MobileTech 8.6 Readme

Release Version: 8.6

Release Date: November 2021

This document includes these sections:

Installing MobileTech

Upgrading to 8.6 from a previous version

You can upgrade to MobileTech 8.6 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 8-6-68 (includes Resco Woodford v14.2.0.141, Publish Version 14.1.1)
- MobileTech 8-6-68.Woodford (included in installation)
- Resco Mobile CRM 14.2.2 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 8.6 Installation and Administrative Guide.

Compatibility

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 8.6.

Software or device	Compatible versions
Operating systems	• Android 9.0 (Pie), 10.0, 11.0, 12.0 • iOS 13, 14, 15 • Windows 10
Signature version number	• Signature 18.04b06 • Signature 18.03b05 • Signature 2018 R3 (18.00b03g310)

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

Incompatibility

Flexible Forms is not compatible with Microsoft Windows 11.

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.

Installation Notes

- 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 https://docs.microsoft.com/en-us/sql/reporting-services/install-windows/reporting-services-configuration-manager-native-mode?view=sqlallproducts-allversions. 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 project and then select *Edit* from the menu bar.
b. From the left navigation, select **Offline HTML**.
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

Case #	New Feature
MTW-1423	The Appointment ID is now appended to the Appointment Summary name in the Document List attached to the service call in Service Management.
MTW-1432	The BOB Dashboard and entity forms have been updated to display the new Priority Fault icons from Building Optimization Broker. Additionally, if multiple Priority Fault levels are present for an entity, the color icons will stack, with a numeric value to the right of the icon to indicate the number of faults for that status. • High Priority Fault • Medium Priority Fault • Low Priority Fault
MTW-1446	The Call Resolution Note field is now limited to 32,000 characters like Signature notes. If the note field exceeds the limit, an error email is sent to the Admin Email Address (set up in MobileTech Company-Specific Settings[3]) that includes the full appointment resolution note that was added and indicates the text that was truncated. The MT appointment.resolutionnote attribute will still contain the full appointment resolution note, so no data is ever lost. Error Email Example: The following MobileTech error has been logged to the MobileTech Event Log: Service Call 210415-0001 Resolution Note - Max length exceeded when trying to append appointment resolution note: [4/15/2021 1:38:58 PM Flint, Alan] appointment 9 notes; Changed Filters; Calibrated Thermostat; Replaced Brake Pads; Added Freon to System; Performed Preventive Maint; RECLAIM REFRIGERANT; Replaced Relay & Contacts; Replaced Motor; Lubricated Guide Rails; Oil Change; Replaced Sheave; Reset System; The following text was not included: to System; Performed Preventive Maint; RECLAIM REFRIGERANT; Replaced Relay & Contacts; Replaced Motor; Lubricated Guide Rails; Oil Change; Replaced Sheave; Reset System;

3 https://docs.key2act.io/display/MT86/MobileTech+Company-Specific+Settings

MTW-1465	Technicians now have the option to create a service request from the BOB dashboard or tab for any linked BOB equipment that has an active fault. The user selects the equipment and then selects Create Service Request. In the Create Service Request window, the BOB equipment name, client, and site fields auto-populate and are display-only. The user selects one fault from the Fault drop-down. The Issue Types and Priority fields auto-populate with values from the fault. The Description field also auto-populates but users can edit this field. To create the service request, the user selects Create. A message displays indicating the request was made and displays the BOB WO number. The service request is available in Service Requests in BOB and in the Schedule Service Request list. The requestor information on the service request is the technician's name and email address.
MTW-1457	For legacy JSA Task Responses set up in Signature, MobileTech now respects the Required checkbox. If a List Response is required, a yellow band displays with an asterisk *. A required Text Response is indicated with an asterisk *. If the user attempts to navigate away from the form, another message displays that the response cannot be empty. The user can back out of the form and choose Discard Changes if they need to leave the form. The user cannot request the JSA report until all of the required tasks have been answered.
MTW-1458	We've updated the XOi Resolution Summary sections of the Appointment Summary and Call Summary reports to display a "friendly" hyperlink. With this feature, the hyperlink to the XOi photos/videos displays as "XOi Link" instead of the full URL web address. ⚠ Users will need to deploy the updated Appointment Summary and Job Summary reports. For information on deploying reports, see the Signature Reports Guide. If you would prefer to have the full hyperlink displayed on the reports, do not deploy the updated reports.
MTW-1469	To help prevent issues with users having multiple devices, you can set up sync prompts that display on the device if the user hasn't synchronized their device after x hours. You can also set the Check Interval. The default Sync Interval is 1 hour with the default Check Interval occurring every 15 minutes. On the message that displays for the user, they can choose the Sync button to sync the device or select Cancel to be prompted again at the Check Interval. For setup information, see Add Synchronization Prompt (optional)[4] in the *MobileTech Installation and Administration Guide*.
MTW-1477	For service calls initiated from a Building Optimization Broker service request, the fault recommendation is now added to the call description.
MTW-1533	If technicians experience a time overlap with timing in and out of more than one device, we've added the ability to delete the overlap from the Time Overlap Not Allowed prompt. The prompt displays the Appointment ID and the accepted Time In and Time Out values. The deleted values display in the form behind the prompt. The Time Overlap window displays if UseTimeLog = True and TimeLogAllowTimeOverlap = False in Settings.

4 https://docs.key2act.io/pages/viewpage.action?pageId=84771327

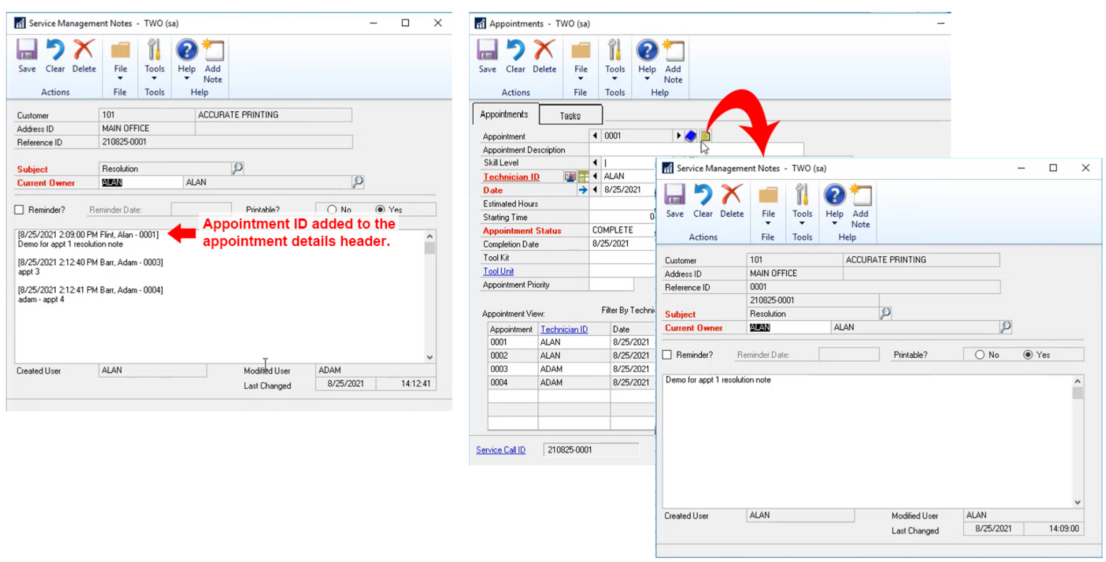
<table>
<tr><td>MTW-1545</td><td>We've added two new parameters (service call ID and/or the short service call description) when automatically including information to the email subject line and the name of the PDF attachment when Call Summary, Appointment Summary, or Field Invoice reports are sent via email. See Optional: Adding Information to Email Subject Lines and Attachment Names[5] for more information.

You have the option between these four parameters:

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>0</td><td>Service Call ID and Appointment Number</td></tr>
<tr><td>1</td><td>Location</td></tr>
<tr><td>2</td><td>Service Call ID</td></tr>
<tr><td>3</td><td>Short Service Call Description (30 character short description)</td></tr>
</table>
</td></tr>
<tr><td>MTW-1546</td><td>When completing task responses, if a task is set up to skip to the next task, the tasks that are skipped now have a status of SKIPPED. Previously skipped tasks were set to COMPLETE. When Task Validation Level in set to REQUIRED or WARNING in MobileTech Admin, skipped tasks are considered "COMPLETE" and will not generate a warning. In the Time Log Settings, Use TimeLog must be set to True.</td></tr>
<tr><td>MTW-1554</td><td>Technicians can now create a technician activity appointment from the calendar in MobileTech. This feature can be turned off if you do not want your technicians to be creating technician activities. See Turn Off Technician Activity Creation from Calendar[6].</td></tr>
<tr><td>MTW-1596</td><td>Users can now create multiple time in/out labor entries before completing a technician activity appointment. A new Time Entries tab displays at the bottom of the Technician Activity form. When the technician activity is completed, the actual hours are the sum of all labor entries. The technician activity can be completed by selecting Complete from the appointment list or form or by selecting Complete from the Appointment Status drop-down in the Time Out form. If the user attempts to complete the technician activity before a labor entry is made, the Labor Entry form displays, and the appointment status is set to Complete when saved. Prior to syncing the device, the user can reopen the completed technician activity by deleting the time entry from the Time Entries window.

To display the new Time Entries tab in the Technician Activity form, in MobileTech Admin > Setup Options > Labor Settings, set UseLabor to True. (This setting defaults to True.)</td></tr>
<tr><td>MTW-1603</td><td>In MobileTech Admin, any SQL user who has system administrator privileges ("sysadmin") can now perform any previous "sa" user items such as installing database objects and creating the middle-tier database. Note that the "sa" password is still required when installing/upgrading MobileTech.</td></tr>
</table>

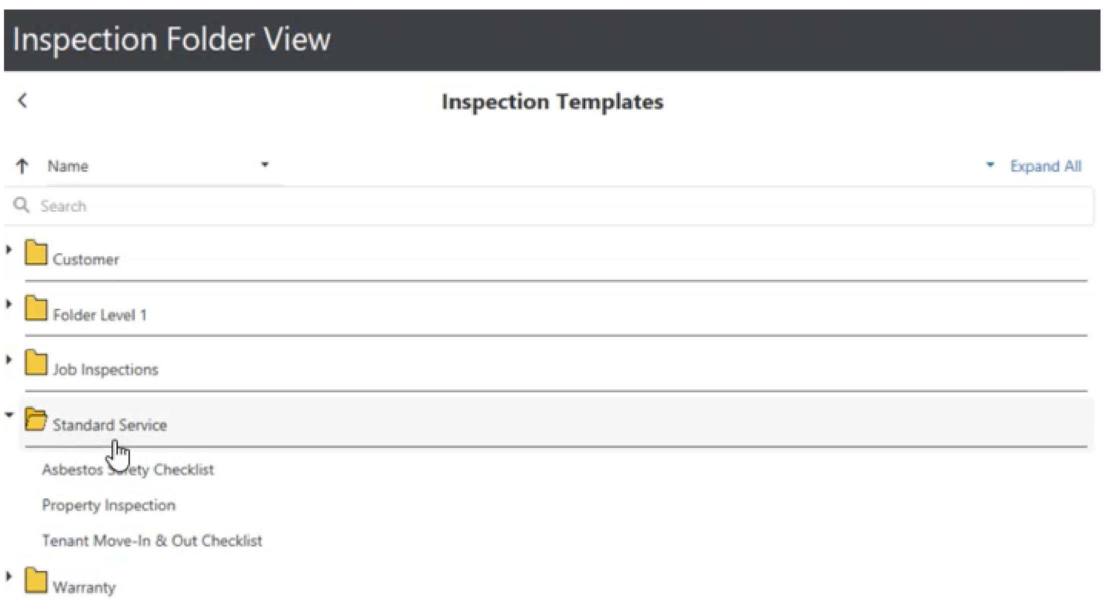
5 https://docs.key2act.io/display/MT86/Optional%3A+Adding+Information+to+Email+Subject+Lines+and+Attachment+Names
6 https://docs.key2act.io/display/MT86/Turn+Off+Technician+Activity+Creation+from+Calendar

MTW-1628	We've updated the Load Data performance so that the process loads technician data in batches of 5 in MobileTech Admin. As the technician data is loaded, the check box is unmarked. To edit the number of technicians processed in the batch, in the MobileTechAdmin.exe.config, edit the numeric value in line <add key=LoadDataTechBatchCount' value="5">.
MTW-1648	We've added the Refrigerant Equipment Type field to the Equipment form if UseRefrigerantTracking is set to true. When the Refrigerant Equipment Type field displays any option other than *0 - Not Applicable*, two additional editable fields display; Optional Charge and Refrigerant Type. Users can enter the information here or from the Refrigerant Tracking tab. See Create or Edit a Refrigerant Tracking Record[7]. ⚠ If the Refrigeration Equipment Type = *0 - Not Applicable*, the Refrigerant Tracking tab will not be displayed. To access Refrigerant Tracking for this equipment, change the Refrigeration Equipment Type to a value other than *0 - Not Applicable* and save changes.
MTW-1659	When UseXOiDeepLinking = True, the XOi hyperlinks will display in all appointments. If the XOi Deep Linking note does not exist, a message displays "Note for XOi Deep Linking has been created yet."
MTW-1723, MTW-1724	An appointment resolution note will now always be created regardless of the UseAppointmentResolutionNote setting. When the appointment is completed, and the device is synched, if UseAppointmentResolutionNote = false then two note entities are created. These notes are available in Signature on the service call resolution note and now added to the appointment note. On the service call resolution note, in addition to displaying the date, time, and technician, the appointment ID is also shown. 

7 https://docs.key2act.io/display/MT86/Create+or+Edit+a+Refrigerant+Tracking+Record

MTW-1739	For Signature 18.04b06 or higher, when the service location is marked as inactive Signature, users can no longer create a new service call cannot be created for that location. If the location is inactive, the location will not display on the New Call form. If you are using the Building Optimization Broker integration, when you select equipment at an inactive location, 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. For information on updating offline HTML to allow service calls to be created if the location is inactive, see Enable Service Call Creation for Inactive Locations[8].
MTW-1755	The Labor Description field for a technician activity is now limited to 51 characters or less due to a limitation of the Appointment Description field in Signature.
New Features for Resco Inspections	
MTW-1368	We've added a new setup option called JobSafetyValidationLevelJobCost to allow the Job Safety Analysis Inspection to be enforced for a job appointment. The default value is REQUIRED. With this option set to required, the technician must complete the JSA before being able to complete a job appointment. If the inspection is not required, you can set the value to OPTIONAL. ⚠ The existing JobSafetyValidationLevel that was only used for service appointments has been renamed to JobSafetyValidationLevelService. Additionally, the JobSafetyStartStatus option only applies to service appointments. See Job Safety Tasks[9] for more information on the Setup Options.
MTW-1500	For Resco Inspections users, a new Manager role is available that allows users assigned to this role the ability to see the Manager Dashboard in Resco Cloud. This dashboard includes, but is not limited to, a calendar overview, a general dashboard, Inspection Designer, Mobile Report Editor, Auto Dashboard that displays various information cards related to the selected inspection report, a Result View, and Submitted Reports. For more information, see Set up the MobileTech Inspection Manager (optional)[10] in the *MobileTech 8.6 Installation and Administration Guide*. For all MobileTech users, the Dashboard options that display depend on the role they are assigned to. See Woodford Roles Overview[11] in the *MobileTech 8.6 Installation and Administration Guide* for detailed information. High-level role overview: • Administrator: Access to all cards. • Inspector/MobileTech: Access to Tools & Settings cards. The Settings options are limited. • Manager: Access to Inspection cards including the Resco App that displays Inspection information cards.

8 https://docs.key2act.io/display/MT86/Enable+Service+Call+Creation+for+Inactive+Locations
9 https://docs.key2act.io/display/MT86/Job+Safety+Tasks
10 https://docs.key2act.io/pages/viewpage.action?pageId=86935585
11 https://docs.key2act.io/display/MT86/Woodford+Roles+Overview

MTW-1541	Users can now create a JSA Inspection report for job appointments from the job appointment entity form by selecting the Inspection tab. In MobileTech Admin Job Safety Tasks Setup Options, if the JobSafetyUnsafeStatus is set up and the Inspection report question "Is location safe?" is set to "No", the appointment status will be set to the JobSafetyUnsafeStatus and the appointment cannot be completed. The appointment is removed from the device on the next sync. If the user opens the Job Appointment Completion form at the time of completing the inspection, the Completion form will be closed and the Job Appointment default form will open instead. If the Inspection is completed and the JSA mobile report is run and SAVED, then the resulting report will be attached to the Job Cost Code in Signature. See Enable Job Safety Analysis (optional)[12] in the MobileTech 8.6 Installation and Administration Guide and Complete a Job Safety Analysis Inspection[13] in MobileTech Help.
MTW-1594	You can now limit Inspection Report access to a specific team and/or branch. This feature requires you to update the Woodford project and import a pre-defined view. See Limit Inspections to Technician Teams and/or Branches (optional)[14] in the MobileTech 8.6 Installation and Administration Guide.
MTW-1626, MTW-1671	An inspection report can be emailed in one of three ways, automatic email sent via the server, manual email sent via the server, or manual email sent via the device. For more information, see Set up Email Options for an Inspection Report (optional)[15].
MTW-1719	You can now enable a tree view folder structure that replicates the folder organization set up in Resco's Questionnaire Designer. For steps to enable this feature, see Enable the Tree View Folder Structure for Inspections (optional)[16] in the MobileTech 8.6 Installation and Administration Guide. 

12 https://docs.key2act.io/pages/viewpage.action?pageId=84770966
13 https://docs.key2act.io/display/MT86/Complete+a+Job+Safety+Analysis+Inspection
14 https://docs.key2act.io/pages/viewpage.action?pageId=86936776
15 https://docs.key2act.io/pages/viewpage.action?pageId=86937002
16 https://docs.key2act.io/pages/viewpage.action?pageId=92438992

MTW-1726	We've added the ability to view an inspection report if it is not associated with additional work, a customer, a location, or a service call. The report can be accessed by selecting Inspections, selecting the Email Reports View, and then selecting the **Report** icon in the top right corner.
MTW-1783	We've added new views that make it easier to determine if the Inspection is "in progress" or "completed". To remove any views that you no longer want to display, see Updating the Available Views (Optional)[17], The views that are available are: • **Email Reports**: Displays all completed inspections that have a regarding entity with a corresponding location and have the Email button available. • **In progress**: Displays all inspections that are open and have not been completed. • **In progress or completed**: Displays all in progress and completed inspections. • **Templates**: Displays available templates. • **Completed**: Displays all inspections that have been completed. Additionally, we've added the regarding entity to display below each Inspection in the view list. 
MTW-1791	The Job Safety Analysis Inspection is now automatically saved when the user selects Complete with Report. You will need to re-import the Job Safety Analysis Inspection in the Questionnaire Designer in Resco Cloud for this change to go into effect. The steps to import the Job Safety Analysis Inspection in the Questionnaire Designer have been streamlined so that you no longer have to open/edit the Command Lines. You just have to import and then activate the report. See Enable Job Safety Analysis (optional)[18].

17 https://docs.key2act.io/pages/viewpage.action?pageId=92441418
18 https://docs.key2act.io/pages/viewpage.action?pageId=84770966

	Additional new features from Resco's Summer and Autumn 2021 Releases include:
	
	• Results Viewer improvements:
	  ◦ You can configure which columns to see[19].
	  ◦ Images display as a gallery[20].
	  ◦ Select/Deselect all questions or entire groups of questions for exporting[21].
	• New Component button[22] can be added to inspections as a new type of static component.
	• New Questionnaire Wizard[23] that guides you through the most important configuration settings.
	• Transform .csv or .xls files into Inspection Templates[24].
	• Add multiple media files within individual questions[25].
	You can also configure:
	  ◦ Maximum number of images/files (default is 1)
	  ◦ Maximum width/height (images only)
	  ◦ Maximum file size
	• Inspection forms and Mobile Reports show images and media as thumbnails[26].
	• Grid layout for questions[27]. This can be configured on Properties and set the Layout Type to Grid.
	• Command Improvements[28].
	• Collapsible Question Groups[29]
	• QR Code in Reports[30]
	  ◦ Generate QR codes from report data and add them to the report.
	  ◦ The report handles QR code as a special type of image (this is not viewable in mobile report preview but is when saved file).
	
	For more information, see Resco's Releases: Summer 2021[31] and Autumn 2021[32] wikis.

Issues Fixed

Case #	Fixed Issue
MTW-1394	An appointment's Actual Hours now only contain the Assigned technician's labor hours. Labor hours for work crew members are no longer included in the Actual Hours calculation.

19 https://docs.resco.net/wiki/Releases/Summer_2021#Result_Viewer_improvements
20 https://docs.resco.net/wiki/Releases/Autumn_2021#Multiple_images_question
21 https://docs.resco.net/wiki/Releases/Autumn_2021#Results_Viewer
22 https://docs.resco.net/wiki/Releases/Summer_2021#New_component:_button
23 https://docs.resco.net/wiki/Releases/Summer_2021#New_questionnaire_wizard
24 https://docs.resco.net/wiki/Releases/Autumn_2021#Create_questionnaire_templates_by_importing_Excel.2FCSV_files
25 https://docs.resco.net/wiki/Releases/Autumn_2021#Upload_multiple_files
26 https://docs.resco.net/wiki/Releases/Autumn_2021#Multiple_images_question
27 https://docs.resco.net/wiki/Releases/Autumn_2021#Grid_layout_for_questions
28 https://docs.resco.net/wiki/Releases/Autumn_2021#Finer_control_over_commands
29 https://docs.resco.net/wiki/Releases/Autumn_2021#Collapsible_question_groups
30 https://docs.resco.net/wiki/Releases/Autumn_2021#QR_codes_in_reports
31 https://docs.resco.net/wiki/Releases/Summer_2021
32 https://docs.resco.net/wiki/Releases/Autumn_2021

Case #	Fixed Issue
MTW-1520	The Save button is now hidden when the Task or Task Response is open as the information in this form is saved by selecting the arrow ← button.. Customers have reported that users were selecting the (no hidden) Save button and they were returned to the Service Call list.
MTW-1536	Users can now enter a negative numeric entry for task responses.
MTW-1634	Tasks display as expected on the Summary tab.
MTW-1665	For Android and Windows users: When creating a time entry in MobileTech and syncing, the transaction date is now correct in TimeTrack.
MTW-1707	Work crews disabled in TimeTrack are no longer displayed in MobileTech.
MTW-1764	Task completion dates are now displaying as expected when the device time zone is different than the server time zone.
MTW-1786	When you unmark the Email Technician when using Contact Management, now the other emails configured to send out are doing so as expected.
MTW-1804	Users will no longer experience an issue with job appointments being removed from the middle-tier when updates were made to the job appointment.

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.

Case #	Description
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.