

A Guide on Where to Start

Updated November 14, 2006

This Quick Start Guide will identify sections in the [AyaNova v3 Manual](#) (*November 12 2006 edition*) to get you up and going once you have configured the installation (refer to “Technical – Additional Installation & Configuration” page 543)

Do note you do **not** have to set everything up at the beginning or in this exact order – you can enter at any time such as by using jump buttons when you need to (refer to “Timesaving Tips & Shortcuts” page 63)

For example, when creating a workorder, if the Workorder Status you need is not in the drop down selection, press the Workorder Status “jump button” to open the Workorder Statuses grid to create a new workorder status, exit, you are returned to the same workorder where now you can select that Workorder Status.

Same thing if it is a new client – when you select New... to start a new service workorder, if the client is not in the list to select, just click on the Client “jump button” to open a new client entry screen, enter the details of the client, save and exit, now select the client from the drop down list.

The only instance where the order of entry does matter, is when you subscribe to event notifications – each user needs to subscribe **prior** to the occurrence the event will monitor is created or saved (refer to “(Username) Navigation Pane – Notification Subscriptions” page 434)

Suggested order of where to start	AyaNova v3 Manual section to reference
Apply your AyaNova v3 activation key	
Edit the AyaNova Administrator default password Create a manager administrator user account	“Starting AyaNova” page 28 “Administration Navigation Pane – Users” page 465
Tax Codes (to be used as defaults in Global Settings)	“Additional Entry Grids – Tax Codes” page 526
Locales (create custom if needed and set as default in Global Settings for new users, and/or assign to existing users)	“Administration – Localized Text Designer” page 472
Global Settings	“Administration – Global Settings” page 445
Import AyaNova CE 1.9.4.4 data (if applicable)	“Importing from an AyaNova 1.9.4.4 Database” page 597
Or erase the AyaNova v3 data entered while in trial mode	“Wiping the AyaNova Database and Starting New” page 593
Or manually delete sample data	“Use Basics - Entry Screen Menu Options” page 62
Security Groups (determines rights to access AyaNova features for users)	“Administration – Security Groups” page 459
Part Warehouses (assign default warehouse to users as well as used to maintain tighter inventory control)	“Part Warehouses” page 520 “Service Workorders – Parts” page 153
Dispatch Groups (used to group clients together for filtering, reporting and scheduling, and assign schedulable users to)	“Dispatch Zones” page 517
User Certificates (used to determine if user can perform certain service and/or be assigned to certain Schedulable User)	“User Certificates” page 531 “User Skills” page

Groups)	532
User Skills (used to determine if user can perform certain service and/or be assigned to certain Schedulable User Groups)	“Schedulable User Group” page 280 “Schedule Screen Tutorial: Using a Schedulable User Group to Determine Availability” page 299
AyaNova Users	“Administration Navigation Pane – Users” page 465
Client Groups (groups clients together for filtering and reporting)	“Additional Entry Grids – Client Groups” page 515
Unit Charge Description	“Additional Entry Grids – Rates” page 523
Service Rates (& contract service rates)	
Travel Rates (& contract travel rates)	
Subscribe to event Client Contract Expiring before setting client contract expiry date	“Username Navigation Pane – Notification Subscriptions” page 434
Contracts	“Contracts” page 389 “Service Workorders – Parts - Discounts” page 155 “Service Workorders – Labor – Rate” page 166
Head Offices	“Head Offices” page 377
Clients	“Clients” page 365 “Service Workorders” page 106
Vendors	“Vendors” page 426
Unit Model Categories	“Unit Models” page 402
Unit Models	
Units (client owned equipment)	“Units” page 407 “Service Workorders – Unit” page 140
Loan Items	“Loan Items” page 423
Part Categories	“Part Categories” page 519 “Part Assemblies” page 518 “Units of Measure” page 528 “Inventory - Parts” page 307 “Service workorders – Parts” page 153
Part Assemblies	
Unit of Measure	
Parts (including restock Level for Part Warehouses)	
Inventory Adjustments (for starting inventory)	“Inventory Adjustments” page 322
Workorder Categories	“Workorder Categories” page 533 “Service Workorder” page 120
Workorder Statuses	“Workorder Statuses” page 535 “Service Workorder” page 123 “Service Workorder Item” page 130, 135 “Schedule Screen” page 269
Workorder Item Types	“Workorder Item Types” page 534 “Service Workorder Item” page 129, 134
Priorities	“Priorities” page 521 “Service Workorder Item” page 131, 136 “Schedule Screen” page 269
Unit Service Types	“Unit Service Types” page 529 “Service Workorder – Unit” page 140
Task Groups & Tasks	“Tasks Groups & Tasks” page 537

	“Service Workorders – Tasks” page 149 “Tutorial: Selecting Tasks Within a Workorder Item” page 195
Users subscribe to events	“Username Navigation Pane – Notification Subscriptions” page 434

Customize report templates for your company	“Creating Custom Reports” page 635
Create new custom report templates for your company	“Tutorial: Text, Layout, Font and Images” page 642

Advanced Service Workorder #: 64
Thursday, March 30, 2006

Our Lady of Tears General Hospital
965 785-6321

Physical Address: 4539 Workshop Drive, Subury, AT 10245-98674
Postal Address: 4539 Workshop Drive, Subury, AT 10245-98674

Service Date: 03/09/2006 4:12:32 PM

Qty	Parts	Price Per	Disc	Net Total	Tax A	Tax B	Line Total
1	CD4583 - CDROM GCR 8523B Internal - LG Electronics	\$22.99	10%	\$20.69	\$0.00	\$1.45	\$22.14
Part Net total		Part Tax A	Part Tax B	Part Total For This Service Item			
220.99		22.99	22.99	22.14			

Customize your company logo and contact information

Customize font, displayed text, and layout

Localize field labels for your service company	“Localized Text Designer” page 472 “Tutorial: Localizing Field Descriptions in a Service Workorder” page 228
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Workorder 49

Client: ABC Accounting, 500 E 9th St, New York NY 10009-5059, United States

Summary: Project

Contact: Client Reference #

Workorder status: Invoice Number: Service Date: 02/09/2006 10:01 AM

Workorder 49

Client: ABC Accounting, 500 E 9th St, New York NY 10009-5059, United States

Summary: Development

Contact: Building Code

Workorder status: Invoice Number: Service Date: 02/09/2006 10:01 AM

Add additional custom fields where needed

“Custom Field Designer” page 479

“Tutorial: Creating Custom Fields for a Workorder Item” page 234

“Tutorial: Adding Custom Fields to the Unit Entry Screen” page 482

GHFH59359FD3J3 ImageRunner 1600 IR1600

Active

Replaced by Unit:

Serial Number:

Description:

Unit model:

Parent Unit of this U:

Unit Has Own Address

Bank service

Unit Metered

Notes:

Purchased Here

Purchased From:

Purchased Date:

Receipt Number:

Client:

Override Warranty

Override LifeTime

Override Length:

Override Warranty Terms:

GHFH59359FD3J3 ImageRunner 1600 IR1600

Active

Replaced by Unit:

Serial Number:

Description:

Unit model:

Parent Unit of this:

Unit Has Own Address

Bank service

Unit Metered

Notes:

Purchased Here

Purchased From:

Purchased Date:

Receipt Number:

Client:

Override Warranty

Override LifeTime

Override Length:

Override Warranty Terms:

Custom Fields	
Field	Field/Value
IP Address	
Networked	<input checked="" type="checkbox"/>
Installed Date	04/08/2005
*	