Schedule 2022 (5.0) Readme

Release Version: 5.0.24
Release Date: November 2022

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Requirements and Compatibility

Signature System Requirements

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at https://www.wennsoft.com/wsportal/product-downloads.

Signature Version Compatibility

- Signature 18.04b06 or higher
- Signature 2018 R3

  > ⚠ WennSoft's mainstream support for Signature 2018 R3 ends on January 10, 2023. See the Lifecycle Support Policy at https://www.wennsoft.com/wsportal for more information.

- MobileTech 8.5.57 or higher for XOi Deep Linking
- Building Optimization Broker 1.3 or higher
- Signature Agent 2.4.39 or higher
- Map2BOB 1.1.16 or higher

Device Compatibility

Schedule is not designed to perform on smaller form factors, like a tablet computer or smartphone.

Incompatibility

WebDav is an optional IIS Feature that is not currently compatible with the Schedule services.

It is our recommendation not to install WebDav as one of the features installed on IIS as a prerequisite feature for Schedule. It is an optional feature and not needed for Schedule and could potentially cause problems.

If WebDav is a needed feature for other IIS websites (other than WennSoft software), we recommend that WebDav is removed from the Handler Mappings and Modules features for the particular IIS Site that Schedule is installed on.

1. Open the Internet Information Services (IIS) Manager.
2. Navigate the **Default Web Site**.

3. Double-click to open **Handler Mappings**.
4. Right-click **WebDav** and select **Remove**.
5. Select **Default Web Site**.
6. Double-click to open **Modules**.
7. Right-click **WebDav** and select **Remove**.
8. Perform IISRESET from elevated CMD prompt.

Upgrading and Installing Schedule

Upgrading Schedule 5.0.24 from a previous version

You can upgrade to Schedule 5.0.24 from version 3.0 or higher.

Installing Schedule for the first time

Refer to the Installation and Upgrade Guide[1] for detailed instructions.

Installation Notes

- Install the .NET Core 3.1 Windows Server Hosting bundle on page 2
- Obtain a Mapping API Key on page 2

Install the .NET Core 3.1 Windows Server Hosting bundle

1. Install the .NET Core Windows Server Hosting bundle[2] on the hosting system. The bundle installs the .NET Core Runtime, .NET Core Library, and the ASP.NET Core Module. The module creates the reverse proxy between IIS and the Kestrel server. If the system doesn't have an Internet connection, obtain and install the Microsoft Visual C++ 2015 Redistributable[3] before installing the .NET Core Windows Server Hosting bundle.
2. Restart the system or execute **net stop was /y** followed by **net start w3svc** from a command prompt. Restarting IIS picks up a change to the system PATH made by the installer.

> ⚠ **IMPORTANT**
>
> You must install the .NET Core Windows Server Hosting bundle after installing Internet Information Services (IIS). If you install the hosting bundle and then install IIS, you will get a CORS error. To fix this, uninstall the .NET Core Windows Server Hosting bundle and then reinstall the bundle.

Obtain a Mapping API Key

If you will be using the Mapping feature, you will also need to obtain a Google or Bing Mapping API key:

- Google Maps: https://cloud.google.com/maps-platform/pricing/ You will need the **Maps JavaScript API** (Maps > Dynamic Maps), **Directions API** (Routes > Directions), and **Geocoding** (Places tab). Geocoding is required for setting coordinates.

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1 https://docs.key2act.io/display/SCHED50/Installation+and+Upgrade+Guide
2 https://download.visualstudio.microsoft.com/download/pr/7e35ac45-bb15-450a-946c-fe6ea287f854/a37cfb0987e21097c7969dda482cebd3/dotnet-hosting-3.1.10-win.exe
3 https://www.microsoft.com/download/details.aspx?id=53840

- Bing Maps: https://www.microsoft.com/en-us/maps/licensing/options

New Features

Case #	Description
SCHED-1225	When creating a service call with a call type of MC (maintenance contract), a message now displays when the equipment selected is not covered by a contract. The message "Equipment ID <ID> is not covered by Contract <Contract Number>." has an OK and Cancel button. Selecting OK leaves the selection of the current field (equipment ID or contract number). Selecting Cancel returns the user to the Service Call window with the current field cleared (Equipment ID, Contract, or Call Type). The message displays in the following scenarios: - The call type is MC, the contract is selected and then the equipment is selected. - The call type is MC, equipment is selected and then the contract is selected. - The contract and equipment are selected and then the call type is changed to MC.
SCHED-1299	Users can now add, edit, and/or remove field purchase orders in Schedule. A purchase order that is entered in MobileTech or Schedule must be reviewed, committed, and processed in Service Management and Microsoft Dynamics GP Purchasing before costs that are associated with the purchase order can be processed in the system. See Working with Purchase Orders[4]. ⚠ To allow users in MobileTech or Schedule to quickly work and provide information to customers in the field, purchase orders for service invoices and field invoices do not include taxes unless the invoices have been received in the Purchasing module of Microsoft Dynamics GP. We've added new Role Permissions for purchase orders so that you can limit your Schedule users to view, edit, and/or delete. (Administration > User Roles) See Working with Roles[5].

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4 https://docs.key2act.io/display/SCHED50/Working+with+Purchase+Orders
5 https://docs.key2act.io/display/SCHED50/Working+with+Roles

Case #	Description
SCHED-1275, SCHED-1450, SCHED-1451, SCHED-1458, SCHED-1521	Users can now add and edit equipment and component equipment from the Customer Hub. You can access the new Equipment tab by selecting the customer's service location. Right-click anywhere within the Equipment tab to access the Add Equipment, Edit Equipment, Add Note, View Note, Add Attachment, and/or View Attachment options from the context menu. See Working with Equipment[6]. On the Equipment tab, you can view the following columns. • Notes - Displays 🗋 if the note is empty or 🗒 if a note is attached. • Attachments - Displays 📎 if no attachment exists or ✉ if a file is attached. • Equipment ID • Description • Component • Master Equipment ID • Component Quantity • Contract • Equipment Type • Manufacturer • Model Number • Serial Number • Barcode • Installed By • Installed Date • Warranty Exp Date • Ext Warranty Expiration Date • Building ID • Building Room • Suspended MCC • Inactive/Retired • User_Defined_1a ⚠ If you do not want your users to be able to view the Equipment tab in the Customer Hub and/or edit (and create) equipment records, you can edit the Equipment role permissions. The View and Edit checkboxes default as marked. See Working with Roles[7].

Issues Fixed

Case #	Issue Fixed
SCHED-1533	We've fixed a performance issue when loading hundreds of service requests initiated from Building Optimization Broker.
SCHED-1540	In the Company Settings > Default Appointment Status, the COMPLETE status has been removed from the list of available statuses for Unschedulable appointments.
SCHED-1574	Appointments created for 7 PM CDT and Time Zone Views is enabled are now created as expected. An issue was reported that these appointments were created as unscheduled.

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6 https://docs.key2act.io/display/SCHED50/Working+with+Equipment
7 https://docs.key2act.io/display/SCHED50/Working+with+Roles