



Readme & Installation Guide

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New Features & Fixes

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New Features

4.0


- An optional Job Panel has been added to the Schedule Board. Users with Signature Job Cost registered can enable to display this panel from Schedule's Global Settings. The Job Panel displays a list of the available jobs. You can quickly view high level details about the job. A context menu is available by right-clicking on a specific job that gives you the ability view more details about the job, customer, and/or location or you can open the Appointment Wizard or create a new job appointment. The context menu also provides you with the option to print a Job Schedule. SCHED-43
- The Job Schedule by Cost Code report, as mentioned above, allows you to view the job information including: Job number, customer, bill to customer, project manager, project number, division, contract type, job address ID, bill to address ID, job start date, job completion date, project management percentage complete, and job status.

Also included are the job's cost code information including: the cost codes and descriptions, status, start and completion dates, estimated hours, actual hours, estimated remaining hours, scheduled appointment hours, unposted TimeTrack hours, remaining less scheduled hours. Each job's total hours are displayed beneath the job. The end-of-report footer includes hour totals for all jobs included in the report. Scheduled Hours are a sum of the hours found in open appointments for the schedule range (6 weeks from the Schedule Start date parameter) included on the report. Unposted TT Hours are the sum of hours from these tables: Uncommitted (WS10702) and Committed / Not Posted (JC10701). SCHED-618

 You will need to add the path into the WSRepts table for this report (Job Schedule By Cost Code). *http://<report server>/<database>/<company>/Signature Job Cost/Job Cost Code Schedule*

- Map View has a new feature that lets you draw a shape on the map to include any unassigned appointments to the selected technician's route. You also have an option to toggle the view for current traffic. SCHED-146
- User can change their Schedule password from the new User Profile page. SCHED-208
- You can now add, edit, and/or detach contacts from within the Location Contact panel of the Customer Hub if you are using Contact Management. (You will need to mark Use Contact Management Option in Service Management Service Options.) This feature is available for Signature 2016 R3 and newer. SCHED-238
- We've added functionality for users to be able to reschedule, split, and/or delete appointments that were created using the Appointment Wizard. Appointments that were created at the same time with the Appointment Wizard are assigned the same Group ID. Within a service or job appointment, you can select to view Related Appointments or Related Appointments by Group ID. In the Related Appointments by Group ID window, you can either select all appointments or specific appointments. (Only appointments that don't have a status of Completed.) Then you can choose to reschedule, split to a new group, or delete. When rescheduling or splitting, you can edit the description, status, start date, estimated hours, days between appointments, and if you want to skip Saturday and/or Sunday. SCHED-239
- Added the ability for users to double-click an appointment on the Customer Hub to open an appointment on the Schedule Board. SCHED-250
- The Appointment Wizard can be accessed by right-clicking on:
 - An empty cell on the Schedule Board. SCHED-242
 - A service call on the Service Call tab from the Customer Hub. SCHED-251
 - Any appointment or resource and choosing Appointment Wizard. (existing functionality)
- The New Appointment window can be accessed by right-clicking (and then choosing New Appointment) on:
 - A service call from the Service Call tab in the Customer Hub. SCHED-251
 - Any appointment in the Unscheduled Appointments section of the Schedule Board. (existing functionality)
 - Any appointment on the Schedule Board. (existing functionality)
 - An appointment on the Open Appointment tab from the Customer Hub. (existing functionality)
- The Date Picker, used to select the date and time in various windows, has been updated for easier use. SCHED-272
- You can now search by maintenance contract using the Find feature on the Customer Hub. SCHED-274
- When an Appointment Status is set to COMPLETE, the Completion Date field is enabled. The Completion Time is set automatically to display the time based off the Start Time and the Actual Hours. The Actual Hours is initially set to the Estimated Hours. If you edit the Actual Hours, the Completion Time is updated. If you edit the Completion Time, the Actual Hours updates, rounded to 2 decimal places. SCHED-287, SCHED-409, and SCHED-410
- A User Profile page has been added to Schedule. Users can view the name associated with their user profile, email address, ERP user account, default company, user role, and time zone. If you have Global Filtering turned on in Microsoft Dynamics GP, the user's affiliate/region/branch information also displays. SCHED-298
- Added the option to Find a customer and location by Maintenance Contract from the Customer Hub. SCHED-436
- The ability to manually log out of Schedule has been added. SCHED-437
- We've added main column headers for the Customer and Location columns so that you can drag all three Customer columns (Name, ID, and Notes) or Location columns (Name, ID, and Notes) at the same time. You can rearrange the three columns (Name, ID, and/or Notes) underneath the Customer and/or Location bands. SCHED-442
- We've added Address 2, City, State, and Postal Code columns in the Customer Hub. SCHED-270 and SCHED-446
- The Timestamp window displays a red background if the actual timestamp on a Service Level Agreement (SLA) item is later than the guaranteed time. SCHED-365

Time Stamps for Service Call 170731-0001		
Date Opened 7/31/2017, 2:22:50 PM	Service Call Date 3/15/2019	User ID sa
	Stamped Time/Date	Guaranteed Time/Date
OPEN	11/6/2017, 3:09:19 AM	
DISPATCHED	10/16/2017, 8:14:58 AM	7/31/2017, 4:22:00 PM
RECEIVED		
ARRIVED	10/16/2017, 8:14:45 AM	7/31/2017, 6:22:00 PM
COMPLETE		

- We've added the option to show/hide the horizontal scrollbar when viewing the Schedule in the Timeline view. This option has been added to the Global Options section in Settings. This option defaults to not marked so that the horizontal scrollbar is not displayed. SCHED-518
- A validation window has been added to the Appointment Wizard process that displays the appointment count, primary key elements (Job/Cost Code, Service Call ID, Activity ID), date range, and resource count. This gives you the chance to cancel in case you've made an error in the Appointment Wizard. SCHED-520
- The Date/Time Lock checkbox has been added to the Service Call window. The function of this checkbox is to prevent the service call from being rolled forward if you have the Roll Service Calls Forward option turned on in Signature Service Management on the Service Options settings window. A *Date/Time Lock*  icon displays on the service appointment when this is marked on the service call (from Schedule or Service Management). This option is available only for service calls with one appointment. SCHED-530
- The Job Detail window was updated to display the Estimator and Project Manager names instead of their IDs. SCHED-546
- You can now set up a company-specific Default Start Time in Configuration Settings. This time will default in the following:
 - Appointment Wizard or New Resource Activity when accessed from right-clicking on a Resource.
 - New Service Appointment or New Job Appointment windows by right-clicking on an existing appointment on the Schedule Board or in the Customer Hub and selecting New Appointment from the context menu. SCHED-572
- We've added a new option on the context menu when you right-click a service appointment to create a new service call for that specific customer and location. This is available on the Schedule Board for scheduled and unscheduled service appointments and on the Customer Hub when you right-click on a customer/location. SCHED-597
- A map view has been added to the Location tab in the Customer Hub. The map is displayed if you have enabled and set up the mapping option in Schedule Settings and if you've entered the latitude and longitude information the Location window in Signature. SCHED-637

Bug Fixes

4.0.31

- The appointment is now properly saved when the duration is extended using the dragging of the appointment end time for the Timeline, Day, and Week views. (This functionality is not supported in the Month view) SCHED-801

4.0.30

- The setting for displaying the horizontal scroll bar on the Timeline view is now properly saved when edited in organizational Settings. SCHED-778
- The appointment branch is now being properly checked for Bing Map users. This was causing an issue with the appointment being added to the appointment list in Map View. SCHED-783
- We've fixed an issue that occurred when in the Map View, the Save button would not be enabled when a route has been optimized for the selected Resource. The Save button is now available. SCHED-784
- The contract number field is now consistently displayed on the service call view when selected in Settings. (Note: The Contract Number field on the Service Call window is not an editable field for selection in Schedule, but it is visible is assigned via Service Management. This feature is on the roadmap) SCHED-786
- On the Google Map window, the save button was inadvertently hidden from the view of the user or was disabled for selection. SCHED-784/SCHED-789
- When using Bing Maps, the single click on an Unassigned appointment will now consistently open the appointment to be viewed or manually edited.
- Add to List button is now properly displayed on the Google Map and Bing Map windows based on conditional logic. The Add to List button will be available only after a resource has been selected for routing. SCHED-790
- When not using Global Filters, the UNASSIGNED technician is now always displayed as a selectable resource in the appointment edit windows. SCHED-791

4.0

- When viewing Map and Route Resources, the route window now displays the horizontal scrollbar when the routes listed exceed the window height. SCHED-257
- Users' role permissions are now respected between multiple companies. SCHED-440
- The date search in the Unscheduled Appointments section of the Schedule Board now returns the results as expected. SCHED-441
- When dragging appointments to the Schedule Board from the Unscheduled Appointments section, appointments no longer display as UNDEFINED. SCHED-635
- The Address ID field is now required to display on Service Calls. Users were experiencing problems when the Address ID field was turned off in General Settings under Service Call fields. SCHED-636
- The PO Number column is now displaying in the Customer Hub and in the Customer Hub Column Chooser. SCHED-674
- The End Route has been updated to display the Start Time as the previous appointment's End Time. The End Time for the End Route is calculated to include the Drive Time. (Start Time + Drive Time.) SCHED-746
- When a service call is created for a future date, the service call ID now correctly includes the call creation date. SMS-334

System Requirements

To find a complete list of system requirements across all the Signature modules, refer to [System Requirements](#)¹.



If you will be integrating with ServiceChannel and this is a new installation, you will need to install to an HTTPS using port 443. If you currently are installed using port 80, please contact WennSoft Support for information on updating to port 443.

¹ <https://docs.key2act.io/display/Signature2018R4/System+Requirements>

Signature Version Compatibility

- Signature 2015 R2 SP3
- Signature 2016 R3 SP1
- Signature 2018 R2
- Signature 2018 R3
- Signature 2018 R4

Install the .NET Core 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](#)³. 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](#)⁴ before installing the .NET Core Windows Server Hosting bundle. **Important!** If the hosting bundle is installed before IIS, the bundle installation must be repaired. Run the hosting bundle installer again after installing IIS.
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.

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 an API key that includes Maps and Routes. You do not need Places.)
- Bing Maps: <https://www.microsoft.com/en-us/maps/licensing/options>

Installing Schedule

- [Installing Schedule Prerequisite Files](#) (see page 5)
- [Installing the Schedule Web Service and Application](#) (see page 6)
- [Install the Schedule Web Service for Additional Companies](#) (see page 6)
- [Log into Schedule](#) (see page 7)

Installing Schedule Prerequisite Files

Prior to installing the K2A Service Library and application, the Schedule installation requires directories and files to be placed on your server.

1. Right-click **Schedulx.x.xx.exe** and choose *Run as Administrator*. The Welcome to the Schedule Setup Wizard page is displayed.
2. Choose *Next*.
3. On the **End-User License Agreement** window, review and accept the terms of the license agreement.
4. Choose *Next*.
5. On the **Select Installation folder** window, accept the default installation location or use the *Browse* button to select a different installation location for the Schedule web service.
6. Choose *Next*.
7. On the **Ready to Install** window, choose *Install*.

² <https://dotnet.microsoft.com/download/thank-you/dotnet-runtime-2.2.0-windows-hosting-bundle-installer>


³ <https://docs.microsoft.com/en-us/aspnet/core/fundamentals/servers/aspnet-core-module>

⁴ <https://www.microsoft.com/download/details.aspx?id=53840>

8. On the **Completing the Schedule Setup Wizard** window, the **Launch Schedule** checkbox is marked by default.
9. Choose *Finish* to launch the Schedule Web Installer. The Schedule Web Installer window launches to set up the K2A web service and application location.

Installing the Schedule Web Service and Application

1. The **Schedule Web Installer** window displays to set up the web service.

 The Schedule Web Installer window may automatically display during the installation process or you can manually open this by going to *Start > Signature > Schedule Web Installer*.

2. A check is run to verify Microsoft NetCore installed. If you do not, a message displays indicating that you need to install this. To do so, choose the hyperlink *.NET Core Windows Server Hosting Bundle* from the installation window.
3. On the **Upgrade/Install Service Library** tab, enter the following information:
 - 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.
4. Choose *Login to display the company/companies* and then choose the **Company** for this Installation This option lets you set up multiple companies during one installation. If you later have a need to install the Schedule Web Service for more companies, see [Install the Schedule Web Service for Additional Companies](#) (see page 6).
5. Enter the **Port for Web Services**. The default port is 80. If you will be integrating with ESMS, enter **443** (the default port for https). Once you tab off the field, a message displays indicating that port 443 requires your domain name and a trusted certificate. Choose *OK*. Enter the **Domain Name**. Current users upgrading should contact WennSoft customer support for assistance.
6. Enter the **physical folder location** for K2A Service Library files.
7. Set the **Schedule 'admin' Password**. This is the administrator's password to log into Schedule.
8. Choose *Install*.
9. Choose *OK* in the message that displays.
10. From the **Upgrade/Install Schedule** tab, enter the URL for the K2A Service Library web service.
11. Choose *Test*. The current Service Library version displays in the field if successful.
12. Enter the **Port** for the website. The port should default from the previous tab.
13. Choose *Install or Upgrade*.
14. When the installation is complete, a message displays at the bottom of the window and a hyperlink is provided to your Schedule website. If you used port 443, verify that the URL begins with **https://**.
15. If you are upgrading Schedule, **start** the **K2A_ServiceLibrary** application pool that was previously stopped.

Install the Schedule Web Service for Additional Companies

Additional companies can be added after the initial installation by following these steps.

1. Navigate the Schedule installation location.
2. Right-click **ScheduleWebInstaller.exe** and choose *Run as Administrator*.
3. The **Schedule Web Installer** window displays to set up the web service.
4. On the **Install/Update Service Library** tab, enter the following information:
 - SQL Server
 - Admin SQL User
 - Password
 - GP System Database
5. Choose *Login*.
6. Select **Companies** for this Installation.
7. Mark **Install SQL Object Only**.


8. Choose *Upgrade*.

Log into Schedule

1. Navigate to your Schedule web location as displayed after the installation of the K2A Web Services.
2. Log in with your Schedule 'admin' username and password.
3. Choose *OK* to open Schedule.
4. Set up the official administrator user.
5. Complete the **Schedule setup instructions** in the Schedule User Guide.

Upgrading Schedule

- [Upgrading the Schedule Prerequisite Files \(see page 7\)](#)
- [Upgrading the Schedule Web Service and Application \(see page 8\)](#)

 Prior to upgrading Schedule, we recommend that you back up the following tables:

GP System Database

- K2A_Area
- K2A_Role – User Roles
- K2A_RolePermissions – User Roles
- K2A_Settings – Settings and Configuration
- K2A_User_Role – User Roles


Company Database

- K2A_ResourceExtension – Technician Details
- SV00113 (Vehicles) – Used for Schedule Mapping/Routing

Upgrading the Schedule Prerequisite Files


Prior to upgrading the K2A Service Library and application, the Schedule installation may require updated files to be placed on your server.

1. Right-click **Schedullex.x.xx.exe** and choose *Run as Administrator*. The Welcome to the Schedule Setup Wizard page is displayed.
2. Choose *Next*.
3. On the **End-User License Agreement** window, review and accept the terms of the license agreement.
4. Choose *Next*.
5. On the **Select Installation folder** window, accept the default installation location or use the *Browse* button to select a different installation location for the Schedule web service.
6. Choose *Next*.
7. On the **Ready to Install** window, choose *Install*.
8. On the **Completing the Schedule Setup Wizard** window, the **Launch Schedule** checkbox is marked by default.
9. Choose *Finish* to launch the Schedule Web Installer. The Schedule Web Installer window launches to set up the K2A web service and application location.

 You may be prompted to download and install a required .NET Core 2.2 update found at <https://dotnet.microsoft.com/download/thank-you/dotnet-runtime-2.2.0-windows-hosting-bundle-installer>. After installing the .NET Core update, you will need to manually open the Schedule Web Installer by going to *Start > Signature > Schedule Web Installer* to continue with the upgrade process.

Upgrading the Schedule Web Service and Application

1. If you are continuing the installation from the steps above, the **Schedule Web Installer** window displays to set up the web service.

 You can manually open this by going to *Start > Signature > Schedule Web Installer*.

2. A check is run to verify Microsoft NetCore is installed. If you do not, a message displays indicating that you need to install this. To do so, choose the hyperlink *.NET Core Windows Server Hosting Bundle* from the installation window.
3. On the **Upgrade/Install K2A Service Library** tab, enter the following information:
 - 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.
4. Choose *Login* to display the company/companies and then choose the **Company** for this Upgrade. This option lets you upgrade multiple companies during one upgrade.
5. Choose *Upgrade*.
6. Choose *OK* in the message that displays.
7. *****At this time you need to STOP the K2A_ServiceLibrary application pool in the IIS Manager before continuing.*****
8. From the **Upgrade/Install Schedule** tab, enter the URL for the K2A Service Library web service.
9. Choose *Test*. The current Service Library version displays in the field if successful.
10. Choose *Upgrade*.
11. A message displays when the installation is complete, choose *OK*.
12. **Start** the **K2A_ServiceLibrary** application pool that was previously stopped.
13. Each Schedule user will need to refresh their browser cache for both the Schedule Board and the Customer Hub tabs. This is done from the keyboard by holding down the CTRL key and then pressing the F5 key once, doing this once for the Schedule Board tab and once for the Customer Hub tab.

Uninstalling Schedule

1. Uninstall Schedule from the Control Panel or using the Product Installer.
2. Remove any remaining folder structure for Schedule (C:\Program Files (x86)\Signature\Schedule).
3. Remove all SCHEDULE web sites from IIS Manager.
4. Remove all application pools from IIS Manager (should be called 'K2A_ServicesLibrary' and 'K2A_SCHEDULE').