MobileTech 8.5 Readme

Release Version: 8.5

Release Date: February 2021

This document includes these sections:

Installing MobileTech

Upgrading to 8.5 from a previous version

You can upgrade to MobileTech 8.5 from version 7.x 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.
- **If you are upgrading from**
  - **MobileTech 7:** You will need to uninstall MobileTech including MobileTech Admin, MobileTech Integration Sync, MobileTech Synch Server, and MobileTech Client from your Windows server/computers. Additionally, The steps for importing a new Resco Woodford project file have changed from previous releases. Be sure to read *Important information for upgrade customers who already use Woodford* in the Signature MobileTech Installation and Administrative Guide before you import the new project file.
  - **MobileTech 7.5 or higher**: You will not need to uninstall previous versions. The steps for importing a new Resco Woodford file have not changed.
- **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 choose Process. For more information, see *Log into MobileTech Administration* in the Signature MobileTech 8.0 Installation and Administrative Guide. For additional upgrade notes, see *Upgrading MobileTech* in the Signature MobileTech Installation and 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.** If you are using Mobile Auditing[1] (UseMobileAuditBackgroundSync=True), please be sure to re-enable the Woodford Auditing settings after importing a new Woodford project.

Installing MobileTech for the first time

You can install and set up MobileTech as described in the Signature MobileTech Installation and Administrative Guide.

1 https://docs.key2act.io/display/mt81/Enable+Mobile+Auditing

Installation Components and Compatibility

MobileTech Components to Install

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

- MobileTech Server 8-5-44 (includes Resco Woodford 13.3.0.51541, Publish Version 13.3)
- MobileTech 8-5-44.Woodford (included in installation)
- Resco Mobile CRM 13.3.2.0 or higher (from device App Store)

Important Notes

- 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 Signature MobileTech 8.5 Installation and Administrative Guide.

Compatibility Information

To find a complete list of system requirements across all the Signature modules, refer to the *Signature System Requirements* document found on the Product Download[2] page on Signature Resources. https://portal.key2act.com/customer-portal/downloads.

This table lists the tested and supported compatible versions for MobileTech 8.5.

Software or device	Compatible versions
Operating systems	• Android 8.0 (Oreo), 9.0 (Pie), 10.0, 11.0 • iOS 13, 14 • Windows 10
Signature version number	• Signature 18.03b05 • Signature 2018 R3 (18.00b03g310) • Signature 2016 R3 SP 2 (16.00b03g321)

Obtain a Google Maps API Key

If you will be using the Mapping feature on a Windows computer, 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.

2 https://portal.key2act.com/customer-portal/downloads

Installation Notes

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:

1. In Woodford, select the MobileTech project and then select *Edit* from the menu bar.
2. From the left navigation, select **Offline HTML**.
3. Double-click **Entity** to open.
   Double-click **Appointment** to open.
4. Select **appointment-form_complete-job.html** and then select *Edit* from the menu bar.
5. Scroll down to *FORM EXECUTIONS*.
6. Locate **//,generateTimesheetReport(appointment) //Uncomment line to turn on automatic generation of timesheets**.
7. Remove the preceding **//,** and succeeding **//Uncomment line to turn on automatic generation of timesheets** so that the line only displays the following.
   generateTimesheetReport(appointment)
8. Select *Save*.
9. Select *Save* from the menu bar.
10. *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

Case #	New Feature

MTW-1047, MTW-1104	**Users now have the option to use Resco Inspections with MobileTech!**
	
	With Resco Inspections, you can create custom inspection questionnaires, surveys, and more. For more information on enabling Inspections, see Enable Resco Inspections (optional)[3] in the MobileTech 8.5 Installation and Administration Guide and see Inspections[4] in MobileTech Help.
	
	A new role, the Inspector Role, has been added. This role determines if the new Inspection Report feature and the Job Safety Analysis form and report are available in the app. This role is assigned in MobileTech Admin.
	
	With this Inspector role assigned, users have access to:
	
	• Inspections icon in the Home navigation.
	• Inspections icon in the Appointment Completion form.
	• Reports icon displays any saved Inspection Reports. In the Microsoft Dynamics GP, Inspection reports are attached with the description "Inspection Report - *(Inspection Name)*". On the device, the attachments display for the current user and if the appointment is on the device. The Sync Filter is set to show for the current and past week. The Reports icon is available on the following forms: Additional Work, Customer, Location, Equipment, and Service Call (Service Appointment Inspections are saved to the corresponding service call).
	• Job Safety Analysis. See below for more information.
	• We've also included Resco's COVID-19 Health Check and Face Mask Check AI Model questionnaire templates.
	    ◦ **COVID-19 Health Check:** Resco Inspection questionnaire template
	    This form enables users to easily self-check whether they exhibit symptoms that are commonly related to the coronavirus. And if that is the case, it can offer also further instructions on necessary actions. (COVID-19 Health Check.qbuilder)
	    ◦ **Face Mask Check**: AI image recognition model for Resco Inspections
	    This AI image recognition model enables users to confirm with a photo whether they are wearing a facemask or not before they can proceed with the job. (Face Mask Check.qbuilder)
	
	⚠ To purchase the Resco Inspections module for MobileTech, contact your Key2Act Customer Success Manager.

[3] https://docs.key2act.io/pages/viewpage.action?pageId=78610471
[4] https://docs.key2act.io/display/MT85/Inspections

Case #	New Feature
MTW-1096	**New tiles on the Resco Cloud Dashboard** The Resco Cloud Dashboard (MobileTech Admin > Tools > Launch Resco Cloud) now displays the following tiles that only visible if the user has the new *Inspector* role. • **Questionnaire Designer** Allows users to import existing (or create custom) questionnaires that are displayed within MobileTech. • **Results Viewer** This browser-based tool displays all completed and in-progress questionnaires. You can filter the results according to various criteria or you can export them in .csv format. Additionally, you can view questionnaires one by one. • **Report Designer** Allows you to import existing templates or design custom document templates.
MTW-1094	**Job Safety Analysis** If you are using Resco Inspections, any Technician who is assigned the Inspector role has the option to use the Job Safety Analysis (JSA) inspection. Job Safety Analysis is tailored to ask specific questions about the site, to allow the Technician to identify hazards, and to document the steps they will take to remove risk. When completed, a JSA report is generated as a PDF file and is available as an attachment to the service call on the device and in Microsoft Dynamics GP. For more information, see Enable Job Safety Analysis (optional)[5] in the MobileTech 8.5 Installation and Administration Guide. and see Complete a Job Safety Analysis Inspection[6] in MobileTech Help. If you would prefer to use the legacy Job Safety Analysis form and report, on each device, you will need to go to Settings > MobileTech Settings and toggle Use Legacy Job Safety Analysis to Yes. This setup option only displays if you are using Resco Inspections and the Technician has been assigned the Inspector role; otherwise, Technicians would continue to use the JSA Task List.

5 https://docs.key2act.io/pages/viewpage.action?pageId=78610486
6 https://docs.key2act.io/display/MT85/Complete+a+Job+Safety+Analysis+Inspection

<table>
<tr><th>Case #</th><th>New Feature</th></tr>
<tr><td>MTW-1048</td><td>
A new Setup Option has been added to MobileTech Admin. If you are using Building Optimization Broker, you can display the Health Monitor information from a BOB dashboard access from the Home dashboard in MobileTech. We've also added a new BOB tab to the Appointment, Service Call, Equipment, Customer, and Location forms. From the BOB dashboard,
From the BOB dashboard, you can:

View the fault priority for all customers on the device.
Zoom to view the customer locations.
Zoom to view the equipment at a customer location.
Scan a barcode to quickly display that equipment and fault priority.
Select the High, Medium, or Low section at the top of the form to view all entities with that status display below.
Create a new service call by selecting a piece of equipment and then selecting Create New Service Call. Select the status information to be added to the Service Call Description.

From the BOB tab on an entity form, you can:

View the entity's Priority Fault status(es).

A numeric value displays in the center of each status icon.
If multiple Priority Fault levels are present for an entity, the color icons will stack, each with a numeric value to indicate the number of faults for that status.

Scan a barcode to quickly display that equipment and fault priority.
Select the High, Medium, or Low section at the top of the form to view all entities with that status display below.
Create a new service call by selecting a piece of equipment and then selecting Create New Service Call. Select the status information to be added to the Service Call Description.

</td></tr>
<tr><td>MTW-1091</td><td>We've added the Call Description to the service call title bars in the Service History window. Calls that don't have a description will still show the service call ID and the date as before.</td></tr>
<tr><td>MTW-1289</td><td>We've added a Prerequisite Files installation window that displays if the user needs to install SQL Server ODBC Driver and/or .NET Framework prior to installing MobileTech.</td></tr>
<tr><td>MTW-1320</td><td>You can now filter the Call Types that display via Offline HTML for technicians when creating a new service call and/or editing an existing service call. See Filter Service Call Types (optional)[7] for more information.</td></tr>
</table>

[7] https://docs.key2act.io/pages/viewpage.action?pageId=80150658

Issues Fixed

Case #	Fixed Issue
MTW-1165	If the Transaction Date is deleted on the PO Receipt form, users must enter a Transaction Date to save the form.
MTW-1166	When accessing Refrigerant Tracking via an appointment, the service call ID is now being set on refrigerant tracking with multiple records.
MTW-1171	Resolution notes are now syncing as expected when using Call Summary Report for a service call with multiple open appointments with different technicians.
MTW-1231	Offline HTML files now read the labels from the Localization dictionaries.
MTW-1237	We've added a step to the MobileTech cleanup job that removes any purchase order records where there are no related purchase order detail records.
MTW-1265	Users can now enter negative labor entries as expected.
MTW-1294	To prevent duplicate labor transactions that may occur from voided payroll transactions, the FTLaborExpense SQL view has been updated to limit the data retrieved to only include transactions with the tt.LNSEQNBR of 16384 as the tt.LNSEQNBR is updated to 32768 for any voided payroll transactions.
MTW-1298	We've enhanced the search performance for Site Inventory, Equipment, and BOB Dashboard forms.
MTW-1336	If a user changes the appointment date to a different date, the data now updates the appointment Start Date and the service call Start Date.
MTW-1376	Users should no longer receive an erroneous invoice sync error message indicating the "Bill To Location is not set up for Service" when the location is set up as expected.
MTW-1424	Fixed a validation issue with tasks created from Quadra. Technicians will no longer receive a "Check Responses Error: Unable to fetch tasks in hierarchy" error message when editing the tasks with a null gptasklistid.
MTW-1438	We've fixed an issue where the Technician Site contains a NULL ownerid when MobileTech user data is created out of order. We've updated the WSMobileLoadTechnicianSite store procedure so that if you mark a Signature Registered User after running Load Data (Refresh Lookups), it will now fix the middle-tier record with the proper ownerid value. You will just need to run Refresh Lookups in MobileTech Administration for the employee and all boxes underneath.
MTW-1443	Call Resolution Codes now synchronize as expected to Signature.

Known Resco Issues

The following are known issues that have been reported to Resco:

Case #	Description
MTW-899	**For Windows users (devices and .msi installation) only:** • When creating a meter reading and using the +/- buttons on a currency-format field, after entering the first reading and attempting to enter the second reading, the first reading amount is cleared out and displays in the second reading field. • When entering a time entry and using the +/- buttons, after entering the first time entry and attempting to enter a second entry, the first entry is cleared and that amount displays in the second time entry field. *Workaround:* Until Resco has a fix for this, we have hidden the +/- buttons for Windows users. Technicians can still manually enter the amounts.
MTW-764	**For iOS users:** Certain data is not being deleted when sharing devices and switching users in the iOS Mobile CRM app. *Workaround*: The user should delete data, re-sync the device, and then verify the user name in MobileTech Settings.