Time

Installation and Setup Guide

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Legal Declarations

Table of Contents

The installation of Time consists of Core cloud setup performed by a WennSoft resource and on-premise setup steps in Signature TimeTrack.

System Requirements

Compatibilities

Software or Device	Compatible Version
Signature	Signature 2021 (2018 R6 SP 1 (18.04b06)) or higher
Microsoft .NET Framework	4.7.2
Android OS	11 or higher
Apple iOS (when available)	16 or higher

Important

- Schedule must be installed so that the ServiceLibrary API endpoints are created. You do not need to own Schedule or have access to the Schedule registration key because you will not need to log into Schedule. The installation is solely for installing the ServiceLibrary API endpoints.
- TimeTrack Setup Options: The **Default Week Ending Day** is required to be set up. Microsoft Dynamics GP > Tools > Setup > TimeTrack > TimeTrack Setup Options.
- Each employee who will be using Time will need an email address.

Outbound Internet Access Requirements

If your server blocks all outbound internet traffic, you must allow the following URLs.

- https://bob-api.key2act.io
- https://cognito-idp.us-east-1.amazonaws.com
- https://docs.wennsoft.com
- https://hub-api-core.key2act.io
- https://time.wennsoft.com
- next-wss.key2act.io
- wss://ds3p5gbkp4.execute-api.us-east-1.amazonaws.com
- wss://vpnebxyaz5.execute-api.us-east-1.amazonaws.com/prod

Security Roles and Tasks

We've added two new security tasks to limit the new TimeTrack add-in windows for Time. These security tasks have been added to the WSTT POWERUSER* and the POWERUSER security roles. An Administrator must be assigned to the **WSTT POWERUSER*** or **POWERUSER** security role.

> ⚠ If the Administrator is already assigned to the POWERUSER security role, no additional steps are needed as the new security tasks have been added to this role.

Security Roles

- **WSTT POWERUSER***: The WSTT POWERUSER* security role gives the user everything they need to manage TimeTrack and Payroll related tasks.
- **POWERUSER**: The POWERUSER security role gives the user access to everything, not just TimeTrack.

Security Tasks

- **WSADD_TIMETRACKSUBMIT**: Provides access to the TimeTrack Import Time window.
- **WSADD_TIMETRACKSYNC**: Provides access to the TimeTrack Data Sync window.

Time User Role	Description	Signature Security
Administrator	• Initially, a WennSoft employee and then potentially rolled over to the customer after implementation.	An Administrator needs to be • Assigned to the **WSTT POWERUSER*** or **POWERUSER** security role. Microsoft Dynamics GP > Tools > Setup > System > User Security • Identified with a Microsoft Dynamics GP User ID in the Signature TimeTrack Registered Users window.
Payroll Admin	• Can enter time for themselves. • Can enter and edit time for other employees. • If using the Manager Approval feature, can be set up as an approver.	A Payroll Admin needs to be • Assigned to the **WSTT POWERUSER*** security role. Microsoft Dynamics GP > Tools > Setup > System > User Security • Set up as a Power User in the Signature Registered Users Setup window. Microsoft Dynamics GP > Tools > Setup > TimeTrack > Registered Users

Time User Role	Description	Signature Security

Manager	• Can enter time for themselves and their employees.
	• If using the Manager Approval feature:
	  ◦ Can approve and edit timesheets for the employees they manage.
	  ◦ A manager may also be assigned as an approver for other employees in Time's Approver Setup window.
		A Manager needs to be:
		• Assigned to their employees as a manager in the Signature Registered Users Setup window.
		Microsoft Dynamics GP > Tools > Setup > TimeTrack > Registered Users

Time User	• General user who enters time for themselves.	• Each user who will be entering time for themselves in the Time app will need to be set up in the Signature TimeTrack Registered Users Setup window. An email address is required for all users who will be entering their own time. See Set up Registered Users[1]. • Time users will need to be set up in the Licensing[2] window.

1 https://wennsoft.atlassian.net/wiki/spaces/drafttime/pages/43516221/Step+4+Set+up+Registered+Users
2 https://wennsoft.atlassian.net/wiki/spaces/TIME/pages/53411842/Licensing

Core Cloud Setup Steps

The Core cloud steps are performed by a Super Admin WennSoft resource.

Complete the steps in the following order:

- Step 1: Create Core Company (page4)
- Step 2: Grant Company Access to Time (page4)
- Step 3: Create FSM Integration Record (page4)
- Step 4: Set up the Registered User Count (page5)

Step 1: Create Core Company

It is recommended to name the Core company similar to the Microsoft Dynamics GP Company for ease of identification. At a minimum, you will need to add the company name, contract type, and address. The company's admin user can update the remaining fields later.

1. In Core, select the menu icon to open the Mega Navigation. In the Admin section, select **Settings**. You can also access Company Settings by selecting K2A Core > Company > Settings.
2. Select *Actions* > *Create*.
3. Complete the following fields on the Company Settings view.
    - **Company Name**: (Required) Enter the unique company name.
    - **Contract Type**: (Required) Select the contract type. (Required)
    - **Company Time Zone**: Select the time zone for the company. The time zone determines how data is displayed and appointments are scheduled. You can also set the time zone for specific users. See User Permissions[3] in Building Optimization Broker documentation.
    - **Address**: (Required) In the **Search for Address** field, begin typing the physical address of the building. Select the appropriate address from the autocomplete selections to fill in the remaining address fields.
    - **Company Logo**: Select the small blue square icon to upload your company's logo (.png only). The logo is displayed in email communications.
    - **Accent Color**: Select a color using the color charge, or enter the hexadecimal color value to display in email communications.
4. Select *Create* to save.

Step 2: Grant Company Access to Time

Granting access to Time is done in the Core Company Settings window within the Applications view. Adding or revoking access is automatically saved as soon as the toggle is selected.

1. To access the current company's settings page, select K2A Core > Company > Settings.
2. Under the company name, select the View - Company Settings drop-down and select **Applications**.
3. Select the **Time** access toggle to enable Time.

Step 3: Create FSM Integration Record

We recommend renaming the default "credentials.csv" download file to the Microsoft Dynamics GP company name.csv. The information in the credentials file will be used in Enter Time Integration Settings (page8) in On-Premise Setup Steps (page5).

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3 https://wennsoft.atlassian.net/wiki/spaces/BOB/pages/35359248/User+Permissions

For additional information on FSM Integration Records, see Working with FSM Integrations[4] in the Building Optimization Broker documentation.

If the company will also have a test company, a separate FSM integration record will need to be created. Each instance of the company will need a unique FSM integration record.

To create an FSM integration record:

1. Select the **App Drawer**.
2. Select **IoT Hub**.
3. From the IoT Hub dashboard, on the FSM Integrations card, select *Manage FSM Integrations* OR select the **FSM Integrations** icon from the left navigation.
4. On the FSM Integrations dashboard, select **New FSM Integration**.
5. In the New FSM Integrations window, enter the **FSM Integration Configuration Name**.
6. Select the **FSM Integration Driver Type**.
7. Select *Create*.
8. In the FSM Integrations Credentials window, the credentials that are required by the FSM Integration to authenticate with your Building Optimization Broker Company are displayed.
   Select *View Key* to display the **Authorization Key**.
9. Select *Download Agent Credentials* to save a copy of the Serial Number and Authorization Key as a credentials.csv file on your workstation. **IMPORTANT**: This is the only time the credentials.csv file is available to download. If you misplace this information, you will be able to use the Rotating FSM Integration Credentials procedure to reset this information.

Step 4: Set up the Registered User Count

In the WennSoft Controlled section, enter the number of registered users the company has. When the Registered User Count increases or decreases, an email notification is sent to the email address(es) set up under **Admin Email Notifications**. The Assigned User Count is auto-populated based on how many employees have their time cards enabled in the Licensing[5] window. The Assigned User Count cannot exceed the Registered User Count.

To set up the Registered User Count:

1. In Time, go to Administration > Settings.
2. In the WennSoft Controlled section, enter the number of registered users the company has in the **Registered User Count** field. You can also use the arrow buttons to increment or decrement the value.
3. Select *Save*.

On-Premise Setup Steps

The following processes need to be set up in the following order:

4 https://wennsoft.atlassian.net/wiki/spaces/BOB/pages/35359288/Working+with+FSM+Integrations
5 https://wennsoft.atlassian.net/wiki/spaces/TIME/pages/53411842/Licensing

- Step 6: Set up and Run TimeTrack Data Sync (page11)

IMPORTANT

The Time Admin user will need to be a member of the Signature WSTT POWERUSER role in order to access the Time setup windows in TimeTrack.

Step 1: Install Latest Schedule

The installation of the latest version of Schedule provides the API key and the Service Library components. After installing, users do not have to log in to Schedule or perform any other Schedule setup options.

To install Schedule:

1. Right-click on the Schedule x.x.xx.exe file and select *Run as administrator*.
2. If the **User Account Control** window displays, select *Yes* to continue with the installation.
3. The **Welcome to the Prerequisites Setup Wizard** displays if any prerequisite files need to be installed or updated. Mark the checkbox next to the file(s) to be installed and select Next. The external setup windows for each file open. You may need to move the Schedule Setup window to see the other setup windows. Complete the file installation(s). After you have installed the prerequisite files, return to the Schedule Setup window and select *Next.*
4. The **Welcome to the Schedule Setup Wizard** displays.
5. Select *Next*.
6. On the **End-User License Agreement** window, accept the license agreement and select *Next.*
7. On the **SQL Server Settings** window, enter your SQL Server System settings:
   - SQL Server
   - Admin SQL User
   - Password
   - GP System Database: The database defaults to DYNAMICS, however, you can change this if you have a different name.
8. Select *Next.*
9. On the **Schedule 'admin' User Setup** window, enter the **'admin' Password** (twice) and then select *Next*. If you don't remember your admin password, contact Wennsoft Support or Professional Services for assistance with resetting the password.
10. On the **Company Select** window, mark one or more companies for this installation.
    If you install Schedule to add another company later, you will need to mark the previously installed companies, plus the new company you are installing now. The configuration file will only contain the companies marked during this installation step.
11. At the bottom of this window, the Version field displays the version of Schedule you are installing.
12. Select *Next.*
13. On the **Registration Web Service Details** window, mark **Use HTTPS for Signature Registration web service**. if the Signature Registration web service is installed on a secure website (https:// instead of http://). This allows the registration web service to be consumed over Secure Sockets Layer (SSL).
14. Select *Next.*
15. On the **Select Schedule Installation Folder** window, you can accept the default installation location or you can select the *Browse* button to select a different location.
16. Select *Next.*
17. On the **Ready to Install** window, select *Install.*
18. On the **Completing the Schedule Setup Wizard** window, the **Launch Schedule** checkbox is marked to open Schedule after you select Finish.

19. This window displays:
    - Service Library URL: You may need this URL for troubleshooting.
    - Schedule URL: This is the URL you will use to open Schedule.
20. Select *Finish.*

Step 2: Install Time App Update for Signature

The Time App update for Signature is installed by applying the .cnk file to the Microsoft Dynamics GP directory. This must be done for each client.

IMPORTANT

Verify the Signature version and select the appropriate .cnk file:

- Signature 2022 (18.05b07g717): W18g717TA.cnk
- Signature 2021 (18.04b06g628): W18g628xx.cnk.

Make a backup of your Data folder before applying the Time app update in case you can roll back the effects of this hotfix if needed. The Data folder is found here \Program Files (x86)\Microsoft Dynamics\GP. The Data folder contains the WENNSOFT.DIC, WSFORMS.DIC and WSREPTS.DIC, as well as other files. (You can right-click on the Data folder and then select Copy. Then navigate to another location or to a different drive and paste the copied Data folder.

To install the Time App Update for Signature:

1. Exit or close Microsoft Dynamics GP on all client and server computers
2. Place the .cnk file in the Dynamics GP top-level directory and verify no one is logged into Dynamics GP.
3. Launch Microsoft GP.
4. Mark *Yes* in the message that displays "New code must be added".
5. The .cnk file will automatically start and run through its table update process. The process may take several minutes to complete.

Step 3: Install TimeTrack Add-In

The Signature TimeTrack Add-In requires Microsoft Dynamics GP 18.5 or higher. Before installing, you must be logged out of Microsoft Dynamics GP.

1. **IMPORTANT**: Make a backup of your Data folder.
    a. Navigate to \Program Files (x86)\Microsoft Dynamics\GP. The Data folder contains the WENNSOFT.DIC, WSFORMS.DIC and WSREPTS.DIC, as well as other files.
    b. Right-click on the Data folder and then select *Copy*. Then navigate to another location or a different drive and paste the copied Data folder.
2. Right-click on the *Signature TimeTrack Add-In xx-x-xx.exe* file and select *Run as administrator*.
3. If the **User Account Control** window displays, select *Yes* to continue the installation.
4. The **Signature TimeTrack Add-in Setup Wizard** displays.
5. Select *Next*.
6. Accept the license agreement on the End-User License Agreement window and select *Next.*
7. On the **Select Installation Folder** window, verify the correct location of the Microsoft Dynamics GP AddIn folder.
8. Select *Next.*
9. On the **Ready to Install** window, select *Install.*
10. Select *Finish*.

Additional configuration steps:

- Step 3-1: Configure Server Objects (page8)
- Step 3-2: Enter Time Integration Settings (page8)
- Step 3-3: Map Technician Activities to Unbilled Accounts (page9)
- Step 3-4: Set up Time Batch ID (page9)

Step 3-1: Configure Server Objects

The Configure Server Objects window is used to create all related Time database objects. This will synchronize the data in the Microsoft Dynamics GP company with the company created in Core. See Step 1: Create Core Company (page4) in Core Cloud Setup Steps (page4).

To create the Time database objects:

1. Launch Microsoft Dynamics GP and sign in as an administrator. (This user will also need to have sysadmin rights to create the tables and database objects.)
2. Select Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
3. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Admin.
4. On the Configure Server Objects tab, select the *Process* button to create the Time database objects.
5. Close the window or continue to Step 4-2: Enter Time Integration Settings (page8).

Step 3-2: Enter Time Integration Settings

To set up the TimeTrack integration with Time, you will need to enter the information that is provided by WennSoft. The Serial Number and Authorization Code are provided when you set up the FSM Integration in Building Optimization Broker (in the pop-up window after adding the FSM Integration and also in the credentials.csv file that can be downloaded after setting up the FSM Integration). The Integration Settings window allows TimeTrack to obtain a list of entities from Building Optimization Broker.

Entering Time Integration Settings

To enter the Time Integration Settings:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Admin and then select the Integration Settings tab.
3. Select *Import Credentials* and Select the credentials.csv file that you downloaded when setting up the FSM Integration in Building Optimization Broker. See Step 3: Create FSM Integration Record (page4) in the Core Cloud Setup Steps (page4).
    - **Serial Number**: Provided by Building Optimization Broker.
    - **Authorization Code**: Provided by Building Optimization Broker. This is the authorization key found in the credentials.csv file.
      The credentials.csv file may have been manually renamed to the company name.
4. Update the remaining fields to match the production environment:
    - **User Pool ID**: us-east-1_eddkfwgBU
    - **Client ID**: 1sors3l7hetplca83ev9v0khkp
    - **Integration URL**: https://bob-api.key2act.io
    - **Websocket URL**: wss://vpnebxyaz5.execute-api.us-east-1.amazonaws.com/prod
    - **API Key**: 220a8c36-bfb5-4db6-a0a3-139311b0ca2f
5. Select *Save*. When successfully connected to Core, the Core company name is displayed in the status bar at the bottom of the window.

Buttons on This Window

- **Save**: Select to save the entered information.
- **Reset Changes**: Select to revert changes to the last saved data.
- **Import Credentials**: Select to import the credentials file that was saved when the FSM Integration record was created.

Step 3-3: Map Technician Activities to Unbilled Accounts

Technician activities are unbilled activities that users need to be able to log time against. Examples of these activities might be meetings, paid time off, jury duty, holidays, etc. Associating the account number to the technician activity is done from the TimeTrack Setup Options Additional Setup window. Only the mapped technician activities are included in the synchronization.

Mapping an Activity to an Unbilled Account Number

1. Go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Additional Setup.
3. On the Technician Activity Accounts tab, complete the following fields:
    - **Activity**: Select an existing technician activity or create a new activity by entering the name. When creating a new activity, when you tab off the field, you are prompted to add the activity.
    - **Account**: Select the appropriate account.
4. Select *Save* for each mapped activity.
5. Complete the activity/account mapping as needed for additional activities.
6. To update an activity with a different account, repeat steps 1-5. If you need to remove a mapping, select the activity, do not select an account, and then select Submit.

Deleting a Technician Activity

IMPORTANT: Deleting a technician activity completely removes the activity from the system.

1. Select the activity from the table.
2. Select *Delete*.

Buttons on This Window

- **Save**: Select to save the window.
- **Delete**: Select to delete the technician activity from the system.
- **Refresh**: Select to refresh the window.

Step 3-4: Set up Time Batch ID

Use the Time App Batch Options window to define the batch naming convention to use.

The batch name is truncated to 7 characters when including the date due to a limit of 15 characters for the batch ID.

To set up the TimeTrack Batch ID:

1. Go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Additional Setup.
3. On the Time App Batch Options tab, complete the following fields:
    - Batch Name options:
        - Custom Batch Name: Enter the custom name.
        - Employee ID
        - Employee Department
        - Employee Position
    - Date included in the Batch Name options:
        - No Date
        - Week Ending Date (Batch NameYYYYMMDD)
        - Transaction Date (Batch NameYYYYMMDDD)
4. Select *Save*.

Step 4: Set up Registered Users

The TimeTrack Signature Registered Users Setup window is used with Time to indicate which users will be using Time. When you synchronize the registered users, the employee records are automatically created in Time. The ability for your employees to use Time and/or have the ability to log into Time is set up in the Licensing[6] section of Time Settings.

To set up registered users:

1. Select *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Registered Users*.
   Use the sort dropdown at the lower left corner of the window to sort employee names by last name, employee ID, or by active users of TimeTrack or Remote Time Entry (Excel TimeTrack Client) employees.
2. Complete the following steps for each employee to be set up as a Time user:
    - **TimeTrack**: Mark to enable time entry in TimeTrack and/or Time for employees. If an employee does not have this checkbox marked, time cannot be entered using TimeTrack and/or Time for that employee.
    - **User ID**: The User ID field is required when setting up a Power User so they can get security access to the Time Import window.
    - **Email Address**: An email address is required for the employee to be able to log into Time. If the employee e-mail address was set up in the Employment Maintenance window in Microsoft Dynamics GP, the email will display here. Otherwise, you can enter the email address manually. If this field is left blank, the employee record will not synchronize to Time.
      IMPORTANT: Each user must have a unique email address to prevent synchronization issues as well as so that the user has a unique login.
    - **Power User**: If marked, the user can enter or edit time for any other user marked as a TimeTrack user.
3. Select *Save*.

Step 5: Install Sync2Core

The local Administrator user is required to install Signature Sync2Core Service in Windows Services. The Signature Sync2Core Service monitors web socket event notifications coming from WennSoft Core into WennSoft Signature.

This installer creates the following:

- Windows Scheduled Tasks (for each company selected during the installation below):
    - **Sync2Core Full Sync**: Typically the Full Sync is run manually in the TimeTrack Data Sync window. See Set up and Run TimeTrack Data Sync (page11).
      The Full Sync defaults to disabled as this task should only be used when you:

6 https://wennsoft.atlassian.net/wiki/spaces/TIME/pages/53411842/Licensing

        - Are syncing data for the first time.
        - Have used any Move utility (Move Equipment, Move Location, or Move Service Call).
        - Have added a new employee.
        - Have created a new Time App company. See Adding An Additional Time App Company (page13).
    - **Sync2Core Incremental Sync**: The incremental sync is used to synchronize any changes to the data from the previous synchronization. Do not select this option if this is your first time synchronizing with Time.
- Windows Service (with multi-company support): Signature Sync2Core Service

> You will need to have installed Schedule 6.0 or higher to install Sync2Core. See Step 1: Install Latest Schedule (page6)in On-Premise Setup Steps (page5).

To install Sync2Core:

1. Right-click on the Sync2Core x.x.xx.exe file and select *Run as administrator*.
2. If the **User Account Control** window displays, select *Yes* to continue the installation.
3. The **Welcome to the Sync2Core Setup Wizard** displays.
4. Select *Next*.
5. Accept the license agreement on the End-User License Agreement window and select *Next.*
6. On the **SQL Server Settings** window, enter your SQL Server System settings:
    - SQL Server
    - Admin SQL User
    - Password
    - GP System Database: The database defaults to DYNAMICS, however, you can change this if you have a different name.
7. Select *Next.*
8. On the **Company Select** window, mark one or more companies that have Time enabled in Core.
   If you enable Time for additional companies later, you must run the Sync2Core installation again. When doing so, be sure to mark all companies that have Time enabled, including existing companies that have previously been set up with Sync2Core.
9. Select *Next.*
10. On the **Select Installation Folder** window, you can accept the default installation location or you can select the *Browse* button to select a different location.
11. Select *Next.*
12. On the **Ready to Install** window, select *Install.*
13. On the **Completing the Sync2Core Setup Wizard** window, select *Finish.*

Step 6: Set up and Run TimeTrack Data Sync

Use the TimeTrack Data Sync procedure to synchronize data from Dynamics GP and Signature tables to K2A Core. This process creates new records in Core including employees, employee pay codes, service calls, jobs, job cost codes, technician activities, etc.

The information displayed in the scrolling window includes:

- **Sync Type**: Indicates the type of sync, IncrementalSync or FullSync.
- **Process Status**: Indicates the status of the sync process.
    - **Complete**: The synchronization successfully was processed.
    - **CompleteWithErrors**: The synchronization was not successful. To find out more information, click on the sync type name in the row of the failed synchronization. The Processed Results window shows the error message that was returned.
- **Sync Start**: Displays the date and time when the last synchronization began.
- **Sync End**: Displays the date and time when the previous synchronization was completed.

- **Process Results**: Indicates the status of the synchronization process.
- **Integration Sync ID**: Displays a unique ID for the integration sync.

Setting up TimeTrack Data Sync

To set up and run the TimeTrack Data Sync:

1. In Signature, go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Data Sync.
3. Mark **Auto Refresh** to automatically refresh the data displayed in the scrolling window.
4. Select the **Auto Refresh Interval** (in minutes). The default value is 1 minute.
5. Select the appropriate synchronization button. If no data is available to sync, a pop-up message displays "No data changes to sync."
    - **Full Sync**: The full synchronization creates all the new records in Time. Select if this is the first time you are synchronizing data or if you have used any Move utility (Move Equipment, Move Location, or Move Service Call).
      IMPORTANT: You must perform a full synchronization of your data so that all of the records are created and synchronized with Time. This may take some time depending on the amount of data to be synced. For example, how many service calls, jobs, cost codes, technician activities, pay codes, employees, etc.).
    - **Incremental Sync**: The incremental sync is used to synchronize any changes to the data from the previous synchronization. Do not select this option if this is your first time synchronizing with Time. Typically the incremental sync is run automatically from the scheduled tasks that are set up when Sync2Core was installed. See Step 5: Install Sync2Core (page10).
6. You can select the *Refresh* button to redisplay the data in the scrolling window.
7. Click anywhere on the data row to open the Process Results window that shows the synced data in JSON (JavaScript Object Notation) format for that synchronization instance. For example, if you updated 14 employee records in the TimeTrack Registered Users window so that the employee records will be used in Time, you may see:
    - Entity: Employee
    - Total Processed Entities: 14
    - Total Failed Entities: 0
8. Close the window.

Buttons on This Window

- **Incremental Sync**: Select to synchronize data that has changed since the previous synchronization. Updates to user-defined fields do not trigger a change that needs to be synchronized.
- **Full Sync**: Select to synchronize all data. Typically you would run a full synchronization if this is the first time you are syncing data or if you have used a Signature Move utility to move equipment, locations, or service calls.
- **Refresh**: Select to reload the grid data.
- **Update**: Mark one or more checkboxes and select to update the marked rows with status, error, and payload information.
- **Delete**: Mark one or more checkboxes and select to purge the previous sync records for the marked rows.

After SQL Database Backup/Restore FSM Integration Credential Import Steps

When your production SQL database has been backed up and restored into a test database within the same production environment, **your FSM integration credentials must be re-imported** from the credentials.csv file matching the test company.

To re-import the FSM integration credentials to the restored company:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Admin and then select the Integration Settings tab.
3. Select *Import Credentials* and Select the credentials.csv file that you downloaded when setting up the FSM Integration in Building Optimization Broker. See Step 3: Create FSM Integration Record (page4) in the Core Cloud Setup Steps (page4).
    - **Serial Number**: Provided by Building Optimization Broker.
    - **Authorization Code**: Provided by Building Optimization Broker. This is the authorization key found in the credentials.csv file.
      The credentials.csv file may have been manually renamed to the company name.
4. Update the remaining fields to match the production environment:
    - **User Pool ID**: us-east-1_eddkfwgBU
    - **Client ID**: 1sors3l7hetplca83ev9v0khkp
    - **Integration URL**: https://bob-api.key2act.io
    - **Websocket URL**: wss://vpnebxyaz5.execute-api.us-east-1.amazonaws.com/prod
    - **API Key**: 220a8c36-bfb5-4db6-a0a3-139311b0ca2f
5. Select *Save*. When successfully connected to Core, the Core company name is displayed in the status bar at the bottom of the window.

Adding An Additional Time App Company

When adding another Time App company in the same environment (like Production), you will need to complete the following steps.

> We recommend that you back up the Schedule and ServiceLibrary folders found at *Program Files (x86)\Signature\Schedule*.

Step 1: Modify the Schedule Installation

You will need to run the Schedule Installation process to add the new company to the Schedule Service Library.

- We recommend that you back up the Schedule and ServiceLibrary folders found at *Program Files (x86)\Signature\Schedule*.
- When running the Schedule installer as an administrator, select the *Modify* option.

To modify the Schedule installation:

1. Right-click on the Schedule x.x.xx.exe file and select *Run as administrator*.
2. If the **User Account Control** window displays, select *Yes* to continue the installation.
3. Select the **Modify** option in the window that displays.
4. The **Welcome to the Schedule Setup Wizard** displays.
5. Select *Next*.
6. On the **SQL Server Settings** window, enter your SQL Server System settings:
    - SQL Server
    - Admin SQL User
    - Password
    - GP System Database: The database defaults to DYNAMICS, however, you can change this if you have a different name.
7. Select *Next.*
8. On the **Company Select** window, mark all companies that you will be using for Time. Make sure to include any previously-installed companies.
9. At the bottom of this window, the Version field displays the version of Schedule you are installing.
10. Select *Next.*
11. On the **Ready to Install** window, select *Install.*
12. On the **Completing the Schedule Setup Wizard** window, select *Finish*.

Step 2: Configure the Server Objects

The Configure Server Objects window is used to create all related Time database objects. This will synchronize the data in the Microsoft Dynamics GP company with the company created in Core.

1. Launch Microsoft Dynamics GP and log into the Production company.
2. Sign in as an administrator. (This user will also need to have sysadmin rights to create the tables and database objects.)
3. Select Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
4. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Admin.
5. On the Configure Server Objects tab, select the *Process* button to create the Time database objects.

Step 3: Re-import the FSM Credentials

When your production SQL database has been backed up and restored into a test database within the same production environment, your FSM integration credentials must be re-imported from the credentials.csv file matching the test company.

To re-import the FSM integration credentials to the restored company:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Admin and then select the Integration Settings tab.
3. Select *Import Credentials* and Select the credentials.csv file that you downloaded when setting up the FSM Integration in Building Optimization Broker. See Step 3: Create FSM Integration Record (page4) in Core Cloud Setup Steps (page4).

    - **Serial Number**: Provided by Building Optimization Broker.
    - **Authorization Code**: Provided by Building Optimization Broker. This is the authorization key found in the credentials.csv file.
      The credentials.csv file may have been manually renamed to the company name.
4. Update the remaining fields to match the production environment:
    - **User Pool ID**: us-east-1_eddkfwgBU
    - **Client ID**: 1sors3l7hetplca83ev9v0khkp
    - **Integration URL**: https://bob-api.key2act.io
    - **Websocket URL**: wss://vpnebxyaz5.execute-api.us-east-1.amazonaws.com/prod
    - **API Key**: 220a8c36-bfb5-4db6-a0a3-139311b0ca2f
5. Select *Save*. When successfully connected to Core, the Core company name is displayed in the status bar at the bottom of the window.

Step 4: Re-run the Sync2Core Installer

Re-run the Sync2Core installer so the Production company is added to Sync2Core. The Signature Sync2Core Service monitors web socket event notifications coming from WennSoft Core into WennSoft Signature.

To install Sync2Core:

1. Right-click on the Sync2Core x.x.xx.exe file and select *Run as administrator*.
2. If the **User Account Control** window displays, select *Yes* to continue the installation.
3. Select the **Modify** option in the window that displays.
4. The **Welcome to the Sync2Core Setup Wizard** displays.
5. Select *Next*.
6. Accept the license agreement on the **End-User License Agreement** window and select *Next.*
7. On the **SQL Server Settings** window, enter your SQL Server System settings:
    - SQL Server
    - Admin SQL User
    - Password
    - GP System Database: The database defaults to DYNAMICS, however, you can change this if you have a different name.
8. Select *Next.*
9. On the **Company Select** window, mark all companies that have Time enabled in Core. If you enable Time for additional companies later, you must run the Sync2Core installation again. When doing so, be sure to mark all companies that have Time enabled, including existing companies that have previously been set up with Sync2Core.
10. Select *Next.*
11. On the **Select Installation Folder** window, you can accept the default installation location or you can select the *Browse* button to select a different location.
12. Select *Next.*
13. On the **Ready to Install** window, select *Install.*
14. On the **Completing the Sync2Core Setup Wizard** window, select *Finish.*

Step 5: Run a Full Synchronization

To set up and run the TimeTrack Data Sync:

1. In Signature, go to Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options.
2. In the TimeTrack Setup Options window, from the ribbon bar select Additional > TimeTrack Data Sync.
3. Select **Full Sync**. The full synchronization creates all the new records in Time.
   - Are syncing data for the first time.
   - Have used any Move utility (Move Equipment, Move Location, or Move Service Call).
   - Have created a new Time App company.
4. Click anywhere on the data row to open the Process Results window that shows the synced data in JSON (JavaScript Object Notation) format for that synchronization instance. For example, if you updated 14 employee records in the TimeTrack Registered Users window so that the employee records will be used in Time, you may see:
   - Entity: Employee
   - Total Processed Entities: 14
   - Total Failed Entities: 0
5. Close the window.

Installing the Time Mobile App

You can download and install the Signature Time app from the Google Play Store for Android devices and from the Apple Play Store for iOS devices. The app is locked to the portrait display. For device OS compatibility, see System Requirements (page1).

To install the Time app:

1. Go to the Signature Time listing in the App Store.
2. Select **Install**.

Contact Information

Support & Sales

Support Phone: 262-317-3800
Email: support@wennsoft.com
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for more information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Presidents' Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, the Day after Thanksgiving, Christmas Day, and the Day after Christmas.

Support Plans
We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal.

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