WennSoft

Signature

Installation and Upgrade Guide

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Viewing System Requirements

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

This documentation is broken down into the following sections:

- **Installing Signature**
  If you are performing a new installation of Signature, select one of these sections for installation instructions, depending on the type of installation you are performing.
  - Server and Client Installation (page 2)
  - Client Only Installation (page 10)
- **Upgrading Signature**
  If you are upgrading Signature from a previous version, you must perform steps before and after upgrading. Please refer to the general upgrade instructions first, then proceed to the upgrade instructions for the type of upgrade you are performing, and then complete the post-upgrade instructions.
  - Upgrading Signature (page 11)
  - Upgrading on a Server and Client (page 14) OR Upgrading on a Client Only (page 17)
  - After Upgrading (page 18)
- Signature SSRS Report Setup (page 20)
- Product Registration Keys Installation (page 27)

Installing Signature

If you do not have the necessary prerequisites for installing Signature products, the installation wizard will offer to install them for you.

CAUTION: Do not set up identical sequential NEXT Numbers for Inventory, Payables, and Payroll transactions in Microsoft Dynamics GP Setup. This will cause issues if you have transactions with the same document number on the same service call. In addition to deleting the specific transaction, the other transactions will also be deleted, causing Service to be out of balance. We recommend that using a prefix for Next Numbers like IV000001. Using unique prefixes will prevent the identical Next Number issue.

See also:

- Before Installation (page 1)
- Server and Client Installation (page 2)
- Client Only Installation (page 10)

Before Installation

1. Install and set up Microsoft Dynamics GP and any required service packs (see the Signature Readme file for version compatibility). Configure the Microsoft Dynamics GP database and create companies.

1. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620771407/System+Requirements

> For the registration key decryption process to work, the person installing the software must have the same network/server permissions as the person who will be using the software on that machine.

2. Install an ODBC driver on the server.
3. We recommend that you use the server name and TCIP as a network protocol.
4. Do not use local server and named pipes for a network protocol.
5. Ensure that a valid ODBC connection can be established to the Microsoft Dynamics GP database and any company database where Signature applications will be installed.

Server and Client Installation

If you do not have the necessary prerequisites for installing Signature products, the installation wizard will offer to install them for you.

> **IMPORTANT**: Verify that the user installing or upgrading Signature has permission to access to all production and test companies.

Installing on a Server and Client

Complete the installation steps in the following order:

- Run the Installation Wizard (page 2)
- Install System and Company Databases (page 3)
- Run the Miscellaneous User Utility (page 4)
- Enable Signature Registration Keys (page 4)
- Launch Microsoft Dynamics GP and Include New Code (page 4)
- Set up Security and Grant User Access (page 4)

Run the Installation Wizard

> **IMPORTANT**: Verify that the user installing or upgrading Signature has permission to access to all production and test companies.

1. Launch the file **Signature Products.exe**.

> We recommended right-clicking the .exe file and choosing **Run As Administrator**. This is necessary even if you are logged in as an administrator, due to the way that Windows handles user roles.

1. On the Welcome screen, select *Next* >.
2. Accept the terms of the license agreement, and select *Next* >.
3. Mark the **Client and Server Installation** option, and select *Next* >.
4. On the Product Selection window, select your installation choice from the drop-down menu next to each feature.
    - **Signature Program**
      Programs include Service Management, Job Cost, and TimeTrack.

- **Signature Utilities**
  This program is used to import data. It also includes file maintenance utilities. The program is required for completing a server and client installation.
- **Signature SmartList Objects**
  These objects can be imported into SmartList. If you are using SmartList Builder, refer to the eOne Integrated Business Solutions documentation for information on importing the Signature SmartList Builder objects. If you are using SmartList Designer, refer to the Microsoft Dynamics GP Systems User Guide for information on importing the Signature SmartList Designer objects. If you also own SmartList Builder, we recommend that you use the SmartList Builder Objects.

5. Select *Next*>.
6. Accept the default installation location, or use the *Browse...* button to navigate to the location where Microsoft Dynamics GP is installed. Select *Next >.*
7. When you are ready to begin the installation, select *Install*.
8. When the installation is complete, leave the **View Readme Text** checkbox marked if you want to read or print the Signature Readme file.
9. Leave the **Launch Signature Utilities** checkbox marked, and select *Finish*.

Install System and Company Databases

1. On the **Welcome to Signature Utilities** window, select a server and enter a password. Select *OK*.
2. On the **Company Login** window, select a company and select *OK*.
3. Select *Yes* to the message prompting you to update database objects. You must update objects to access Signature products.
4. If you have a backup of your database objects, select *Continue* when you are prompted to create a backup. If you do not have a backup, select *Cancel*. Back up your data, then resume the installation process through Signature Utilities.
5. On the Install Companies window, select the system database to install. You must install the system database before installing company databases.

   Note: You can use the *Ctrl* key to select the system database and company database(s) at the same time. The system database will be installed first, followed by the company database(s). For a successful installation, do NOT attempt to process more than 10 company databases at once.

6. Select the company databases to install.
7. Select *Begin Process*. If you have *Fabrikam, Inc.* selected as a company to install, you will be asked if you want to install Signature sample data. This is the only opportunity you have to install sample data. Progress bars appear. This process may take some time depending on the number of companies and amount of data you have. If you have multiple companies, you MUST select to install Signature products on ALL companies, or add new companies after completing the installation. If you select not to update companies during the installation, you will be prompted to install database objects. You must respond *Yes* to this prompt. If you add new companies later, you must launch WS Utilities and run the SQL Update option. If problems occur during the installation, the Signature SQL Installation window will display the errors. Record the errors and contact WennSoft Support. Once the errors are corrected, select Exit and restart Signature Utilities by dragging the WSUTIL.set file over the Dynamics.exe file and choosing *File Maintenance Utilities* > *Signature* > *SQL Update*. When the process has completed successfully, *Complete* appears next to the **Currently Installing Company** and **Overall Progress** fields on the **Install Company** window.
8. Exit Signature Utilities to complete the installation.

Run the Miscellaneous User Utility

The SQL Update Misc User Utility creates a miscellaneous user on each database (including Dynamics), which enables actual users to work with document attachments. This user is used by the system only, and contains no associated login. For more information, see SQL Update Misc User Utility[2].

Enable Signature Registration Keys

To register Signature, you must install the latest Signature Product Registration Application and enable your registration keys. Refer to the **Signature Readme** file for version compatibility information, then proceed to Product Registration Keys Installation (page 27) for complete installation and registration instructions, as well as tips for troubleshooting the registration application.

> ⚠ You only need to install the registration application and enable your registration key on your server machine(s). This process does NOT need to be performed on client machines.

Launch Microsoft Dynamics GP and Include New Code

1. Launch Microsoft Dynamics GP.
2. Select *Yes* to the message asking if you wish to include new code. A message appears stating that **SIGNATURE.CNK** is being included.

Set up Security and Grant User Access

Before you begin to set up security, take a few minutes to organize how each person will be using Signature. Which windows and settings will each user need to access? What windows and settings should each user not be able to access? You should have set up User Classes, User IDs, and user access to companies in Microsoft Dynamics GP setup. For more information, refer to these topics in the Microsoft Dynamics GP user manual. Each Signature user must be assigned additional roles, as well as access to alternate/modified forms and reports, before using Signature. You must set up tasks, roles, and Forms and Reports IDs before users can access Signature operations.

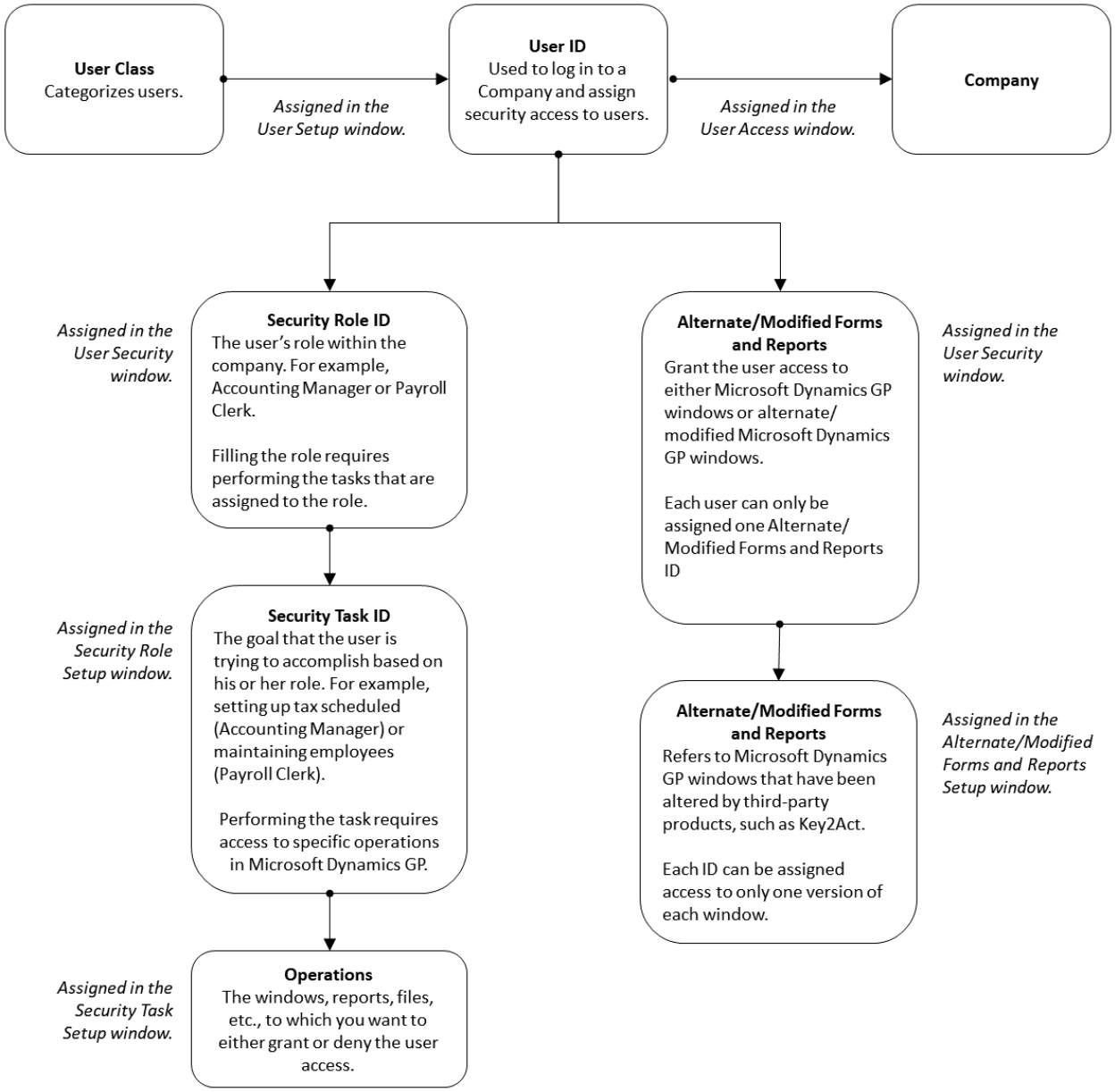
Setting up Security

To begin setting up security, identify the daily tasks that a user completes using Signature. Some default roles and tasks have been created for you; they can be used as they are or modified to meet your needs. You can also create your own roles and tasks.

> ⚠ The provided Signature **POWERUSER** security role has access to all features.

Security is broken down into the following components:

2. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620314525/SQL+Update+Misc+User+Utility



Creating, Copying, and Modifying Security Tasks

You can create new security tasks, edit existing security tasks, as well as the ability to copy an existing security task into a new or existing security task.

Creating a New Security Task

1. Select *Microsoft Dynamics GP > Tools > Setup > System > Security Tasks*. The Security Task Setup window opens.

2. Create a **Task ID** and assign it to a **Category**; for example, you may decide to categorize tasks associated with Signature as *Other*.
3. Fill in a **Task Name** and **Description**. The Task Name, along with the Task ID and Category, populates in the Task ID Lookup window; you may want these fields to provide a general description of the task.
4. To assign access to Signature operations, select sort criteria from the following drop-down menus:
   - **Product**
     Select the product to which the operation belongs, in this case, Signature Products.
   - **Type**
     Select the type of operation to which you are assigning access, for example, Windows or Reports.
   - **Series**
     Select the series under which you would find the operation, for example, *Sales* or *Financial*. Most operations for Signature products are found under the *3rd Party* series.
5. A list of operations populates in the **Access List** scrolling window. Mark the checkbox next to the operations that someone performing this task must access. You can toggle between different Products, Types, and Series without losing the selections you have marked. You can also *Mark All* or *Unmark All*.
6. Select *Save* when you are done. The *Print Operation Access* button on this window is reserved for future use. After you complete the security setup, this button will allow you to view a list of users that have access to each operation.

Copying One Security Task ID to Another

To save time, you can copy all security settings from an existing security task into the task that you are about to create or to an existing role.

> While you can copy a security task ID to an existing task ID, this will overwrite any information that was previously entered in the task you are copying to.

1. Select *Microsoft Dynamics GP* > *Tools* > *Setup* > *System* > *Security Tasks*. The Security Task Setup window opens.
2. Enter a **Task ID**, **Task Name**, and **Task Description** for the new task. You may decide to use the name of an existing task, without the asterisk *.
3. Select *Copy*. The Copy Security Task window opens.
4. Use the lookup window to select the name of the task you want to copy information from, then select *OK*. In the Security Task Setup window, your new task has been created with the same information as the existing task you copied from.
5. Make any modifications you want, and select *Save*.

Modifying Existing Security Tasks

An asterisk * indicates a pre-existing task that will be updated to include new features and functionality in future releases of Signature products.

> Any modifications that you make to a role or task marked with an asterisk will be lost when you update your software in the future.

We recommend that, if you are going to alter any of the tasks provided by Signature, you copy the ID and make changes to the copy, to prevent losing your modifications when you update to future product versions.

Creating, Copying, and Modifying Security Roles

You can create new security roles, edit existing security roles, as well as the ability to copy an existing security role into a new or existing security role.

> ⚠ The provided Signature POWERUSER security role has access to all features.

Creating a New Security Role

1. Select *Microsoft Dynamics GP* > *Tools* > *Setup* > *System* > *Security Roles*. The Security Role Setup window opens.
2. Enter a **Role ID**, **Role Name**, and **Description**. You may decide to create roles based on positions within your company, as shown above; this way, users can be assigned the roles that correspond to their positions.
3. To display a list of tasks in the scrolling window, select a **Category** from the drop-down menu. You can also select to view *All*.
4. Mark the checkbox next to each task that you want to associate with this role; any user who is assigned this Role ID will be able to access all the operations assigned to the selected tasks. You can also select to *Mark All* or *Unmark All*.
5. Select *Save*.

Copying One Security Role ID to Another

To save time, you can copy all security tasks from an existing security role to the role that you are about to create or to an existing role.

> ⚠ While you *can* copy a security role ID to an existing role ID, this will overwrite any information that was previously entered in the role you are copying to.

1. Select *Microsoft Dynamics GP* > *Tools* > *Setup* > *System* > *Security Roles*. The Security Role Setup window opens.
2. Enter a Role ID, Role Name, and Role Description for the new role. You may decide to use the name of an existing role, without the asterisk *.
3. Select *Copy*. The Copy Security Role window opens.
4. Use the lookup window to select the name of the role you want to copy information from, then select *OK*. In the Security Role Setup window, your new role has been created with the same information as the existing role you copied from.
5. Make any modifications you want, and select *Save*.

Modifying Existing Roles

An asterisk * indicates a pre-existing role that will be updated to include new features and functionality in future releases of Signature products.

> ⚠ Any modifications that you make to a role marked with an asterisk will be lost when you update your software in the future.

We recommend that, if you are going to alter any of the roles provided by Signature, you copy the ID and make changes to the copy, to prevent losing your modifications when you update to future product versions.

About Setting Security for Third-Party Products That Modify Microsoft Dynamics GP Windows

Signature and other third-party products modify Microsoft Dynamics GP windows to provide additional functionality. When a third-party product has modified a Microsoft Dynamics GP window, the modified window is known as an *alternate* Microsoft Dynamics GP window.

To use Signature and Microsoft Dynamics GP together, a user must have access to all the alternate Microsoft Dynamics GP windows that have been modified by the Signature application. You risk damaging your data if you do not provide the proper Microsoft Dynamics GP security to the alternate Microsoft Dynamics GP windows that belong to Signature.

In some cases, two or more third-party products may modify the same Microsoft Dynamics GP window. The result will be two or more alternate Microsoft Dynamics GP windows attempting to replace a single Microsoft Dynamics GP window. Within Microsoft Dynamics GP security, a user can have access only to the Microsoft Dynamics GP window or to one of the alternate Microsoft Dynamics GP windows.

Users can only work with one third-party product at a time. You must set up an Alternate/Modified Forms and Reports ID for each third-party product, and a user ID for each Alternate/Modified Forms and Reports ID. For example, if you have a user, jsmith, who needs to work in a Signature product and another third-party product, you could set up two user IDs: jsmithws and jsmithother.

> ⚠ Users who have a user profile set up in Job Cost and do not have a user profile set up in Service Management cannot have access to three alternate Microsoft Dynamics GP windows that are modified for Service Management: Customer Address Maintenance, Customer Class Setup, and Customer Maintenance. Make sure Job Cost-only users do not have access to these windows as modified by Signature.

Creating Alternate/Modified Forms and Reports IDs

1. Select *Microsoft Dynamics GP > Tools > Setup > System > Alternate/Modified Forms and Reports*. The Alternate/Modified Forms and Reports window opens.
2. Enter an **ID** and **Description**. For example, if you are setting up access to Microsoft Dynamics GP windows, you may create the ID DYNAMICSUSER; to set up access to windows modified by Signature, SIGNATUREUSER.
3. Select Signature Products from the **Product** drop-down menu. You can also view forms and reports for All Products.
4. From the **Type** drop-down menu, select Windows. A tree-view list displays in the scrolling window.
5. Expand the Sales series to view the list of Sales windows modified by Signature.
   - If the user is a Service Management user, mark the **Signature Products** radio button for each Sales window.
   - If the user is a Job Cost only user, mark the **Signature Products** radio button for every Sales window *except* Customer Address Maintenance, Customer Class Setup, and Customer Maintenance.
6. Expand the Financial series, and mark the **Signature Products** radio button for each window. This allows GL entry transactions for jobs and service calls.
   Expand the Purchasing series, and mark the radio buttons per the following table:

To allow this:	Mark the *Signature Products* radio button next to:
Creating purchase orders (PO) with Signature items.	• Purchase Order Entry • Purchasing Item Detail Entry
Viewing Signature items in PO inquiry zoom windows.	• Purchase Order Inquiry Zoom • Purchasing Item Detail Inquiry Zoom
Entering PO receivings for Signature items.	• Receivings Transaction Entry • Receivings Item Detail Entry

To allow this:	Mark the *Signature Products* radio button next to:
Viewing Signature items in PO receivings inquiry zoom windows.	• Receivings Transaction Inquiry Zoom • Receivings Item Detail Inquiry Zoom
Entering invoice matchings to PO with Signature items.	• Purchasing Invoice Entry • Purchasing Invoice Item Tax Detail Entry • Match Shipments to Invoice
Viewing Signature items in PO invoice inquiry zoom windows.	• Purchasing Invoice Inquiry Zoom • Purchasing Invoice Item Tax Detail Inquiry Zoom • Match Shipments to Invoice Inquiry Zoom
Entering payables transactions to jobs and service calls.	• Payables Transaction Entry Distribution
Viewing Signature items in payables zoom windows.	• Payables Distribution Zoom • Payables Transaction Entry Zoom

7. Expand the Inventory and Payroll series, and mark the Signature Products radio button for each window.
8. Go back to the **Type** drop-down menu and select Reports. A tree-view list displays in the scrolling window.
9. Expand each series and report, and mark the **Signature Products** radio button next to each report.
10. Select *Save* when you are done.

Granting Security Access

Once you have set up security IDs, you can assign users access to Signature products.

1. Select *Microsoft Dynamics GP > Tools > Setup > System > User Security*. The User Security Setup window opens.
2. Select a **User** from the lookup window, and select a Company from the drop-down menu.
3. A list of **Roles** populates in the scrolling window. Mark the checkbox next to each role you want to assign to this user. This user will have access to all operations assigned to the tasks that these roles contain.
4. Select an **Alternate/Modified Forms and Reports ID** from the drop-down menu. Each User ID can only be assigned one Alternate/Modified Forms and Reports ID; to grant access to additional alternate windows, you must set up additional User IDs.
5. Select the **AFA Reports** button to open the Advanced Financial Analysis Reports Security window. Select a Reports Type from the drop-down menu and mark the checkbox next to each report you want the user to access. You can also *Mark All* or *Unmark All*.
6. Select *OK* to return to the User Security Setup window.
7. Select *Save*.

Client Only Installation

If you do not have the necessary prerequisites for installing Signature products, the installation wizard will offer to install them for you.

> **IMPORTANT**: Verify that the user installing or upgrading Signature has permission to access to all production and test companies.

Complete the installation steps in the following order:

Step 1: Run the Installation Wizard

1. Launch the file **Signature Products.exe**.

   > **Note:** We recommended right-clicking the .exe file and choosing **Run As Administrator**. This is necessary even if you are logged in as an administrator, due to the way that Windows handles user roles.

2. On the Welcome screen, select *Next >*.
3. Accept the terms of the license agreement, and select *Next >*.
4. Mark the **Client Only Installation** option, and select *Next >*.
5. On the Product Selection window, select your installation choice from the drop-down menu next to each feature.
   - **Signature Program**
     Programs include Service Management, Job Cost, and TimeTrack.
   - **Signature Utilities**
     This program is used to import data. It also includes file maintenance utilities. The program is required for completing a server and client installation.
   - **Signature SmartList Objects**
     These objects can be imported into SmartList. If you are using SmartList Builder, refer to the eOne Integrated Business Solutions documentation for information on importing the Signature SmartList Builder objects. If you are using SmartList Designer, refer to the Microsoft Dynamics GP Systems User Guide for information on importing the Signature SmartList Designer objects. If you also own SmartList Builder, we recommend that you use the SmartList Builder Objects.
6. Select *Next*>.
7. Accept the default installation location, or use the *Browse...*button to find the folder where you want Signature to be installed. Select *Next >*.
8. When you are ready to begin the installation, select *Install*.
9. When the installation is complete, leave the **View Readme Text** checkbox marked if you want to read or print the SignatureReadme file. Unmark the **Launch Signature Utilities** checkbox, and select *Finish*.

Step 2: Launch Microsoft Dynamics GP and Include New Code

1. Launch Microsoft Dynamics GP.
2. Select *Yes* to the message asking if you wish to include new code. A message appears stating that **SIGNATURE.CNK** is being included.

Upgrading Signature

IMPORTANT: Verify that the user installing or upgrading Signature has permission to access to all production and test companies.

We recommend performing a complete upgrade on a test system before upgrading your production system.

To upgrade to Signature 2018, you must first upgrade Microsoft Dynamics GP and install any required service packs. Refer to the system requirements for Microsoft Dynamics GP and the upgrade information in the Signature Readme file to ensure that you have the correct version requirements fulfilled before upgrading Signature. Make sure to configure the Microsoft Dynamics GP database and upgrade companies before upgrading Signature.

Verifying Version Numbers

Before upgrading Signature products or Microsoft Dynamics GP, determine the version of your currently installed programs.

- Verify the installed version of Microsoft Dynamics GP by opening GP and choosing *Help > About Microsoft Dynamics GP*. Version information displays in the About Microsoft Dynamics GP window.
- Verify the installed version of each Signature product by opening GP and choosing *Help > About Signature*. Version information displays in the About Signature window.

Ensure that an ODBC driver is installed on the server, and that a valid ODBC connection can be established to the Microsoft Dynamics GP database and any company database where Signature applications are installed.

- We recommend the server name and TCIP be used as a network protocol.
- Do not use local server and named pipes for a network protocol.

Additional Signature products must be upgraded at the same time that you upgrade Signature. Contact us for the latest versions of these products. Refer to the Signature Readme file for version compatibility and any pre-upgrade requirements for these products.

- If you do not have the other necessary prerequisites for upgrading Signature, the installation wizard will offer to install them for you.
- For the registration key decryption process to work, the person installing the software must have the same network/server permissions as the person who will be using the software on that machine.

When upgrading Signature, measures must be taken to protect your existing data before and after running the installation wizard. The upgrade process is divided into three sections:

- Before Upgrading (page 12) You must perform the procedures in this section before upgrading Signature (Service Management, Job Cost, and TimeTrack).
- **Upgrading Signature products** An installation wizard leads you through installation of the software. Follow the instructions for a complete (server and client) or client-only installation.
  - Upgrading on a Server and Client (page 14)
  - Upgrading on a Client Only (page 17)

- **After Upgrading** (page 18) You must perform these tasks after upgrading Signature (Service Management, Job Cost, and TimeTrack).

> ⚠ You must complete all three sections to successfully upgrade Signature.

See also:

- Before Upgrading (page 12)
- Upgrading on a Server and Client (page 14)
- Upgrading on a Client Only (page 17)
- After Upgrading (page 18)

Before Upgrading

Step 1: Verify Version Compatibility

Before upgrading, verify the Signature version you are currently running is compatible with the version you are upgrading to by referring to the Signature Readme file.

Step 2: Back up the Microsoft Dynamics GP Databases on the Server

Back up all Microsoft Dynamics GP and Signature server applications and data files.

Step 3: Back up the Client Directory on a Workstation

Back up all Microsoft Dynamics GP and Signature files on a workstation, including dictionary files for custom reports and windows.

1. When an upgrade is installed, the dictionary files containing the custom windows and reports are replaced.
2. A backup copy of the dictionary files is used to restore the customized windows and reports for Job Cost and Service Management applications after the upgrade is installed.

Step 4: Test a Restore

Ensure that the copied application and data files are functional and could be used in the event of a failed upgrade.

Step 5: Commit All Batches and Records

If you have a batch with salary transactions that are only partially entered, do NOT commit the batch. Once you commit, you will not be able to enter the remaining salary transactions for that batch after upgrading.

1. In TimeTrack, commit all transaction batches. Committing all transactions before upgrading ensures that data will not be lost. Follow the procedures in the *"Committing time card transactions"* section of the TimeTrack User Manual. We recommend you print the WS Time Sheet Committed report during the commit process.

2. In Signature Utilities, commit all records in the Location Import Warehouse table. For instructions, see the *Signature Utilities User Guide*.

Step 6: Back up Custom Security Settings

The default roles and tasks provided by Signature, which are marked with an asterisk, will be overwritten by the upgrade process. If you have made any modifications to these roles and tasks, those modifications will be lost after the upgrade.

To keep your modifications, we recommend making copies of and renaming any default roles and tasks that you have modified. After upgrading, you can update your security settings to include access to new windows and functionality, then adjust user-level security to include the copied roles, rather than the default roles.

Step 7: Print Copies of Modified Windows and Reports

Modified Signature and Microsoft Dynamics GP windows and reports may not convert properly to Signature 2018. Print copies of all modified windows and reports to use as a reference if you have to re-create them after you upgrade.

Step 8: Post Transactions

To ensure all transaction data is written to Microsoft Dynamics GP before an upgrade is installed, post as many transactions as possible before upgrading.

- Post Service Management transactions. Refer to the "*Service Invoicing Procedures*" section in the Service Management User Manual for posting procedures.
- Post batches containing Job Cost transactions. Refer to the "*Transactions*" section of the Job Cost User Manual for posting procedures.
- If you are upgrading from a version before Signature 2013 R3, for data integrity, all service invoice batches need to be posted.

Call WennSoft Support if you need help posting transactions.

Step 9: Back up all Signature Application and Data Files

Step 10: Remove Existing Signature SSRS Reports

SSRS reports are frequently updated and enhanced with each Signature release. To successfully replace the old reports, you must remove the existing Signature SSRS reports before you upgrade.

Delete Signature SSRS Report Files

1. Browse to the location where Microsoft Dynamics GP is installed, for example, **C:\Program Files\Microsoft Dynamics\GP**.
2. Open the **Signature** folder, then locate and delete the folder **SRS Reports**. When you install Signature 2018, this folder and all the Signature SSRS reports contained in this folder will be replaced by the new and enhanced reports.

Remove the Deployed Reports

1. In a Web browser, open the Report Manager for SQL Server Reporting Services. The location of the Report Manager is most likely http://MyMachine/MyReportServerName[3] where *MyMachine* is your machine name and *MyReportServerName* is the name of the report server given when you installed SQL Reporting Services. To determine the name of the report server, select *Start* > *All Programs* > *Microsoft SQL 2012* > *Configuration Tools* > *Reporting Services Configuration*. Connect to your server and select *Report Manager URL*. The **Name** field on this page contains the name of the report server.
2. In Report Manager, select on a company name to open the location of the reports for that company.
3. Delete any Signature SRS reports that have been deployed to this company. After upgrading, when you deploy SRS reports using the new deployment wizard, these reports will be replaced.

   - Do not delete any reports that were not provided by Signature, as these reports will not be replaced by the Signature deployment wizard.
   - You can delete multiple reports at once by using the *Show Details* button to expose a checkbox next to each report name. Locate and mark the checkbox next to the Signature reports, then select *Delete*.
   - By default, Signature reports are organized into folders by product. If you have kept this default organization, you can delete the entire folder for each Signature product. If, however, Signature reports have been rearranged into other folders that also contain non-Signature reports, do not delete the folder; rather, open the folder and individually delete only Signature reports.

4. Repeat steps 2-3 for any additional companies that use SSRS reports. Signature reports may have been deployed across multiple companies.

Step 11: Upgrade Microsoft Dynamics GP

See the *Microsoft Dynamics GP Update Instructions*. Be sure to open each company in Microsoft Dynamics GP and make sure it is functioning before upgrading Signature products.
Refer to the SignatureReadme file for up-to-date version and service pack requirements.

Upgrading on a Server and Client

If you do not have the necessary prerequisites for installing Signature products, the installation wizard will offer to install them for you.

IMPORTANT: Verify that the user installing or upgrading Signature has permission to access to all production and test companies.

Complete the upgrade steps in the following order:

- Run the Installation Wizard to Upgrade the Server and Client (page 15)
- Upgrade System and Company Databases (page 15)
- Run the Misc User Utility (page 16)
- Enable Signature Registration Keys to Upgrade the Server and Client (page 16)
- Launch Microsoft Dynamics GP and Include New Code for the Upgrade (page 16)

3. http://mymachine/MyReportServerName

- Verify Security and User Access (page 16)

Run the Installation Wizard to Upgrade the Server and Client

1. Launch the file **Signature Products.exe**.

> ⚠ We recommended right-clicking the .exe file and choosing **Run As Administrator**. This is necessary even if you are logged in as an administrator, due to the way that Windows handles user roles.

1. On the Welcome screen, select *Next >*.
2. Accept the terms of the license agreement, and select *Next >*.
3. Mark the **Client and Server Installation** option, and select *Next >*.
4. On the Product Selection window, select your installation choice from the drop-down menu next to each feature.
   - **Signature Program**
     Programs include Service Management, Job Cost, and TimeTrack.
   - **Signature Utilities**
     This program is used to import data. It also includes file maintenance utilities. The program is required for completing a server and client installation.
   - **Signature SmartList Objects**
     These objects can be imported into SmartList. If you are using SmartList Builder, refer to the eOne Integrated Business Solutions documentation for information on importing the Signature SmartList Builder objects. If you are using SmartList Designer, refer to the Microsoft Dynamics GP Systems User Guide for information on importing the Signature SmartList Designer objects. If you also own SmartList Builder, we recommend that you use the SmartList Builder Objects.
5. Select *Next>*.
6. Accept the default installation location, or use the *Browse...* button to navigate to the location where Microsoft Dynamics GP is installed. Select *Next >*.
7. When you are ready to begin the installation, select *Install*.
8. When the installation is complete, leave the **View Readme Text** checkbox marked if you want to read or print the Signature Readme file.
9. Leave the **Launch Signature Utilities** checkbox marked, and select *Finish*.

Upgrade System and Company Databases

1. On the **Welcome to Signature Utilities** window, select a server and enter a password. Select *OK*.
2. On the **Company Login** window, select a company and select *OK*.
3. Select *Yes* to the message prompting you to update database objects. You must update objects to access Signature products.
4. If you have a backup of your database objects, select *Continue* when you are prompted to create a backup. If you do not have a backup, select *Cancel*. Back up your data, then resume the installation process through Signature Utilities.
5. On the Install Companies window, select the system database to install. You must install the system database before installing company databases.

> ⚠ **Note:** You can use the *Ctrl* key to select the system database and company database(s) at the same time. The system database will be installed first, followed by the company database(s). For a successful installation, do NOT attempt to process more than 10 company databases at once.

6. Select the company databases to install.

7. Select *Begin Process*. If you have *Fabrikam, Inc.* selected as a company to install, you will be asked if you want to install Signature sample data. This is the only opportunity you have to install sample data. Progress bars appear. This process may take some time depending on the number of companies and amount of data you have. If you have multiple companies, you MUST select to install Signature products on ALL companies, or add new companies after completing the installation. If you select not to update companies during the installation, you will be prompted to install database objects. You must respond *Yes* to this prompt. If you add new companies later, you must launch WS Utilities and run the SQL Update option. If problems occur during the installation, the Signature SQL Installation window will display the errors. Record the errors and contact WennSoft Support. Once the errors are corrected, select Exit and restart Signature Utilities by dragging the WSUTIL.set file over the Dynamics.exe file and choosing *File Maintenance Utilities > Signature > SQL Update*. When the process has completed successfully, *Complete* appears next to the **Currently Installing Company** and **Overall Progress** fields on the **Install Company** window.
8. Exit Signature Utilities to complete the installation.

Run the Misc User Utility

The SQL Update Misc User Utility creates a miscellaneous user on each database (including Dynamics), which enables actual users to work with document attachments. This user is used by the system only, and contains no associated login. For more information, see SQL Update Misc User Utility[4][5].

Enable Signature Registration Keys to Upgrade the Server and Client

To register Signature, you must install the latest Signature Product Registration Application and enable your registration keys. Refer to the **Signature Readme** file for version compatibility information, then proceed to Product Registration Keys Installation (page 27) for complete installation and registration instructions, as well as tips for troubleshooting the registration application.

> ⚠ You only need to install the registration application and enable your registration key on your server machine(s). This process does NOT need to be performed on client machines.

Launch Microsoft Dynamics GP and Include New Code for the Upgrade

1. Launch Microsoft Dynamics GP.
2. Select *Yes* to the message asking if you wish to include new code. A message appears stating that **SIGNATURE.CNK** is being included.

Verify Security and User Access

Review the security and user access settings as discussed in Set up Security and Grant User Access (page 4).

Update Modified Forms and Reports

To update modified forms and reports, use the Microsoft Dynamics GP Utilities window.

1. Go to *Start > All Programs > Microsoft Dynamics > GP Utilities*.
2. Enter your sa login credentials and select *OK*.

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4. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620314525/SQL+Update+Misc+User+Utility
5. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620314525/SQL+Update+Misc+User+Utility

3. Select *Next*.
4. Select *Next* to inspect the version information for your companies.
5. In the Additional Tasks window, select **Update modified forms and reports** from the drop-down and then select *Process*.
6. Review the path to your DYNAMICS.SET file, revise if needed, and then select *Next*.
7. Mark the checkbox next to the Signature products whose modified forms and reports you want to update and then select *Update*.
8. When finished, select *Next*.

For information on how to create these IDs, see Creating alternate/modified forms and reports IDs (page 8).

Upgrading on a Client Only

If you do not have the necessary prerequisites for installing Signature products, the installation wizard will offer to install them for you.

IMPORTANT: Verify that the user installing or upgrading Signature has permission to access to all production and test companies.

Complete the Signature upgrade steps in the following order.

Step 1: Run the Installation Wizard

1. Launch the file **Signature Products.exe**.

   Note: We recommended right-clicking the .exe file and choosing **Run As Administrator**. This is necessary even if you are logged in as an administrator, due to the way that Windows handles user roles.

2. On the Welcome screen, select *Next >*.
3. Accept the terms of the license agreement, and select *Next >*.
4. Mark the **Client Only Installation** option, and select *Next >*.
5. On the Product Selection window, select your installation choice from the drop-down menu next to each feature.
   - **Signature Program**
     Programs include Service Management, Job Cost, and TimeTrack.
   - **Signature Utilities**
     This program is used to import data. It also includes file maintenance utilities. The program is required for completing a server and client installation.
   - **Signature SmartList Objects**
     These objects can be imported into SmartList. If you are using SmartList Builder, refer to the eOne Integrated Business Solutions documentation for information on importing the Signature SmartList Builder objects. If you are using SmartList Designer, refer to the Microsoft Dynamics GP Systems User Guide for information on importing the Signature SmartList Designer objects. If you also own SmartList Builder, we recommend that you use the SmartList Builder Objects.

6. Select *Next>*.
7. Accept the default installation location, or use the *Browse...*button to find the folder where you want Signature to be installed. Select *Next >*.
8. When you are ready to begin the installation, select *Install*.
9. When the installation is complete, leave the **View Readme Text** checkbox marked if you want to read or print the SignatureReadme file. Unmark the **Launch Signature Utilities** checkbox, and select *Finish*.

Step 2: Launch Microsoft Dynamics GP and Include New Code

1. Launch Microsoft Dynamics GP.
2. Select *Yes* to the message asking if you wish to include new code. A message appears stating that **SIGNATURE.CNK** is being included.

After Upgrading

After upgrading Signature, complete the following procedures.

Step 1: Run the Rebuild Payroll Keys Master Utility

If you are using TimeTrack, you must rebuild the Payroll Keys Master table.

The Payroll Keys Master table tracks all payroll transaction numbers.

> ⚠ Verify no other users are logged in to TimeTrack before performing this utility.

1. Select *Microsoft Dynamics GP > Tools > Utilities > TimeTrack > Rebuild*.
2. Mark the products you want to rebuild the Payroll Keys Master table for.
3. Select *Rebuild*. The following message appears: *It is recommended that you back up your data before running this utility. Do you want to continue?*
4. If you have backed up your data, select *Continue*. If not, back up your data, then proceed.

Step 2: Set up DEFAULT Payroll and Offset Accounts

After upgrading but **before posting any transactions**, you MUST enter an All - Default: REQUIRED account for each origin/account type combination in the account tree. This account is required, but it is only used if you do not have accounts assigned anywhere in the individual Division tree levels.

When you upgraded, a conversion script moved some accounts from old windows to the new window. For more information on which accounts were moved and additional requirements related to account setup, refer to the step-by-step instructions in the core user manual.

> ⚠ The Payroll and Overhead Offset Accounts Setup window replaces the Job Cost Overhead Detail Accounts window (in Job Cost) and the Expense and Travel Offset Account Setup window (in TimeTrack). The Overhead Offset Credit Account and Payroll Offset Credit Account Setup fields have been removed from the Revenue and Exp Account Setup window, as these accounts are now set up on the new window. Offset accounts for plus button transactions have been moved to this new window from the Invoice Accounts - Costs and Maintenance Accounts - Costs window.

Step 3: Update the DEX.INI File for Document Attachments

If you are using document attachments, you need to specify a directory in your DEX.INI file for document attachments to be temporarily stored, for example, WS_TempDir=C:\temp\

Map the attachments folder to the server

Add the following line to the **DEX.INI** file on each client workstation:

WS_DocRoot=H:\GP\docs (must end with backslash)

- where **H** is a shared mapped drive
- where **GP** is the name of the Microsoft Dynamics GP folder on the shared SQL server
- where **docs** is a folder in the Microsoft Dynamics GP folder

> ⚠ If you select the **Copy To Database** option in the Document Maintenance window, you cannot have spaces in the path.

Step 4: Change Bill To Address on Customer Invoices for Third-Party Billing (Service Management Users Only)

The upgrade routine updates posted and unposted Service Management invoices and credit memos with the customer and location IDs from the service call.

If you have any third-party invoices to bill, you need to reset the Bill to Customer ID and Bill to Address IDs to match the third-party to be billed on these invoices after running the upgrade.

Refer to the *Service Management user guide* for more information.

Step 5: Enable SmartList Security

1. Select *Microsoft Dynamics GP > Tools > SmartList Builder > Security > SQL Table Security*.
2. Under Databases, mark the checkbox for your company database. The tables will appear in the right column of the window.
3. Select *Mark All*.
4. Select *OK*.

Step 6: Update Reports with Modifications and Custom Reports Path

Beginning with Signature 2016, the SSRS reports are deployed to new Signature folder locations. For example, Signature Service, Signature Job Cost, etc. The existing reports in the WennSoft folders (WennSoft Service, WennSoft Job Cost, etc.) will not automatically be removed.

- **If you have any modified reports**, you may need to redo your changes if the core report has been updated with this release. By having both versions available, you will be able to compare your modified reports with the updated reports to determine if you need to modify the report(s) in the Signature location. You can manually remove the WennSoft folders when you are done.
- **If you have custom reports**, the path locations in the WSRepts table need to be updated to include a question mark (**?**) so that the path becomes: http://\{Report Server Location}**?**/{System Database}/{Company Database}/{Signature Folder}/{Report Name} For example, an updated path would look similar to: http://K2A0123/

ReportServer**?**/DYNAMICS/TWO/Signature Service/Service Call Invoice To automatically reset all report locations to the correct default locations, as well as adding the ? to the pathname, run the **WS_SetReplacementReportsForSRS** procedure.

Step 7: Run the Enable Payroll File Maintenance Utility

If you do not have Microsoft Dynamics GP Payroll registered, you will need to enable payroll in the File Maintenance Utility so that the lookups in TimeTrack function as expected.

1. In Signature Utilities, select File Maintenance Utilities.
2. Select Job Cost > Enable Payroll.
3. A message appears asking if you want to proceed, select *Proceed*.
4. Select *OK*.
5. Close Signature Utilities.

Step 8: Additional Upgrade Information

Installing an Updated .RDL File

You can upload the .RDL file into the SRS folder in your browser or copy the file to the appropriate WS SQL Reports folder in your GP Client and redeploy using the WS SRS Deployment Wizard.

To upload a file or report:

1. Start Report Manager (SSRS Native Mode).
2. In Report Manager, navigate to the *Contents* page. Navigate to the folder to which you want to add an item.
3. Select *Upload File*.
4. Select *Browse* to select a file to upload. You can upload a report definition file, an image, a document, or any file that you want to make available on the report server.
5. Type a name for the new item. An item name can include spaces, but cannot include the reserved characters: ; ? : @ & = + , $ / * < > |.
6. If you want to replace an existing item with the new item, select *Overwrite item if it exists*.
7. Select *OK*.

Running a Cleanup Script If No Longer Using Signature Agent

If you have Signature Agent installed but are no longer using it, you will need to run the RESET K2ADC DATABASE.sql cleanup script that will clear all database objects related to Signature Agent.

Signature SSRS Report Setup

System Requirements

To find a complete list of system requirements across all the Signature modules, refer to System Requirements[6].

6. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620771407/System+Requirements

Prerequisites

Certain IIS features must be installed before you can enable SQL Server Reporting Services to be installed with SQL Server. Select all the System Requirements, as well as the additional features below. Select *Start > Administrative Tools > Server Manager > Roles > Add Roles*, and select the *Web Server (IIS)* role to configure.

Web Management Tools

- IIS 6 Management Compatibility
    - IIS 6 WMI Compatibility
    - IIS Metabase and IIS 6 configuration compatibility
- IIS Management Console
- IIS Management Scripts and Tools
- IIS Management Service

World Wide Web Services

- Application Development Features
    - .NET Extensibility
    - ASP.NET
    - ISAPI Extensions
    - ISAPI Filters
- Common HTTP Features
    - Default Document
    - Directory Browsing
    - HTTP Redirection
    - HTTOP Errors
    - Static Content
- Security
    - Request Filtering
    - Windows Authentication

Health and Diagnostics

- HTTP Logging and Request Monitor

Performance

- Static Content Compression

Before You Begin

Before deploying the latest Signature reports, you must have SSRS reports set up. This setup requires the following steps:

Step 1: Install SQL Server Reporting Services

SQL Server Reporting Services is part of the Microsoft SQL Server installation pack. You must install this to be able to use SSRS reports in Microsoft Dynamics GP and Signature. Refer to the Microsoft SQL Server documentation for information on installing SQL Reporting Services.

Step 2: Enable Use of Microsoft Dynamics GP SSRS Reports

If you have not done so already, you must run the Microsoft SQL Server Reporting Services wizard to enable access to SSRS reports within Microsoft Dynamics GP.

1. Launch the file **Microsoft.Dynamics.GP.BusinessIntelligence.SRSDeployment.exe**
2. On the Welcome Screen, select *Next >*.
3. Enter the **Microsoft Dynamics GP Server** name and instance. For example, if the server name is *Fred* and the instance *Fred1*, you would enter *Fred\Fred1*.
4. Enter your server **User Name** and **Password**, then select *Next* **>**.
5. Select the company database for which to enable reports, for example, TWO. In addition, select the Microsoft Dynamics GP products to enable reports for, by marking the appropriate checkboxes. Mark *Select All* to select ALL products. Select *Next >*.
6. Enter the Target Server URL as *http://MyMachineName/ReportServerName_ where _MyMachine* is your machine name and *MyReportServerName* is the name of the report server given when you installed SQL Reporting Services. To determine the name of the report server, select *Start > All Programs > Microsoft SQL> Configuration Tools > Reporting Services Configuration*. Connect to your server and select *Web Service URL*. The **Virtual Directory** field contains the name of the report server. When you are ready to deploy reports, select *Finish*.
7. When processing is complete, if you want to deploy reports for another company, mark the checkbox and select *OK* to start the wizard again. If you are finished deploying reports, leave the checkbox unmarked and select *OK*.

Step 3: Define the Location of SSRS Reports Server and Report Manager

1. Select *Microsoft Dynamics GP > Tools > Setup > System > Reporting Tools Setup*. The Reporting Tools Setup window opens.
2. Complete the following fields on the Reporting Services tab:
    - **SQL Server Mode**
      Select *Native* mode. Signature SSRS reports do not currently support *SharePoint Integrated* mode.
    - **Report Server URL**
      This is the location of the reporting server site that hosts the web service. You specified this location when you installed SQL Server Reporting Services. Enter: http://MyMachine/ MyReportServerNamewhere *MyMachine* is your machine name and *MyReportServerName* is the name of the report server given when you installed SQL Reporting Services. To determine the name of the report server, select *Start > All Programs > Microsoft SQL> Configuration Tools > Reporting Services Configuration*. Connect to your server and select *Web Service URL*. The **Virtual Directory** field contains the name of the report server. The instructions for finding the report manager URL may vary depending on which version of SQL Server you are running.
    - **Report Manager URL**
      Enter the Web location where the Report Manager is accessed. Enter: http://MyMachine/ MyReportsFolder where *MyMachine* is your machine name and *MyReportsFolder* is the name of the virtual directory of the Report Manager. To determine the name of the report server, select *Start > All Programs > Microsoft SQL> Configuration Tools > Reporting Services Configuration*. Connect to your server and select *Report Manager URL*. The **Virtual Directory** field contains the name of the report server. The

instructions for finding the report manager URL may vary depending on which version of SQL Server you are running.

3. When you are finished, select *OK* to save the Reporting Tools Setup window.

Setting up Signature Reports

Complete the following steps to enable the use of Signature SSRS reports.

Step 1: Deploy Signature SSRS Reports

To deploy Signature SSRS reports, you must run the Signature SQL Reporting Wizard.

To ensure a clean installation and deployment of the new reports, you should have removed any existing Signature SSRS reports from both the Microsoft Dynamics GP install directory and the Report Manager. Refer to the Signature Install and Upgrade manual for more information.

Before you begin, determine the name of your SQL report server, which was set up when SQL Server Reporting Services was installed. Select *Start > All Programs > Microsoft SQL> Configuration Tools > Reporting Services Configuration*. Connect to your server and select *Web Service URL*. The **Virtual Directory** field contains the name of the report server; write down this name, as you must enter it in the steps that follow.

The instructions for finding the report manager URL may vary depending on which version of SQL Server you are running.

To start the Signature SQL Reporting Wizard, navigate to your Microsoft Dynamics GP install directory, then open the **Signature\SRS Reports** folder and launch the file **Signature.Dynamics.GP.BusinessIntelligence.SRSDeployment.exe**.

You can also run this wizard from the following locations within Microsoft Dynamics GP:

- From Service Management, select *Run Wizard* in the Service Options window.
- From Job Cost, select *Run Wizard* in the Job Cost Setup Options window.
- From Equipment Management, select *SRS Wizard* in the System Setup window.
- On the Welcome screen, select *Next >*.

1. Enter the **Microsoft Dynamics GP Server** name and instance. For example, if the server name is *Fred* and the instance *Fred1*, you would enter *Fred\Fred1*.
2. Enter your server **User Name** and **Password**, then select *Next >*.
3. Select the company database for which to enable reports, for example, TWO. You must run the wizard multiple times if you wish to deploy SRS reports for multiple companies.
4. Enter the **Report server URL**. This is the location of the reporting server site that hosts the web service. You specified this location when you installed SQL Server Reporting Services. Enter: http://MyMachine/MyReportServerName where *MyMachine* is your machine name and *MyReportServerName* is the name of the report server given when you installed SQL Reporting Services.
5. Enter the **Dynamics/Signature Directory**. This is the directory where Microsoft Dynamics GP and Signature are installed.
6. Select *Next >*.
7. All SSRS report folders found in the Dynamics/Signature directory appear on the next wizard screen. Unmark the checkbox next to any folder, or expand a folder and unmark the checkbox next to any report, that you do not want to deploy.
   To use KPI reports and report templates, you must be running SQL Server Reporting Services 2008 R2 or later. Additionally, you must have SQL 2008 R2 Business Intelligence Studio installed to deploy the Signature Template Pivot report template.

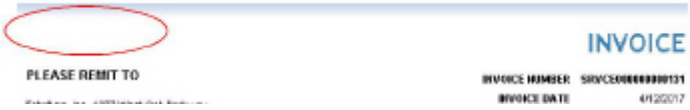
8. Select *Deploy*. It will take a few moments to deploy the reports. A message appears when the deployment is successful. Select *OK*. The Signature SQL Reporting Wizard starts over again. You can either deploy reports for an additional company database by choosing *Next*, or you can exit the wizard by choosing *Cancel*.

Additional Setup for Equipment Management Reports

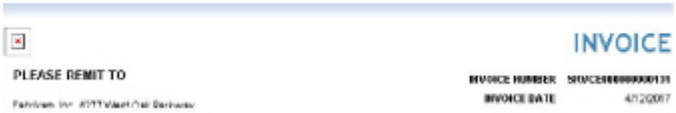
For Equipment Management, you must also set up your SSRS reports in the Report Definition Setup window (*Microsoft Dynamics GP > Tools > Setup > Equipment > System > Report Definitions*). For step-by-step instructions, refer to the Advanced Rental feature chapter of the *Equipment Management User Guide.*

Step 2: Set up the Company Logo (Optional)

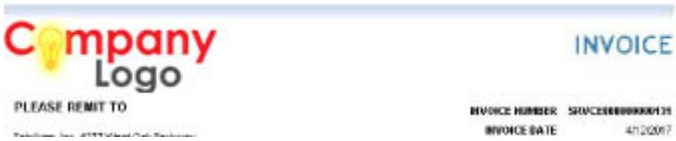
You can customize the company logo that appears on some of your customer-facing reports, for example, invoices. For each of the reports that display a logo, the .rdl file points to the subfolder **Signature Images** and the file **Company Logo**. The default logo is a transparent image that appears on the reports as blank.



If you want your own company logo to appear on the reports, you can replace this image; however, DO NOT delete the default logo unless you are replacing it. If the .rdl cannot locate **Signature Images\Company Logo**, the logo appears on the report as a missing image.



1. In Report Manager, locate the company where reports are deployed, and open the folder **Signature Images**.
2. Rename or delete the default **Company Logo** file by choosing *Show Details*, then *Edit* or *Delete*.
3. Return to the Signature Images folder and select *Upload File*. Before uploading, change the name of your new logo to **Company Logo** (no file extension), then select *OK*.



Step 3: Set up Signature SSRS Reports to Print from GP

To set up Signature SSRS reports to print from the appropriate window in the GP application, you must replace the provided Dexterity reports with the corresponding Signature SSRS reports. This requires that you either manually populate the ***WSRepts*** table with the pathname to the replacement report, or run the stored procedure **WS_SetReplacementReportsForSRS**, which populates all applicable Signature SSRS report pathnames into the table.

About the WSRepts Table

The table **WSRepts** stores the path location for replacement reports. This table is created in each company database during the Signature installation or upgrade process.

A select statement on this table yields something like the following:

```
select * from WSRepts
```

Results | Messages

	ReportReference	ReportLocation
1	AS_Asset_Summary	
2	Error Messages	
3	JC AIA Page 1	AIA Page1.rpt
4	JC AIA Page 2	ApplicationForPayment.rpt
5	JC AP Detail Historical Aged TB	
6	JC Architect Setup	
7	JC Audit Cash Receipts	
8	JC Audit Costs	
9	JC Audit Costs PM	
10	JC Backlog	
11	JC Backlog By Period	
12	JC Backlog Sort By	
13	JC Backlog by Division	
14	JC Benefits Categories List	
15	JC CIS 23 Voucher Production	CIS23VoucherProductio...
16	JC CIS 25 Voucher Production	CIS25VoucherProductio...
17	JC CIS 4 Year End	CIS4YearEnd.rpt
18	JC CIS 5 Year End	CIS5YearEnd.rpt
19	JC CIS 6 Year End	CIS6YearEnd.rpt
20	JC CO Cost Codes	
21	JC CO Estimate Revision List	
22	JC Cash Receipts History	
23	JC Cash Receipts TRX Journal	
24	JC Certified Payroll	CertifiedPayroll

Query executed successfully.

The **ReportReference** column identifies the name of the report you want to replace, most likely a Dexterity report name.
The **ReportLocation** column stores the full path and file name of the report being referenced. This could be a local SSRS report or the URL of a remote SRS report. A blank column assumes the system is running the Dexterity version of the report. To replace the Dexterity report with the SSRS report, you must populate this column with the SSRS report location.
In the example below, an existing Dexterity report is replaced with an SSRS report using the stored procedures.
UPDATE WSRepts Set ReportLocation = 'http://localhost/ReportServerNew/TWO/Signature Service/Service Cost Audit' where ReportReference ='SV_Service_Cost_Audit_Report'
If you are replacing reports individually, you can determine the name of the Dexterity report by printing that report from within the Signature system. For SSRS reports, you also need to know the machine name on which your report server resides.

Running the SQL Stored Procedure

The SQL procedure **WS_SetReplacementReportsForSRS** globally replaces all applicable Dexterity reports with the SSRS report equivalent.
Running this procedure DOES NOT update a ReportLocation that already contains a value; it only applies to blank ReportLocation columns, which assumes that the Dexterity report is being used. If you already have a custom report specified to replace the Dexterity report, it will not be overwritten.

To replace Dexterity reports, run the following command against the *company* database to call on the stored procedure: exec WS_SetReplacementReportsForSRS
The common printing DLL **Signature.ReportControl.dll** provides the WSRepts table and the two SQL procedures that can be used to set up SQL reporting. For more information on this DLL, refer to the user manual.

Product Registration Keys Installation

Registering your product involves installing the Signature Product Registration Application, then enabling your registration keys.

You only need to install and enable registration keys on your server machine(s). This process does NOT need to be performed on client machines.

Before you begin, locate the registration key text file that was provided with your software. This file contains your personal product registration information. You must browse to the location of this file in Step 2.

System Requirements

The Microsoft Dynamics GP requirements for the following products must be met on every server machine where the Signature Product Registration Application will be installed:

- Internet Information Services (IIS)
- Microsoft .NET 4.5 Framework or higher

To find a complete list of system requirements across all the Signature modules, refer to System Requirements[7].

Installing the Registration Software

If you already have the Signature Product Registration Application installed (before the 2016 release), you must uninstall the current version before installing the current version. Refer to the Readme to ensure compatibility of the registration application.

Notes:

- **Disable any security software before installing Signature Registration.** Remember to re-enable this once the installation is complete.
- If you are using Windows Server 2012 R2, you will need to install the Signature 2020 (18.03b05) Registration Application.
- You only need to install and enable registration keys on your server machine(s). This process does NOT need to be performed on client machines.

1. Launch the file **Signature Registration xxxx.exe**. On the Welcome screen, select *Next >*.
2. Accept the terms of the license agreement, and select *Next >*.
3. Accept the default installation location, or use the *Browse...* button to find the folder where you want the Product Registration application to be installed. Select *Next >*.
4. When you are ready to begin the installation, select *Install*.

7. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620771407/System+Requirements

5. When the installation is complete, select *Finish*.

Enabling Registration Keys

The first time you open the Signature Product Registration application, the Signature event log folder will be created on the server. To ensure that this folder is created successfully, this application must be run with administrator privileges the first time.

1. Select *Start* > *Signature* > *Signature.Registration.Entry*. If you are opening this application for the first time, right-click and select *Run as administrator*. The Registration Key Entry window opens.
2. Enter the **User ID** and **Password** for the "sa" user.
3. Use the drop-down menu to select the **SQL Server Instance** and **System Database** where Signature is installed.
4. Enter a **Runtime Password** for the registration user.
5. Enter the **Server Name**, and use the drop-down menu to select the **Virtual Directory** where the WSRegistration Web service is located.
   You must use the fully qualified domain name (FQDN) for the Signature Registration to function on a Secure Sockets Layer (SSL) and allow the use of HTTPS. This is compatible with TLS 1.2 Protocols. An example of an FQDN is **server.domain.com**. You will also need to complete the *Additional Steps to Set up the Secure Sockets Layer* steps below.
6. Locate your registration key (.TXT) file that contains your registration information.
7. Select *Register*. You receive a notification message when the registration key is validated. Select *OK*. When you log into Microsoft Dynamics GP, make sure to test all the Signature menus to make sure you have proper access. If, when you log in, your Signature menus are disabled, contact WennSoft Sales to obtain a new registration key file.

Additional Steps To Set Up the Secure Sockets Layer

To allow for the Signature Registration to function on an SSL, in addition to entering the FQDN above when enabling the Registration Keys, you will also need to locate the RegistrationURLPrefix section and change the value to **https** . You will also need to update the dex.ini file to include **RegistrationUrlPrefix=https** line.

Update the Signature.Registration.Entry.exe.config File

1. Open the Signature.Registration.Entry.exe.config found in C:\Program Files (x86)\Signature\Signature Registration.
2. Locate the RegistrationURLPrefix section and change the value to https.
   <setting name="RegistrationUrlPrefix" serializeAs="String">
   <value>**https**</value>
   </setting>

Update the DEX.INI File on Each Workstation

On each workstation, update the dex.ini file found in C:\Program Files (x86)\Microsoft Dynamics\GP\Data to include the following line. You will need to do this on each workstation.
RegistrationUrlPrefix=https

About Registration Key Tables

The Signature Product Registration Application creates two tables in the system database.

- **WSRegKey**
  Created when the product is registered (using the Registration Key Setup application).
- **WSRegistrationSettings**
  Created upon initial installation and contains the location of the WSRegistration web service.

See also:

- Technical Notes and Troubleshooting (page 29)

Technical Notes and Troubleshooting

This section contains technical notes and tips for troubleshooting the Signature Product Registration Application.

> ⚠ Any procedures covered in this section should be performed ONLY by authorized technical personnel, such as IT or WennSoft Consulting.

Technical Notes

About Registration Key Tables

The Signature Product Registration Application creates two tables in the system database.

- **WSRegKey**
  Created when the product is registered (using the Registration Key Setup application).
- **WSRegistrationSettings**
  Created upon initial installation and contains the location of the WSRegistration web service.

About WS SQL Database Users

Signature uses three SQL database users in a system capacity for Service Management and Job Cost.

- **WSRegUser$Dynamics**
  Created when enabling the registration keys. For more information, see Enable Signature Registration Keys (page 4).
- **WSMPUser$Dynamics**
  Created by Signature during the software installation. This SQL user is used internally for MapPoint integration.
- **WSMiscUser$Dynamics**
  Created by Signature during the software installation. This SQL user is used internally for document attachments to the SQL database.

Troubleshooting

Viewing Errors in the Web Service Event Viewer

Any errors relating to the Signature Product Registration Web Service appear in the Internet Information Services (IIS) Event Viewer. To access the Event Viewer.

1. Select *Start > Control Panel > Administrative Tools > Event Viewer.*
2. Select *Signature*.

Verify the SignatureRegistration Web Service is Installed and Working Correctly

After installing and enabling the registration key application, if you receive any errors relating to web services when logging into Microsoft Dynamics GP, follow the steps below to troubleshoot the problem.

1. Select *Start > Control Panel > Administrative Tools > Internet Information Services (IIS)*.
2. Expand the server, then **Web Sites**, then **Default Web Site**.
3. Locate the virtual directory called **SignatureRegistration**, as shown below.
    - Computer Name
        - Application Pools
        - Sites
            - Default Web Site
                - aspnet_client
                - SignatureRegistration
4. Right-click **SignatureRegistration** and select *Properties*.
5. Select the **Virtual Directory** tab, then select *Configuration*.
6. Under Application Mappings, you should see 30 or more .DLL files listed, most referencing the string "2.0.50727." If there are several fewer than this, you need to run the following command from a DOS window:
    a. Select *Start > Run*, then type "cmd" and select *Open* to open a DOS command window.
    b. Use the "cd" command to switch to the following folder: C:\windows\microsoft.net\framework\v2.0.50727
    c. Run the "aspnet_regiis -i" command.
7. When finished, open IIS again and verify that the additional .DLL files are present with the correct .NET version.

Verify the Registration Keys are Registered

To verify that registration keys are registered, you can query the WSRegKey table:

	SuiteID	EncryptedKey	ModifiedUser	ModifiedDate
▶	19	G2nr+63GR8gu...	sa	9/17/2007 2:27:57 PM
*	NULL	NULL	NULL	NULL

- **SuiteID**
  The suite the key belongs to. There can be many records in this table, but only one per SuiteId.
- **EncryptedKey**
  The actual key that gets decrypted.

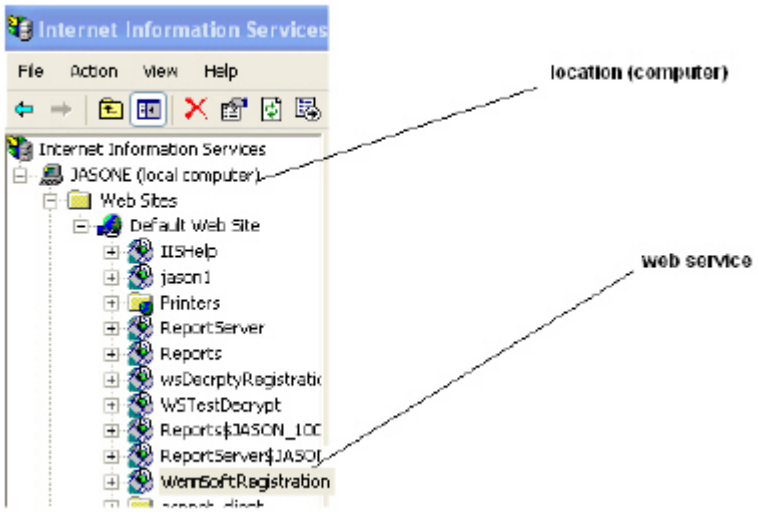
- **Modified User**
  The user who is logged in when registering the key.
- **Modified Date**
  The system date when the key gets registered.

Verify the Web Service Location Match IIS

To verify that these match, query the WSRegistrationSettings table in the system database to see the value stored in that table, for example,

JASONE/WSRegistration

Next, go back into IIS and make sure the WSRegistration web service appears under the correct location (in our example, JASONE).



Uninstalling Signature

If you need to uninstall Signature, follow the instructions below.

> These instructions apply to core Signature products (Job Cost, Service Management, and Equipment Management) only. To uninstall any add-on products, use Add/Remove Programs in Windows. ONLY qualified technical personnel with system administrative privileges should uninstall products.

Step 1: Unmark Security to Alternate Signature Windows and Reports

Refer to your Microsoft Dynamics GP user documentation for step-by-step instructions.

Step 2: Clear Information in the SLB10400 Table

Contact Signature WennSoft Support for information on how to clear information stored in the SLB10400 table.

Step 3: Remove Signature References from the DYNAMICS.SET File

The DYNAMICS.SET file, which appears in the Microsoft Dynamics GP install folder, contains references to Signature products and modules, as well as directory paths for some files. You can use a text editor such as Notepad to edit this file.

1. Remove Signature products and modules references from the file, including the dictionary ID, name, and associated lines.
    - Signature Products 131 Signature Products :C:Program Files (x86)/Microsoft Dynamics/GP2018/WENNSOFT.DIC:C:Program Files (x86)/Microsoft Dynamics/GP2018/Data/WSFORMS.DIC:C:Program Files (x86)/Microsoft Dynamics/GP2018/Data/WSREPTS.DIC
    - Equipment Management (if it exists) 836 Signature Equipment Management :C:Program Files (x86)/Microsoft Dynamics/GP2018/EQUIPMNT.DIC :C:Program Files (x86)/Microsoft Dynamics/GP2018/Data/EQPT_FRM.DIC :C:Program Files (x86)/Microsoft Dynamics/GP2018/Data/EQPT_RPT.DIC
    - Alt Window & Report Manager and dictionary ID 835 Alt Window & Report Manager :C:Program Files (x86)/Microsoft Dynamics/GP2018/WSAWRM.DIC :C:Program Files (x86)/Microsoft Dynamics/GP2018/Data/WSAWRM_F.DIC :C:Program Files (x86)/Microsoft Dynamics/GP2018/Data/WSAWRM_R.DIC
2. A number appears at the very top of the set file that tells you the number of dictionaries installed. You need to REDUCE this number for EACH dictionary you remove.

Step 4: Remove Signature-related Files and Folders from the Microsoft Dynamics GP Installation Folder

1. Open Windows Explorer and navigate to the Microsoft Dynamics GP installation folder.
2. Locate and remove the Signature folder and all subfolders from the Microsoft Dynamics GP installation folder.
3. Locate and remove the following file, if it exists: <GP installation folder> \ DATA \ GDBoard.exe.
4. Locate and remove all Signature folders from <GP installation folder>\ SQL.
5. Locate and remove all Signature folders from <GP installation folder>\Documentation.
6. Locate and remove the following files from the Microsoft Dynamics GP installation folder: SVIEWER.EXE WENNSOFT.DIC Wsinstall.bat wsutil.dic WSUTIL.SET.

Additional Information

You can make the following edits to the Dex.ini file found in the Data folder of your Microsoft Dynamics GP installation.

Enabling Add-on-the-fly Functionality to the Transfer to Job Process

If you need to enable the ability to add a job on the fly in the Transfer to Job window, you can do so by adding the following line to the Dex.ini file.

```
EnableTransferToJobCreateJob=TRUE
```

Update the Telephone Format for the Service Contact Management Window

If you need the telephone number to display in a format other than (XXX) XXX-XXXX in the Service Contact Management window, you can change the format by updating the **PhoneFormatSetting** line in the Dex.ini file. The format in the Dex.ini can use an “X” and/or “#” to represent a digit of the phone number.

You can edit the line to include the representation of up to 14 digits. Extra spaces before and after are trimmed but any additional spaces within the formatting will display. The SV01150 table holds the telephone number as digits only with no additional characters (1234567890). For example, for Australia, the format would be (##) ####-#### so that the number would display in the Service Contact Management window as (12) 3456-7890.

> ⚠ Any characters that are not "X" or "#" entered in the PhoneFormatSetting line will display in the telephone number.

Installing Service Call Auditing

Service Call Auditing provides the ability to view changes to a service call in the Service Call window by selecting the Additional Audit button. After you have installed the Signature Audit Add-In file, you will need to set up and enable Service Call Auditing. For information about the Service Call Audit window, see Viewing the Service Call Audit[8].

Installation Notes

- Before installing Signature Auditing, verify that your instance of Microsoft Dynamics GP is not running.
- SQL Server Agent must be running to use Service Call Auditing.
- You must be a sysadmin to enable Service Call Auditing. This is required to enable the SQL Server Change Data Capture (CDC) feature.

Installing

1. Right-click on the *Signature Audit Add-In xx-x-xx.exe* file and select *Run as administrator*.
2. If the **User Account Control** window displays, select *Yes* to continue with the installation.
3. The **Signature Audit Add-in Setup Wizard** displays.
4. Select *Next*.
5. On the **End-User License Agreement** window, accept the license agreement, and select *Next.*
6. On the **Select Installation Folder** window, accept the default location of the Microsoft Dynamics GP AddIn folder.
7. Select *Next.*
8. On the **Ready to Install** window, select *Install.*
9. Select *Finish*.

8. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620327247/Viewing+the+Service+Call+Audit

Setting up Service Call Auditing

IMPORTANT

- This setup window is limited to users with the SysAdmin role to check the setting (run query) that user must have access to check the SQL job table for this information.
- The Additional Audit button displays after you've installed the Signature Audit Add-In file.
- The SQL Server Agent must be running.
- If Enable Service Call Audit is unmarked to disable service call auditing, audit history will be deleted.

To enable Service Call Audit and set up the Audit Record Retention:

1. Select *Microsoft Dynamics GP > Tools > Setup > Service Management > Module Setup > Service Options*.
2. From the navigation ribbon, select *Additional > Additional Setup Options*.
3. Complete the following:
    - **Audit Record Retention (in days)**
      Enter the number of days to retain service call audit information, based on the SQL Server date. The default setting is 90 days. You can enter any number higher than 0 but no larger than 36,524 days (which is equal to 100 years).
    - **Enable Service Call Audit**
      Mark to enable the system to begin auditing service calls for historical information.
4. Select *Save.*

Contact Information

Support & Sales

Support Phone: 262-317-3800
Email: support@wennsoft.com
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for more information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Presidents' Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, the Day after Thanksgiving, Christmas Day, and the Day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs, and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal.

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