

Schedule 2020 (4.5) Readme

Release Version: 4.5.13

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Requirements and Compatibility

System Requirements

To find a complete list of system requirements across all the Signature modules, refer to [System Requirements](#)¹².

Signature Version Compatibility

- Signature 2018 R4
- Signature 2018 R3
- Signature 2016 R3 SP2
- MobileTech 8.0 for XOi Deep Linking

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 installed (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.

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

² <https://docs.key2act.io/display/Signature2018R4/System+Requirements>

Install the .NET Core 3.1 Windows Server Hosting bundle

1. Install the [.NET Core Windows Server Hosting bundle](#)³ 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](#)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 the **Maps JavaScript API** (Maps > Dynamic Maps), **Directions API** (Routes > Directions), and **Geocoding** (Places tab). Geocoding is required for setting coordinates.
- Bing Maps: <https://www.microsoft.com/en-us/maps/licensing/options>

Upgrading and Installing Schedule


Upgrading Schedule 4.5 from a previous version

You can upgrade to Schedule 4.5 from version 3.0 or higher.

Installing Schedule for the first time

Refer to the [Schedule Installation and Admin Guide](#)⁵ for detailed instructions.


New Features

Case #	Description
SCHED-765	<p>Geocoding for technician starting locations and service locations has been enhanced to provide greater flexibility in address field selection for geocoding, improved error messaging, and now also provides access to non-administrative users. This new Geocoding window is accessed using the Hamburger menu  icon.</p> <p>Role based permissions will now control the ability of the user to access the geocoding features. The Administrator role will be updated to automatically include these permissions, however the permissions must be manually added to other roles. This will allow a non-administrator role to perform the daily update of technician starting locations for routing purposes. It will also allow a non-administrator role to perform geocoding for new Service Locations, as they are continually</p>

³ <https://docs.microsoft.com/en-us/aspnet/core/host-and-deploy/iis/?view=aspnetcore-3.1>

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


⁵ <https://docs.key2act.io/display/SCHED45/Installation+and+Upgrade+Guide>

Case #	Description
	<p>added to Signature Service Management. For detailed information, see Geocoding Service Locations and Technician Locations⁶ in the Schedule 4.5 User Guide.</p> <p>The Administrative Setup window still has these options available for administrators to process, if necessary.</p>
SCHED-793	When using the Job Panel, users can now view and search by the division assigned to a job.
SCHED-849	A K2A Service Library event log has been added to the Windows Event Viewer. Access the Windows Event Viewer to view a log of application and system messages, including errors, information messages, and warnings that may have occurred with the K2A Service Library. In the event viewer, expand Applications and Service Logs and then select K2A Service Library.
SCHED-882	We've updated the Required Purchase Order functionality to check the Bill To Location when the Bill To Location is different than the Service Location. If the Bill To Location has Purchase Order Required marked in Signature, then the Customer PO field is required in the Service Call window for all call types other than MC or MCC.
SCHED-883	Users can now export the results after performing a search using the Find feature on the Schedule Board and the Customer Hub. When opening the Excel export file, if you are prompted to Enable Editing, select Yes to view all the column headers. Users have the option to select and export one row or export all rows.
SCHED-885	We've added a Refresh  icon to the Resources section on the schedule board that refreshes just the Resource section.
SCHED-904	In Administration Settings, an Integrations tab has been added for setting up the XOι Integration to be used with the XOι Deep Linking feature available in MobileTech 8.0. See Setting up XOι Integration ⁷ for more information.
SCHED-920	In the New Service Call window, the Job lookup icon now opens a Job Lookup window that allows for filtering and sorting as well as having paging and scrolling functionality.
SCHED-924	<p>You can now add additional data to the Unscheduled Grid on the Schedule Board. For instructions on adding columns, see the Schedule Configuration⁸.</p> <p>Unscheduled grid column list additions:</p> <ul style="list-style-type: none"> • Contract • Contract Sequence • SV Call Source, • SV Call Source Description • Service Call Creation Date

⁶ <https://docs.key2act.io/display/SCHED45/Geocoding+Service+Locations+and+Technician+Locations>

⁷ <https://docs.key2act.io/display/SCHED45/Setting+up+XOι+Integration>

⁸ <https://docs.key2act.io/display/SCHED45/Schedule+Configuration>

Case #	Description
SCHED-998	The Service Appointment context menu has been updated to include <i>View Bill To Location</i> when the service call has different Bill To values. When selected, the Customer Hub opens to that entity.
SCHED-1002	When selecting View Customer Details, View Location Details, or View Bill To Location Details from the right-click menu on an appointment on the schedule board, the Customer Hub opens with the appropriate row highlighted. Select the row to drop down the details window. The View Bill To Location displays if the Bill To Location is different than the Service Location.
SCHED-1050	We've added a Notify column to the Appointment History window. The Notify  icon displays if the customer has been notified of the appointment change.

Issues Fixed

Case #	Issue Fixed
SCHED-802	The Schedule Board Day and Timeline views were updated to fix an issue where the view did not contain any appointments for the selected technicians.
SCHED-811, SCHED-990, SCHED-1054	Schedule has been updated to replicate the note creation process, ensuring the same data is found in notes created in Schedule as you would see for notes created in Signature. This update applies to service call notes, appointment notes, and location notes.
SCHED-814	When creating a new service call in Schedule, any extra carriage returns in the Description remain after creating the service call.
SCHED-815	When working with appointments in the Related Appointments window, the checkboxes all now display without needing to click in the body of the list.
SCHED-880	The service call ID now correctly includes the call creation date when the call is created for a future date.
SCHED-884	The Appointment Wizard no longer creates duplicate appointments if a technician does not have an Employee ID or Vendor ID assigned.
SCHED-911	When opening an appointment from the Related Appointments window, all fields display as expected.
SCHED-912 SCHED-913	Users can now enter a Priority in Schedule without first backspacing to remove the blank space that occurred if the Priority was not entered in Signature.

Case #	Issue Fixed
SCHED-919	A scrollbar has been added to the Appointment Status drop-down and is visible when the number of statuses exceeds the standard display.
SCHED-940	With Time Zones enabled in Signature, users with their clients and server in different time zones no longer experience multiple temporary appointments displayed on the schedule board when creating a new appointment from an existing appointment.
SCHED-945	Users will no longer experience the appointment start time not being correct when the Client and Servers are in different time zones.
SCHED-946	The Appointment Wizard has been updated to create all appointments as expected when Time Zones are enabled in Signature and the client and server are in different time zones.
SCHED-956	When processing Resource Home Locations, users will no longer receive a "ResourceExtension update error" message due to a NULL value that cannot be entered. If the value is null, Schedule will insert a 0 (zero) into the coordinate column.
SCHED-963	When a note is automatically generated when a service call description exceeds the character limit, the global filtering values now populate as expected.
SCHED-982	When the Find window is closed, the filters now clear as expected.
SCHED-986	The Author drop-down list in the Notes window now displays in alphabetical order.
SCHED-1038	The User ID now displays as expected in the Time Stamps for Service Call window for service calls created in Schedule.
SCHED-999	The Service Call window has been updated to fix the Bill To labels to display ID instead of Name. (Bill Customer ID and Bill Address ID)
SCHED-1049	Data is now sorting as expected in the Unscheduled Appointments grid when the Appointment Time is the secondary sort.