

Schedule 2021 (4.6) Readme

Release Version: 4.6.29

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This document includes these sections:

- [Requirements and Compatibility](#) on page 1
- [Upgrading and Installing Schedule](#) on page 2
- [New Features](#) on page 2
- [Issues Fixed](#) on page 3

Requirements and Compatibility

Signature System Requirements

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

Signature Version Compatibility

- Signature 18.03b05 or higher
- Signature 2018 R3
- Signature 2016 R3 SP2
- 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 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**.

1 <https://docs.key2act.io/display/1803b05/Signature+System+Requirements>

2 <https://docs.key2act.io/display/1803b05/Signature+System+Requirements>

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.

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 4.6.39 from a previous version

You can upgrade to Schedule 4.6.39 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-244 | Users can now manually enter a service call ID when creating a new service call from the Customer Hub if the Signature Service Call ID setup window is set to <i>Option 1 User enters Service Call ID</i> . |

³ <https://download.visualstudio.microsoft.com/download/pr/7e35ac45-bb15-450a-946c-fe6ea287f854/a37cfb0987e21097c7969dda482cebd3/dotnet-hosting-3.1.10-win.exe>

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

⁵ <https://docs.key2act.io/display/SCHED46/Installation+and+Upgrade+Guide>

| Case # | Description |
|------------|---|
| SCHED-646 | If you have your Resources filtered to only display one Technician Team on the Schedule Resource grid, when you open the Appointment Wizard and select to create appointments for a Technician Team, the Team field will default to the filtered team. If you have more than one technician team displayed, you will need to manually select the appropriate team. |
| SCHED-837 | <p>Schedule is now integrated with the Building Optimization Broker's Service Request Management module. New role-based security in Schedule administration can enable a Schedule user to view and act upon new Service Requests to either accept or decline those requests. Accepting a request will initiate the new service call form, with information defaulted from the linked Signature customer, location, equipment, and contact (optional). The number of service requests that have been created in Building Optimization Broker and available to be processed in Schedule is indicated on the Schedule menu bar to the right of the Service Requests button. This number is updated when Schedule auto-refreshes, which is based on the Time Period set up in Global Options Settings. For information on working with service requests from Building Optimization Broker, see Processing Service Requests from Building Optimization Broker⁶.</p> <p>See Building Optimization Broker Settings⁷ for setting up the integration in Schedule.</p> <div style="border: 1px solid yellow; padding: 5px; margin-top: 10px;"> <p> The Administrator role has Building Optimization permissions automatically set to View, Edit, and Delete. For any other role, you will need to manually set these permissions.</p> </div> |
| SCHED-944 | Users now have the ability in Schedule Configuration to add a default appointment status for manually created new appointments. (Settings > Configuration) |
| SCHED-1104 | The On/Off toggle buttons in the Notes window have been updated so that they are more noticeable. |

Issues Fixed

| Case # | Issue Fixed |
|------------|--|
| SCHED-1044 | The default company now displays in the User Profile as expected. |
| SCHED-1077 | Removed the ability to create a new service call from a resource activity. |
| SCHED-1010 | If an appointment has an un-scheduleable status, the date and time cannot be edited. This appointment also cannot be dragged and dropped onto the schedule board with this type of status. Changing the status to a valid value reenables the date/time field for editing. |

⁶ <https://docs.key2act.io/display/SCHED46/Processing+Service+Requests+from+Building+Optimization+Broker>

⁷ <https://docs.key2act.io/display/SCHED46/Building+Optimization+Broker+Settings>

| Case # | Issue Fixed |
|------------|---|
| SCHED-1136 | Users can now delete appointments as expected from the Related Appointments window accessed from the Service Call window. |
| SCHED-1145 | When creating a new appointment from a completed appointment, the start date can now be edited. |
| SCHED-1147 | Error messages that display at the top of the window now automatically resize to show the entire message. |
| SCHED-1148 | When creating a new service call, if a caller name is added to the appointment that contact name now displays as expected in Signature when you have the option selected as Auto-Create Location Contact on Service Call in Service Options. |
| SCHED-1163 | Adding a phone number to a new service call initiated from the Customer Hub now adds the information to the Caller Phone field as expected. |
| SCHED-1164 | When scheduling an appointment outside a technician's shift, Schedule now displays a message informing you that it's outside the resource's shift, but you will still be able to schedule the desired time. |
| SCHED-1188 | Users can now reduce the Timeline View Bar Height to a minimum of 17 pixels in Settings > Schedule Configuration. |
| SCHED-1197 | Users are now able to enter an apostrophe in the Resource Name field in Administration Settings. |
| SCHED-1216 | If a user changes the appointment date to a different date, the data now updates the appointment Start Date and the service call Start Date. |
| SCHED-1220 | Contract dates now display as expected when using the Contract Number lookup on a service call. |
| SCHED-1224 | When a user creates multiple service calls in Signature and assigns them to multiple technicians with different estimated hours, the results now display in Schedule as expected. When a user splits appointments by when viewing related appointments in the service call and changes the estimated hours, the split appointments now display with the same hours. |
| SCHED-1229 | We've fixed an issue where On Hold contracts displayed in the Contract Number lookup on a service call. |
| SCHED-1233 | When creating a new service call, users can no longer select MCC as a call type. |

| Case # | Issue Fixed |
|------------|---|
| SCHED-1234 | Users will no longer receive an "Error loading data message" when doing a find for Maintenance Contracts with no results. |