCURATE-12500 CLEVELAND Hourly Pay Cook Labor Category 1 03:00 PM 04/13/2022 to 04:00 PM 04/13/2022 1.00 Employee: Alan Flint 1.00 I hereby certify that, to the best of my knowledge, the provided information is true and accurate MTW-1844 Users can now add attachments to service and job appointments. The attachments are available in Signature 18.05b07 or higher at the appointment level. See Add Attachments to a Service Call<sup>27</sup>.

<sup>26</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489723/Signature+Settings

<sup>27</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488602/Add+Attachments+to+a+Service+Call

Case #	New Feature
MTW-1856	On the Equipment form, users can now select a different Building ID and can enter a Building Room.
MTW-1871	Auditing and Log synchronization events are now enabled by default in the MobileTech Woodford project. These options are both needed to populate the Sync Dashboard. See <u>Using Sync Dashboard</u> (optional) <sup>28</sup> .
MTW-1871	The sync prompt now defaults to enabled with the sync interval set to 4 hours and the check interval is 15 minutes. The prompt automatically displays on the device if the user hasn't synchronized their device within 4 hours with a check interval set at 15 minutes. After the technician syncs, the sync interval is reset. See <a href="Edit Synchronization Prompt">Edit Synchronization Prompt</a> (optional) <sup>29</sup> .
MTW-1871	The Support Email field in the Branding section of the MobileTech Woodford project now defaults to blank. When technicians select Email Log Files in the MobileTech About window, this is the email address that defaults to the device's email client. If the Support Email field is left blank, the technician will need to enter the recipient email. For more information, see <u>Add Support Email Address (optional)</u> <sup>30</sup> .
MTW-1875	For Signature 18.04b06 or higher, when the customer record is marked as inactive in Signature, users can no longer create a new service call for any of the customer's locations. If the customer is inactive, none of their locations will display on the New Call form. If you are using the Building Optimization Broker integration, when you select equipment for an inactive customer, Create Service Call and Create Service Request are removed from the list of action items. New appointments can still be created from existing service calls. See <a href="Enable Service Call Creation for Inactive Customers and Inactive Locations">Enable Service Call Creation for Inactive Customers and Inactive Locations</a> <sup>31</sup> .
MTW-1877, MTW-1878	Technicians now can delete a time-in for a job appointment or technician activity. Technicians are asked if they want to manually update the appointment or activity status. Technicians have the option to manually update the status. This is only available if the technician has not synced their device. See <u>Delete Time-In</u> <sup>32</sup> .  This feature can be turned off in Offline HTML in Woodford. See <u>Turn Off Ability to Delete Time-In (optional)</u> <sup>33</sup> .
MTW-1881	When saving responses for Yes/No, Integer, or Numeric task responses, the taskresponse.dateresponse value is set to the current date to indicate that a response of None or 0 (zero) is a valid response. Previously, the responses that were set to None or 0 were read as a non-response.

<sup>28</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488951/Using+Sync+Dashboard+optional

<sup>29</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489011/Edit+Synchronization+Prompt+optional

 $<sup>{\</sup>tt 30\,https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489241/Add+Support+Email+Address+optional}$ 

<sup>31</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489341/

Enable+Service+Call+Creation+for+Inactive+Customers+and+Inactive+Locations

<sup>32</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488290/Delete+Time-In

<sup>33</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488288/Turn+Off+Ability+to+Delete+Time-In+optional

Case #	New Feature
MTW-1913	When viewing service call history in MobileTech, if an employee is no longer an active MobileTech employee (and an active TimeTrack user), the Signature Employee/Vendor ID (gptechnicianid) now displays. Previously, if the technician was inactivated, the Employee information was blank.
MTW-1923	We've added the ability to choose if you want the Job Appointment Summary Report and Inspection Reports to be stored at the Cost Code or Job Level.
	A new setup option <b>JobAppointmentAttachmentLocation</b> has been added to the Resolutions Settings Setup Options. You can select where you want to attach the Job Appointment Summary Report and Inspection Report in Signature. The default value is Job and attaches the reports at the job level. Select Code Code to attach the reports to the cost code assigned to the job. The default value is Cost Code. See <u>Resolution Settings</u> <sup>34</sup> .
MTW-1925	The JSBridge log file located on the device now includes when a technician selects Cancel in the Sync Reminder prompt. This includes the date and time the Cancel button was selected. See <u>Edit Synchronization Prompt (optional)</u> <sup>35</sup> .
MTW-1969	Two new setup options have been added to Report Settings to provide the ability to turn off the summary reports when service and/or job appointments are completed. The default values are set to <b>True</b> .
	GenerateServiceSummaryReport
	If set to <b>False</b> :  • The Call Summary Report or Service Appointment Report is not generated when a
	service appointment is completed.
	<ul> <li>The list of emails to select to receive the report will not display.</li> <li>The Technician and Customer signature buttons will not show on the Summary tab.</li> <li>GenerateJobSummaryReport         If set to False:     </li> </ul>
	The Job Summary Report is not generated when a job appointment is completed.
	<ul> <li>The list of emails to select to receive the report will not display.</li> <li>The Technician and Customer signature buttons will not show on the Summary tab.</li> </ul>
MTW-2034	Latitude and longitude data is now captured when the TimeLog form is initially opened for Time In/Time Out and for Travel Time Log if the device has GPS capabilities and a value is returned. This information resides in the timelog table in the MobileTech Middle Tier. The fields are gptimein_latitude, gptimein_longitude, gptimeout_latitude, and gptimeout_longitude. GPS information cannot be edited on devices.
	If the travel time log is transferred, the original latitude/longitude values are used. Transferring the travel time log does not update the values.

<sup>34</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488366/Resolution+Settings 35 https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489011/Edit+Synchronization+Prompt+optional

# **New Features** Case # **New Feature** MTW-2049 We've updated how text input fields display on forms. Text input fields now contain descriptive text to help identify that these fields are editable and where to tap to add the text. Most text input fields display "Enter <field label>". On the legacy Job Safety Tasks form, the text fields display "Enter Response". Customer PO #: Enter Customer PO# Description: **Enter Description** We've also updated the Date Time Minute drop-down to increment by 1 minute. Previously this was limited to a 5-minute increment. You can edit the minute increment value in the MobileTech Woodford file. See Edit Time Entry Minute Increment (optional)<sup>36</sup>. ⚠ If you change the Time Log minute increment, this will change for all the date-time form inputs that have the 'Normal' style applied. Time In ▣ 220412-0001:0001 UNASSIGNED 4/25/2022 12:56 PM Time In AM 12 56 PM 1 2 58

MTW-2050

When completing a service appointment, technicians can now add an attachment to the service call, appointment, or equipment associated with the service call. The attachment is available on the Attachments tab the attachment was added to (service call, appointment, or equipment). See Complete a Service Appointment<sup>37</sup>.

3

59

<sup>36</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489617/Edit+Time+Entry+Minute+Increment+optional 37 https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488625/Complete+a+Service+Appointment

Case #	New Feature
MTW-2051	We've added the Equipment tab to the Appointment Completion form. When selected, technicians can view equipment associated with the service call. Equipment can also be associated with the service call from the Equipment tab. Equipment can also be associated with the service call from the Service Call form.
MTW-2058	We've added a Today's Appointments view to the Appointments list. Technicians can select Today's Appointments to view only the appointments for the current day.
MTW-2074	From the Appointment Completion form, when a technician selects one of the following tabs that opens a list that currently has no items, the corresponding form opens automatically so the technician can add that item: Time Entry, Inventory, or PO Detail tab. Previously, after selecting the tab, the technician would have to click the Add icon to open the form to create the item.
	The form auto-open happens the first time you navigate to the corresponding tab within the same instance of the Appointment Completion form.  For example, from the Appointment Completion form, you go to the Inventory tab. The Inventory form automatically opens where you can add the new inventory item. You close the Inventory form without creating a new item (the inventory list is still empty). You click a different tab. Still in the same instance of the Appointment Completion form, when you click the Inventory tab again, the empty Inventory list displays. You would have to select the Add icon to open the inventory form.
	The functionality has been added to the following lists but defaults to disabled (false). You can enable this in Offline HTML for each list by setting the variable <b>autoOpenNewForm</b> to true. Likewise, you can disable this for the Time Entry (from the Appointment Completion form), Inventory, and/or PO Detail lists by setting the variable to false. See <u>Enable/Disable Automatic New Form for Empty Lists (optional)</u> <sup>38</sup> .
	<ul> <li>Additional Work</li> <li>Attachment</li> <li>Change Order</li> <li>Change Order Detail</li> <li>Meter Reading</li> <li>Note</li> <li>Refrigerant</li> </ul>
MTW-2163	Technicians can now add or edit a comment on the Task form. The new Comment field has a 120-character limit and is found in the Task Details section below the Description field. The Comment field is available with or without task responses set up for the task.
MTW-2187	We've added the ability to set up your password complexity requirements, password expiration, and lockout mode in MobileTech Admin. While you can manually add the technicians' passwords in MobileTech Admin (see <u>Add a MobileTech User</u> <sup>39</sup> ) or in Resco's Admin Console (see <u>Set Technician Passwords with Admin Console (optional)</u> <sup>40</sup> ), you can use the Update Password Policy

<sup>38</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488591/

Enable+Disable+Automatic+New+Form+for+Empty+Lists+optional

<sup>39</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488383/Add+a+MobileTech+User

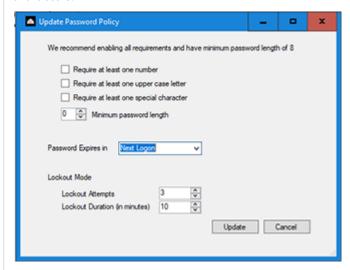
 $<sup>40\,</sup>https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489041/Set+Technician+Passwords+with+Admin+Console+optional/Console+optional/Console+Optional/Conso$ 

#### Case # New Feature

window to set up the complexity, password expiration, as well as the lockout mode. In MobileTech Admin, select Tools > Update Password Policy.

- When MobileTech users and administrators update their passwords, the password complexity is enforced.
- The password expiration applies only to MobileTech users, not to MobileTech administrators.
- If you've previously set up password complexity and lockout policy using Regex, those values will default into this window.
- If you do not have a password complexity set up, the Update Password Policy window automatically displays after these events:
  - Add Company Objects
  - Add/Update Organization Database
  - · Change Administrator Password
  - Upgrade Resco Server

We recommend enabling all requirements and setting the minimum password length to 8 characters.



If you do not have a password complexity set up, the Update Password Policy window automatically displays after these events:

- Add Company Objects
- Add/Update Organization Database
- · Change Administrator Password
- Upgrade Resco Server

Case #	New Feature
MTW-2194	<ul> <li>Technicians can now enter purchase orders on job appointments. We've added/updated the Purchase Order Settings section in the MobileTech Admin Setup Options window so that you can enable/disable the ability to add a purchase order to service and/or job appointments. The other remaining fields have not changed. See Purchase Order Settings<sup>41</sup> for setup information and see Create a Purchase Order<sup>42</sup>.</li> <li>UsePurchaseOrderService: Determines whether the PO Line tab is available when completing service appointments. Technicians can use that tab to enter purchase orders. This defaults to True for new installations and retains the existing setting for UsePurchaseOrder if upgrading.</li> <li>UsePurchaseOrderJob: Determines whether the PO Line tab is available when completing job appointments. Technicians can use that tab to enter purchase orders. This defaults to True for new installations and if upgrading retains the existing setting for UsePurchaseOrder.</li> <li>PurchaseOrderValidationLevelService: The level of requirement for entering purchase orders before completing a service appointment. The default value is OPTIONAL for new installations and retains the existing setting for PurchaseOrderValidationLevel if upgrading.</li> <li>OPTIONAL - Technicians do not need to enter purchase orders before completing appointments and are not prompted to enter them.</li> <li>WARNING - Technicians are prompted, but not required, to enter purchase orders before completing appointments.</li> <li>REQUIRED - Technicians must enter at least one purchase order before completing appointments.</li> <li>The job appointment summary tab has been updated to include a purchase order section.</li> <li>The Job Summary report has been updated to display a Purchase Orders section if PO lines exist for the job appointment.</li> </ul>
	reports, see the Signature Reports Guide. If you will not be enabling UsePurchaseOrderJob, you do not need to deploy the report.  • Use the Mobile Purchase Order window in Signature to process the purchase order added
	to a job appointment as you would if the purchase order was added to the service appointment.
MTW-2204	If you have updated to the latest Signature release (18.05b07), when you upgrade to MobileTech 9.0, the wsiMoblePurchaseOrderWork stored procedure will include a new @l_vTRX_Origin char(13) parameter that contains the value "MobileTech". This value corresponds with a new TRX Origin column in the Process Mobile Purchase Orders window in Signature.
MTW-2208	We've added an audit table named WSMobileTechAdminAudit containing information about which machines have MobileTech Admin installed. The table includes the machine name, installation date, installation by, and installation version.

<sup>41</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489753/Purchase+Order+Settings 42 https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488731/Create+a+Purchase+Order

Case #	New Feature
MTW-2269	The AutoStatusUpdate setup option in Mobile Device Global Settings now applies to both job and service appointments. This setting determines the default status for appointments that are received by the device. The default value is blank, which means no status is assigned to the appointments. See <a href="Mobile Device Global Settings">Mobile Device Global Settings</a> <sup>43</sup> .
MTW-2280	Technicians' latitude and longitude coordinates now automatically uploaded to the new audit_timelog table with a background sync to the middle-tier any time they time in, time out, or delete a time in. If you are using Travel Time Log, the coordinates automatically upload when travel time begins, pauses, resumes, ends, or if the travel time is deleted. See <a href="Travel Settings">Travel Settings</a> <sup>44</sup> . Some of the fields in the audit_timelog table include the name of the event (Time In, Time Out,
	Delete Time In, Begin Travel, Pause Travel, Resume Travel, Delete Travel, and End Travel), the service call ID, job number, appointment ID, employee ID, time in, time out, and latitude/longitude.
	To capture the data, the device must be connected to the server and have GPS Location turned on. If there isn't a connection or errors occur, an error message is saved to the JSBridge log file.
	The audit_timelog table has been added to the clean-up job and only keeps entries that were modified in the last 21 days, which is the same functionality as the timelog.
	You can disable this feature by accessing Offline HTML in the Woodford file. Go to Entity > timelog and edit timelog-form.html. Set useTimelogBackgroundSync to false. Save and publish the project. See <u>Disable Time In/Out and Travel Coordinates Background Sync</u> <sup>45</sup> .

<sup>43</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488360/Mobile+Device+Global+Settings

<sup>44</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488682/Travel+Settings

<sup>45</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489925/

Disable+Time+In+Out+and+Travel+Coordinates+Background+Sync

### Case # **New Feature** MTW-2281 When viewing the Job Detail for a job appointment, the Notes tab now includes all job notes including job, job cost code, change order, and job appointment notes. The Note tab is now always displayed, regardless of having a note attached. On the Note List, the note subject, creator, and date created as well as what the note references (note types (blue letters), appointment number, change order ID, job number, and job cost code) are displayed. Only the change order note can be edited. The job, job cost code, and job appointment notes are read-only. *In the screenshot below, the user created the note subjects to indicate the note type.* Appointment Notes ↑ Subject Q. Search Change Order Note CHANGE ORDER: 1008-4 Job Appt Note konnen AFFONTMENT: 1008:000213 Job Cost Code Note konnen xos cost code: Install 100 Amp Panels 1st Fir Job Level Note 9/15/2022 XX: 1008 : ELEC/Proj AIA Rate Class MILW MTW-2288 We've added a new setup option to the Purchase Order Settings section called UsePONonInventoryItems. When set to True, this setting allows users to enter non-inventory items to purchase order lines. This defaults to True. See Purchase Order Settings<sup>46</sup>. Originally UseNonInventoryItems in the Inventory Settings section allowed your technicians to enter non-inventory items when completing appointments and adding to purchase order lines. The Inventory Setting now only applies when completing an appointment. See Inventory Settings<sup>47</sup>.

<sup>46</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489753/Purchase+Order+Settings

<sup>47</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489668/Inventory+Settings

Case #	New Feature
MTW-2289	You can now add a shortcut to the Purchase Order Lines list on the home screen. When selected, the PO Lines list displays all purchase order lines on the device. The information included in the list is the purchase order number, vendor, item number, item description, site, quantity, unit, and date as well as the associated appointment ID, service call ID, or job number. Only the technician's appointment purchase orders display in the list.
	If the purchase order has not been synced to the back office, the technician can click on the PO line and then select Add PO Line to open the PO Line form to complete the new purchase order line. If the purchase order line has been synced, a message displays indicating that the purchase order cannot be modified. However, the technician can create a new purchase order line for the appointment by selecting the + icon to open the PO Line form and selecting the appointment. The PO Line form is completed as it was before. See <u>Create a Purchase Order</u> <sup>48</sup> .
	For information on how to add the PO Lines icon on the home screen, see <u>Adding Purchase Orders' PO Lines to Home Screen (optional)</u> <sup>49</sup> .  PO Lines  List of PO Lines
MTW-2293	We've added the ability to search for the customer number or customer name in the Field Invoicing Customer Setup window. See <u>Set up Customer Options for Field Invoicing and Field Payments</u> <sup>50</sup> .
MTW-2295	We've added the Enter Site Name toggle to the PO Line form if the technician has sites assigned but no inventory available for the site. The technician will need to enter the item number and description manually but can now have the option to select an assigned site instead of manually entering the site name.

<sup>48</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488731/Create+a+Purchase+Order

<sup>49</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6490087/Adding+Purchase+Orders+PO+Lines+to+Home+Screen+optional 50 https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488392/

Set+up+Customer+Options+for+Field+Invoicing+and+Field+Payments

# **Resco Inspections**

Case #	Description
MTW-1725, MTW-2191	Technicians can now view all inspection reports related to an entity including those created by other technicians within a selected date range if an internet connection is available. On the Inspection Reports list, we've added date range selectors and a Refresh icon. The date range defaults to the filter of the current week and the previous week. The technician can enter a date range and then select the Refresh icon to view all related inspection reports that have been created by any user, not just for the current user. The inspection report list has been updated to include the date the inspection report was created, the user who created the report if an online fetch was performed, and the appointment ID if accessing the reports from the Service Call form.
	This applies to the following forms:
	<ul> <li>Additional Work</li> <li>Customer</li> <li>Location</li> <li>Equipment</li> <li>Service Call (including inspections for appointments on the service call)</li> </ul>
MTW-1756	Users can now import a separate Woodford project that has Inspections enabled called <i>MobileTech with Inspections 9-0-xx.woodford</i> . This includes having branch/team entities enabled, Inspections is added to Home and Appointment forms. All Woodford projects are located in the <i>C:\Program Files (x86)\Signature\MobileTech\Admin\Woodford</i> folder. See <a href="Import the MobileTech Woodford">Import the MobileTech Woodford</a> Project <sup>51</sup> .
	<ul> <li>You will need to assign the Inspector Role in MobileTech Admin to any technicians who will be using Inspections (and the optional Job Safety Analysis). See <u>Working with Resco Inspections (optional)</u><sup>52</sup>.</li> <li>For branch/team filtering, you will still need to complete the steps as outlined in <u>Limit Inspections to Technician Teams and/or Branches (optional)</u><sup>53</sup></li> </ul>
MTW-1761	In the MobileTech Inspection Manager web app and Schedule, we now pull the technician's phone number from the K2A_ResourceExtension table, if available. The technician's phone number entered in Schedule (Administration > Resource Options) auto-populates in the Mobile Phone field in the MobileTech Inspection Manager web app (Technicians > select Technician). You will need to Load Data in MobileTech Admin (Tools > Load Data) to update the telephone number in the MobileTech Inspection Manager web app. If you update the technician's phone number in Resco Cloud, this will not update the phone number in Schedule.
K2ADEV-742	The inspection report filename is limited to 51 characters (this includes any appended date or timestamp information and the MIME type '.pdf') to match the settings in Signature. If the Inspection Report name exceeds 51 characters, the Inspection Report annotation entity fails with the sync error: String or binary data would be truncated.

<sup>51</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488390/Import+the+MobileTech+Woodford+Project

<sup>52</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488406/Working+with+Resco+Inspections+optional

<sup>53</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488404/

Limit+Inspections+to+Technician+Teams+and+or+Branches+optional

#### MTW-2190

You now have the option to link an inspection to all service appointments, all job appointments, and/or all equipment assigned to service appointments. This link is used to add an inspection to the appointment completion validation. Validation levels can be REQUIRED or WARNING. With REQUIRED, the inspection is required to complete the appointment. With WARNING, a technician can still complete the appointment without the inspection. Setting this up requires updating the link-appointment.js script in the MobileTech with Inspections Woodford project. You can limit the inspection to specific types of service appointments and/or equipment by adding the schema field name and value. See <a href="Inspection Validation During Appointment Validation Check (optional)">Inspection Validation During Appointment Validation Check (optional)</a>

```
links = {
    servicecall: {
        WARNING: [],
        REQUIRED: []
    },
    job: {
        WARNING: [],
        REQUIRED: []
    },
    equipment: {
        WARNING: [],
        REQUIRED: []
    };
};
```

A

Inspections must be template dependent. To set up template dependency the inspection must use versioning and the dependency level must be set to full. For information on setting up, see Resco's wiki: <a href="https://docs.resco.net/wiki/Questionnaire">https://docs.resco.net/wiki/Questionnaire</a> Designer#Creating a new questionnaire.

### MTW-2191

From the Equipment form, when viewing the inspection reports for a piece of equipment, all inspection reports will now be available, including those created by other technicians. Previously only the inspection reports for the current and previous week were available.

<sup>54</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488733/ Inspection+Validation+During+Appointment+Validation+Check+optional

#### MTW-2195

Technicians can now select location contacts to send inspection reports to when completing the appointment. The Inspection Report Emails form is accessed just like the Summary report emails form, during the appointment completion process after selecting the checkmark. The inspection report is sent to the selected location contacts, the technician, and to the distribution list as set up in the Inspection Email Options window in MobileTech Admin. See Set Up Email Options for an Inspection Report (optional)<sup>55</sup>.

On the Inspection Report Emails form in MobileTech, all inspection reports created for the appointment are listed. The technician can expand the inspection report to view a list of the location contacts and then select the contacts to send the inspection report. Only one report attachment is sent per email. For example, if the technician created two inspection reports and selects the same location contact for each report, the contact will receive separate emails for each inspection report.

As with the automatic sending of the inspection report, in Report Settings, ReportEmailMode must be set to "Selected or entered by Technician" (see Report Settings<sup>56</sup>) and in Inspection Email Options, the specific inspection report must be set up (see <u>Set Up Email Options for an Inspection</u> Report (optional)<sup>57</sup>).



#### **▲** IMPORTANT

The functionality for when the inspection reports are sent has changed. Inspection reports will be sent when the appointment is completed. Previously, the inspection reports were sent when the device was synced.

To disable the technician's ability to select location contacts for the inspection report, but still automatically send the report as set up in the Inspection Email Options window, you can set the Offline HTML variable 'sendInspectionEmailOnCompletion' to false in the entity > locationcontact > reportcontact-list.js.

JSA (Job Safety Audit) Inspection reports do not display in the Questionnaire Report Emails form as there is already automated logic available. See Set up Report Email Options<sup>58</sup>.

### MTW-2252

On the Job Safety Analysis Inspection form, the Technician name now auto-populates in the signature section. Technicians no longer have to manually enter their name.



⚠ This feature requires you to re-import the Job Safety Analysis.qbuilder questionnaire file into the Questionnaire Designer. See Enable Job Safety Analysis (optional)<sup>59</sup>.

### MTW-2277

We've updated the JSA Inspection form to use the Resco Cloud Summer 2022 Release's leaner JSON data storage option. We've also updated the JSA Inspection form to use versioning as Resco has deprecated the non-versioned inspection templates.



A If you were previously using the JSA Inspection form, you will need to reimport the template to utilize the updates.

<sup>55</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489555/Set+Up+Email+Options+for+an+Inspection+Report+optional 56 https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488502/Report+Settings

<sup>57</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489555/Set+Up+Email+Options+for+an+Inspection+Report+optional

<sup>58</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488381/Set+up+Report+Email+Options

<sup>59</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489537/Enable+Job+Safety+Analysis+optional

MTW-1859	Additional new features from Resco Winter 2021 Release
	For information including a YouTube demonstration from Resco, please go to <a href="https://docs.resco.net/mediawiki/index.php?title=Releases/Winter_2021">https://docs.resco.net/mediawiki/index.php?title=Releases/Winter_2021</a> .
	<ul> <li>Platform</li> <li>Tree view improvements</li> <li>Simpler form rules</li> <li>Pay with Resco (preview)</li> <li>Add multiple records to the associated view</li> <li>Integrations improvements</li> <li>Resco Cloud connector</li> <li>Web triggers for REST API</li> <li>Web triggers for OData</li> <li>Record Type translations support for Salesforce</li> <li>Support for working with marketing campaign members for Salesforce</li> <li>Inspections</li> <li>Buttons and reports</li> <li>Import questions from images/PDF documents. See Import Templates to Resco Inspections (optional)<sup>61</sup> in the MobileTech 9.0 Installation and Administration Guide.</li> </ul> A You can import up to 200 pages for free. If you need more, set up an AWS account <sup>62</sup> and activate Textract; you can then enter your Amazon credentials in the Questionnaire Designer. If you will be purchasing a
	license, you will need <b>Analyze Document API for pages with tables and forms</b> . The price per analyzed page (for the 1st million pages) is: $\$0.015 + \$0.05 = \$0.065.$
	Questionnaire records are easier to reference
MTW-2120	Additional new features from Resco's Spring 2022 Release

-

<sup>60</sup> https://docs.resco.net/mediawiki/index.php?title=Releases/Winter\_2021&mobileaction=toggle\_view\_mobile 61 https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6488946/Import+Templates+to+Resco+Inspections+optional 62 https://docs.aws.amazon.com/textract/latest/dg/setting-up.html#setting-up-signup

For information including a YouTube demonstration from Resco, please go to https:// docs.resco.net/wiki/Releases/Spring 2022.

- Inspections
  - Multiselect actions for Questionnaire Designer
  - Disable automatic reports in Questionnaire Designer
  - Display all images of multi-image question
  - Set up report command using Advanced Report Configuration



If you are currently using the JSA Inspection, you will need to reimport the Inspection template to use the updated Run Report command and the Advanced Report Configuration window. See Resco's Configure Run Report command wiki found at <a href="https://docs.resco.net/wiki/">https://docs.resco.net/wiki/</a> Configure Run Report command. MTW-2133

- Create a new record from a lookup question
- Reuse answers more effectively
- Disable immediate filtering in Result Viewer



Resco has added an **Apply filter changes automatically** checkbox to the Resco Cloud Results Viewer. When marked, the filter is immediately applied as you enter characters in the filter section. When unmarked, a Search button displays at the bottom of the filter section that you will need to click in order to apply the filter. MTW-1838

- Export with question labels, not IDs
- Default value for Image/Media question
- Tagged images on forms
- Resco Cloud authentication options
- Woodford command-line interface (CLI)
- Woodford GitHub integration improvements
- Debugger port change

#### MTW-2274 Additional new features from Resco's Summer 2022 Release

For information about the following new Resco Inspection features, see <a href="https://docs.resco.net/">https://docs.resco.net/</a> wiki/Releases/Summer\_2022#Inspections.

#### Inspections

- Leaner JSON
- Change group labels using rules
- Tweaks to the Yes/No question
- · Static image size
- UI: Switching between groups & group icons
- Custom commands for Button components
- Grid layout editor improvements
- Reorder uploaded images
- New deprecations

#### Additional new features from Resco's Autumn 2022 Release MTW-2358

For information about the following new Resco Inspection features, see <a href="https://docs.resco.net/wiki/Releases/Autumn\_2022">https://docs.resco.net/wiki/Releases/Autumn\_2022</a>.

### Inspections

- Improved grid layout editor
- Restrict image/media actions
- Restrict image/media display size
- Smart styles for yes/no questions
- Select language for questionnaire reports
- Dynamics backend integration improvements

# **Issues Fixed**

Case #	Fixed Issue
MTW-1897	Users are now able to enter payment information after completing an appointment as expected. We've fixed an issue that caused an error message that displayed over the Payment Detail window.
MTW-1898	Turning off Global Filtering in Signature no longer causes orphaned data in MobileTech.
MTW-1900	When Refreshing Lookups in MobileTech Admin, users with branches with duplicate names will no longer receive an error message.
MTW-1914	We've fixed an issue where users were able to create equipment even though the Create permission for equipment was disabled in Woodford.
MTW-2044	The note subject field maximum length has been updated to 500 characters and is validated when the note is created.
MTW-2209	To optimize sync time, we've added Equipment to the global Sync Date Filters in the MobileTech Woodford project. The default setting is +/- 1 month. See <u>Set up the Sync Date Filters (optional)</u> <sup>63</sup> .
MTW-2254	When an appointment is reassigned in the back office to another technician, the resolution note error "Object reference not set to an instance of an object" no longer occurs.
MTW-2257	Time entries no longer are moved back one day in MobileTech when using Time Zone Views and then running Load Data in MobileTech Admin.
MTW-2285	Users can now add task materials when UseNonInventoryItems is set to False in Inventory Settings.
MTW-2347	Appointments created for 7 PM CDT and Time Zone Views is enabled are now created as expected in Schedule. An issue was reported that these appointments were created as unscheduled in Schedule.

<sup>63</sup> https://wennsoft.atlassian.net/wiki/spaces/MT90/pages/6489535/Set+up+the+Sync+Date+Filters+optional

Case #	Fixed Issue
MTW-2375	The FTPurchaseOrderDetail view no longer causes timeouts and deadlocks.
MTW-2395	When using the Move Service Call utility in Signature, users will no longer experience orphaned appointment records. The appointments are now moved as expected to the moved service call.