Service Scheduler - Administration

- Updating registration details
- Service Scheduler - server installation guide
- Zero config / Auto Discover
- System settings
- User administation
- User administation - account switching
- User administation - global user
- SMS Integration
- User administration - Azure
    - Register Entra application
    - Update global settings
    - Limit access to groups / UPN

Updating registration details

Login as an administrator user

Select the system menu (or padlock)

image.png

Navigation to System and search settings for "registration_", edit the entry

image.png

Enter the new key and press save

image.png

Service Scheduler - server installation guide

MySQL

See MySQL installation guide

Zero config / Auto Discover

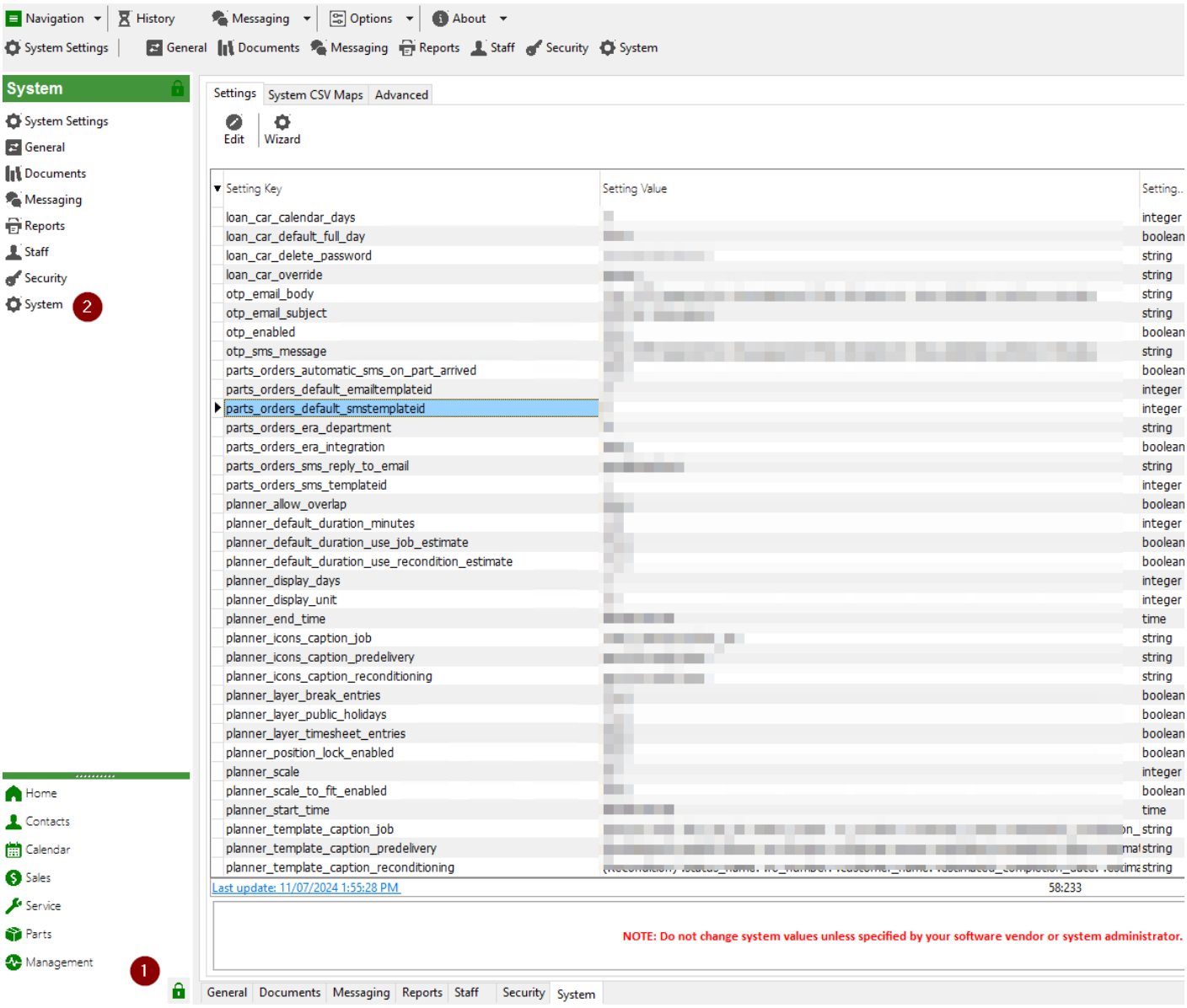
See this guide for detailed setup of Zero config

System settings

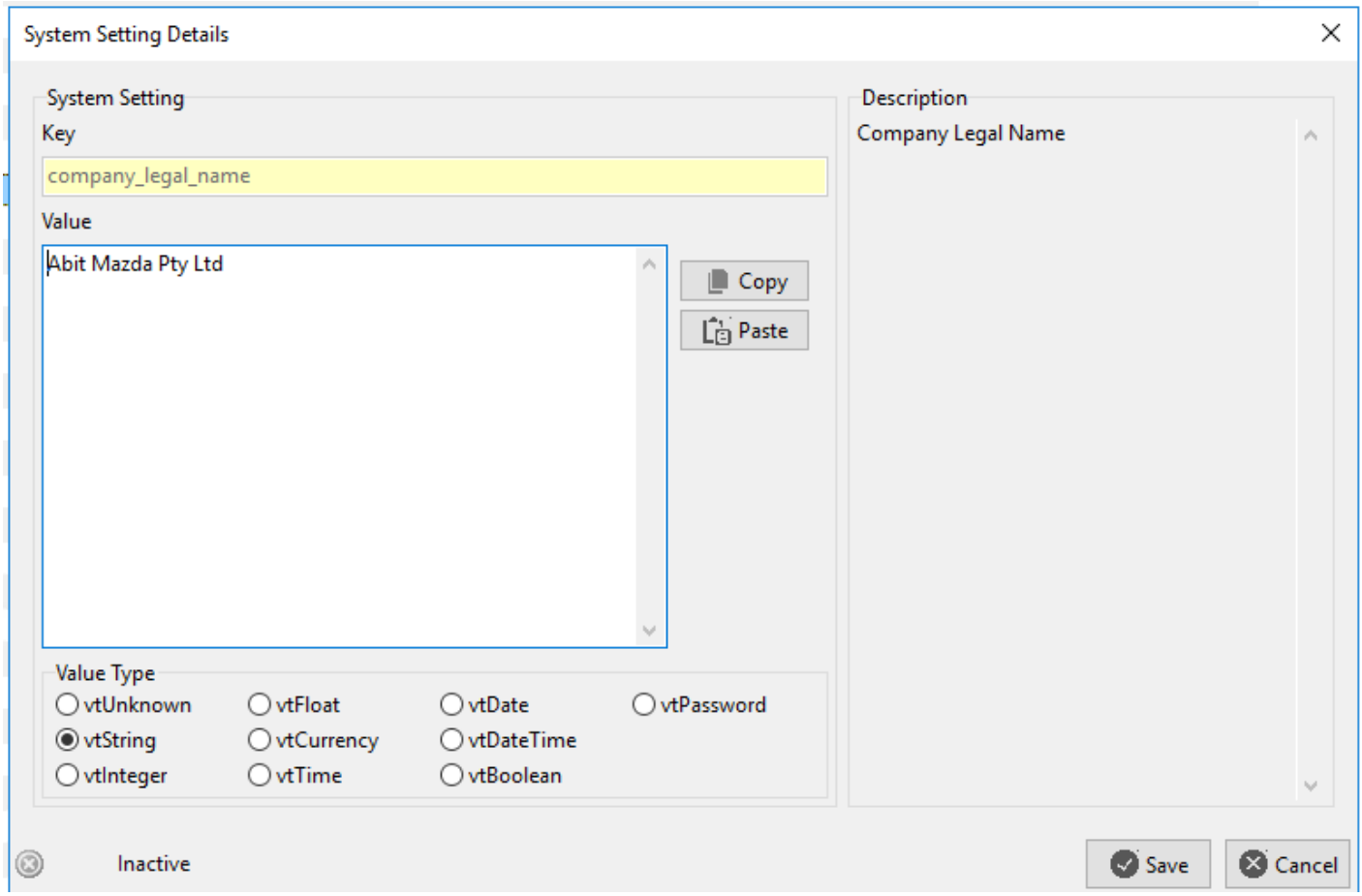
System settings contain many default and system options for Service Scheduler. Care should be taken before adjusting these settings.

> NOTE: For changes to apply it is recommended that users restart the application

To access system settings

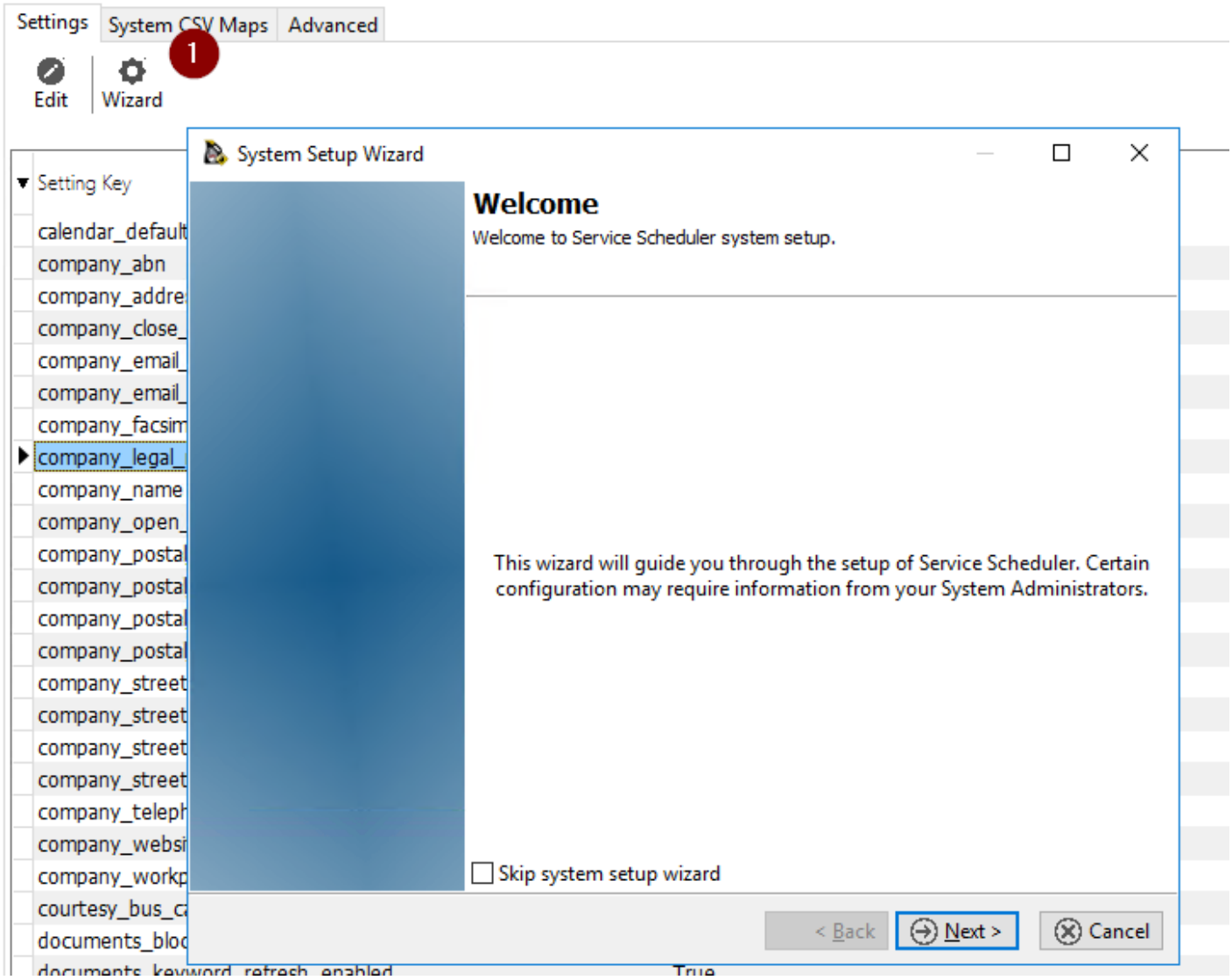


Edit a setting to make changes



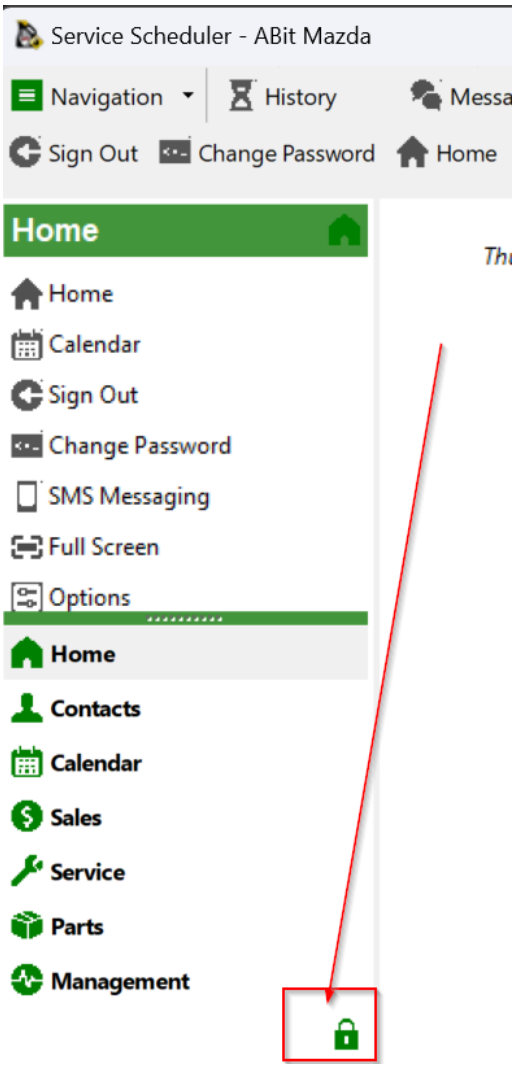
System setup wizard

A wizard is available to prompt an administrator through common system settings


Settings
System CSV Maps
Advanced
1
Edit
Wizard
Setting Key
calendar_default
company_abn
company_addre
company_close_
company_email_
company_email_
company_facsim
company_legal_
company_name
company_open_
company_postal
company_postal
company_postal
company_postal
company_street
company_street
company_street
company_street
company_teleph
company_websi
company_workp
courtesy_bus_c
documents_bloc
True
System Setup Wizard
Welcome
Welcome to Service Scheduler system setup.
This wizard will guide you through the setup of Service Scheduler. Certain configuration may require information from your System Administrators.
Skip system setup wizard
< Back
Next >
Cancel

User administation

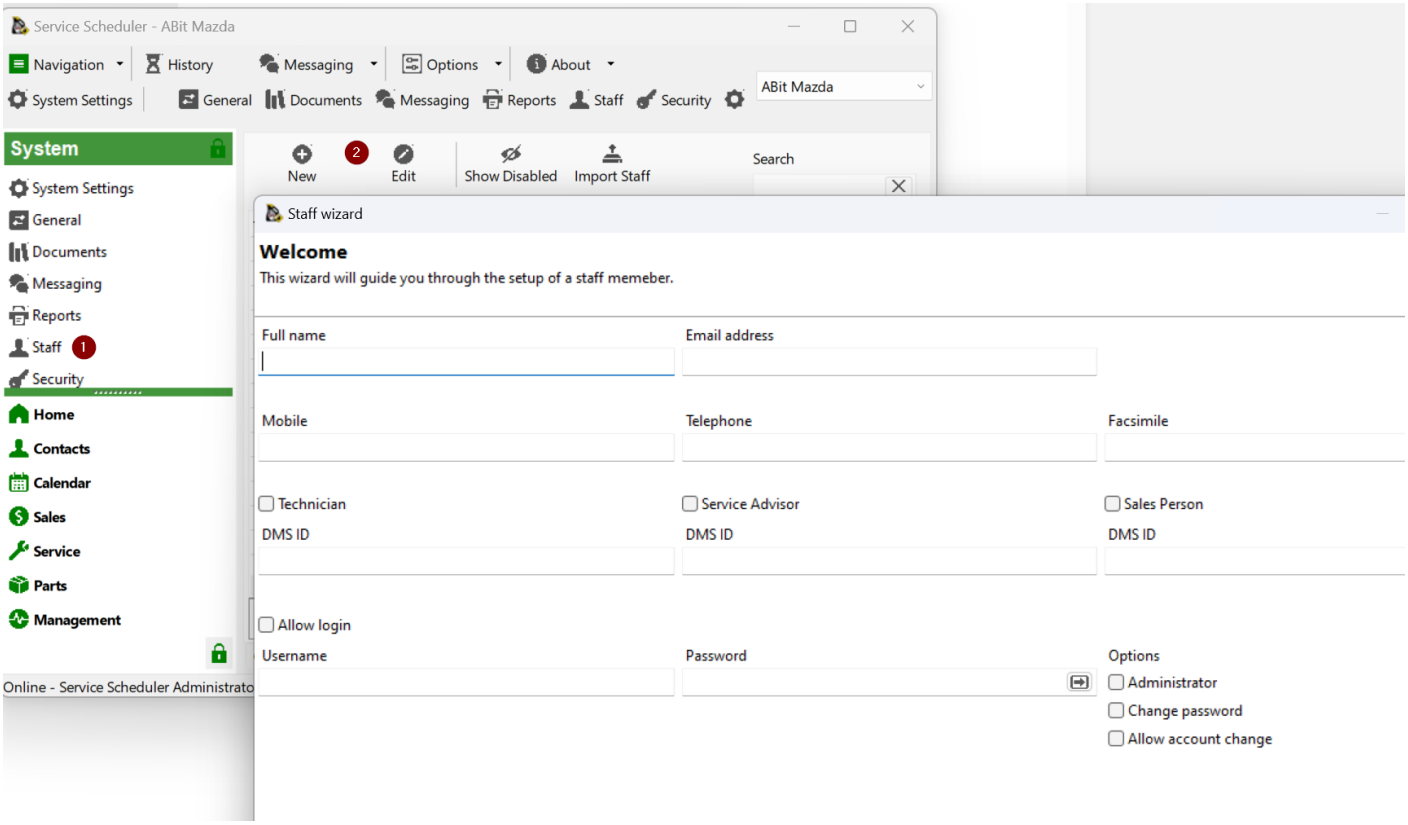
Select administration area



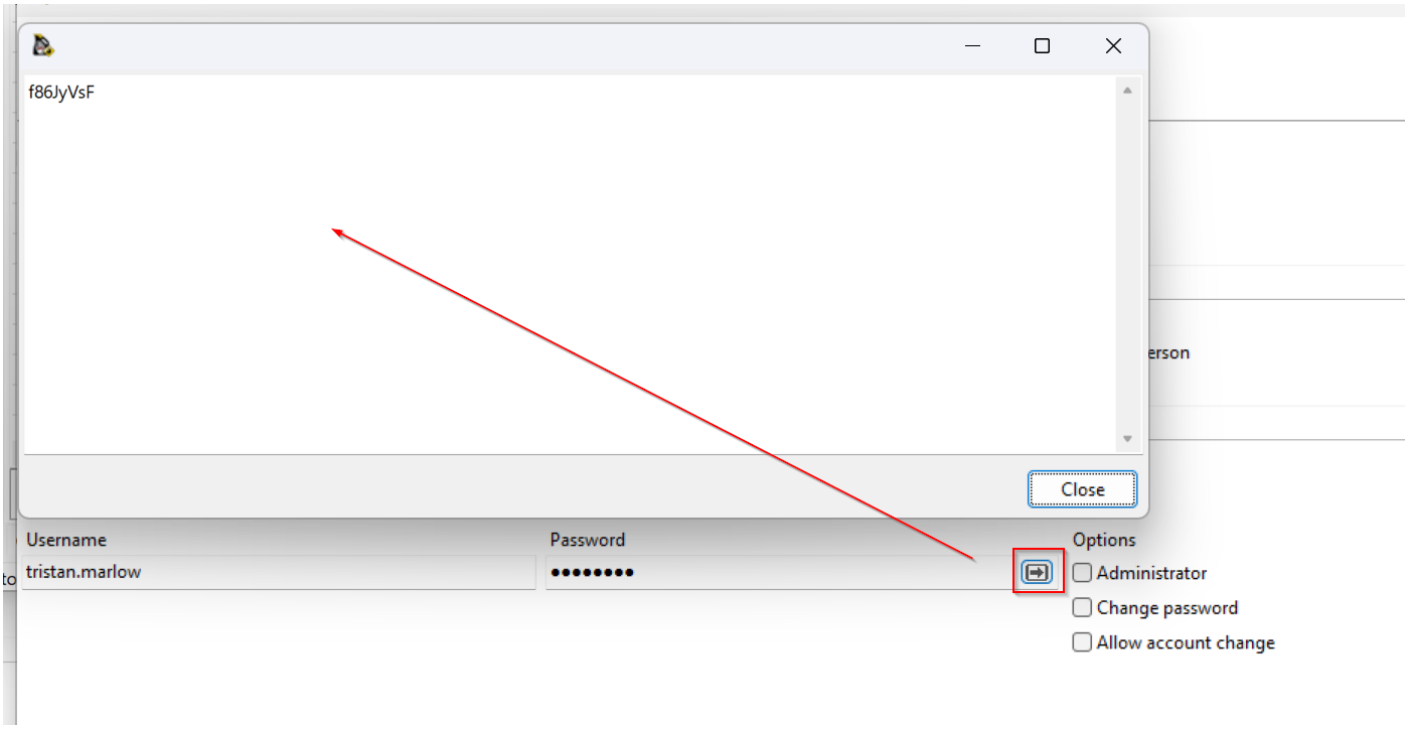
Local user accounts

Creating a new staff member

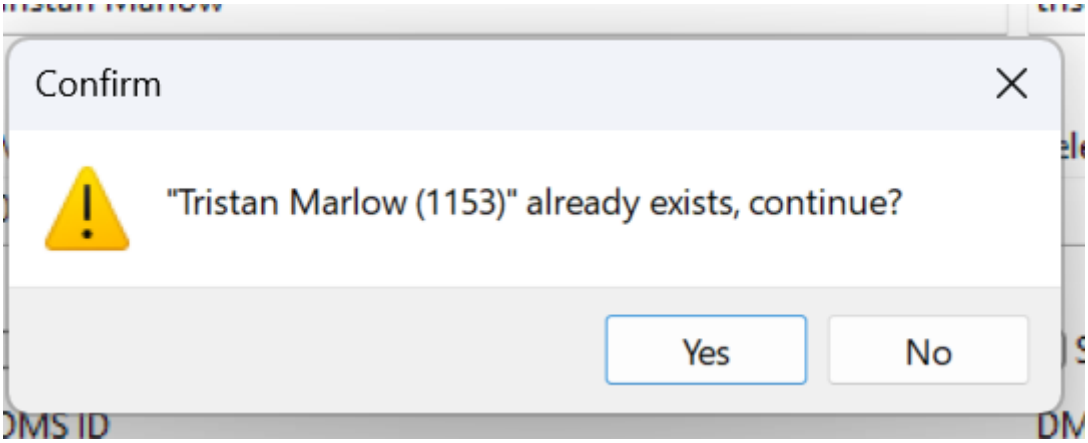
Start the new staff wizard, enter required information if the user is required to login check the "Allow login" box



You can use the generate password button to create a password

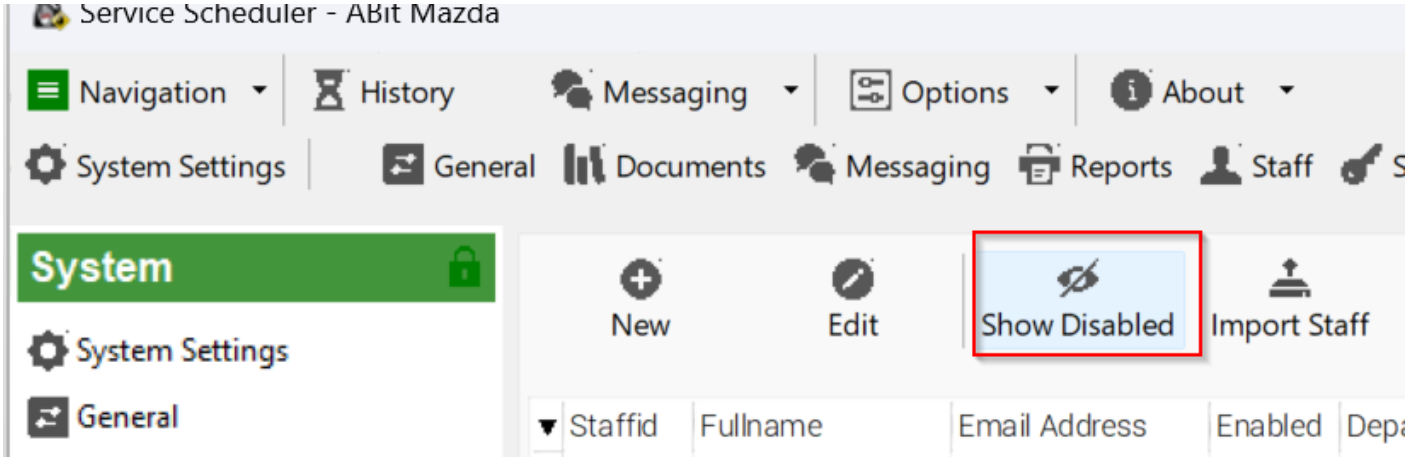


Service scheduler will check for a similar name to ensure that the user

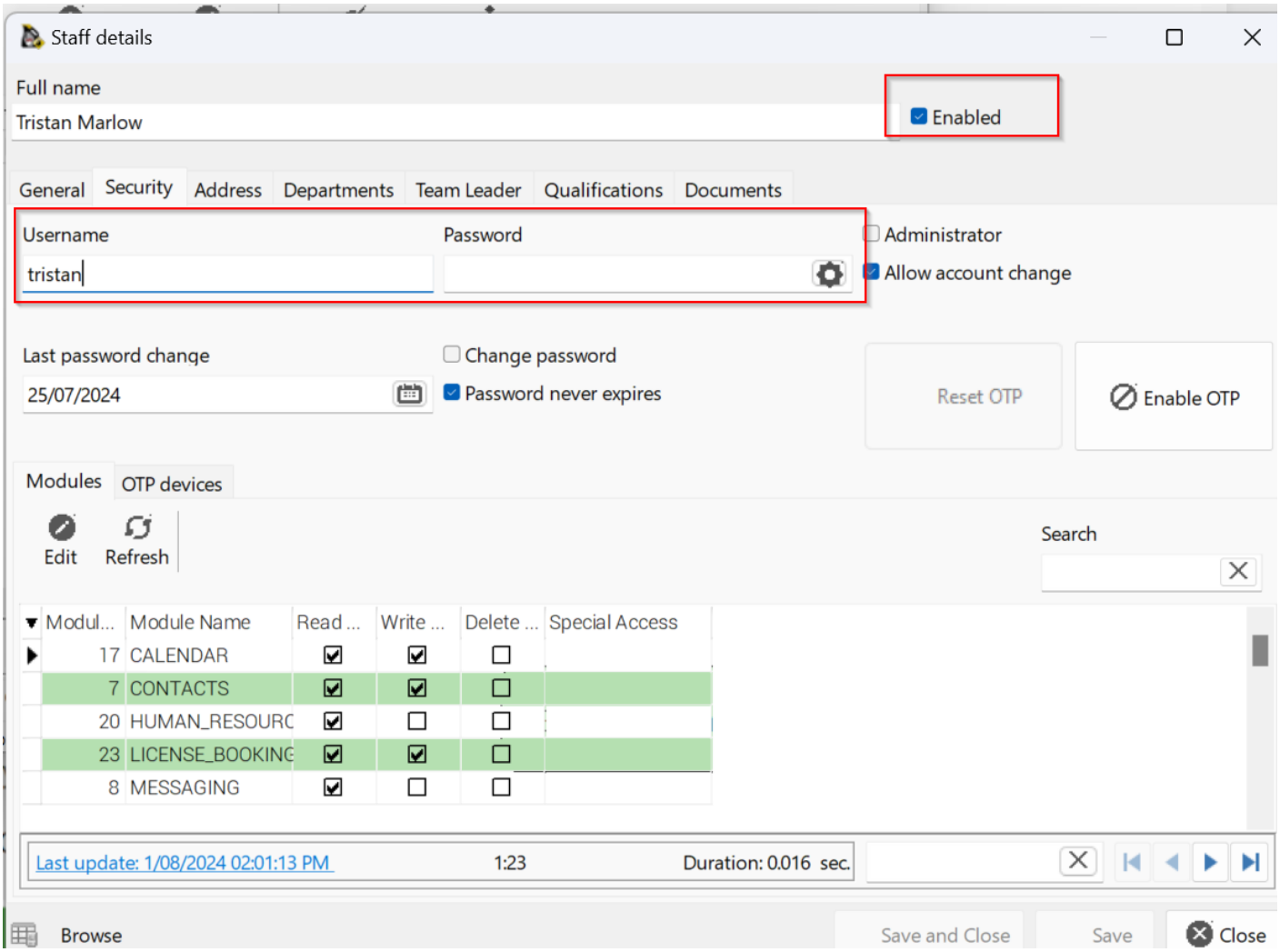


Edit existing staff member

To find a staff member that has had their account disabled. Select the following button

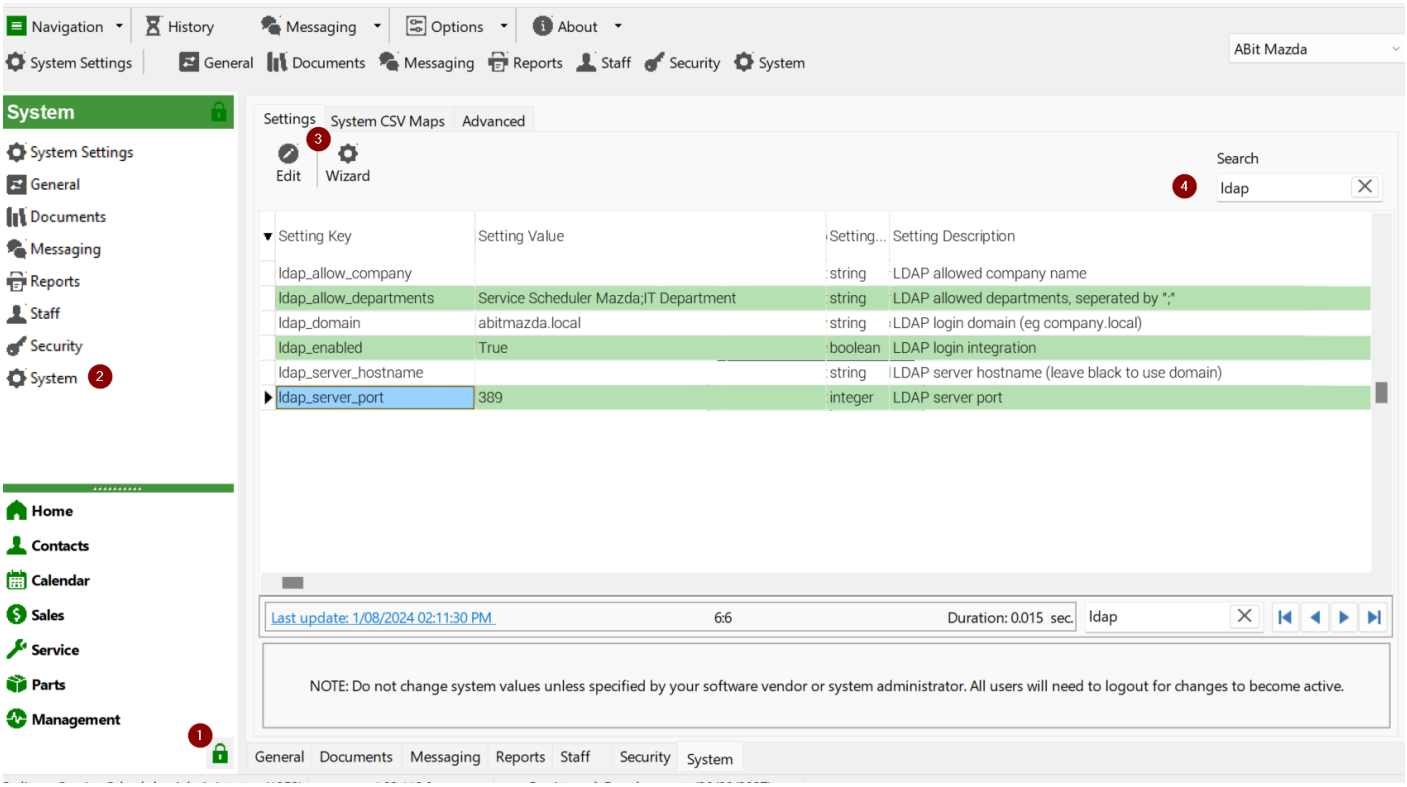


Adjust user details as required



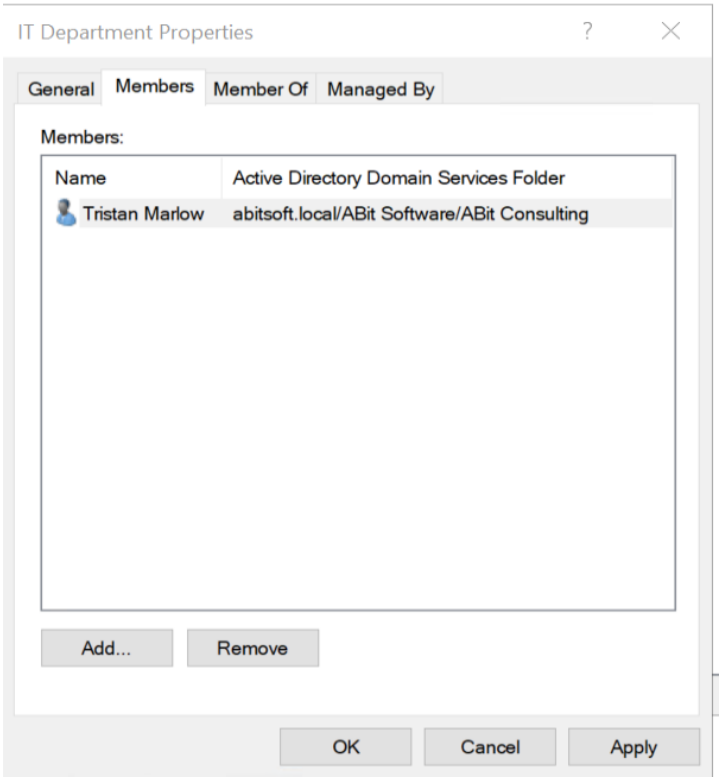
LDAP Integration (Active Directory)

To enable LDAP integration, navigate to system settings and search for "ldap"



ldap_allow_company	This will look at the users "company" and if matches will allow login/ Blank will allow any company value.
ldap_allow_departments	This will look at group the user is a member of and if they match a group name
ldap_domain	Your LDAP / Active Directory domain name
ldap_server_hostname	The domain will be used to find a server via DNS but a specific server can be specified.
ldap_server_port	Port to communicate for LDAP requests

Departments / Active Directory groups are the recommended method of controller



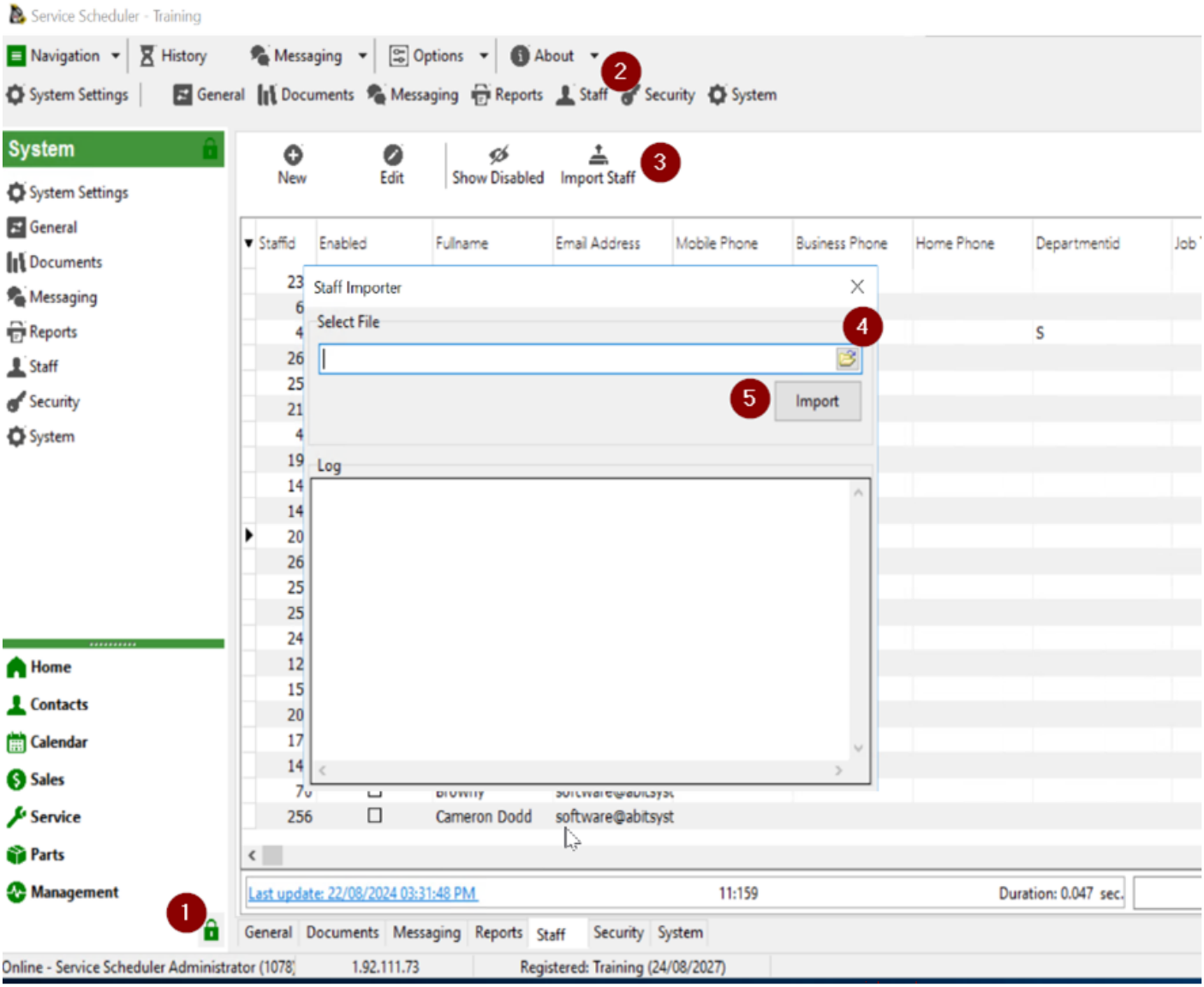
As the password is controlled by LDAP, attempting to change the password will result in "User passwords are managed by LDAP integration"

image.png

Bulk Import

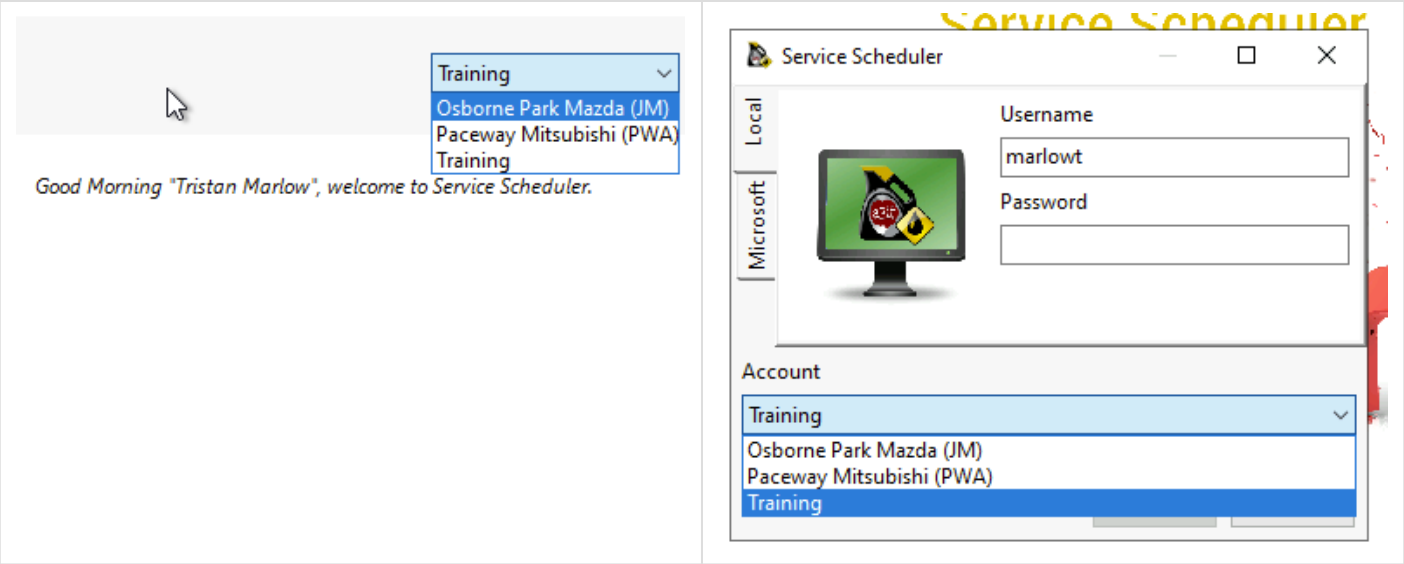
Create a CSV file with the following format.

dmsid	fullname	email_address	username	password	administrator	advisor	technician
	Joe Boss	joe.boss@company.com	joe.boss	#password2024!	1	0	0
	Joe Advisor	joe.advisor@company.com	joe.advisor	#password2024!	0	1	0


Service Scheduler - Training
Navigation
History
Messaging
Options
About
System Settings
General
Documents
Messaging
Reports
Staff
Security
System
2
System
System Settings
General
Documents
Messaging
Reports
Staff
Security
System
New
Edit
Show Disabled
Import Staff
3
Staffid
Enabled
Fullname
Email Address
Mobile Phone
Business Phone
Home Phone
Departmentid
Staff Importer
Select File
4
5
Import
Log
Cameron Dodd
software@abitsyst
Home
Contacts
Calendar
Sales
Service
Parts
Management
1
Last update: 22/08/2024 03:31:48 PM
11:159
Duration: 0.047 sec.
General
Documents
Messaging
Reports
Staff
Security
System
Online - Service Scheduler Administrator (1078)
1.92.111.73
Registered: Training (24/08/2027)

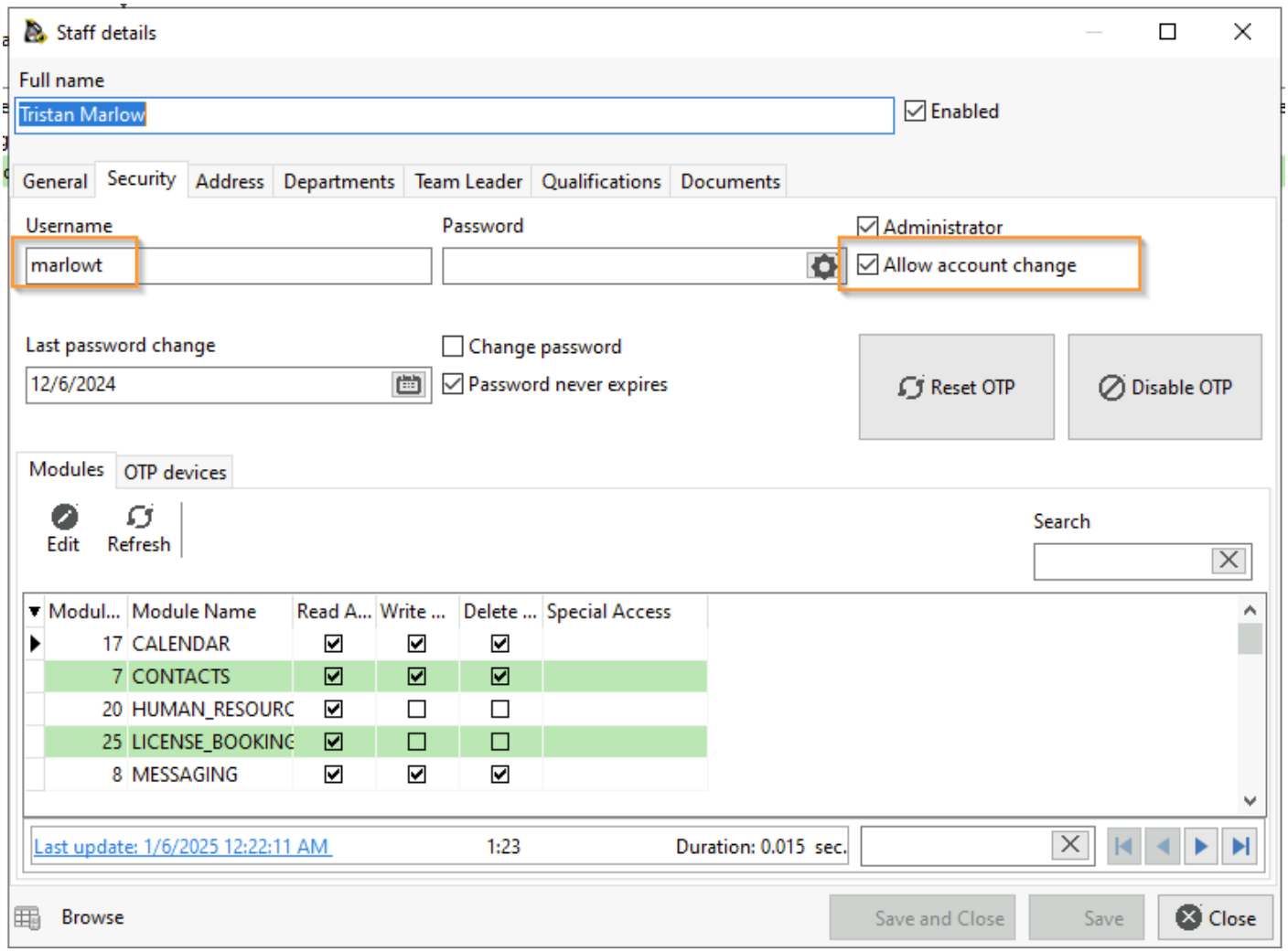
User administation - account switching

When multiple dealerships are setup in Service Scheduler, users may be granted access to swap between sites without logging out and logging back in.



To enable, "Allow account change" must be checked in each account they are allowed to swap from. And the user must exist in all accounts with the same "username"

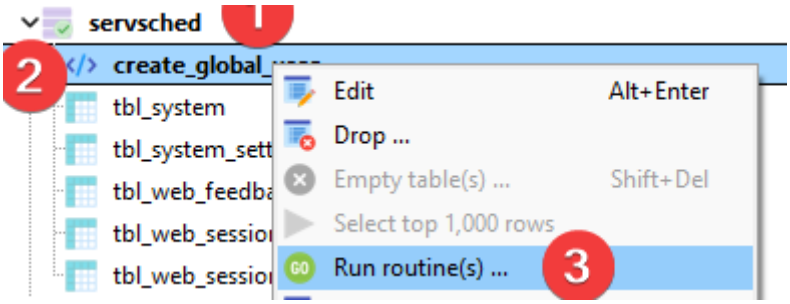
> The passwords do not need to match, however in a local account setup it is recommended to avoid confusion if the user attempts to login to an account from the login dialog.

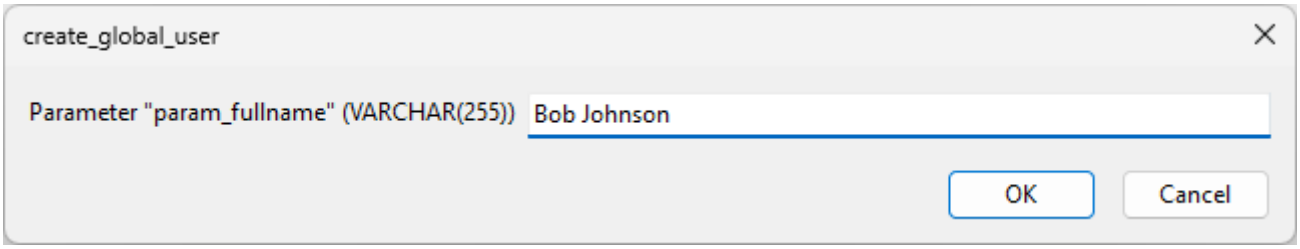

Staff details
Full name
Tristan Marlow
Enabled
General
Security
Address
Departments
Team Leader
Qualifications
Documents
Username
marlowt
Password
Administrator
Allow account change
Last password change
12/6/2024
Change password
Password never expires
Reset OTP
Disable OTP
Modules
OTP devices
Edit
Refresh
Search
Modul...
Module Name
Read A...
Write ...
Delete ...
Special Access
17 CALENDAR
7 CONTACTS
20 HUMAN_RESOURC
25 LICENSE_BOOKINC
8 MESSAGING
Last update: 1/6/2025 12:22:11 AM
1:23
Duration: 0.015 sec.
Browse
Save and Close
Save
Close

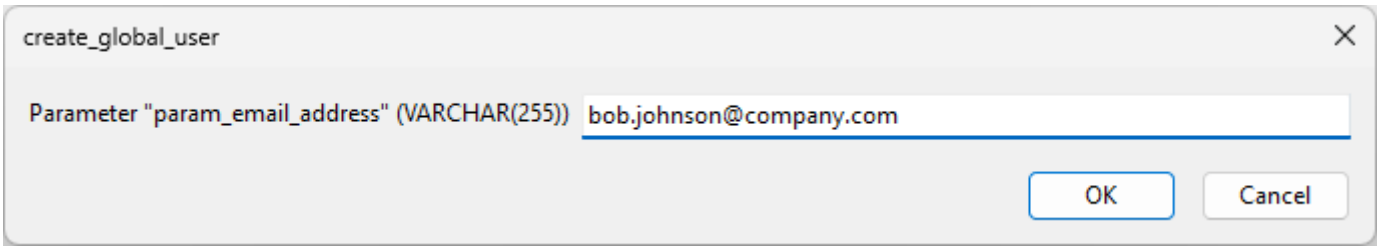
User administation - global user

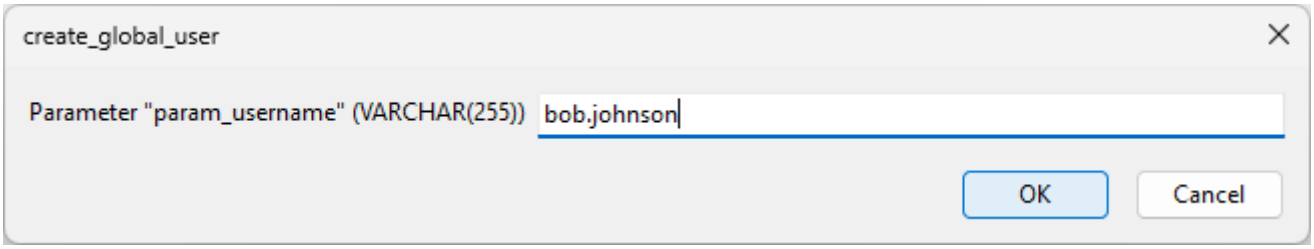
Open HeidiSQL

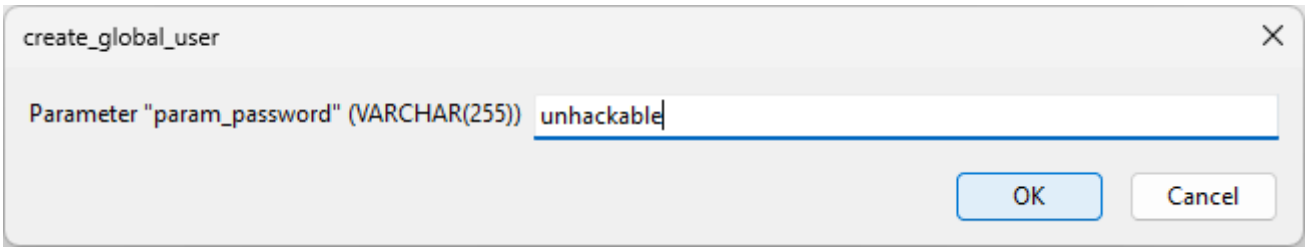
Navigate to root catalog eg servsched. Find create_global_user











1 = administrator, 0 = standard user

Right click and press Run (or F9)

if you had more than one user you can add multiple lines, just ensure each line ends with ';'

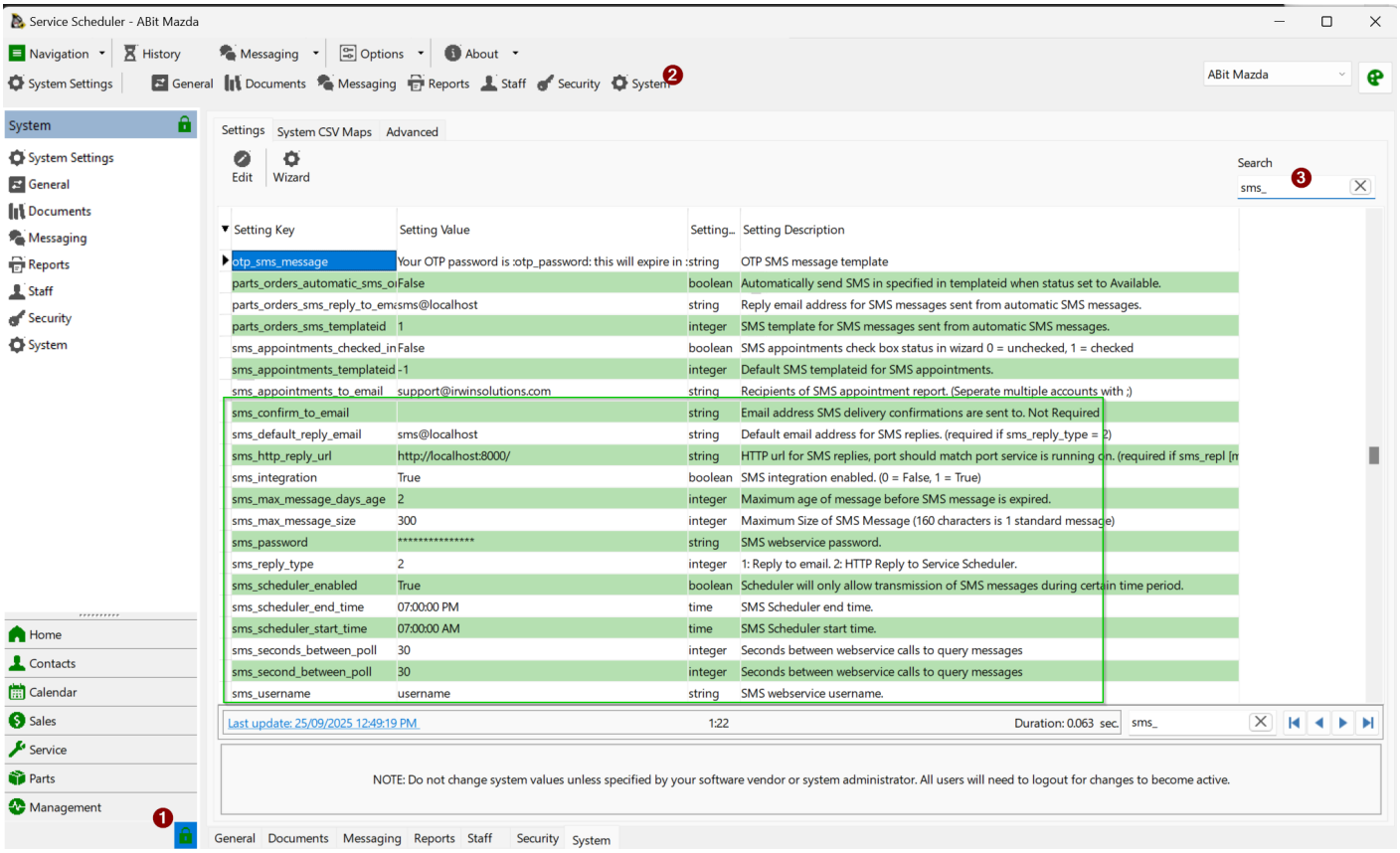
```
CALL `create_global_user`('Bob Johnson', 'bob.johnson@company.com', 'bob.johnson',
'unhackable', '0');
CALL `create_global_user`('Jane Johnson', 'jane.johnson@company.com', 'jane.johnson',
'unhackable', '0');
```

SMS Integration

SMS messaging is an optional component. Messaging is provided by irwinSolutions Pty Ltd (http://www.irwinsolutions.com/) where credit can be prepaid.

Enable integration

SMS settings are located in System -> System -> Setting



Once and account has been provided set **sms_integration** to 1 and update **sms_username** and **sms_password** with credentials.

If you would like customer SMS replies to go to an email address set **sms_default_reply_email**

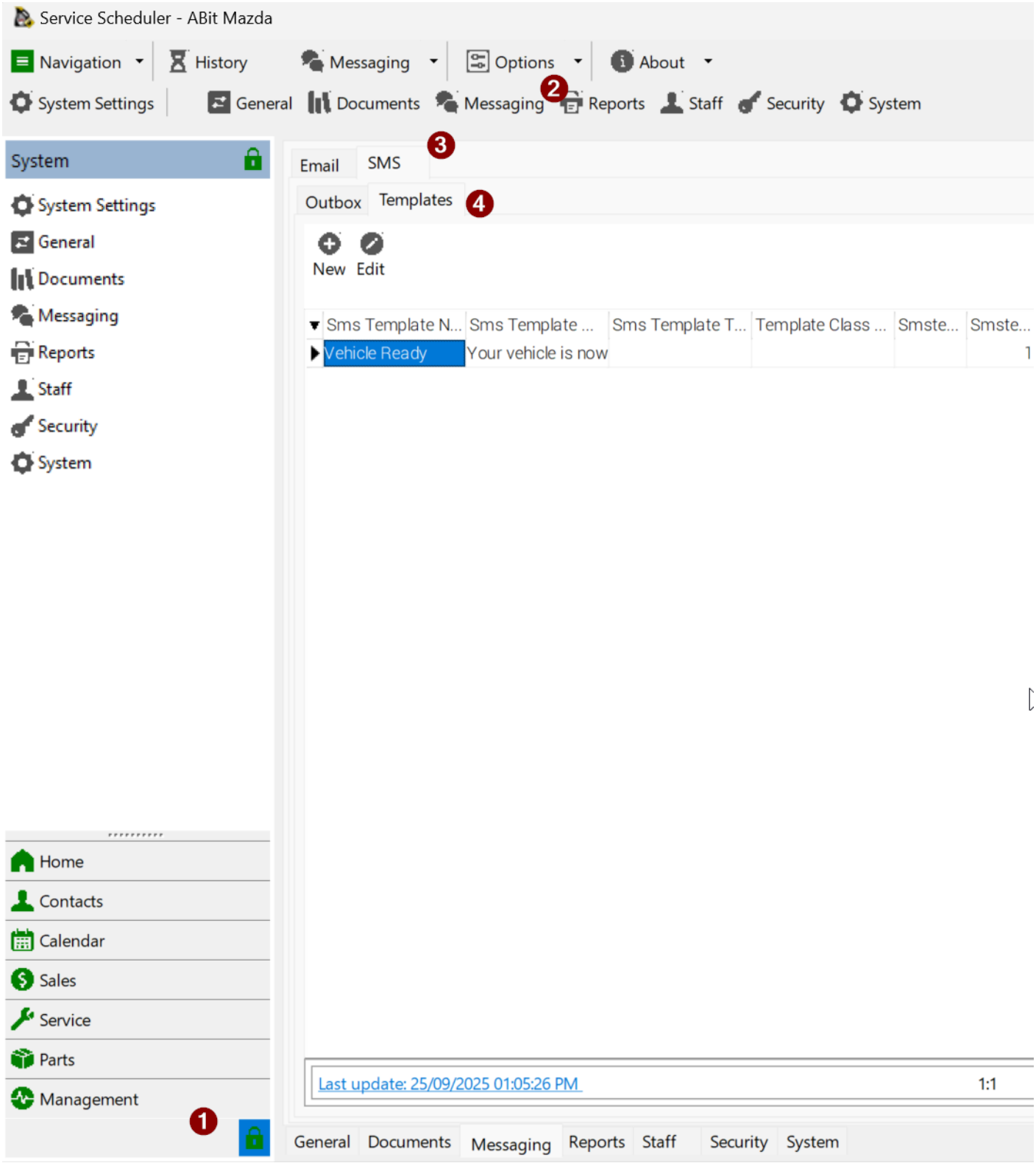
SMS replies are possible back to Service Scheduler, this requires port forwards to the Service Scheduler server port (default 8090) and then a public URL back to this instance set into **sms_http_reply_url**. (eg http://mycompany.com:8090)

> Check with your IT or network administrator that the Service Scheduler server can access primary.smartmessagingservices.net/gateway/services/SMSService?wsdl

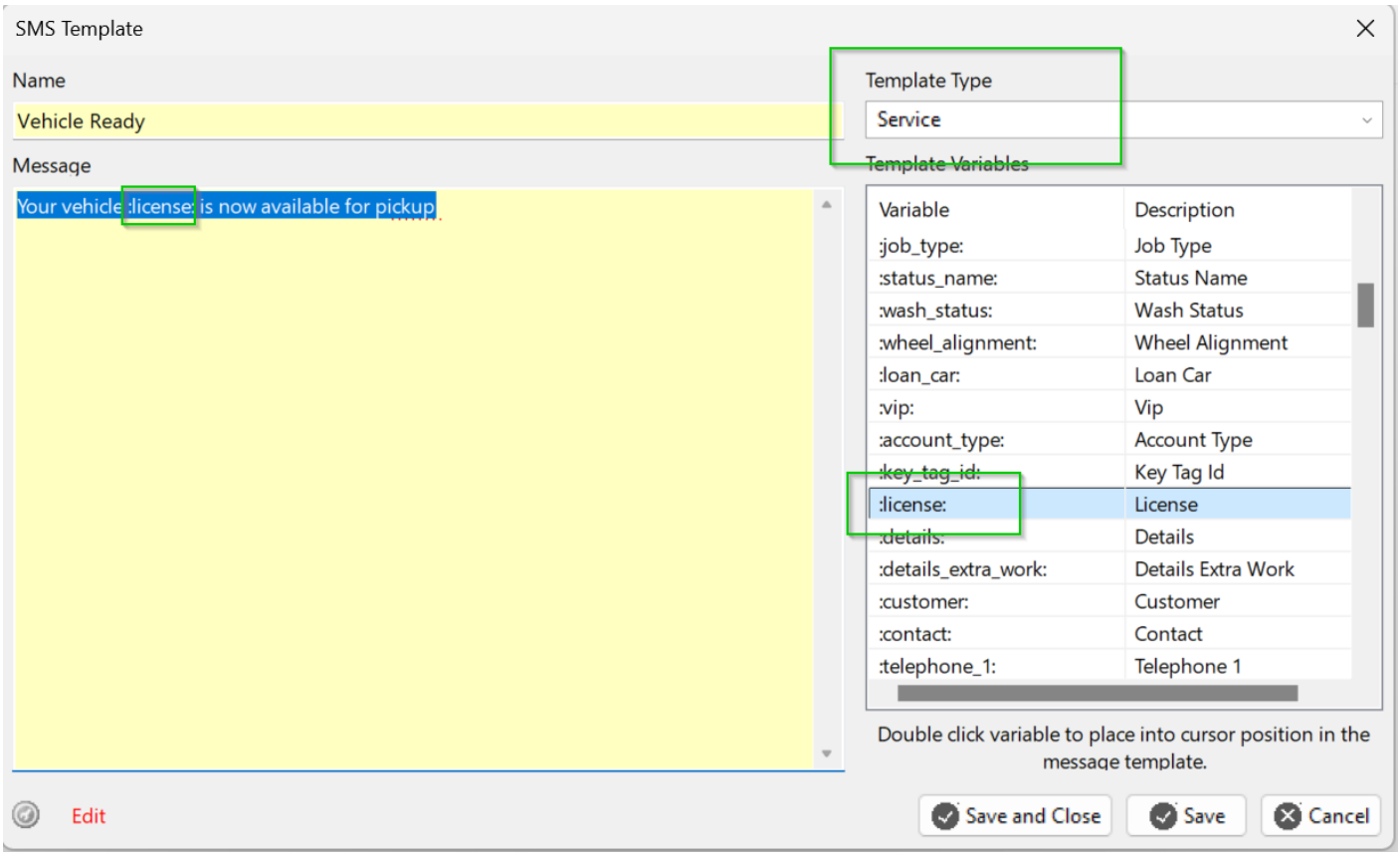
sms_confirm_to_email	Email address SMS delivery confirmations are sent to. Not Required
sms_default_reply_email	Default email address for SMS replies. (required if sms_reply_type = 1)
sms_http_reply_url	HTTP url for SMS replies, port should match port service is running on. (required if sms_reply_type = 1)
sms_integration	SMS integration enabled. (0 = False, 1 = True)
sms_max_message_days_age	Maximum age of message before SMS message is expired.
sms_max_message_size	Maximum Size of SMS Message (160 characters is 1 standard message)
sms_password	SMS webservice password.
sms_reply_type	1: Reply to email. 2: HTTP Reply to Service Scheduler.
sms_scheduler_enabled	Scheduler will only allow transmission of SMS messages during certain time period.
sms_scheduler_end_time	SMS Scheduler end time.
sms_scheduler_start_time	SMS Scheduler start time.
sms_username	SMS webservice username.
sms_wsdl	SMS webservice WSDL. Leave as default primary.smartmessagingservices.net/gateway/services/SMSService?wsdl

SMS Templates

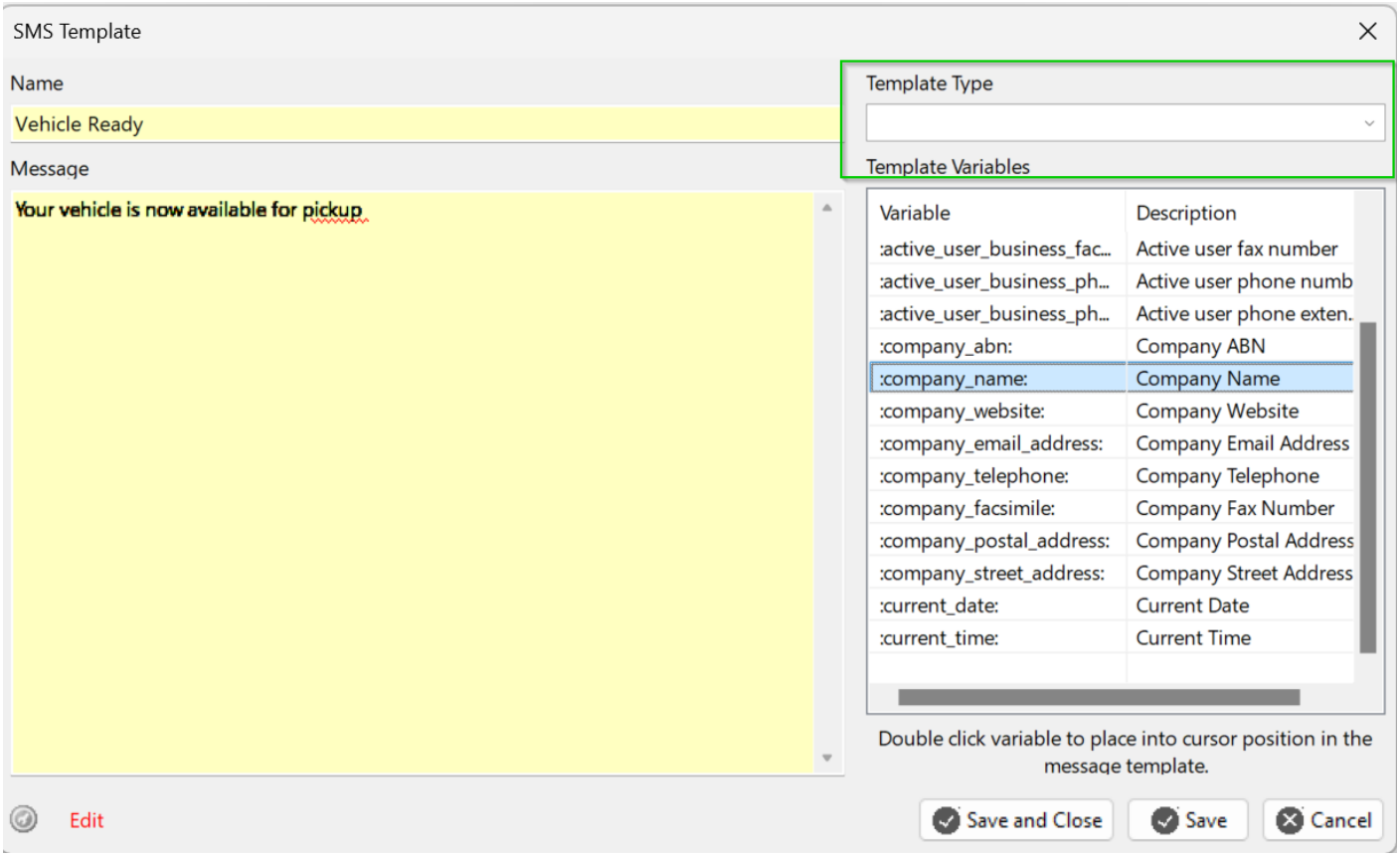
SMS templates are available under System -> Messaging -> SMS -> Templates



An SMS template can include data related to the module you are sending it from. For example a service job could use the field :license: to send a message that include the vehicle registration.



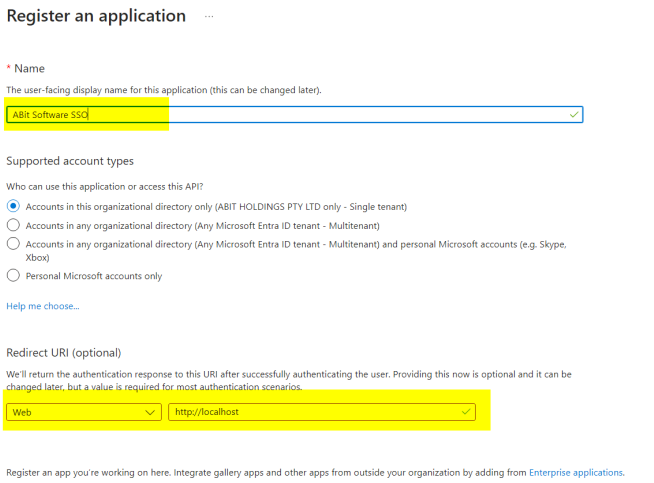
If the template type is left blank then the template is generic and can be used anywhere. This limits template fields to generic business and user details.



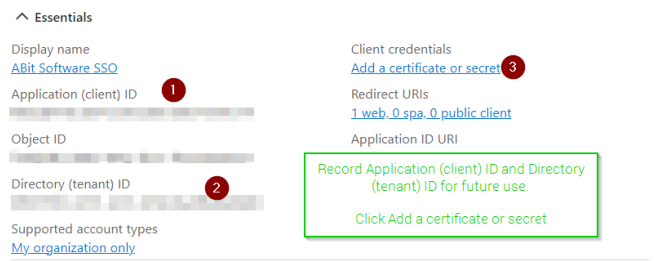
User administration - Azure

Register Entra application

Basic application setup

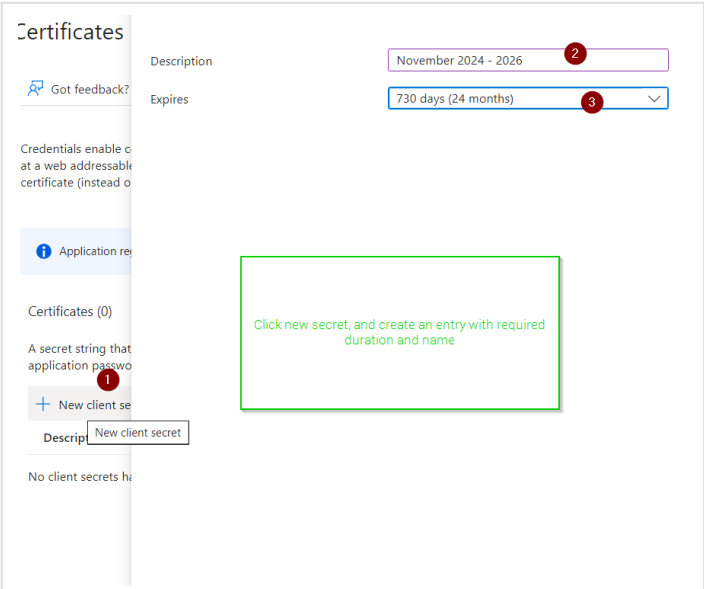


Create a new application and allow Web URL of http://localhost

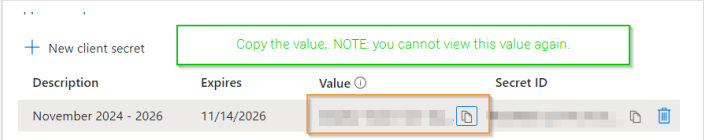


Record Application (client) ID and Directory (tenant) ID for future use.

Click Add a certificate or secret



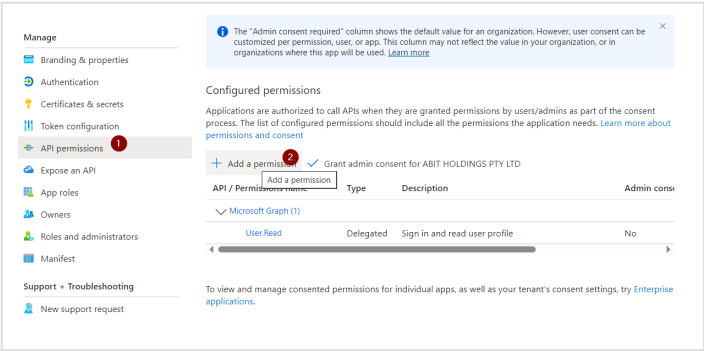
Click new secret, and create an entry with required duration and name



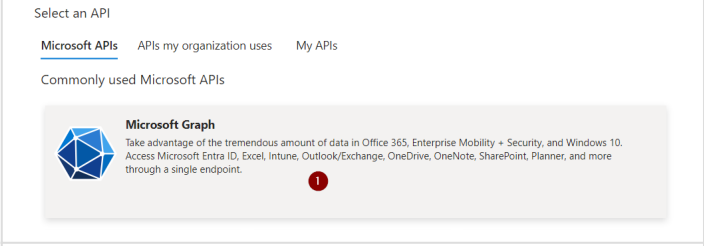
Copy the value.

> NOTE: you cannot view this value again.

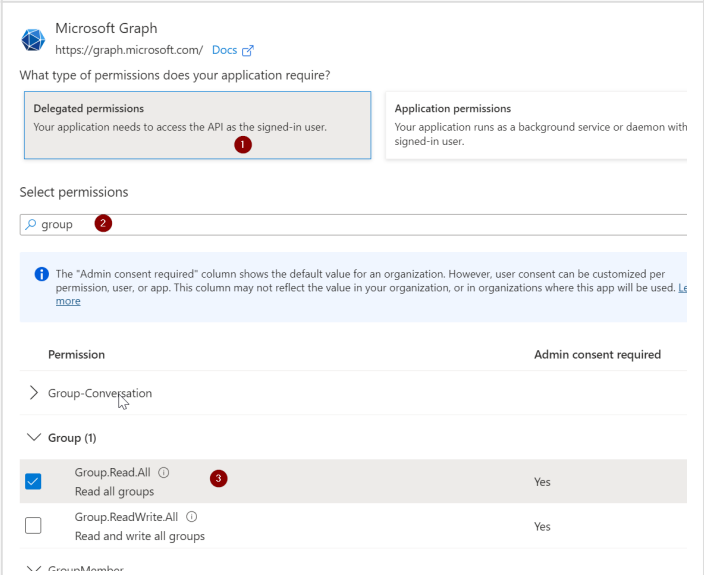
Allow groups for authentication restrictions



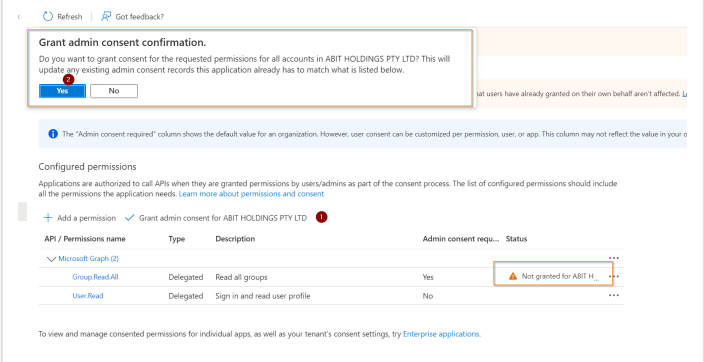
To access group details the API needs Group.Read.All application permission



Select Microsoft Graph



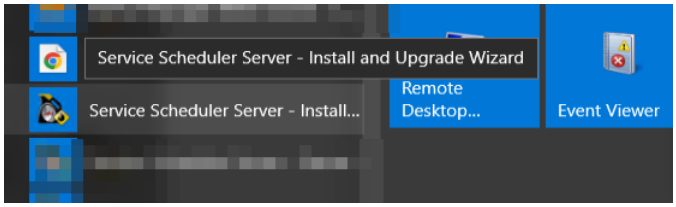
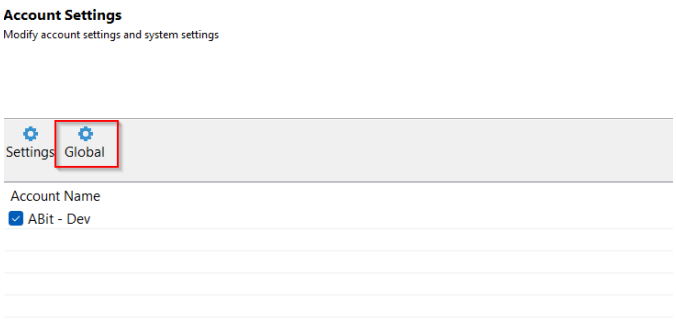
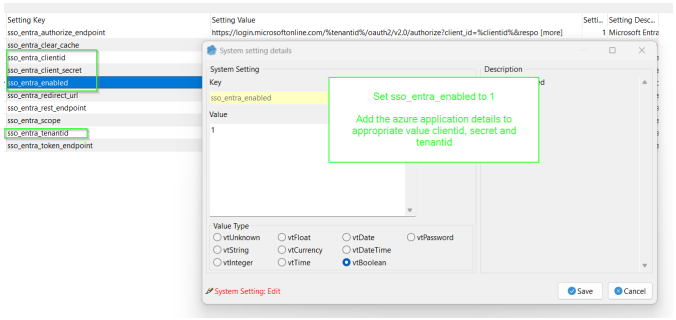
Select delegated permissions and search for group to add Group.Read.All



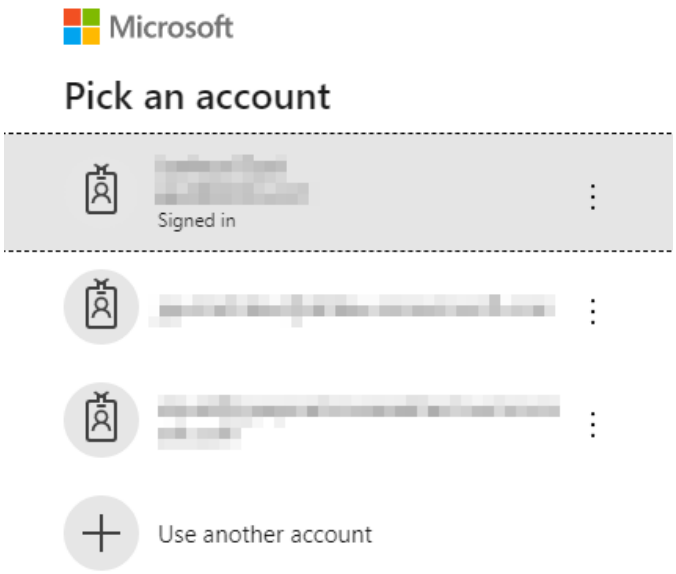
Confirm admin consent

Update global settings

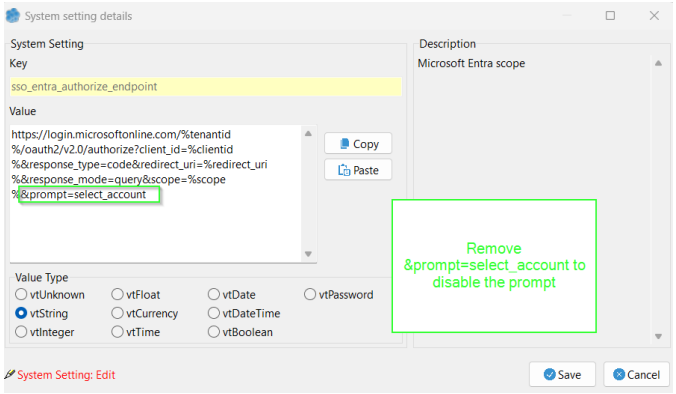
You will need the Azure clientid, applicationid and secret from the Azure Application

	Start the Service Scheduler Install / Upgrade wizard on the server
	Click next until the Account Settings page and select "Global"
	Set sso_entra_enabled to 1 Add the azure application details to appropriate value clientid, secret and tenantid

Stop service scheduler for prompting for account on login



To stop the prompt adjust global setting sso_entra_authorize_endpoint

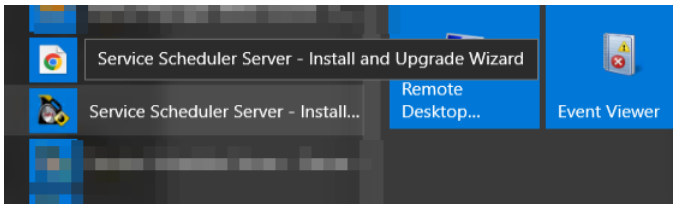
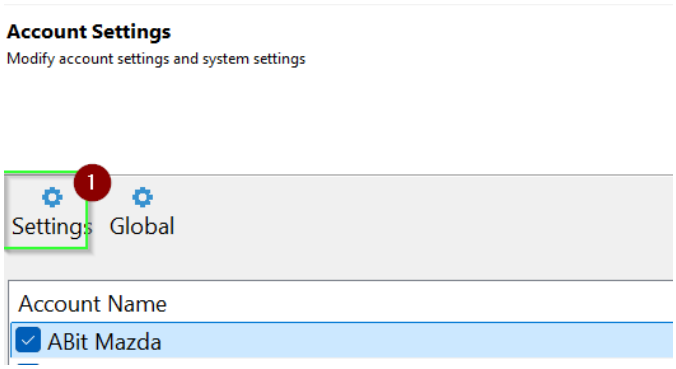
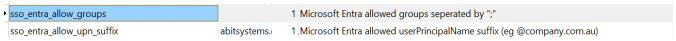
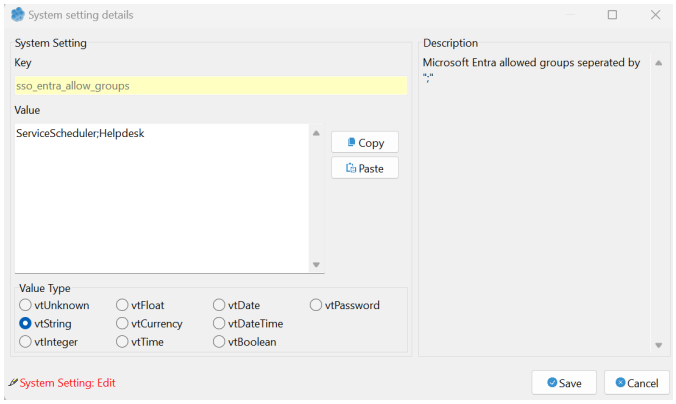
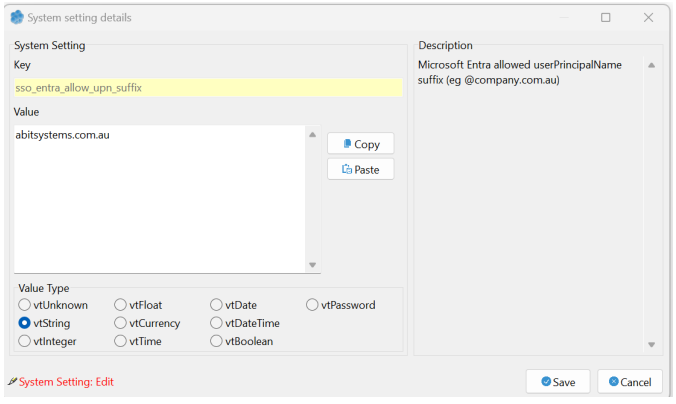


https://login.microsoftonline.com/%tenantid%/oauth2/v2.0/authorize?client_id=%clientid%&response_type=code&redirect_uri=%redirect_uri%&response_mode=query&scope=%scope%&prompt=select_account

Remove the &prompt=select_account to disable.

Limit access to groups / UPN

> For groups to work the Microsoft Entra application will need Group.Read.All permission

	Start the Service Scheduler install and upgrade wizard
	Select settings
	Locate the settings sso_entra_allow_groups and sso_allow_upn_suffix
	To limit access to certain group, add the group names separated by the ";" character.
	To limit to user UPN suffix enter the userPrincipalName suffix