



Readme & Installation Guide

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New Features & Fixes

Version 3.0.12	
Bug Fix	There was a periodic issue with Schedule losing the ID of the appointment during the drag and drop process, resulting in an 'Undefined' value being shown on the schedule grid. The process has been updated so that if the appointment ID cannot be found in the current cached result set, it will query the database to get the information. SCHED-634
Version 3.0.11	
Bug Fix	We fixed an issue that Australian customers experienced with the date format and creating a new Service Call. SCHED-537
Version 3.0.7	
New Features	<ul style="list-style-type: none"> • Job appointment notes can be created for any open job. A job appointment note can be viewed, edited, and printed from within Signature, MobileTech and Schedule. • A new Find feature has been added to the Schedule Board and Customer Hub. The ability to search from the Schedule Board and Customer Hub has been added. <ul style="list-style-type: none"> • Schedule Board: Users can now search for appointments by service calls, purchase orders, jobs, projects, and resources from the Schedule Board. Right-click on the search result to use the context-sensitive menu to have the option to open a service call, open an appointment, unassign an appointment, unschedule an appointment, view on calendar, view job details, view customer details, and/or view location details, depending on the Find type and status of the results. (For example, View on Calendar is only available if the appointment is currently on the Schedule Board.) • Customer Hub: Users can search for a Contact Name or customer phone number. From the right-click context menu the user can navigate to the customer or location details. • The Customer Hub has been updated to provide you with a better experience when grouping, sorting, filtering, and displaying customers and locations. <ul style="list-style-type: none"> • Group - To group the display by a column, select a column header and drag this to the area labeled Drag a column header to the group location to group the results by that column located to the top left of the columns. • Sort order - Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously. • Filter - Select the lookup  to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.

	<ul style="list-style-type: none"> • Column Order - Drag the column headers to the left or right to change the column order. • Scrolling - A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.
Bug Fixes	<ul style="list-style-type: none"> • On the Appointment Wizard, the tab order and/or logic is not correct. • Saved filters on the Resource grid were not updating the Schedule Board display.

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.

Signature Version Compatibility

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

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>

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

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>

Installing Schedule

- [Installing Schedule Prerequisite Files \(see page 3\)](#)
- [Installing the Schedule Web Service and Application \(see page 3\)](#)
- [Install the Schedule Web Service for Additional Companies \(see page 5\)](#)
- [Log into Schedule \(see page 5\)](#)

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 **Schedulex.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 K2A 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 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:

Schedule Web Installer

Upgrade/Install KEY2ACT Service Library and Schedule application.

[Net Core Windows Server Hosting Bundle](#)

Upgrade/Install KEY2ACT Service Library | Upgrade/Install Schedule

SQL Server:

Admin SQL User:

Password:

GP System Database:

Login

Port for Web Services:

Select physical folder for the KEY2ACT Service Library website files.

Set Schedule 'admin' Password:

- 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 \(see page 5\)](#).

Schedule Web Installer

Upgrade/Install KEY2ACT Service Library and Schedule application.

[Net Core Windows Server Hosting Bundle](#)

Upgrade/Install KEY2ACT Service Library | Upgrade/Install Schedule

SQL Server:

Admin SQL User:

Password:

GP System Database:

Login

Select the Companies for this Installation:

Port for Web Services:

Select physical folder for the KEY2ACT Service Library website files.

Set Schedule 'admin' Password:

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 \(see page 6\)](#)
- [Upgrading the Schedule Web Service and Application \(see page 6\)](#)

 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 **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*.
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 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 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').