

NEXGEN Product Release Notes

2020 Q4 GENERAL RELEASE, DECEMBER 2020*

VERSION: 2020.4.7.1**

Includes changes since NexGen version 3.5.580

* This release has been delayed due to technical complexities of implementing new WPF Job Screen.

** For information on new version numbering, see page 5 (**NEW NEXGEN & ATOM VERSION NUMBERING**).

RELEASE DEPENDENCIES

- Requires Atom API Version 2020.4.1.2
- Latest Atom Releases: Atom for Android 2020.4.1.2 & Atom for iOS 2.2.96
- Windows .NET 4.7.2 or later

NEW FEATURES & ENHANCEMENTS

- **Schedule Job Screen (New WPF* format)** – This release introduces the new look and feel for the future of the NexGen application with the premier of the new Schedule Job Screen. The new Schedule Job Screen will streamline your job entry/management and delight your dispatchers. This has been over a year in development and incorporates your requested changes to job management in addition to modernizing the user interface. For more information see the Documentation & Training section below.
** - WPF = Windows Presentation Foundation. This is the technology platform from Microsoft that enables the new look and feel of NexGen Job Screen.*
- **Ability to track MSHA Jobs** – You are now able to mark the job as an "MSHA" job, track labor to these jobs and also view on a new MSHA job report. The report can be found on the menu by browsing to **Reports > Jobs > MSHA Report** (located under OCIP reports).
- **Certification Report** - Added scheduling type filter and multi-select functionality to the drop-down selections on the certification report.
- **E-mailing Certificates from Job Screen** – When e-mailing certificates from the Show Certification on the job screen, we have now added e-mail body content.
- **Text Editor & Spell Check** – A feature that has been one of the most requested over the past year, we have added rich text editing controls and spell check functionality to all comment fields, description of work and equipment required fields on the following quote screens:
 - Job Quote
 - Trucking Quote
 - Work Order Quote
- **Job Hours Validation** – When entered miles/hours value lower than the unit's current readings, now will display a message to the user prompting whether to update the current meter readings or not and update the current readings accordingly. This is similar functionality as found in the Work Order screen.

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- **Work Order Add Hours Validation** – Added a validation so a user cannot add labor hours from an Atom device when the work order had been set to a status of closed in NexGen.
- **Work Order Activity Detail Report** – Added date range and status filters to the Work Order Activity Detail report.
- **Service Invoice Parts Validation** – Added a validation at time of saving a service invoice to check for existence of parts on the work order. If a discrepancy is found, prompt user to remove part from invoice. Message: *"One or more parts have been removed from the Work Order since opening this invoice. Do you want to remove these parts from the invoice?"* Options: **"OK"** - remove all disassociated parts and save invoice & **"Cancel"** - return to invoice without saving
- **OCIP by Customer Report** – Added grand totals for codes to the OCIP by Customer report.
- **Sage 300, 2021 upgrade** – Upgraded invoice & voucher exports to work properly with Sage 300, 2021. (See Administrator's notes below.)
- **Sales Assistant Enhancements** – For this release, a number of enhancements to Sales Assistant were made based on both planned enhancements and requests from our clients after the initial release. The enhancements and changes include:
 - **Emailing from Atom** – Previously, email was sent from the account configured in the system-wide email settings for Atom, which was causing problems for some users of Office 365 due to recent security changes at Microsoft. Now, email is sent directly from the Assigner's account as configured in **Admin > Users**. This addresses the O365 configuration challenges and provides a more consistent user experience since NexGen-assigned Tasks and Atom-assigned Tasks will come from consistent addresses. In the cases where a user does not have a defined account, we attempt to send from the System account.
 - **Self-Notification** – We allow Assigners to send a notification to themselves when creating or modifying a Task. Many of our early adopters asked to receive an email for their self-assigned tasks.
 - **Task Deletion security** – Several early adopters wanted to control Assignees' ability to delete Tasks, especially those created by others. To accomplish this, we now disable the Delete button and Ctrl-D shortcut when the currently displayed Task was created by a different user. Self-created Tasks can be deleted, and Tasks created by others can be Completed.
 - **Disable changes to completed Tasks** – Preventing any field from being edited after a Task has been set to complete. Previously, comments could be edited for a completed Task. Now, to edit a Completed Task, the Task needs to be reopened, edited, and then closed again.

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SOFTWARE ISSUES ADDRESSED IN THIS RELEASE

- **Delete Voucher from Receiver** – Under certain conditions when a service invoice is associated with a voucher and materials were also associated, that voucher was not able to be deleted from a receiver. (Case #13427)
- **Quote Lost Code grayed out** – Corrected an issue on the Job Quote screen where the Lost Code was not editable after the quote was converted to a job. (Case #14546)
- **Out-of-Memory error exporting Unit Description report** – Under certain conditions, exporting the Unit Description report to a CSV/XLS/XLSX file generated an out-of-memory error. Issue was resolved. (Case #14847)
- **Enter Closed Work Order on Voucher Details** – Immediately notify user when closed work order is attempted to be added to a voucher. Was waiting until save until notifying user before this modification. (Case #15836)
- **Error on Work Order Screen Employee Tab** – Corrected an issue on the work order screen where users were getting an error if the estimate tab was made not visible through Profile Screen setting. (Case #16318)
- **Work Orders from Deficiencies** – Restricted Job Checklist deficiencies from appearing on Work Orders from Deficiencies screen. (Case 16718)
- **Maintain Company** – Corrected an issue on the company screen where the year-end month was not accepting ten (10) as a valid entry. (Case #16895)
- **Refresh button is cancelling work orders** – Corrected an issue on the work order screen. When choosing the refresh button, program was changing the status of the work order to Cancelled. (Case #17125)
- **Unit Meter Tab** – Made a change to the Units Meter Tab where if a manual entry is directly added that entry will be able to be deleted if necessary. This was reported when user was able to save a no-value record in Meter tab of Maintain>Units with no resolution for removing the record. (Case #17274)
- **E-Ticket Not Invoiced Screen** – Corrected an issue on the e-tickets not invoiced screen. When clicking on an operator ticket the e-ticket was not opening correctly. (Case #17490)
- **Unit type on Operator E-Tickets and LEM E-Tickets** – Corrected an issue when creating an operator E-Ticket where the schedule type and unit type of the unit was displaying the primary type instead of the type assigned to the job. (Case #17623)
- **Inventory Stock Adjustments** – Corrected date filtering. (Case #18050)
- **Ticket status is not resetting** – Corrected issue when canceling an E-Ticket. The Status of the E-Ticket was not resetting and appearing as “No Ticket” on the scheduling screens. (Case #18069)
- **Error message on Unit Code change** – Corrected an issue when changing the unit code on the unit screen. The error received was “*No primary key value for foreign key 'UnitCode' in Table FMS_MAT_TRANS. No changes made to database.*” (Case #18209)

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- **Error message saving "Export Invoices" screen as PDF** – Corrected specific condition that was causing this error. (Case #18403)
- **Error encountered when converting quote to job with Tools in the Tools list** – Corrected error converting quote to job with Tools in the Tools List on the quote. The error received was “*String was not recognized as a valid DateTime. Couldn't store <00> in ModifiedDate column. Expected type is DateTime.*” (Case #18468)
- **Inventory Stock Adjustments search query** – Corrected search query when using special characters like “*” in the parts string. (Case #18498)
- **Checklist tab & Hours/Miles tab on Operator/Trucking E-Tickets** – Corrected an issue when clicking on the E-ticket from the Job Screen where it was opening the incorrect screen to view the E-Ticket. (Case #18610)
- **Coming Due Certifications Report** – Corrected an issue on the Coming Due Certification Report by Employee where the Certification Number field was only printing the first character of the field. (Case #18723)
- **Recurring Invoice – Estimated Billing Tab** – Corrected an issue when deleting sub-item on recurring invoice that was causing issues with Estimated Billing on job screen. See details of the changes below. (Case #18858)
 - When a new Line is added in the Recurring Billing, that line will be added as last line to that Job.
 - Disabled the “Move line” option in the recurring invoice when there are sub-items on the Job estimate tab.
 - When deleting a sub-item or summary line, then the whole group will be deleted from recurring invoice.
 - The order that line items in Recurring Invoices are displayed is independent of the order in Job Estimate tab.
- **Vendor Report** – Corrected report filtering when selecting new date range. (Case #18928)
- **Unable to change units on cancelled LEM** – Corrected an issue when canceling a LEM E-Ticket that the unit associated with the LEM was not able to be changed. (Case #18951)
- **NexGen Auto Logoff Function** – Corrected an issue where the Auto Logoff feature was not correctly logging off users after the time limit set in System Defaults. (Case #19146)
- **Payroll Pre-Processor Utility** – Corrected employee multi-select function to populate as expected. (Case #19167)
- **Revenue Detail Report by Invoice Date** – Corrected stored procedure to work correctly with the *View By: All Taken By – Revenue* report selection. (Case #19235)
- **Save location in Maintain > Documents for E-Tickets** – Corrected **Use API** feature to work while using the Enhanced e-Ticket Cancellation feature on the save directory which does not have access rights to any user except the Atom Account. (Case #19240)

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- **Unable to delete job resource** – Allow user to delete a job unit/people (resource) entry when there is an associated cancelled e-ticket. This applies to Unit, Employee or Unit-based Employee. (Case #19417)
- **Revenue Detail Report by Work Date for Salesperson-Profit** – Corrected stored procedure that was returning jobs with zero value when exporting to excel. (Case #19421)
- **Work Order save error** – Corrected error that occurred when a part is added to a work order and an existing part is deleted from work order. (Case #19493)
- **Resolved “Deadlock” conditions** – In some conditions, deadlocks were occurring on the FMS_SCREEN_ACCESS table when users are creating or modifying records related to 'Work Orders', 'Invoices', PO's, 'Customer'. The query used to access these records was optimized to prevent these deadlocks from occurring. (Case #19623)
- **Inventory Stock Adjustments** – An error was being generated in some conditions when options were selected in the “Retrieve By” dropdown. This error has been corrected. (Case #19788)
- **Productive vs Non-Productive Summary Report not grouping correctly** – When the report is set to View By “Job”, the results are the same as when set by “Classification”, but the classifications are replaced by job numbers. Corrected grouping so that when View By = Job, this report will list out all productive labor that has been applied to the specific job listed. (Case #19806)
- **Customer comments deleted when creating Sales Assistant Task** – When creating tasks in Sales Assistant, comments on the Account > Comments tab were being deleted. Customer comments are no longer affected by Sales Assistant task creation. (Case #20062)
- **Service Invoice Corruption when changing markup/discount** – Corrected issue where in certain conditions Service Invoices were becoming corrupted when changing the markup or discount. (Case #20511)

NEW NEXGEN & ATOM VERSION NUMBERING

FCC will be following the new release numbering approach for NexGen & ATOM starting with this release. This new version numbering will be seen on the login screen, the NexGen Help > About screen and at the bottom of the Atom device Main screen.

Details about the meaning behind the new version numbering scheme using this release's version number as an example:

2020.4.7.1 = <Year>.<Major Release #>.<Minor Release #>.<Patch Version>

- **Year** – Current year for release (in this example 2020)
- **Major Release #** - 1, 2, 3 or 4 (Represents the quarter of the release – in this example 4)
- **Minor Release #** – 1, 2, 3, 4, etc. (Interim minor release version number between quarterly releases. In this example 7)

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- **Patch Version** – 1, 2, 3, 4, etc. (Any patches applied to Major/Minor releases – in this example 1)

SYSTEM ADMINISTRATOR NOTES

See the **Admin User Guide – WPF** for full details on what you, as a System Administrator, need to know about the new WPF Release (see Document & Training section below).

System Default Changes

- **Sage 300 2021 update** – If you have updated to Sage 300 2021, you will need to go into your System Defaults and on the General Tab change the Accounting Program Version to **6.8A**.
- **Features tab changes**
 - **Enable WPF Schedule Job Screen** – This checkbox is used to enable (checked) or disable (unchecked) the new WPF Job Screen from showing on the Schedule menu and being available to users. If unchecked, the legacy (current) Schedule Job screen will be used.
 - **New WPF Tab** - There is a new tab in **Set System Defaults** called “WPF”. This was added to enable you make certain settings related to the new WPF environment. With this release, the only change is to “**Select a WPF Theme**”. The options are Office 2013, Summer and Windows 7. This setting will apply to all users in the system and is NOT an individual setting.
NOTE: *The WPF tab will only be available if the WPF Schedule Job Screen is enabled (see above).*
- **Job tab changes**
 - **Job Start Time** and **Job End Time** are now required on the Schedule Job Screen (WPF). If the values are set in these fields, they will populate by default at the job level, but the user will always be required to select times for jobs.
 - **Change Unit/Employee Dates** has no impact on the new WPF Schedule Job Screen; this setting will continue to work in the legacy Schedule Job Screen.
 - **Termination Code** has been removed from the WPF Schedule Job screen. Setting this value to **Yes** will not have any impact on the WPF Schedule Job screen.
- **Changes to Maintain > Documents for completed/canceled e-tickets**
 - 'E-Ticket' document type replaced with 'E-Ticket Copies'
 - Not allowed to select more than one instance of the 'E-Ticket' in the Document column
 - Document column sorted alphabetically by default
 - Not be able to check the 'Master' option
 - Column width and screen width expanded to accommodate the full text of the longest string in the enumerated values of the Document column

Other WPF-related Changes

- **Admin > User Screen Colors** has no impact on the Schedule Job (WPF) screen. The WPF screen theme is controlled through Admin > Set System Defaults, WPF tab.

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- There are many additional data points exposed to users by default, review permissions before enabling this screen. Go to **Admin > Profile Screen Settings** to review all available data points. See the *Admin User Guide – WPF* for full detail on profile screen settings (see Document & Training section below).
- Bar Code in the Resource (Unit) column has been removed. This was to simplify the dropdown – the field was not used consistently and did not add a capability for leveraging the bar code.
- When converting a quote to a job with default times defined and dates defined in the quote, the system will no longer automatically save the job.
- Use of the + and – keys are no longer supported when working with date fields.
- F7 and F8 keys are no longer supported when in the Job search field to change records (previous, next).
- **Menu Security Setting Changes (Admin > Menu Security)** - Added the following items that are **enabled by default**. Check your Menu Security settings for all profiles to ensure the access to these new items are enabled/disabled as appropriate for your organization.
 - New Schedule Job - WPF: **Schedule > Job – WPF**
 - New MSHA Report: **Reports > Jobs > MSHA Report**

DOCUMENTATION & TRAINING

- **WPF Admin, Schedule Job Screen and Dispatch User Guide:**
 - [NexGen WPF Dispatch User Guide 1.0](#)
 - [NexGen WPF Admin User Guide 1.0](#)
 - [WPF Schedule Job Webinar Part One](#)
 - [WPF Schedule Job Webinar Part Two](#)

PREVIOUS RELEASE DOCUMENTS:

Quarterly Release [3.5.580](#) (Q2 2020)

Quarterly Release [3.5.567](#) (Q1 2020)