AyaNova 7 Help

USER MANUAL

Ground Zero Tech-Works Inc

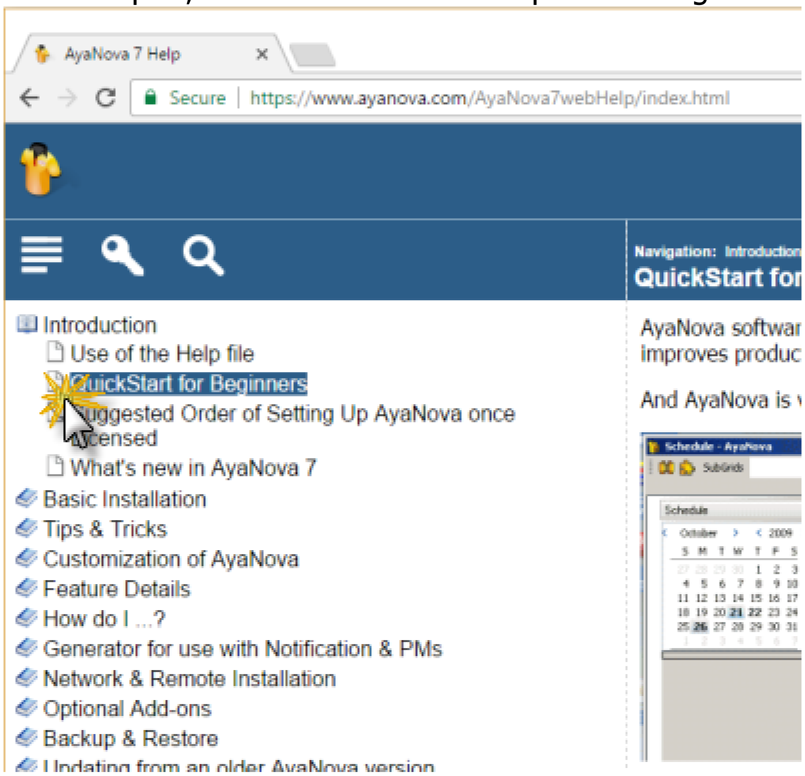
Introduction

1 Introduction

1.1 Use of the Help file

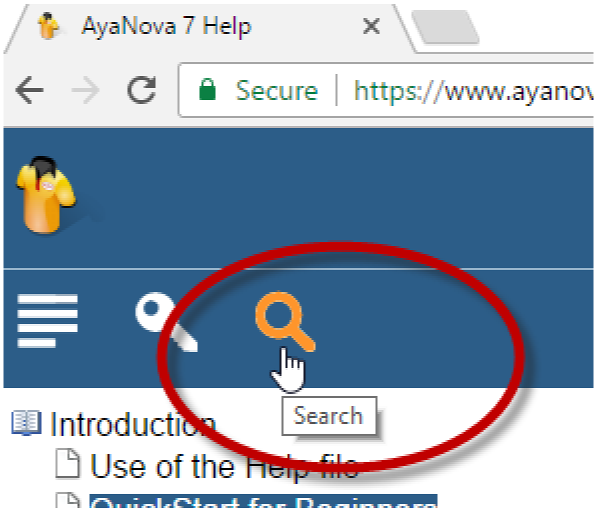
This online Help file provides detailed information on all features and use of AyaNova as well as installation and configuration guides and more.

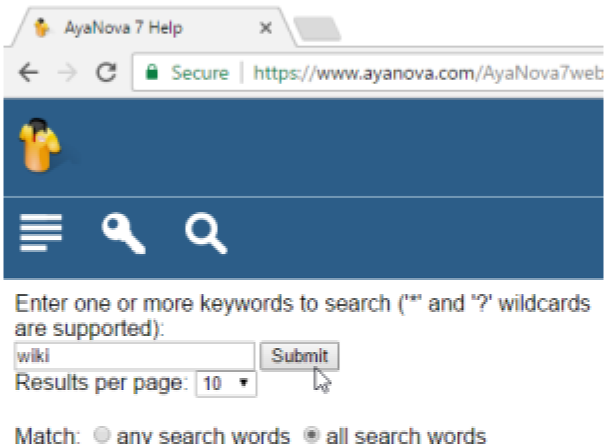
- To view topics, double-click on the chapter headings to expand



- To print the entire Help documentation, download the PDF from http://www.ayanova.com/onlinehelp.htm

- To search for a specific word to bring up relevant Help topics, select Search, type in the word.





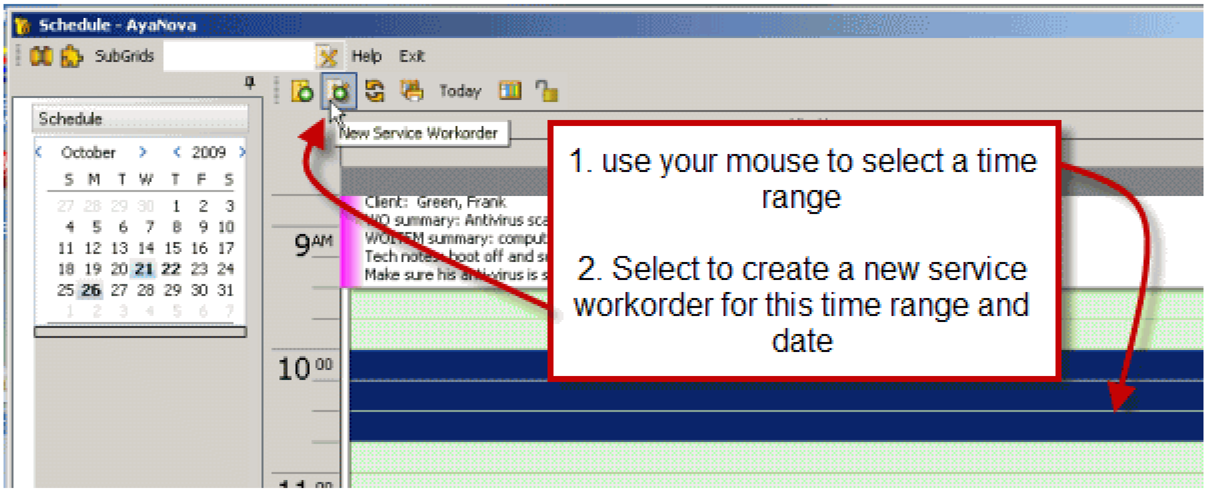
Screenshots depicted in this Help may not display exactly as your copy of AyaNova does, as dependant on screen size, display settings, data and specific version in use.

This documentation is provided as is and could include technical or other mistakes, inaccuracies or typographical errors. Where inconsistencies between the documentation and the program occur, the program is considered to be the authority.

1.2 QuickStart for Beginners

AyaNova software is affordable, networkable, scaleable and easy-to-use service management and work order program for Windows that improves productivity and simplifies management and delivery of first class customer service.

And AyaNova is very easy to use.



- Walk through the easy steps to **schedule a technician and create a workorder at the same time** using the Schedule screen - check out the How do I schedule user for a new workorder item via the Schedule screen?

- See how easy it is to **create a workorder for client** that you will provide service for - check out the Tips & Tricks section Creating a new workorder for a client

- Follow along with how to edit an existing workorder by selecting it from a grid

- Watch a video about the Schedule screen

- Watch a video about the service workorder entry screen

This AyaNova Help file contains details on all of the features of AyaNova, including step by step tutorial walk through's with screenshots in the How do I...?'s, as well as tips on use in the Tips & Tricks section, as well as specific details on each feature in the Feature Details section

1.3 Suggested Order of Setting Up AyaNova once Licensed

The following is a suggested order for setting up AyaNova for the first time when initially licensed. This is a suggestion only, you do not necessarily have to do things in this manner, many items can be entered on the fly but it's helpful to go through this and follow the help links.

Quick setup of AyaNova and start using:

Follow along with the tutorials and, review Feature details.
Erase the AyaNova data entered to start fresh or manually delete objects (workorders, clients, etc) if applicable
Create Tax Codes (and set defaults in Global Settings if desired)
Create and setup Security Groups (determines rights for users to access AyaNova features)
Create AyaNova Users - schedulable users such as technicians as well as non-schedulable users such as those that just enter data
Create Labor and Travel Rates for selection in workorders
Create Clients (you can import using the ImportExport.csv utility, and/or you can create on the fly as needed)
Use as is and/or Customize existing report templates for your company and/or create new report templates
Create service workorder for a client (follow along with tutorial for a quick walk through)

More in depth setup of AyaNova:

Follow along with the tutorials and, review Feature details.
Set up for AyaNova network configuration (multiple networked users connect to the database at the same time) if required
Set up backup routine for your configuration (stand-alone backup or network Firebird Server configuration or SQL configuration)
Edit the AyaNova Administrator default password and create a new manager administrator user account - see Users

Create Tax Codes (to be used as defaults in Global Settings)
Locales (create a custom locale if you want to change the text displayed in AyaNova and set as default in Global Settings for new users, and/or assign to existing users)
Erase the AyaNova data entered to start fresh or manually delete objects if applicable
Create Regions (used to restrict data access based on region a user is a member of) and set Client Notifications for each Region
Create and setup Security Groups (determines rights to access AyaNova features for users)
Create Part Warehouses (assign default warehouse to users as well as used to maintain tighter inventory control)
Create Dispatch Zones (used to group clients together for filtering, reporting and scheduling, and assign schedulable users to)
Create User Certifications (used to determine if user can perform certain service and/or be assigned to certain Schedulable User Groups)
Create User Skills (used to determine if user can perform certain service and/or be assigned to certain Schedulable User Groups)
Set your Global Settings
Set up AyaNova Users
Client Groups (groups clients together for filtering and reporting)
Create Labor and Travel Rates for selection in workorders
Subscribe to events such as Client Contract Expiring before setting client contract expiry date
Create Contracts
Create Head Offices
Create Clients (you can import using the ImportExport.csv utility, and/or you can create on the fly as needed)
Create Vendors
Create Unit Models
Create Units (you can import using the ImportExport.csv utility, and/or you can create on the fly as needed)
Create Loan Items

Create Parts (you can import using the ImportExport.csv utility, and/or you can create on the fly as needed)
Enter Part Inventory Adjustment for starting inventory
Create Workorder Categories
Create Workorder Statuses (you can enter manually, and/or import using the ImportExport.csv utility)
Create Workorder Item Types (you can enter manually, and/or import using the ImportExport.csv utility)
Create Priorities (you can enter manually, and/or import using the ImportExport.csv utility)
Create Unit Service Types (you can enter manually, and/or import using the ImportExport.csv utility)
Create Task Groups & Tasks
Have users subscribe to events
Customize existing report templates for your company and create new report templates
Add additional custom fields where needed

1.4 What's new in AyaNova 7

We are very pleased to present AyaNova 7

AyaNova 7 has included the most widely requested features reported to our support staff and posted on our wish list forum.

There are some huge new features and dozens of improvements in all areas that will simplify using AyaNova and most importantly save you and your staff time.

Please take a few minutes to go over the list of changes / improvements that include:

Licensing/Installation
Performance
Plugins/Options
New Features
Expanded Features

Licensing/Installation
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CHANGE Uninstall now gives the option to completely remove the database files (Cancel to keep). Don't worry it double checks with the user before doing so and you all backup regularly anyway right? :)

***CHANGE* Help -> License menu option now available whether logged in as AyaNova Administrator or not**, and gives helpful info reminding logged in user of need to log in as AyaNova Administrator to edit in this area.

CHANGE as of AyaNova 7.4 AyaNova has moved to an annual subscription license model for email support, updates and upgrades.

Performance
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***IMPROVED* AyaNova speed improvement** - A caching improvement means objects are opened faster when they are used more than once. For example a workorder or report will open much faster the second and subsequent times.

***IMPROVED* AyaNova now uses the .net 4 framework**, this is the latest version of the .net framework from Microsoft and is the foundation upon which AyaNova runs. Amongst many internal improvements, the new framework ensures the best possible speed and stability of AyaNova at it's foundations.

***IMPROVED* Installation of web interfaces** - due the .net 4 framework, installation of WBI and MBI is simplified.

IMPROVED All user interface and reporting components used in AyaNova have been upgraded to their latest stable versions taking advantage of speed and usability improvements. Some examples are the custom filter screen, and that the scripts in report designer now all displayed together as now need to go hunting to find which labels or bands has scripts.

Plugins/Options
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***IMPROVED* Import Export CSV plugin simplified** - Big usability improvement and time saver* now you no longer have to have your import data csv file for clients, parts or units in a predefined order, you can simply select which of your columns in your CSV file import into which fields into AyaNova right in the plugin itself.

***NEW* Plugins from the grid** - The plugin menu is now available in main grid right click context menu. This means for example that you can now export a client record right from the main grid list saving having to open records one by one to operate on them.

***NEW* QBI QuickBooks plugin** - Can now choose to invoice workorders for the same customer individually. This was requested for those that need to have a single work order per invoice rather than the default method of QBI which is to group as many workorders per invoice as possible.

***NEW* Signature capture** - If you have MBI or WBI and a supported browser you can now capture your clients signature *onsite* with no special hardware or software and print the signature image on service work order reports. This feature has been widely requested for some time and we've really wanted to do it however it wasn't until just recently with the prevalence of the modern HTML 5 compatible web browser that we were able to offer a practical solution.

***NEW* Signature capture customize text** - to go with the signature capture feature we've added global settings so you can set what the customer sees on the signature form in three different areas.

***NEW* WBI technician interface drop down list boxes** - Now all drop down combo boxes in WBI feature the same time saving multi character auto complete feature as you've come to rely on in AyaNova. This means you can quickly select an item from a drop down list by typing the first few letters.

ADDED to WBI Client interface - Unit serviced now displays in customer's WBI workorder list.

ADDED to WBI Client interface - Customer can now select a menu option to show open workorders only or all workorders.

ADDED to WBI Client interface - You can now specify individual custom html fragments to display at the top and bottom of all WBI forms viewed by your customers. This allows you to, for example, put a logo and contact information on all your WBI pages viewed by your customers.

ADDED to WBI Client interface - You can now optionally allow clients to view the wikipage of their service work orders. This is useful if, for example, you provide a report to the client as part of the service you provide and want to attach it to the workorder and have them view it directly from thier WBI client login.

***ADDED* Additional preset date selections for your filters in your desktop AyaNova as well as in WBI and RI**

***NEW as of AyaNova 7.3* Our RI (Responsive Interface) remote access option -** quick access through your web browser (no need to install on device!) to edit, update and create workorders, quotes, PMs, clients, units and parts while away from the office regardless of what type of device (Android, Iphone, tablet, laptop, and/or computer!)

***NEW as of AyaNova 7.3* Our Client RI remote access option for client access**

***IMPROVED as of AyaNova 7.5* WBI signature field** displays larger for ease of entry

***IMPROVED as of AyaNova 7.5* WBI** signature parsing code added to handle unusual browser canvas implementations

***IMPROVED as of AyaNova 7.5* RI signature field** displays larger for ease of entry

***IMPROVED as of AyaNova 7.5* RI** signature parsing code added to handle unusual browser canvas implementations

NEW ClientRemover plugin makes it easy to remove one or multiple Clients and all their linked data such as Workorders, Quotes, PMs, and Units.

New Features
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***NEW* Work order form header area customization** - Major new feature allows you to hide fields and labels in the work order header area. *Many* of you have asked for the ability to hide unused fields on the work order form, now you can do that easily with a few clicks right in the work order form itself simplifying the work order form for your staff.

***NEW* Work order form sub section area customization** - Major new feature allows you to hide entire subsections on the work order form (Expenses, Loans etc) that you don't use in your company. This will simplify input and entry for your staff.

***NEW* Date and time fields time picker control** - Many people have asked for a drop down time picker control in AyaNova like we added to WBI as it's a fantastic time saver, we couldn't find one that was suitable so we wrote our own. It's simple and effective. The new drop down time picker component in AyaNova will save your staff a *lot* of time entering data in AyaNova.

***NEW* Work order form default start time** - New global setting that is a big time saver and convenience for those that would like to set a default start time in new scheduled user records.

***NEW* Schedule form default date** - AyaNova will "remember" the last time span you were viewing when you logged out and automatically go to it in a smart way* If you were last viewing the current day it will open on the current day. If you were last viewing a specific time period outside of the current day it will open to that same time period saving you time having to navigate to that time period again.

***NEW* Schedule form default open or closed** - AyaNova will default to the last setting used when you log out for the Open or Open and Closed workorders toggle button.

***NEW* Part inventory adjustments grid** - Expanding your inventory management abilities, the new Part Adjustments Items grid is where you can easily and quickly filter and sort as needed to obtain reports on parts manually brought into inventory.

***NEW* Main grids last row count default** - AyaNova will now remember the setting last used for the number of rows to display in grids and automatically use that setting when you next log in. This was a popularly requested feature. We originally put in the row filter to help people with slower equipment and larger databases however with all the speed improvements in AyaNova and in hardware and software platforms AyaNova runs on these days, for many users it's not as much of an issue and they just want to see all records always. This feature should alleviate that problem.

***NEW* Schedule form navigator bold dates** - This is a very handy new feature to make it easier to see at a glance what days in the month you have something scheduled without having to actually view that day, the date navigator now shows dates bolded that have one or more scheduled items. We've wanted to do this for a while and this feature was now practical due to improvements in the underlying scheduling components.

***NEW* Service workorder / Quote / PM** - When generating a service work order from source quote or PM, the WIKI page will also be automatically copied to the service work order which ensures that you are always getting all needed info with the generated service workorder.

***NEW* Localize on the fly from within the entry screen itself** - easily and quickly edit what label text shows for the entry screen you are viewing, as only the field labels showing will display.

***NEW* Show all... right-click grid option** - quickly display all units, service workorders, quotes and/or PM's records byright-clicking on the record in the grid

***NEW* Show all... menu option** - quickly display all units, service workorders, quotes and/or PM's records via the menu option Show all...

NEW Network Generator service log will now display the name of the registered database

NEW as of AyaNova 7.5 Schedule Marker grid in User navigation pane displays all Schedule Marker / Follow Ups assigned specifically to this user, to the Dispatch Zone this user is a member of, to the Region this user is a member of, to the Scheduleable User Group this user is a member of or if assigned to Global.

NEW as of AyaNova 7.5 Schedule Marker grid in Administration navigation pane displays all assigned Schedule Marker / Follow Ups for all users, all Dispatch Zones, all Regions and all Scheduleable User Groups or if assigned to Global

NEW as of AyaNova 7.5 Service workorder/quote/PM templates each now have a setting that will dictate when generating the order from the template, whether to use the part price in the template **OR** to use the current part price from the part record itself. Useful when a template was created before part prices were updated.

NEW as of AyaNova 7.5 ImportExportCSV now includes import and export for Part Categories, Priorities, Unit Servce Types, Workorder Statuses, Workorder Categories, Workorder Item Types and Rates records.

NEW as of AyaNova 7.5 ImportExportCSV Duplicate option now includes the ability to update existing Rates

Expanded Features
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***ADDED* Client notifications based on Workorder Status** - Previously you could send a notification to a customer if their work order's status had changed to a specific value. People loved this feature but wanted to do it for more than one status and so we've changed that area to a grid that allows you to select as many status changes as you wish. For example, you might want your client automatically emailed a client claim receipt report when workorder is accepted for service - so have a specific workorder status created for that; you might want the client automatically emailed when need their approval before continuing - so have a specific workorder status for that; so many possibilities!

***ADDED* Client notifications based on Quote** - New type of client notification when a Quote for a client is set to a certain status the client can automatically be emailed with a customizable message and copy of the quote report. For those that do a lot of quoting this can be a *HUGE* time saving feature.

***ADDED* User notification on quote created / updated** - Your AyaNova users can subscribe to be notified when a quote is created / updated. Schedule service as soon as possible to maintain revenue by being notified as soon as a quote is created or updated.

***ADDED* Unit display formats** - More name display options for those that wish to include more information in their reports regarding the unit - for example, not just the serial number but also the vendor, model number and model name.

***IMPROVED* Notification system** - Now problems with notification delivery via SMTP display a better error message simplifying troubleshooting email notification delivery.

***IMPROVED* Wiki pages last edit auditing** - The wiki page now features the record history button like all other objects in AyaNova making it easy to see who last edited and when.

***ADDED* Quote workorder status added** - A total of six different quote statuses are now available. As always, you can localize to what works best for your company, as the text used is just an example.

***ADDED* Part inventory adjustments grid** - Now you can print a detailed style report right from the grid for multiple items. Previously you could only print a detailed report from the individual adjustment item form.

***CHANGE* Object.Workorder removed** - simplifies security group settings. Do note if use WBI Client access, make sure to check your WBI Client security group settings

***IMPROVED* User name display formats** - Now includes additional selections that include the Region name. This means throughout AyaNova at a glance you can see what Region a user belongs to ensuring correct scheduling.

***IMPROVED* Schedule form user name column headings** - Now the Schedule form column headings conform to the global setting for user name display formats. This means you can not only view the user names in the format you choose but in conjunction with the new Region option for user name display formats you can include the region name making dispatching much easier.

***IMPROVED* Main grid form autorefresh** - To always keep you up to date, AyaNova auto-refreshes the main grids approximately every 5 minutes. But for those that are working their way through a large list of records directly in a grid, you can now turn Auto-refresh off if needed.

***CHANGE* refresh selectable items in Global Settings** - Can now refresh drop down lists such as Tax Codes when editing via Global Settings without having to exit out of AyaNova and back in before able to see new entries.

***IMPROVED* Notification grid row resize** - Messages in the notification delivery log grid are often multi line, before you could hover the mouse over to view all the lines but it wasn't ideal, now the rows can simply be resized bringing this grid into line with all the other main grids in AyaNova.

***IMPROVED* Popup notifications** - Completely new user interface for popup notifications, now displays as a "billboard" that slides up in the lower right corner and slowly fades. Hovering the mouse over it will keep it in view, clicking on it will open a detailed list of all popups. Users of many other popular software applications will be immediately familiar with this style of interface.

***IMPROVED* Banked service hover display in workorder** - Major improvement, now shows *exactly* which service bank is in effect for that particular item and the balance. Takes into account whether a unit is selected with it's own service bank or if the client or head office service bank is in effect.

This will be a tremendous time saver to service people entering data in a service bank scenario.

***IMPROVED* Schedule user** - Now a warning displays if you attempt to schedule a technician for a client who is not visible to that technician due to differing regions. No more accidentally scheduling a tech who is unable to view the scheduled item for that client. Note that it does not prevent you from doing this, just warns you; some have requested that they still be able to do it for various reasons.

***IMPROVED* Service workorder / Quote / PM** - To help you make sure you see what quantity was quoted in a Quote or required in a PM, the Quantity Quoted or Quantity Required column in the Parts subsection of the generated workorder will now always display to the left - so no chance of accidentally missing the quantity required.

***IMPROVED* Service workorder / Quote / PM** - A work order generated from a quote or PM that has a serialized part quoted no longer requires you to delete the generated serialized part record then re-enter it to select a serial number, now you can just select the serial number right on the generated line.

***IMPROVED* Service Workorder** - A work order that has a unit meter reading attached to it was previously undeleteable. Now when the work order is deleted if there is a unit meter reading it is deleted automatically as well allowing the work order to be deleted.

***IMPROVED* Service workorder / Quote / PM** - Print menu option in workorder entry screen set so that now you don't have to actually click on the drop down arrow, can just click on the menu option itself

***IMPROVED* Service / Quote / PM Templates grids** - With our continual improvement of design from the user's viewpoint, we have now included the ability to open the template by clicking on it's description in addition the previous method of clicking on it's number.

***CHANGE* Service workorder / Quote / PM grids** - If Custom Fields not enabled for workorder item, the Custom Fields grid will no longer display in the navigation pane

IMPROVED* Login screen no longer always *on top - the AyaNova login screen will no longer force itself to on top in front of existing other programs, which is useful if you are in the middle of working in something else and not yet ready to log in.

***CHANGE* menu options and subsections that do not have data entered are now grayed out** so is much easier to distinguish what has additional data or not

***CHANGE* Schedule screen's not assigned column now displays text instead of "-"** so more obvious to the logged in user the column's use.

ADDED as of AyaNova 7.4 Command line option to use your operating system's default font in AyaNova.

ADDED as of AyaNova 7.5 Added the bool field Completed to the Schedule Marker / Follow Up screen with which can filter and sort in the new Schedule Marker grids

ADDED as of AyaNova 7.5 Purchase Order detailed type report templates now includes Unit of Measure datafield in the PurchaseOrderListPurchaseOrderList dataset which can be easily dragged into any existing/new Detailed type report template from the Purchase Order grid

ADDED as of AyaNova 7.5 ToMSSQL now reports on specific broken GUIDs if applicable, to facilitate troubleshooting of record issues in a Firebird database.

ADDED as of AyaNova 7.5 Show all... - Right-click grid option and menu option added for Loan Items to have AyaNova automatically filter and display the workorders where this loan item was previously and presently selected.

ADDED as of AyaNova 7.5 Added two additional Unit Display Formats in Global Settings to facilitate those without Unit Models to distinguish the correct unit to select by its Description.

IMPROVED as of AyaNova 7.5 Wo/Quote/PM template's Wikipage AND wikifiles will now be replicated to the generated wo/quote/PM from the wo/quote/PM template.

Basic Installation

2 Basic Installation

2.1 AyaNova computer requirements

Minimum AyaNova desktop program requirements:

- Windows operating system XP and newer with latest service packs from Microsoft applied
- Latest Microsoft .Net Framework 4.x pre-installed with all service packs applied

    - Yes, AyaNova will run on older operating systems such as Windows XP SP3 as well as on the latest operating systems (i.e. Windows 10, Windows Server 2012, etc)
    - The AyaNova installation will check your computer to see that you do have .NET 4 installed.
    - You can also download and install the latest Microsoft.NET Framework 4 via your Windows Update

AyaNova minimum hardware requirements:

- 1GHz or higher Pentium-compatible CPU with 500MB RAM or higher

    - The above is **minimum** hardware requirements. What this means is, your AyaNova will always run faster on a faster computer (more memory, higher processor, etc).
    - AyaNova is hardware scalable - performance is **directly related** to the performance of the computer where the AyaNova database is. Obviously a faster computer is going to be able to respond more quickly.
    - If you are encountering any perceived slowness in running AyaNova, it may be time to update your hardware or purchase a newer computer.

AyaNova networking requirements:

- If configuring for network use, refer to the appropriate Help topic for the type of database server configuration you will be using - network Firebird SuperServer 2, network SQL Express 2005 and higher or network SQL Server 2008 and higher

- **Note**: The AyaNova database may be configured for use on a Linux server using the Linux Firebird 2.1.1 SuperServer from http://firebirdsql.org

Backup Hardware

- Backing up your data properly is very important. In the event of database corruption, hardware failure, fire, theft or disaster it will enable you to get up and running again quickly.

- Refer to the Help topic on backup and restore if using the default stand-alone installation
- Refer to the Help topic on backup and restore if using the network Firebird 2 configuration
- Refer to the Help topic on backup and restore if using the network SQL Express or SQL configuration

2.2 Default AyaNova installation

Read through all instructions first before proceeding.

NOTE: These same single computer steps are **also** used in the initial steps on the server when first configuring for network use. Refer to Network Configuration for details on configuring AyaNova for network use.

If you are trying out AyaNova follow these instructions for stand alone setup, you can also try the network configuration later once you've evaluated AyaNova

1. AyaNova requires the latest Microsoft updates on your computer as well as **Microsoft .NET Framework 4**

2. If you haven't already, log into your computer as you normally do

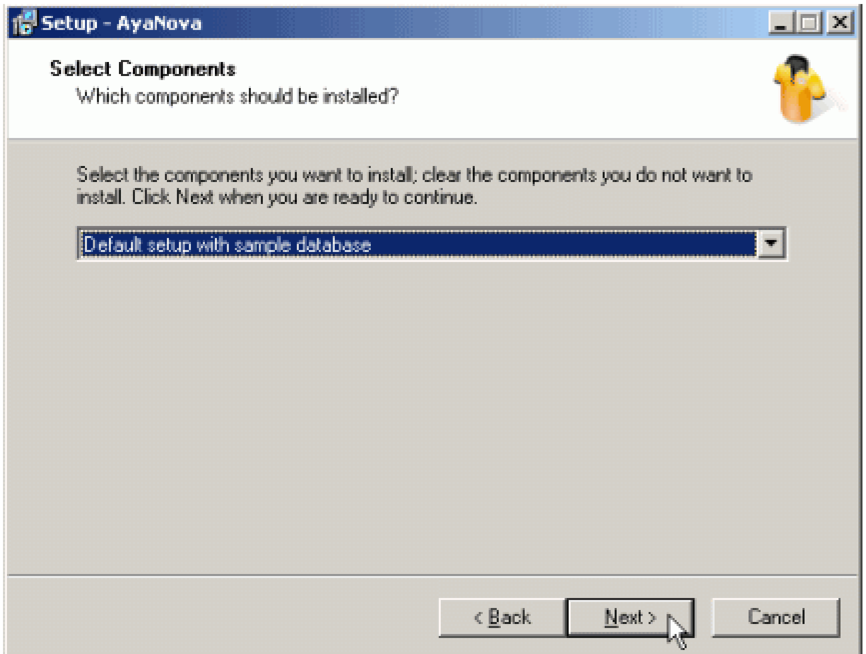
- Note, if you perform **any** installation of AyaNova via remote access and encounter an issue, remove and repeat the steps when physically at the computer and not via remote.

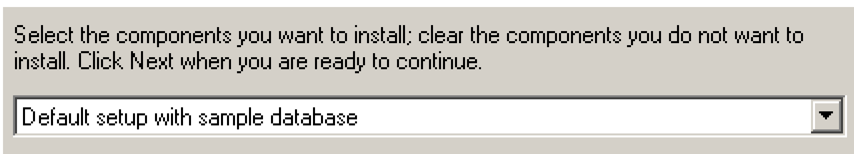
3. Shut down any other programs before running setup.

4. Download the AyaNova installation file AyaNovaSetup.exe from the AyaNova web site http://www.ayanova.com/download.htm to a temporary folder on your hard drive

5. Double-click the AyaNovaSetup.exe file to begin the installation

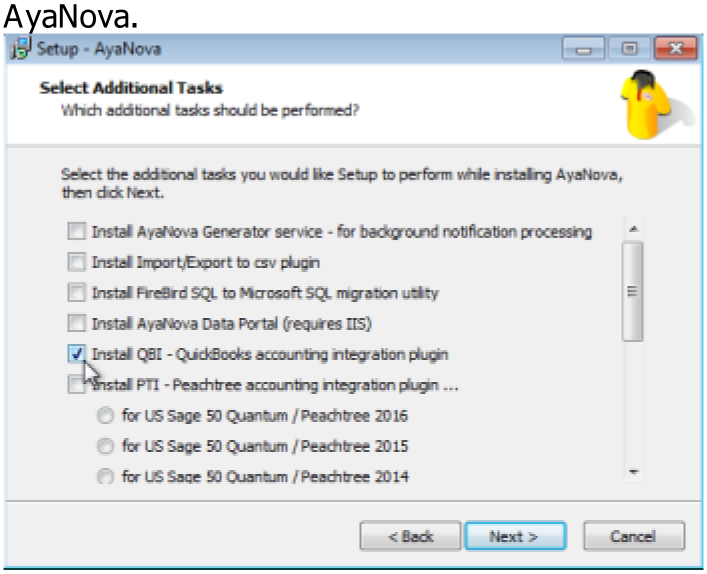
6. The default option is "**Default setup with sample database**". Click Next





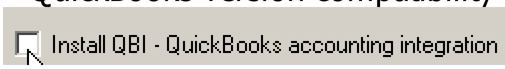
NOTE: the network setup option is **ONLY** if you have performed the preceding steps as per the network steps for the specific AyaNova database server setup you are following (i.e. network Firebird Server, or network SQL Express or network SQL Server)

7. The installation shows additional AyaNova optional products you may be interested in trying out or using when installing the default stand-alone AyaNova.

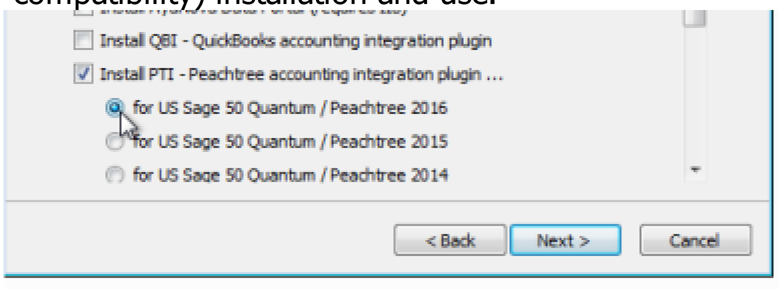


If you are not installing any of the optional items skip to step 9.

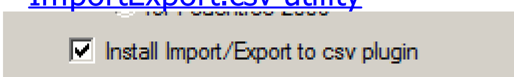
- Refer to the QBI (QuickBooks interface) Help file for details on requirements (QBFC7.0, QuickBooks program also installed to the local hard drive, QuickBooks version compatibility etc) installation, and use.



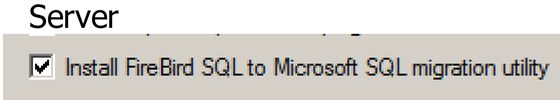
- Refer to the PTI (Peachtree interface) Help file for details on requirements (Peachtree program also installed to local hard drive, Peachtree version compatibility) installation and use.



- This installs client, part and unit import/export utilities. See also: ImportExport.csv utility



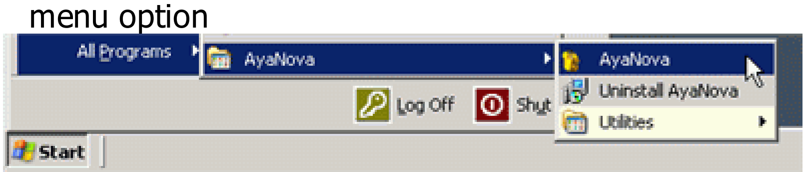
- This installs the Firebird to SQL database creation utility. You **only** need this installed on a server if configuring for network use with SQL Express or SQL Server



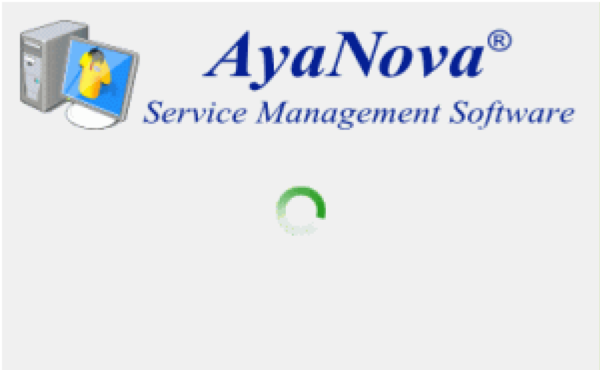
8. Once the installation completes successfully, you can now start the AyaNova program with the installed sample trial database

- Run AyaNova from the desktop icon

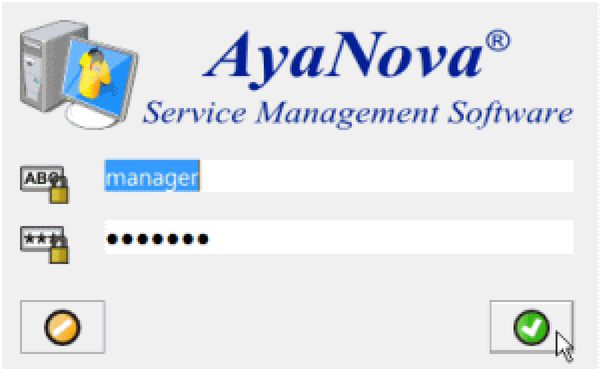
- **<u>Or</u>** run AyaNova from the Start -> All Programs -> AyaNova -> AyaNova menu option



9. When started, AyaNova will initially pre-load items it needs for faster access later.



10. The AyaNova login screen will appear.



- If just installed AyaNova, the AyaNova Administrator username and password will be pre-entered for you
- Test logging in as other sample users - see the Sample Users and Passwords for login names and passwords.

- Once AyaNova is licensed (either temporarily or with a paid for license) the fields will be blank for you to enter manually

Important:

- These same steps are also used when first configuring for network use. Refer to Network Configuration for details on configuring AyaNova for network use once this basic default installation is performed.

- The AyaNova program files are installed by default to C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova (or C:\Program Files\ if 32 bit) folder

- The AyaNova database file AYANOVA.FDB is installed by default to %AllUsersProfile%\AyaNovaData folder

    - On a Windows 7 or newer operating system, this usually is the C:\ProgramData\AyaNovaData folder
    - If you can not find the ProgramData folder, it may be that it is hidden. Usually to unhide, just Control Panel > Folder Options > View Tab > Select Show hidden folders or do a search online
    - On very old operating systems such as XP or 2003 operating system, this usually is the C:\Documents and Settings\All Users\Application Data\AyaNovaData folder

- Refer to Backup & Restore if using stand-alone single computer default installation

2.3 Erase the AyaNova database

Important:

- When you run the AyaNovaSetup.exe file, the AyaNova program files are installed AND a sample database with sample data already entered so your trial of AyaNova is not just a blank slate, and you can get an overview of how to use by reviewing the data already entered along with the information and tutorials in the manual.

- We **strongly recommend** that you **keep** that sample data while **first** familiarizing yourself with AyaNova as you follow along with the tutorials

- The following are **not** erased:

    - Existing licenses *any Activation Key licenses previously applied are maintained in the database*
    - Global Settings
    - Default AyaNova Administrator user *login username and password are not changed from when the Erase steps are performed*
    - Default AyaNova Administrator security group
    - Tax Codes
    - Regions
    - Default warehouse
    - Localized Text *any custom locales will not be lost when you erase*
    - Existing report templates *any changes or customizations you made will still be there after you erase*
    - Workorder starting number will be +1 of last entered workorder number

Once you have followed along with the tutorials and familiarized yourself with every feature using the sample data, and now are ready to wipe the sample data and get started, **perform the following steps to erase**:

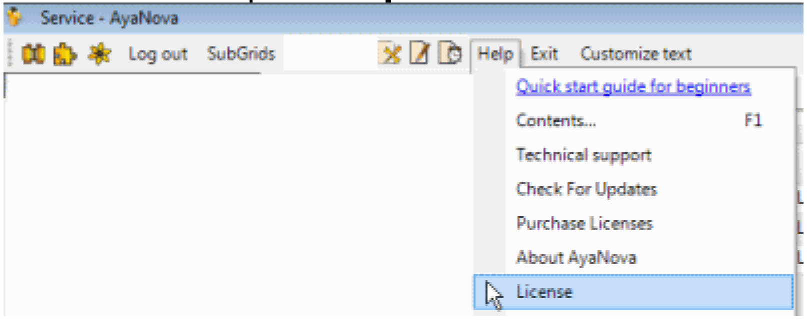
1. Ensure all users, including yourself are not logged into AyaNova or accessing the AyaNova database in any way.

2. Be physically at the same computer where the AyaNova database resides: **Do not be logged into the computer via remote access**

3. Log into AyaNova as the AyaNova Administrator

- Default username is ***manager*** with password ***letmein*** if you have not yet changed it
- You can not erase the database as any other user, even a user who is a member of the AyaNova Administrators group
- This is also why strongly recommend you edit the default username and password of the AyaNova Administrator once you have licensed AyaNova to protect your database from accidental or malicious acts

6. Select the menu option **Help -> License** from the main menu bar



7. Select the menu option **Erase Entire AyaNova Database**

8. Select **YES** to proceed if this is what you wish

9. Allow the process to complete without interruption. AyaNova will close

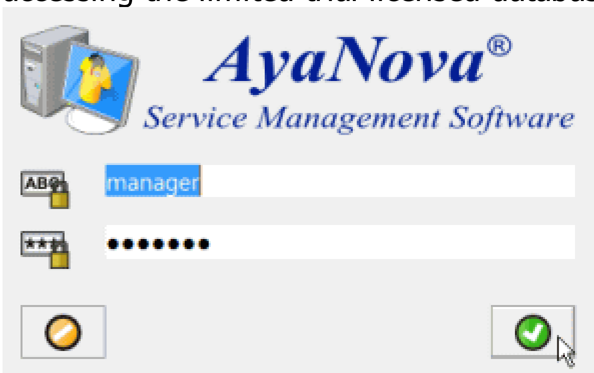
10. Run AyaNova again, and log in as the AyaNova Administrator

11. You will now want to enter Global Settings, part warehouses, dispatch zones, security groups, users, rates, contracts, clients, unit models, units and other objects that you will use in AyaNova - review the Suggested Order of Setting Up AyaNova Once Licensed.

Your first workorder number will default to +1 of the last workorder number before you deleted the database. It is not possible to restart at number 1 even though all data is deleted.

2.4 Sample users and passwords

When you first run AyaNova after installing it, the log in screen will display the AyaNova Administrator's username and password pre-entered for you as it is accessing the limited trial licensed database:



To complete the login, press the OK icon 

To cancel logging in, press the CANCEL icon 

The following are usernames and passwords for the evaluation trial AyaNova that you can also log in as to check out how what regions the user belongs to, plus what security group settings affects what that user has access to:

Username:	Password:	A member of Security Group	Locale:	Region:
test	test	AyaNova Administrator	English	ALL REGIONS
eva	eva	Read Only	English	REGION 2
hank	hank	Technicians	English	REGION 1
manager	letmein	AyaNova Administrator	English	ALL REGIONS

As the sample users in the trial AyaNova can not be edited, we have included three usernames that use the additional sample locales so you can review AyaNova using the sample language locale of your choice. Also note once AyaNova is licensed, you can assign further customized locales to users.

Username:	Password:	A member of Security Group	Locale:	Region:
german	german	AyaNova Administrator	Deutsch	ALL REGIONS
spanish	spanish	AyaNova Administrator	Español	ALL REGIONS
french	french	AyaNova Administrator	Français	ALL REGIONS

And if you are testing out the optional add-on WBI, use the following client logins to see what the client version of WBI looks like for a client (or head office) to request service, view their requests, and view their service workorders.

Username:	Password:	A member of Security Group	Locale:
abc	abc	Client user	English
molly	molly	Head Office Client user	English

The AyaNova Administrator should **only** ever be used for configuration and initial settings when you purchase AyaNova. You would log in as the AyaNova Administrator to initially import an older version of AyaNova data, to set up Global Settings, create Security Groups, create users, apply the AyaNova Activation key, and erase the database.

What security group a user is a member of, denotes access to various AyaNova features. See also: Security Groups and Users

It is highly recommended that different users do NOT log in with the same username and password at the same time. One of AyaNova's many features is the ability to customize grid and form layouts, and if two instances of the same username are logged in, it is possible that settings made when logged in, in one instance, will not be saved due to the second instance overwriting those settings. Also refer to the section on Grids.

NOTE: Event Generator does not run in stand-alone default installation when logged in as the AyaNova Administrator (default username *manager* with default password *letmein*). Log in as another user when in the default stand-alone installation to allow notifications to be sent out and preventive maintenance orders to be automatically created

2.5 Evaluation trial AyaNova restrictions

The unregistered evaluation trial AyaNova has the following restrictions with all other features enabled:

1. 45 day trial
2. Restricted to 5 (five) scheduleable resources

- We encourage you to initially use the sample data in the database so you can test out all features of AyaNova without having to enter in data to start with.
  - Although the sample data provided with the trial AyaNova is loosely geared towards that of a computer service organization, AyaNova has powerful features to help manage all aspects of service and repair for any organization that provides service of any kind including auto repair, plumbing, locksmith, alarm and security, HVAC, appliance repair, medical equipment repair, electronics repair, computer service, lawn care, property management, schools, municipal maintenance, and many more.
- Once you have familiarized yourself using the sample data, you can erase the database and start fresh with your own data.
- Once you have determined that AyaNova meets your needs, and you wish to use it for your service organization, purchase licenses for the number of your schedulable users.

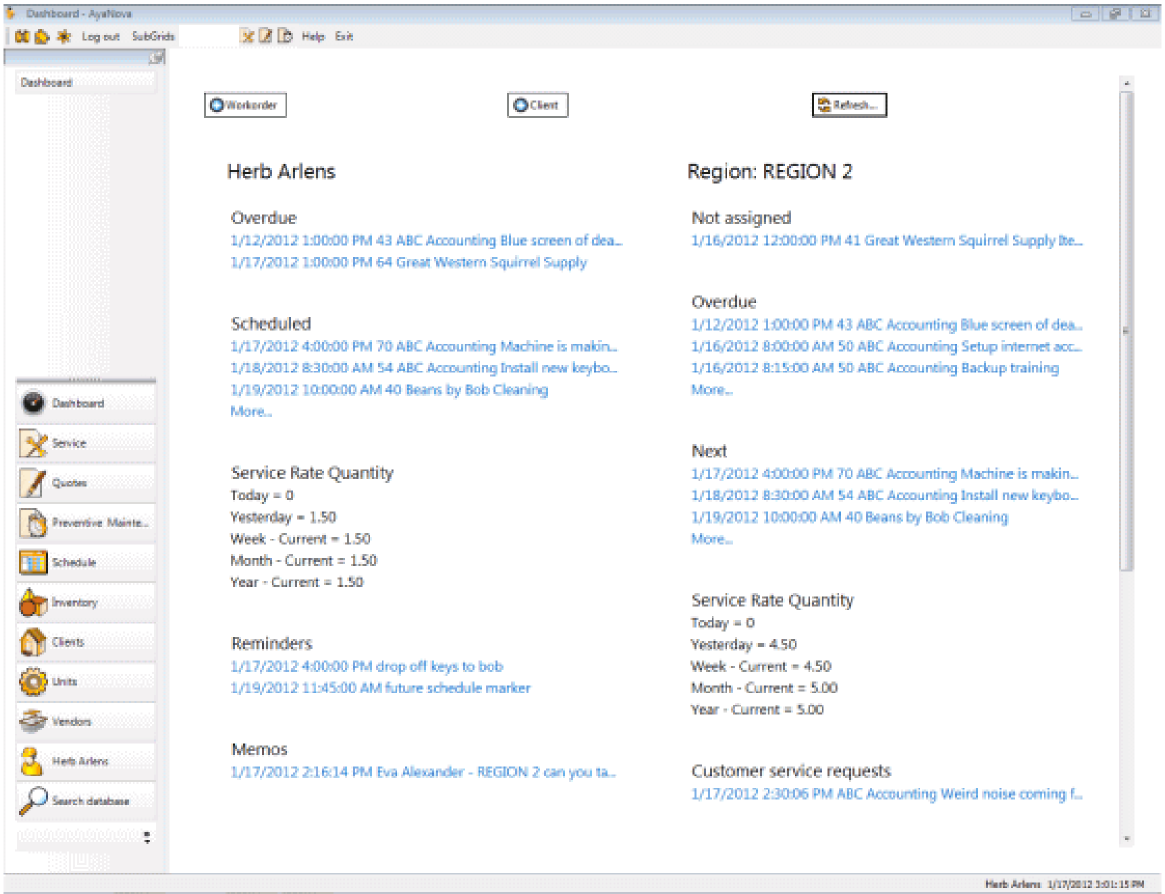
- There is no need to download anything further as you will be sent activation instructions to activate the AyaNova database that you have already downloaded and installed.
- Refer to the menu option in the AyaNova program under Help for purchasing information. Or visit us at our website https://www.ayanova.com for contact information, for answers to common questions, and for our AyaNova Support Forum which in addition to providing support, includes topics and information posted by other AyaNova users.

Tips & Tricks

3 Tips & Tricks

3.1 Dashboard

A new feature added with AyaNova 7.2 is the **Dashboard**



What shows within the Dashboard depends on whether the account you are logged in as is a schedulable resource or not (set in your User entry screen), and what your security group rights are to Service Workorders, Schedule Markers, Memos, and Customer Service Requests.

If logged in as a user that is a schedulable resource, the Dashboard is where you can quickly see at a glance, as well as access:

- **Overdue** provides links to service workorders that were scheduled prior to today's present time and date as a reminder so that you do not forget to enter your labor, parts, etc as well as checkmark Service Completed.

- **Scheduled** provides links to service workorders that are scheduled after today's date and time

- **Service Rate Quantity** shows at a glance totals for today, yesterday, current week, current month and current year of your Labor hours (or whatever the unit charge is that you use). The label text Service Rate Quantity is taken from your Labor subsection of your service workorder entry screen.

- **Reminders** provide links to the next three future dated Schedule Markers or Follow Ups assigned to you as a schedulable resource.

Otherwise quick access for company information (name displayed is from your registered license) or Region specific name is displayed if the user logged in is assigned to a specific Region:

- **Not assigned** provides links to service workorders that have not yet been assigned to any schedulable resources.

- **Overdue** provides links to service workorders that were scheduled to schedulable resources of this company/specific region prior to today's present time and date. Very useful as a reminder for both the dispatch manager and schedulable resources

- **Next** provides links to service workorders that are scheduled after today's date and time for schedulable resources of this company/specific region

- **Service Rate Quantity** shows at a glance totals for today, yesterday, current week, current month and current year of schedulable resources of this company/specific region Labor hours (or whatever the unit charge is that you use). The label text Service Rate Quantity is taken from the Labor subsection of your service workorder entry screen.

- **Customer Service Requests** provides links to the next three not yet accepted customer service requests.

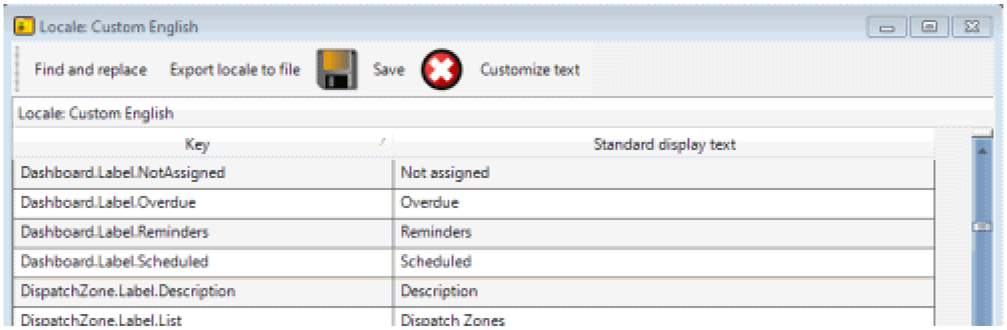
Which screen shows first on login:

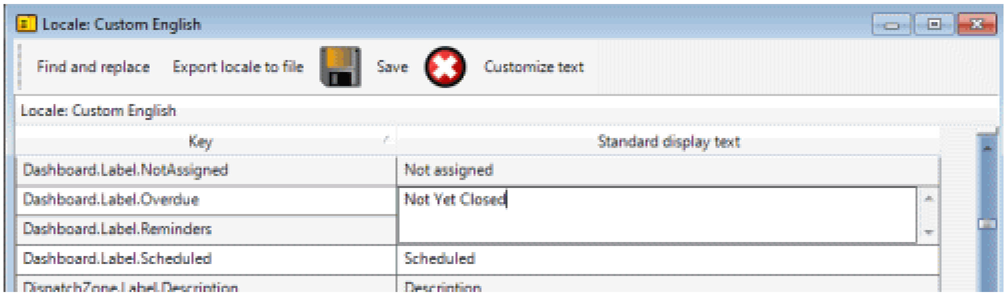
As with the other navigation pane grids of AyaNova, if viewing the Dashboard when exit out of AyaNova, the Dashboard will be the first screen that displays when you next log in.

Customize label text:

As with all labeling in AyaNova , you can also localize any of the labels test to what works **for you and your company**.

For example, you can localize what is presently labeled Overdue to instead be labeled Not Yet Closed.
Do refer to the tutorial on editing a custom locale for how to details.

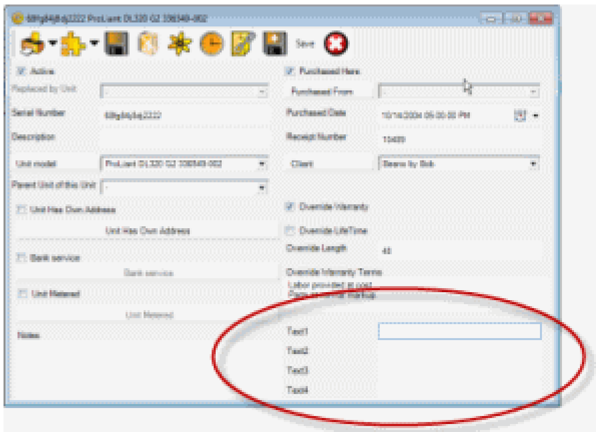


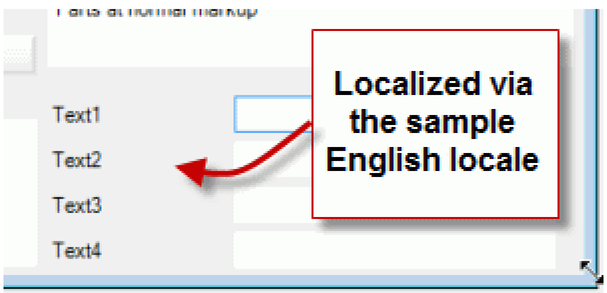


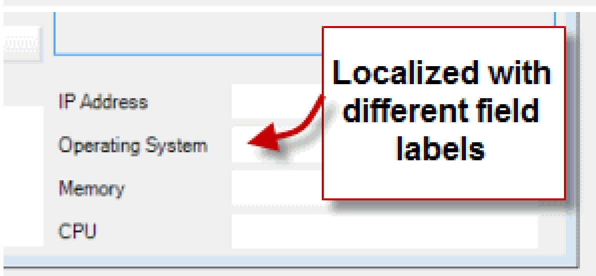
3.2 Localize field labels

One of the many features of AyaNova is the ability to have the labels in AyaNova display what text works best for your service type and company.

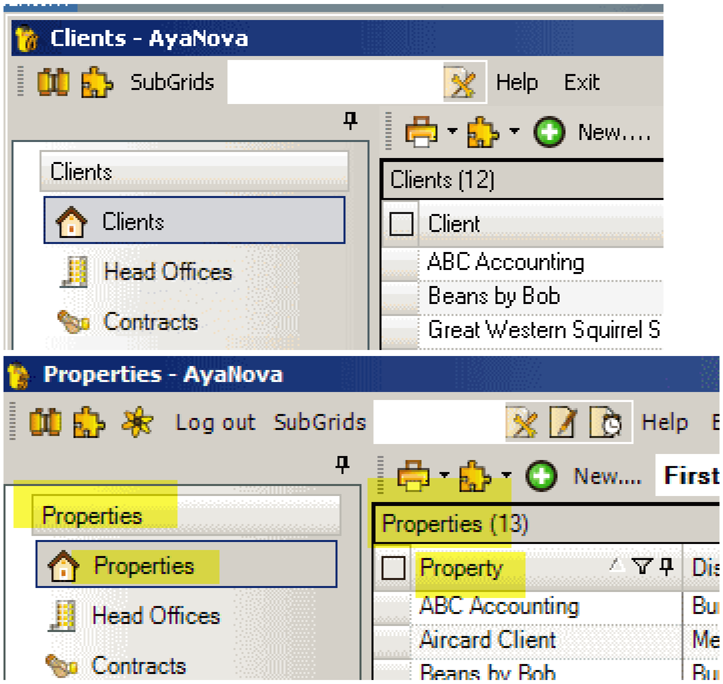
- For example, the field that is presently labeled Internal Reference # in the Service Workorder entry screen can be labeled something else - perhaps a label for other data that you want to always have entered for every workorder







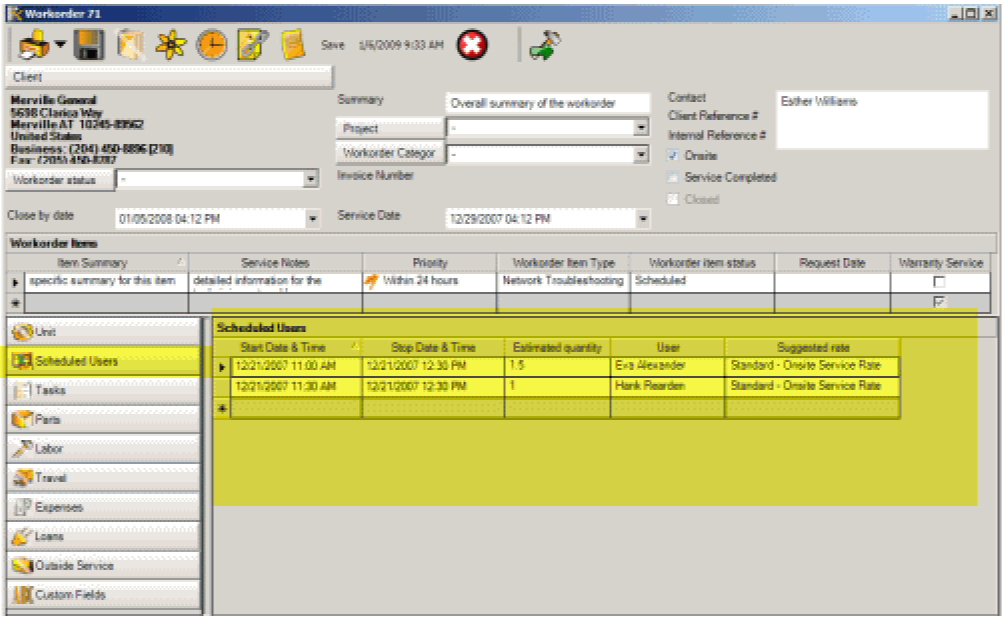
- Or another example, you might provide property management service, so where AyaNova presently is localized to Clients and Client, it may make more sense for your type of service if these were labeled as Properties or Property.



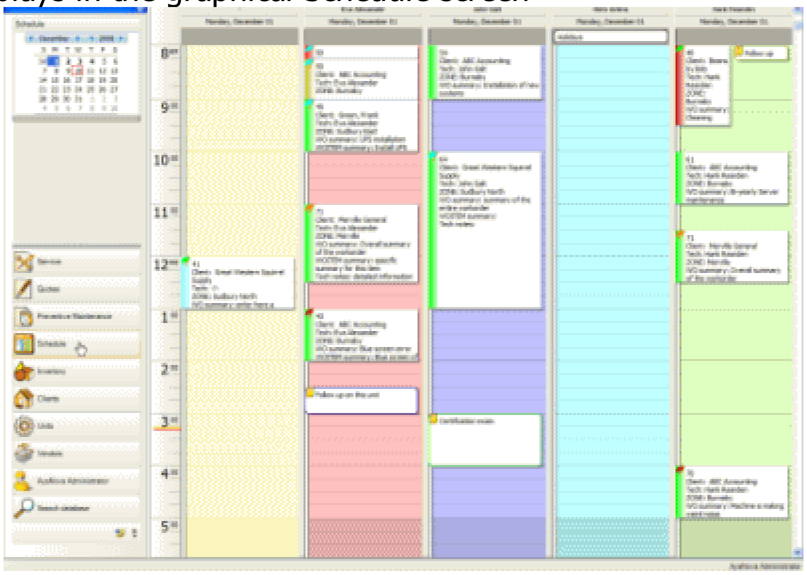
- See the [How do I create new/customize an existing locale?] for a walk through example of localizing in AyaNova with more details in the [Localized Text Designer] section.

3.3 Scheduling

Schedulable users are scheduled within the service workorder in the Scheduled Users subsection of the workorder entry screen.



What is scheduled in the Scheduled Users subsection of the service workorder also displays in the graphical Schedule screen

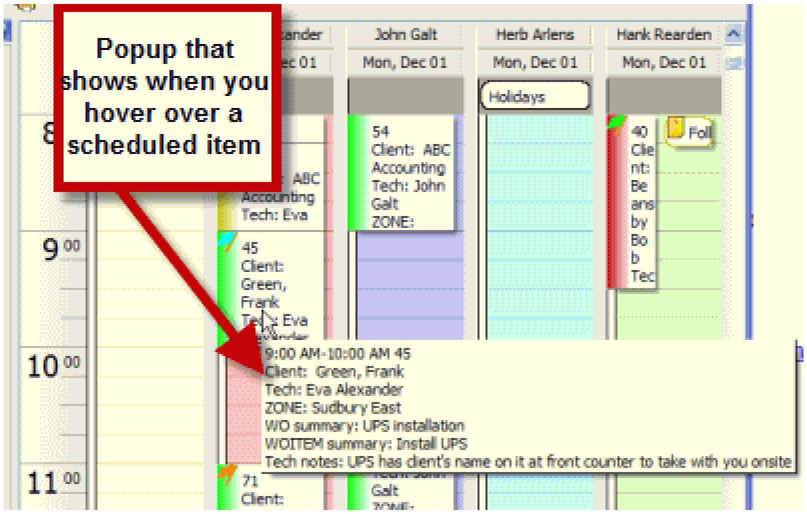


Refer to the following sections for details on creating a service workorder and scheduling

[Creating new workorder for a client](#)

Creating new workorder for a unit
What do I use a service workorder for?
Create a new Service Workorder
Service Workorder - Scheduled Users subsection
Schedule Screen
Basic overview of a workorder
How do I schedule a user for a new workorder item via the Schedule screen?

3.4 Edit what displays in popup on the Schedule screen



When you hover your mouse cursor over a scheduled workorder item on the calendar, AyaNova will "pop-up" a summary of what the workorder item is about.

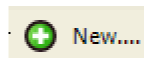
- What displays in this popup is dependant on what you have set in your Global Settings for the Workorder Item Summary Template
- See the [How do I edit what pops up on the Schedule screen for a workorder item?] for a walk through on how to edit what displays here.

3.5 Creating new workorder for client

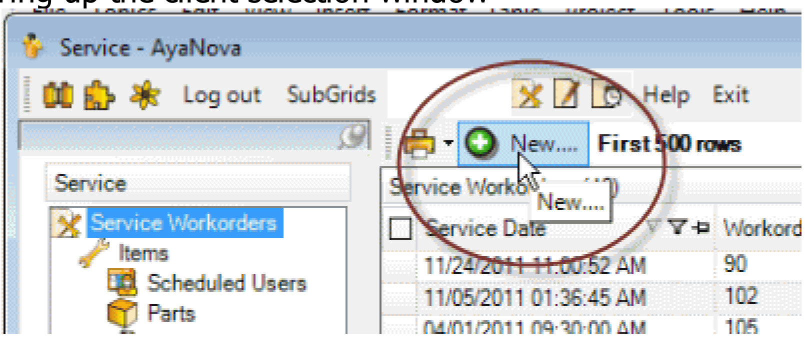
There are many ways to quickly create a new workorder for a client:

1. **Use the New... menu option on the Service Workorders grid**
2. **Use the Client Finder to quickly list the client for selection**
3. **Right-click on the client's name on any grid**
4. **Use the Search Database to quickly find the client and right-click on it**
5. **Select to create new workorder via Dashboard**

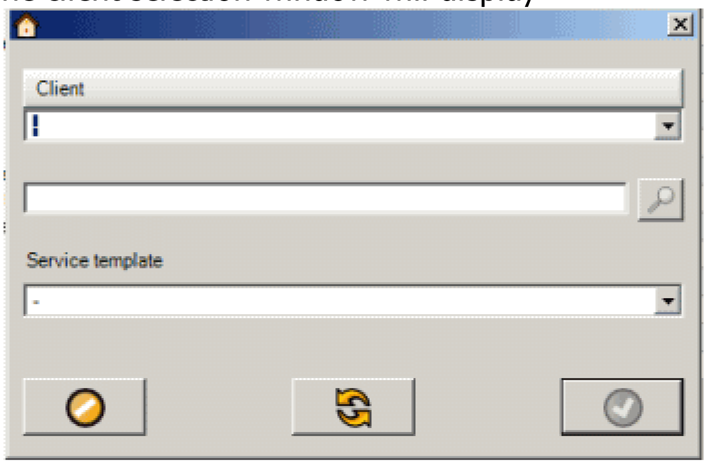
1. Use the New... menu option on the Service Workorders grid

- In the Service navigation pane grids, select the 

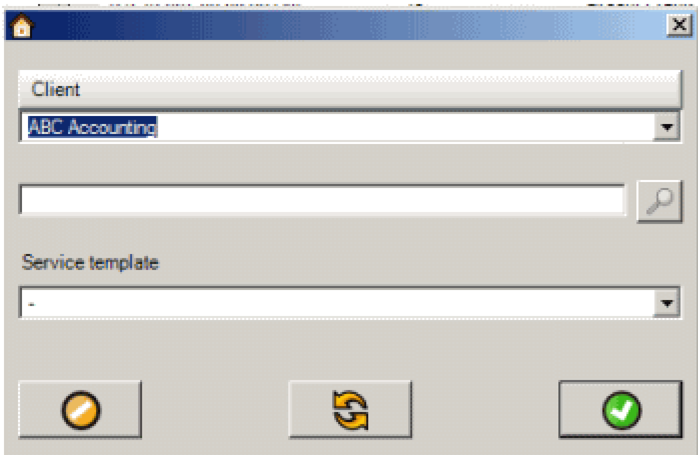
menu option to bring up the client selection window



- The client selection window will display

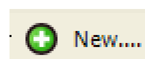


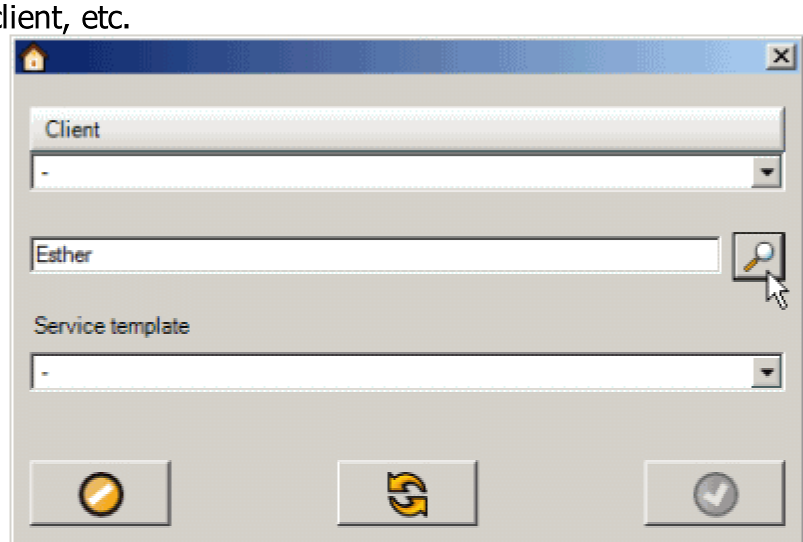
- Drop down and select the client from the selection list and create the new workorder by selecting the green OK checkmark.



2. Use the Client Finder to quickly list the client based on search results

For example:

- You want to create a new service workorder for a client but only received their personal name, not the company's name
- In the Service navigation pane grids, select the  menu option to bring up the client selection window
- Enter in text into the Client Finder field and select the find button. This text that you enter could be text entered in a previous workorder for this client, text in the client's entry screen, text in a unit entry screen owned by this client, etc.



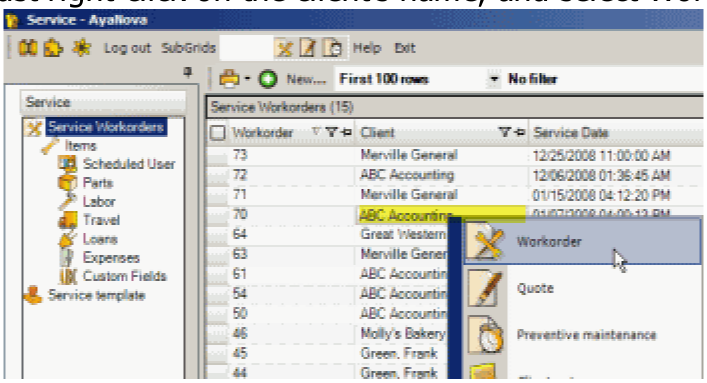
- Clients will now be listed in the selection list that have this text entered in one of their related objects
- Select the client and create the new workorder

See also: [Client Finder]

3. Right-click on the client's name on any grid

For example:

- You are presently viewing the Service Workorders grid.
- You want to quickly create a new workorder for the client Beans By Bob
- Just right-click on the client's name, and select Workorder.

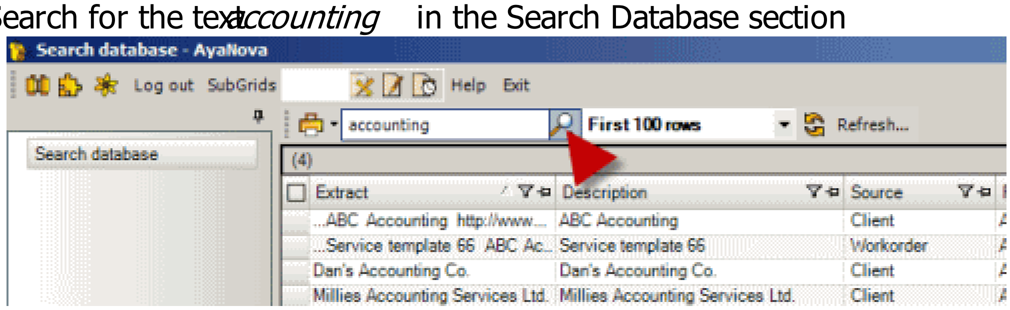


- The client selection window for a new service workorder will appear with that client already selected. Select a template for the workorder if desired, and click on the green OK checkmark to open up a new service workorder entry screen for this client.

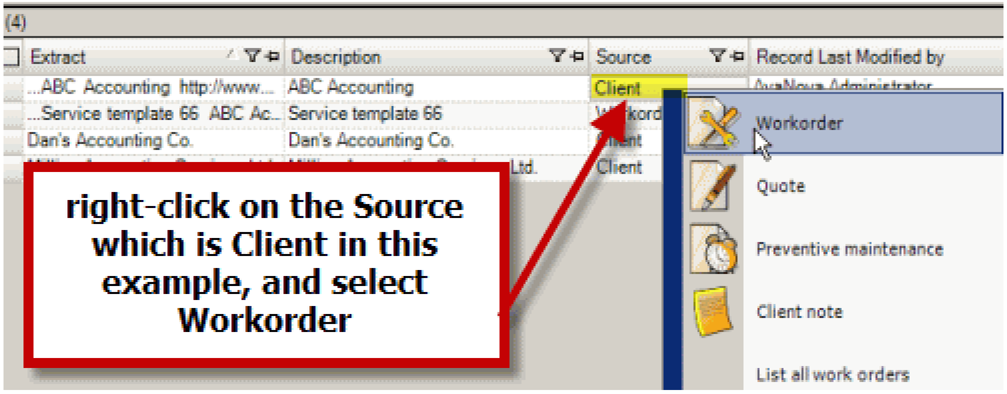
4. Use the Search Database to quickly find the client and right-click on it

For example:

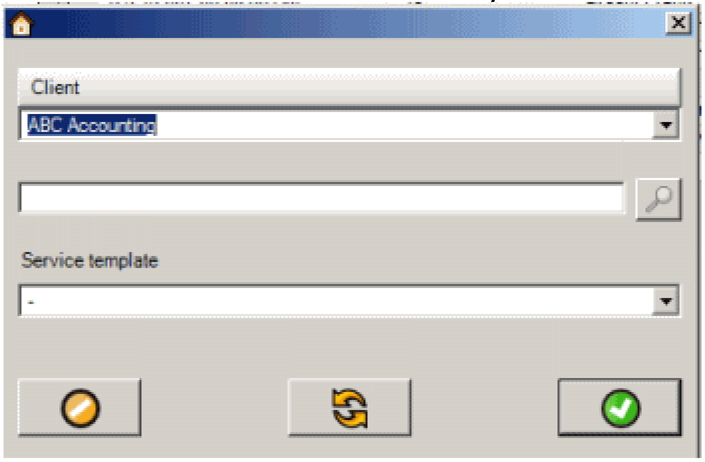
- You want to quickly create a new service workorder for the client that has Accounting in its name
- Search for the text *accounting* in the Search Database section



- Just right-click on the Source for the client you want, and select Workorder.

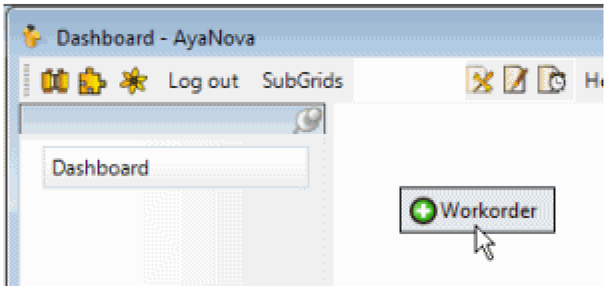


- The client selection window will appear with that client already selected for you. Select a template if desired and the green OK checkmark to open up a new workorder with that unit already selected.

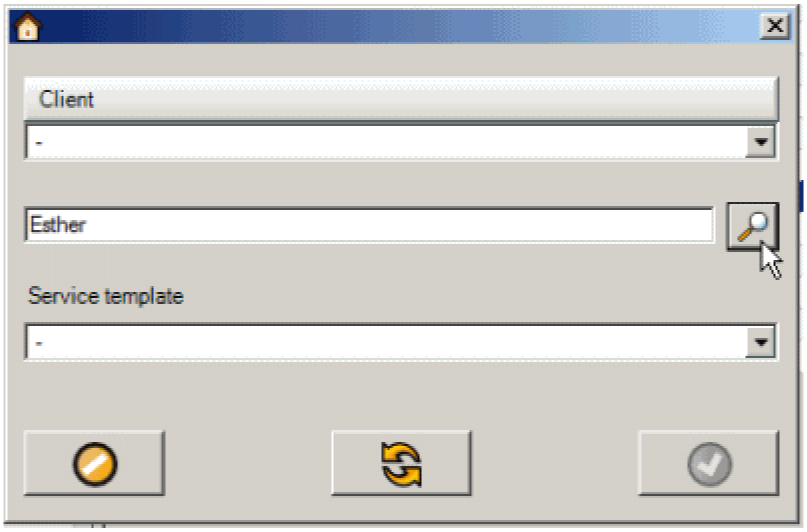


5. Select to create new workorder via Dashboard

a. From the Dashboard, select the menu option to create a new workorder



b. The client selection window will appear. Select an existing client, [create a new client if not yet entered](), or use one of the methods already covered above to find the client for selection


Client
-
Esther
Service template
-

3.6 Creating new workorder for a unit

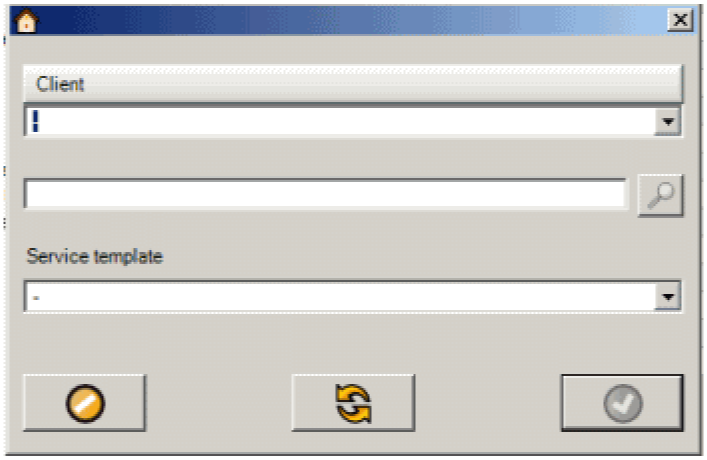
There are many ways to quickly create a new workorder for a unit:

1. **Use the New... menu option on the Service Workorders grid**
2. **Use the Client Finder to quickly select the client for the workorder that will be for the unit**
3. **Right-click on the unit's name on any grid and select Workorder**
4. **Use the Search Database to quickly find the unit and right-click on it and select Workorder**

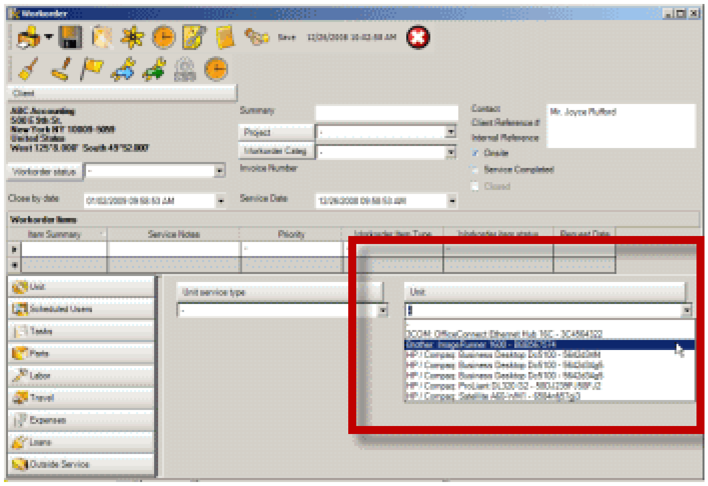
1. Use the New... menu option on the Service Workorders grid

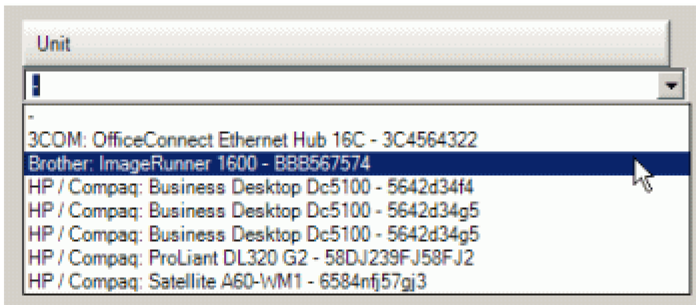
- In the Service navigation pane grids, select the 

menu option to bring up the client selection window
- Drop down and select the client that "owns" the unit and create the new workorder

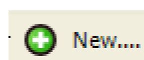


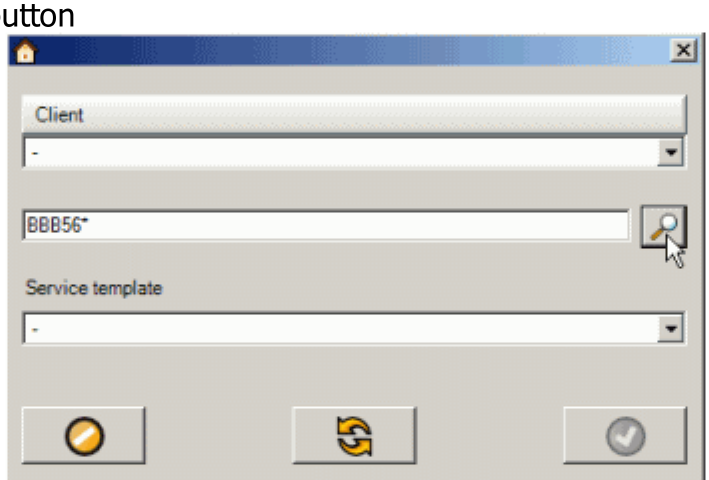
- In the new workorder, drop down the Unit selection and select the unit





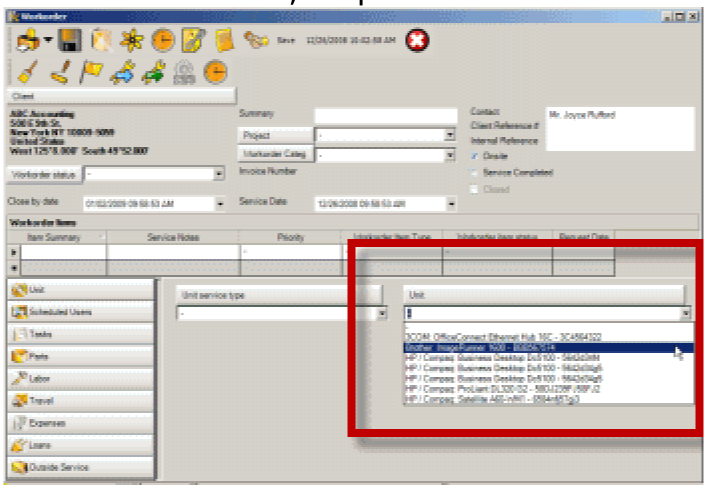
2. Use the Client Finder to quickly select the client for the workorder that will be for the unit

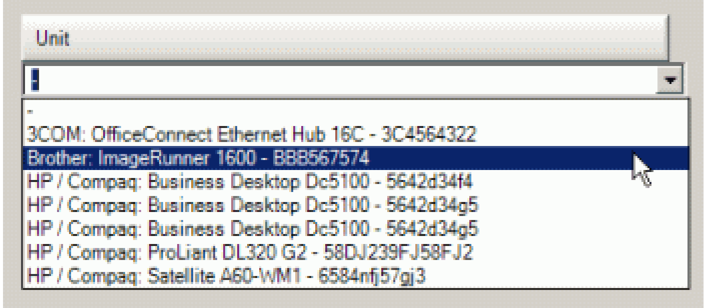
- In the Service navigation pane grids, select the  menu option to bring up the client selection window
- Enter in any text that you may have entered regarding that unit in the Client Finder field (for example the unit's serial number) and click on the finder button



- Clients will now be listed in the selection list that has this text entered in one of their related objects such as the unit entry screen.
- Select the client and create the new workorder

- In the new workorder, drop down the Unit selection and select the unit



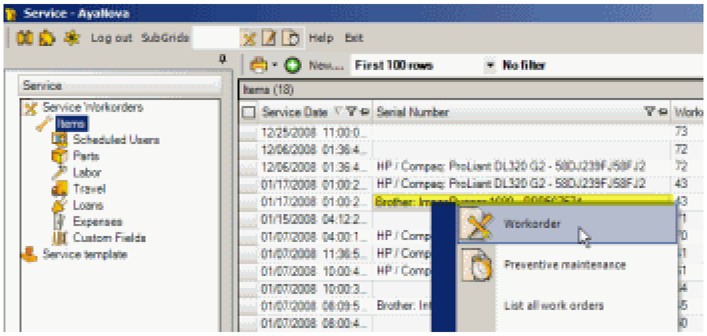


See also: [Client Finder]

3. Right-click on the unit's name on any grid and select Workorder

For example:

- In any grid where the unit is listed, right-click on the unit's serial number and select Workorder
- The client selection window for a new service workorder will appear with the client that "owns" that unit already selected.

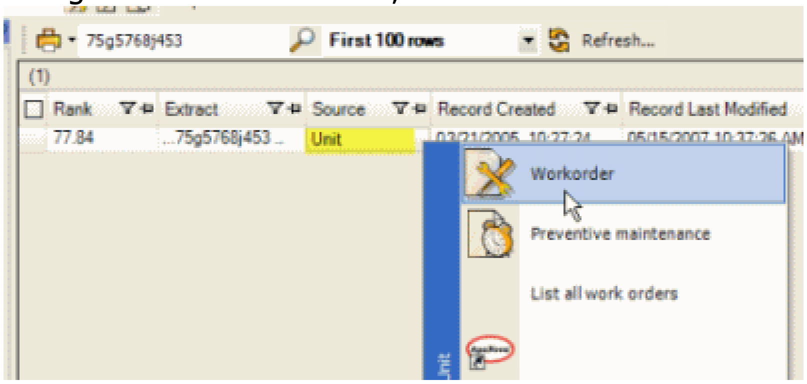


- The client selection window will display with the client that "owns" this unit already selected
- Select a template for the workorder if desired, and OK to open up a new service workorder entry screen with that unit already selected.

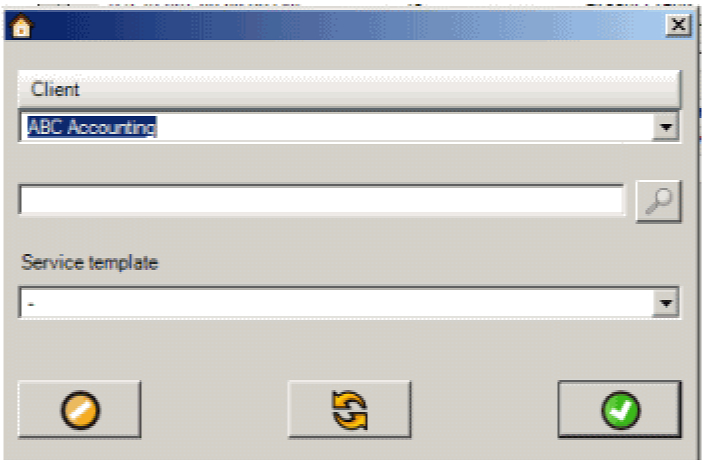
4. Use the Search Database to quickly find the unit and right-click on it and select Workorder

For example:

- You want to quickly create a new service workorder for the unit with serial number 75g5768j453
- Search for 75g5768j453 in the Search Database section
- Just right-click on the Source, and select Workorder.



- The client selection window will appear with the client that "owns" this unit already selected for you. Select a template if desired and OK to open up a new workorder with that unit already selected.


Client
ABC Accounting
Service template

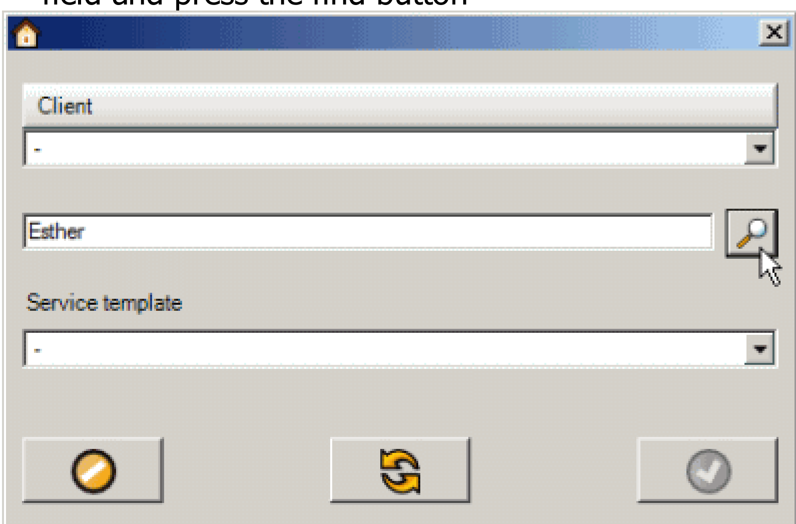
3.7 Don't know the client's name?

With the **Client Finder** feature, **enter any text** that was entered elsewhere in AyaNova so that the list of clients for selection is narrowed down and you can quickly create the new service workorder, quote or PM for the client you want.

Example of Client Finder use:

1. You are creating a new workorder or quote or PM for a client, but you do not know the client's name
2. You do know the contact person's name Esther Williams
3. Create a new service workorder selecting the New... 

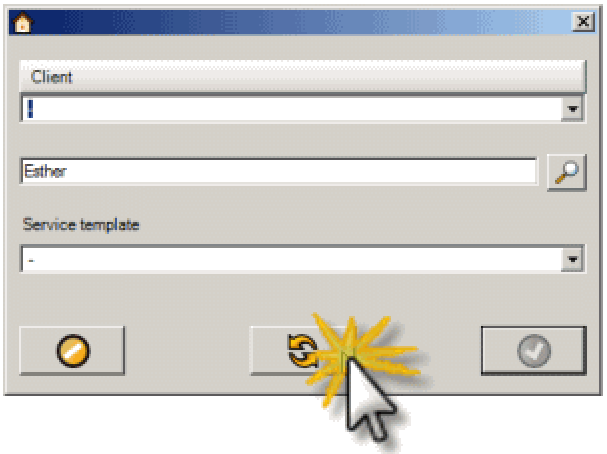
menu option in the Service Workorder grid
4. By default, all active clients for your region will be displayed but as you don't know the client's name, you will use the Client Finder feature
5. In the client selection window, enter the text ***Esther*** in the Client Finder field and press the find button



6. Now drop down the client selection list - it will show all clients that have that text entered in one of its objects. In this example, there is only one client that has the text ***Esther*** listed in any of its related objects.

7. Select the client and create the service workorder

To clear the search to restore listing of all clients for selection, just select the Refresh button



Text entered in any of the following objects are searched:

- Client entry screen
- Client Note
- Client Service Request (CSR)
- Contract
- Dispatch Zone
- Head Office
- Previous PM of that client
- Previous Quote of that client
- Previous Service workorder of that client
- Unit owned by that client
- Unit meter reading for a unit owned by that client
- Wiki Page of that client

You can use the asterisk * wildcard character at the start or end of a word to find all records that partially match your search word for the Client Finder.

Examples:
•***cab**** would match the word cable or the word cabinet.
•***sun**** would match "Samsung", you can also do it more than once so "*sun* not*" would match "Notes about Samsung"

3.8 Create workorder for client not yet entered into AyaNova

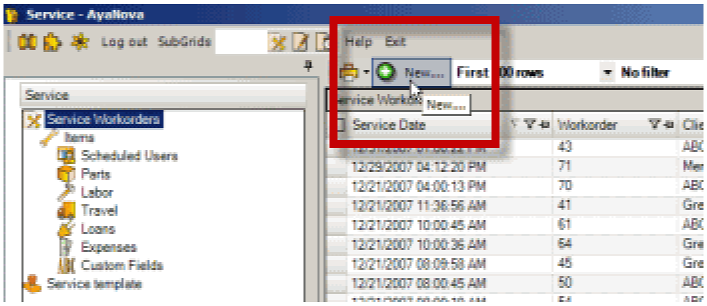
What if the client is not yet available for selection in your existing list of clients to choose from when creating a new workorder?

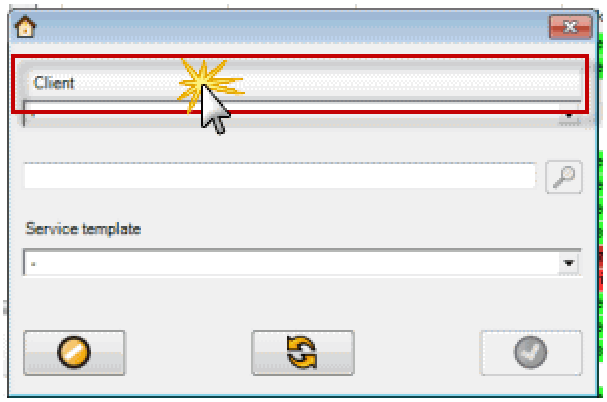
Easy - just create the client on the fly!

A. The client is not entered in AyaNova yet:

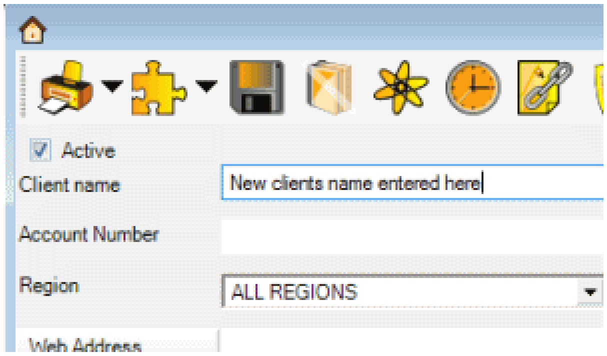
- You have dropped down the list of clients in the client selection window and the client is not listed
- You have used the Client Finder feature and no client displays for selection
- Such as the examples in the Tips & Tricks section Creating new workorder for a client

B. In the client selection window after clicking on New... to create a new service workorder, just click on the Client "jump" button with no client selected

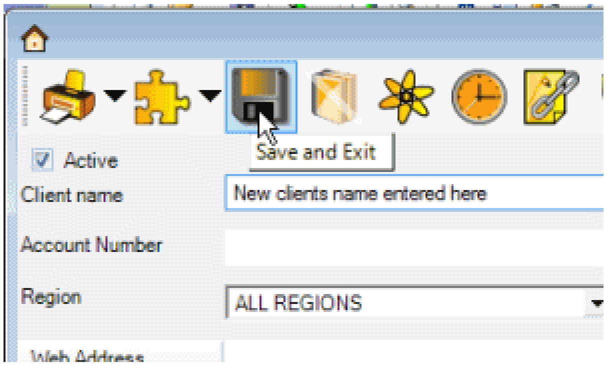




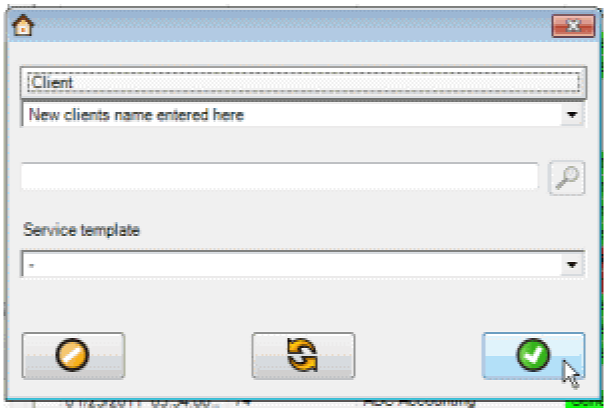
C. Clicking on the Client "jump" button with no client selected will open a new empty client entry screen so that you can quickly enter in the Clients Name



D. Click Save & Exit

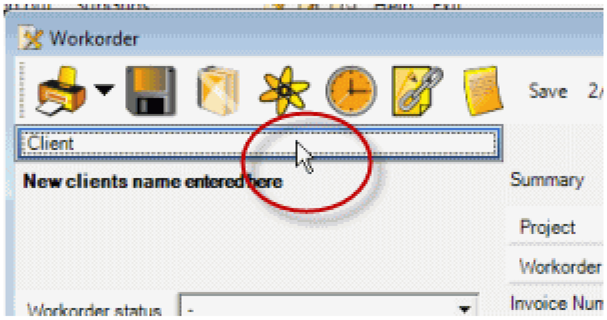


E. And you are returned to the client selection window where you can now select that client you just created!

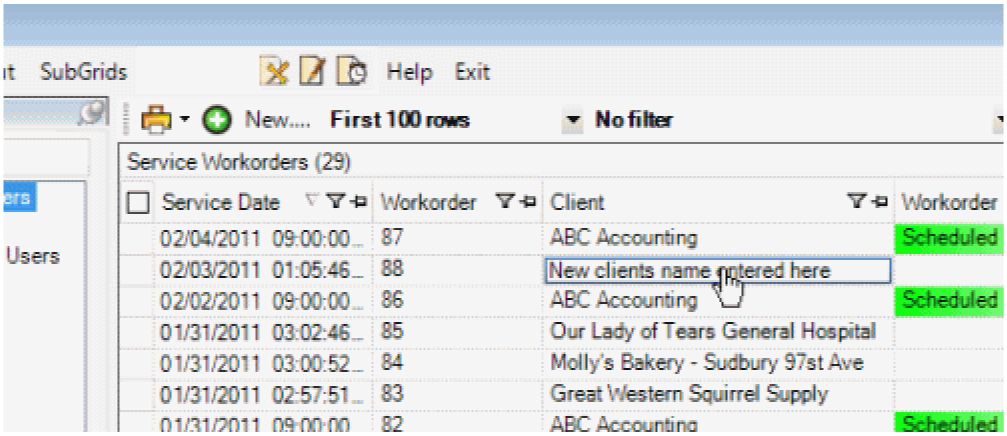


F. You can always go back into that client's entry screen at any time and add more details such as address, phone numbers, etc

Use the Client "jump" button from within the service workorder itself to open that client's entry screen



Or use the client "jump" button on any grid where that client's name is which will open that client's entry screen



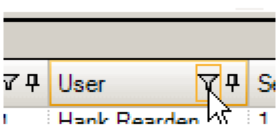
3.9 Filtering a grid

Filtering a grid provides the following:

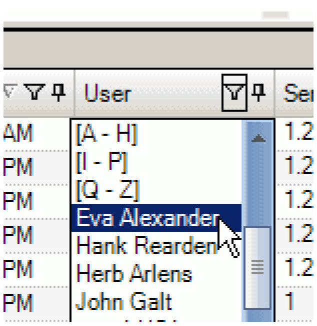
- Allows you to restrict what displays based on the filter making it easier to find the record you need to access.
- Also restricts the amount of information that needs to be retrieved from the database resulting in faster performance.
- And also filter a grid so you can report on only the records displaying in that grid

For example, you might filter on the User column in the Labor grid to only show records where that user performed service so that you can print out a report on that user's billable hours.

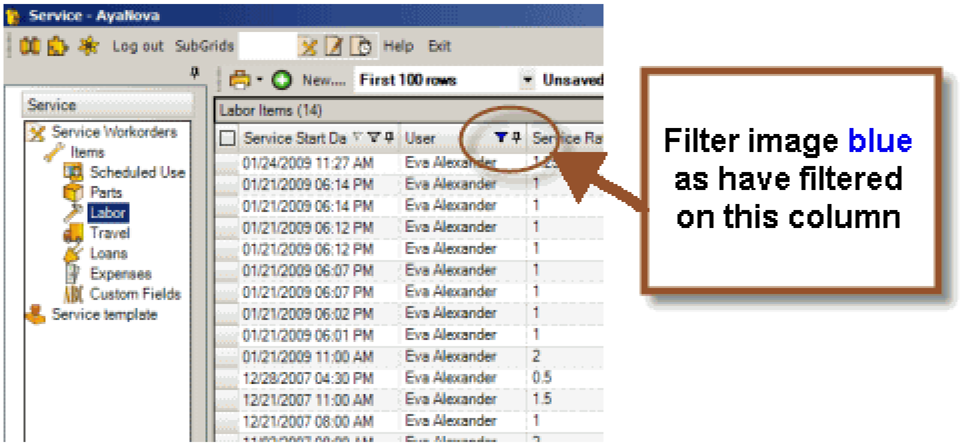
1. Drop down the filter image on the column



2. Select the User you want to show to only show records of



3. The filter image will show blow to remind you this column is now filtered, and the grid will now only show records that match that filter.



See also:
[Filtering a grid]
[How do I filter a grid and print a report for the records that show?]
[How do I create a custom filter?]
[Using the Filter Drop List]
[How do I quickly find workorders for a client or a unit?]

3.10 Jump buttons via grids

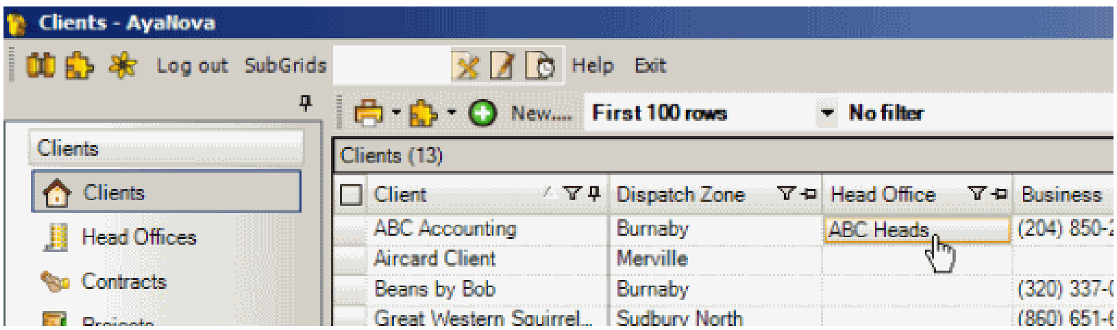
See also:

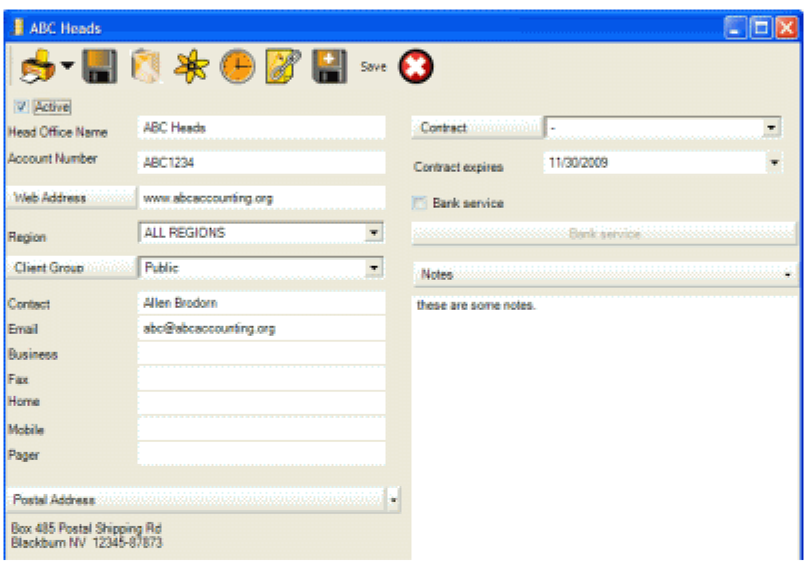
[Accessing data displayed in main grids]

[Adding, editing and deleting data for display in a main grid]

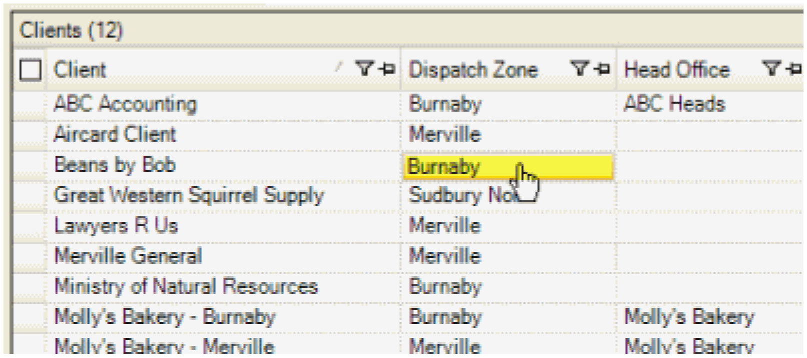
Examples of using main grid "jump buttons" to open that record for viewing or editing

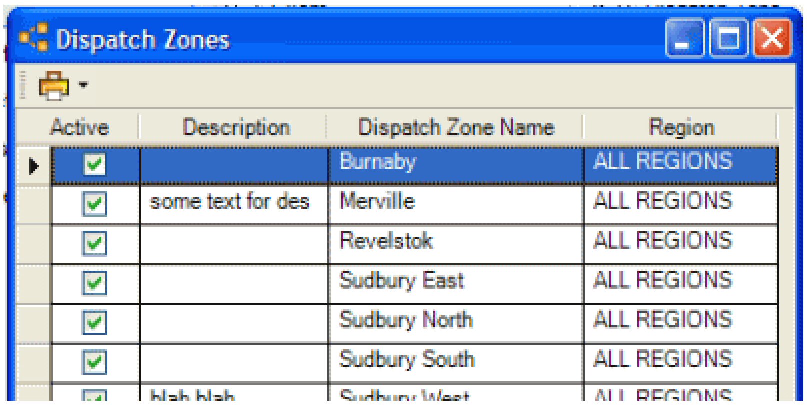
1. In the Clients grid, click on a specific Head Office cell under the column Head Office, which will "jump" you to that specific Head Office's entry screen so that you can edit and view.





2. Another example from the Client grid - click on a cell under the column Dispatch Zone, which will "jump" you to the Dispatch Zone subgrid so you can view all, or edit or delete as needed


Clients (12)
Client
Dispatch Zone
Head Office
ABC Accounting
Burnaby
ABC Heads
Aircard Client
Merville
Beans by Bob
Burnaby
Great Western Squirrel Supply
Lawyers R Us
Merville
Merville General
Merville
Ministry of Natural Resources
Burnaby
Molly's Bakery - Burnaby
Burnaby
Molly's Bakery

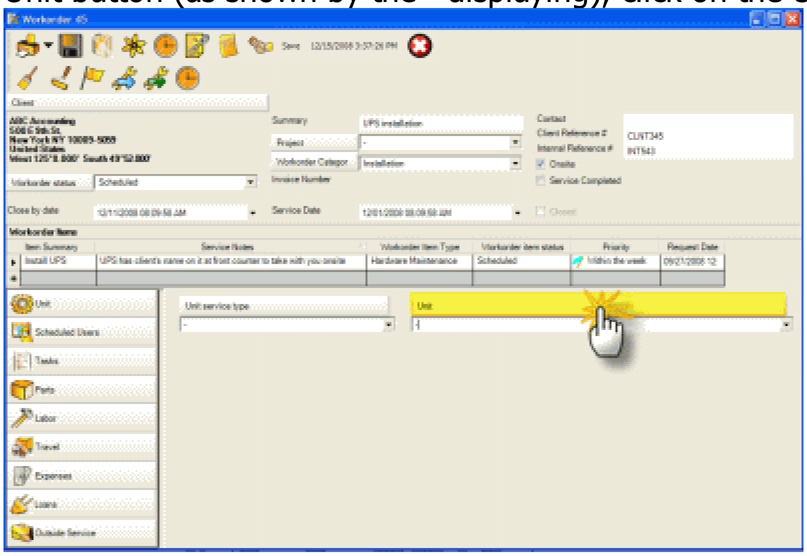

Dispatch Zones
Active
Description
Dispatch Zone Name
Region
Burnaby
ALL REGIONS
some text for des
Merville
ALL REGIONS
Revelstok
ALL REGIONS
Sudbury East
ALL REGIONS
Sudbury North
ALL REGIONS
Sudbury South
ALL REGIONS

3.11 Jump buttons via entry screens

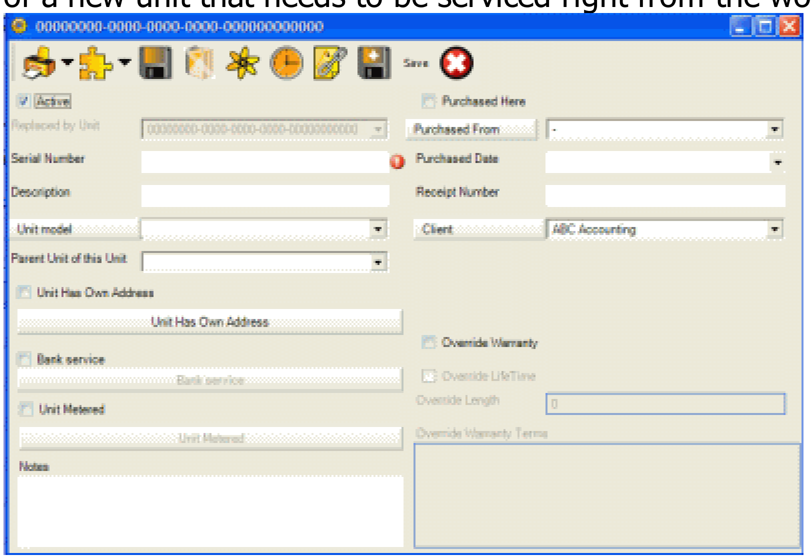
"Jump buttons" provide a quick way to either create a new record or view details about an existing record without having to go out of the entry screen you are in.

For example:

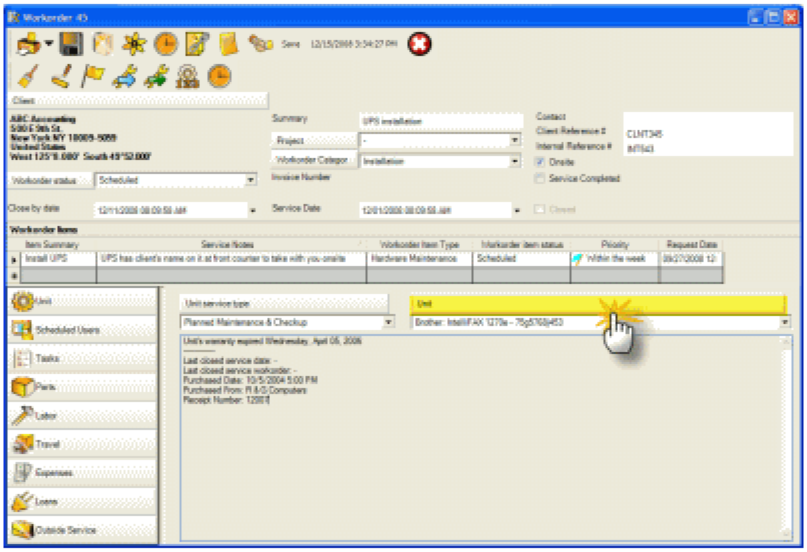
1. In a Service Workorder entry screen that has nothing yet selected in the Unit button (as shown by the - displaying), click on the Unit "jump" button



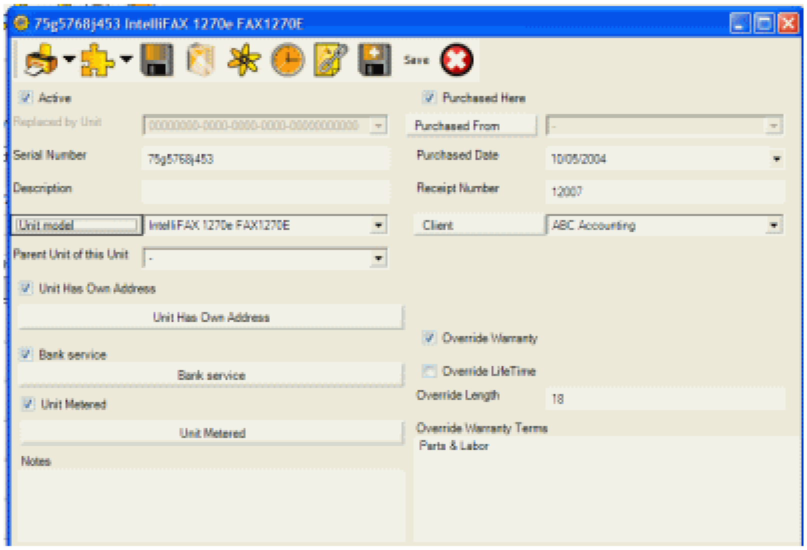
This will open up a new empty unit entry screen so that you can enter details of a new unit that needs to be serviced right from the workorder entry screen



2. Another example, if instead a unit is selected in the Unit field in the Service Workorder, when you click on the Unit button



you will be "jumped" to that specific unit's entry screen so that you can view details about that unit



3.12 Listing all workorders for a specific client or unit or loan item

Three ways to quickly show all workorders for a client or unit or a loan item:

1. Select the Show all... menu option in the client's entry screen or unit's entry screen
2. Select the Show all... menu option in a service workorder
3. Use the List All Workorders command from any grid

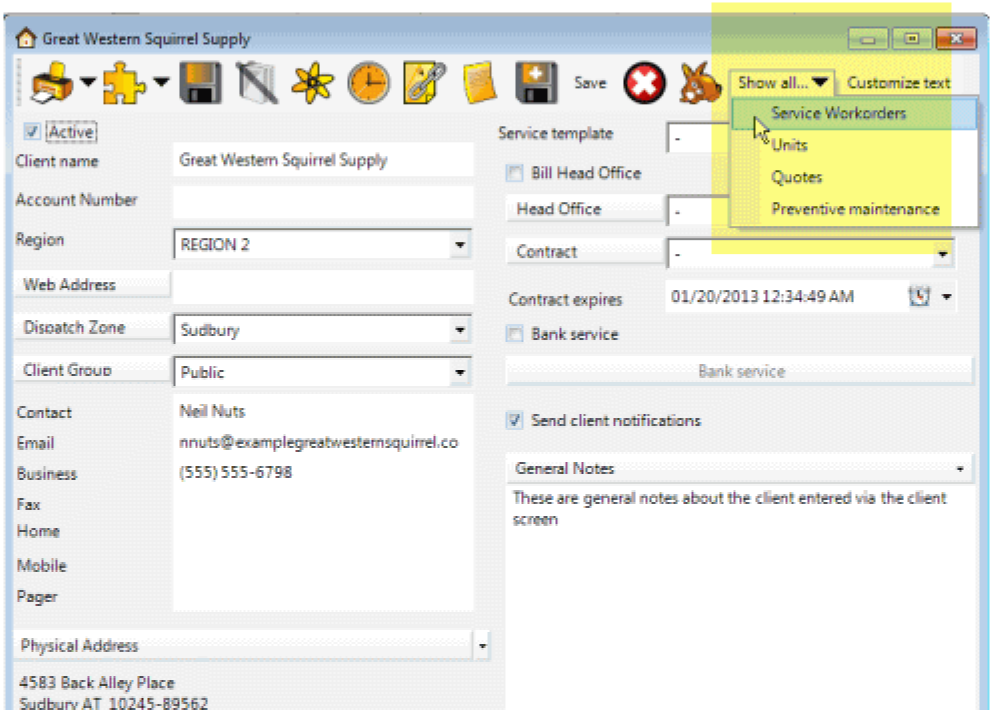
1. Select the Show all... menu option in the client's entry screen or unit's entry screen or the loan item's entry screen

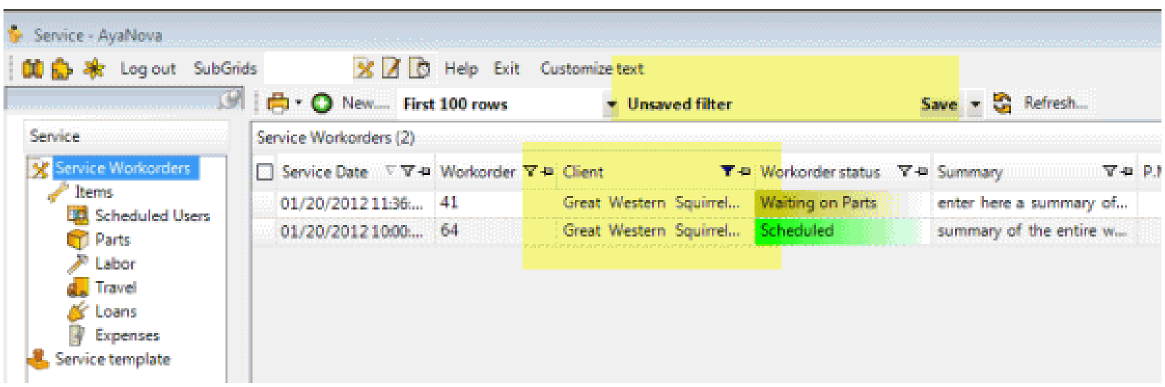
From the client's entry screen menu bar, select the Show all....Service workorders
AyaNova will automatically filter the **Service Workorders grid** for you, displaying all workorders for this client.

Or from the unit's entry screen menu bar, select the Show all...Service workorders
AyaNova will automatically filter the **Service Workorders Items grid** for you, displaying all workorders for this unit.

Or from the loan item's entry screen menu bar, select the Show all...Service workorders
AyaNova will automatically filter the **Service Workorders Loan Items grid** for you, displaying all workorders for this loan item.

Note that the filter is not saved. And you can revert back to viewing all by selecting No Filter.



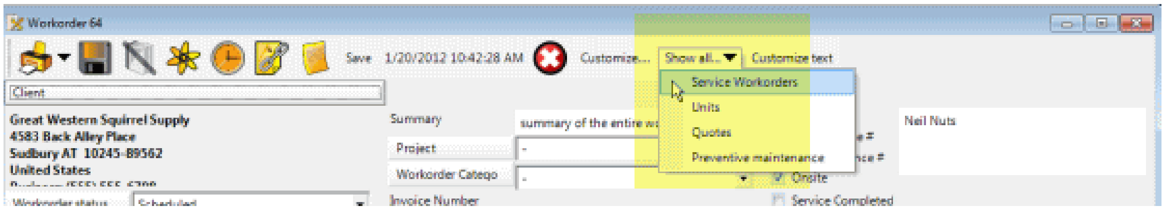


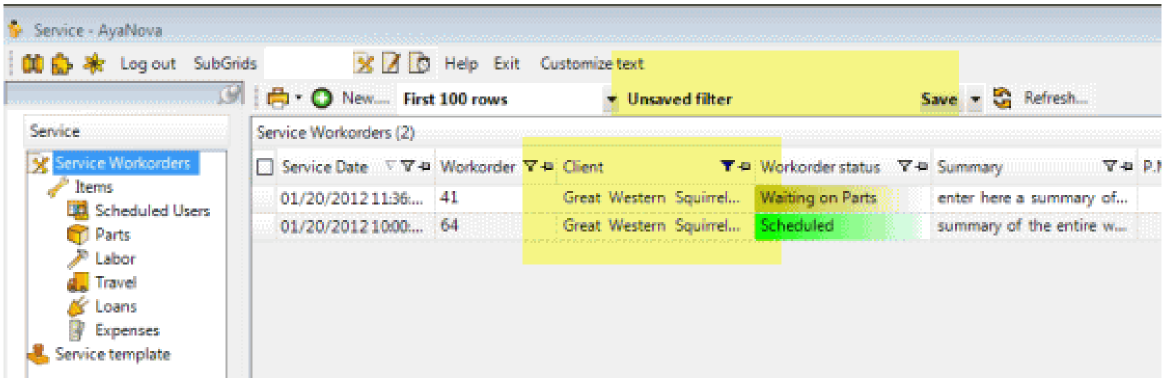
2. Select the Show all... menu option in a service workorder

From the service workorder entry screen menu bar, select the Show all....Service workorders

AyaNova will automatically filter the Service Workorders grid for you, displaying all workorders for this client of this workorder.

Note that the filter is not saved. And you can revert back to viewing all by selecting No Filter.



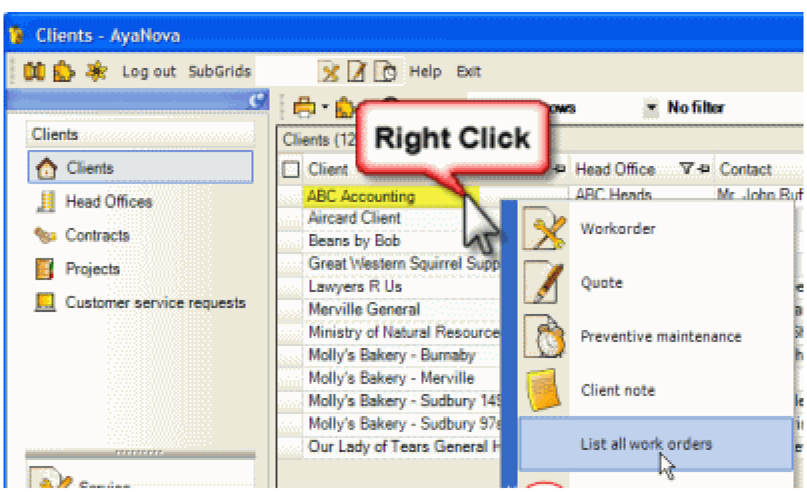


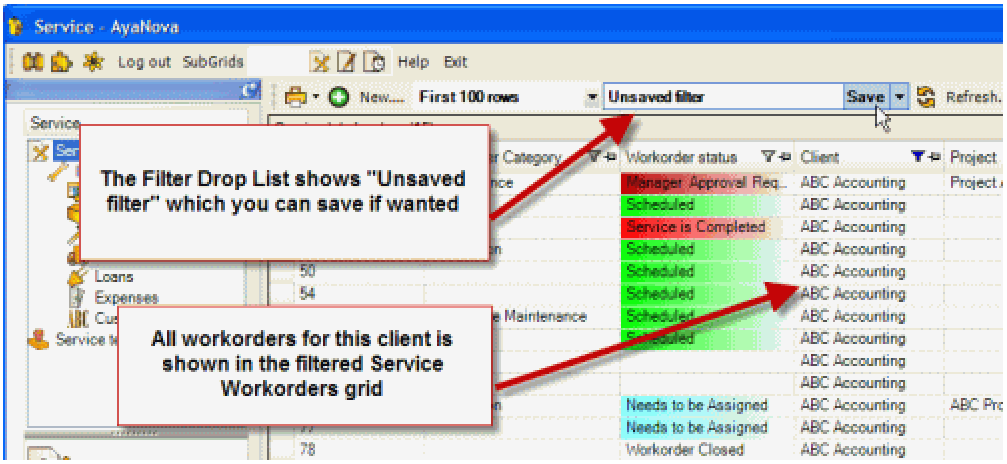
3. Use the List All Workorders command from any grid

A time saving feature is the **List All Workorders** command.

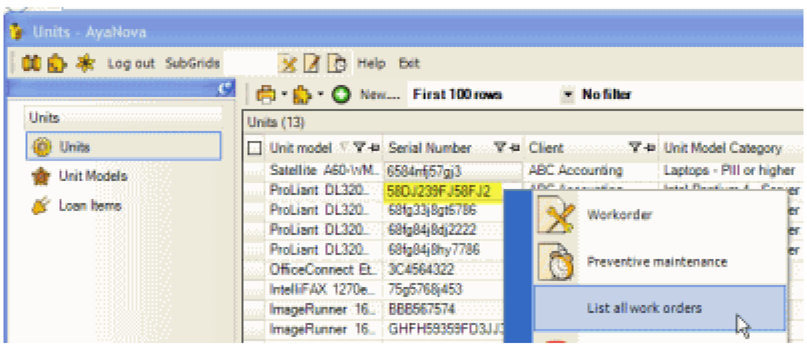
Save time by quickly right-clicking on a client or unit or loan item in any grid and selecting the **List All Workorders** command to display all workorders for that client or unit or loan item.

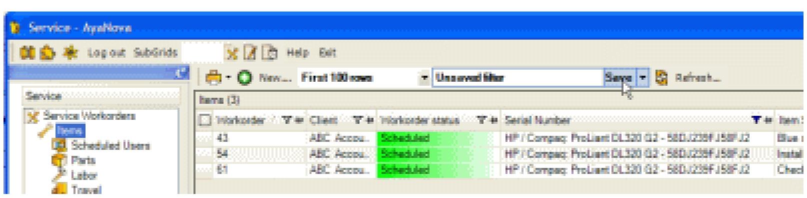
Selecting the **List All Workorders** command for a client is just as if you had filtered in the **Service Workorders grid by the client selected**. An unsaved filter is made on the client name to accomplish this.





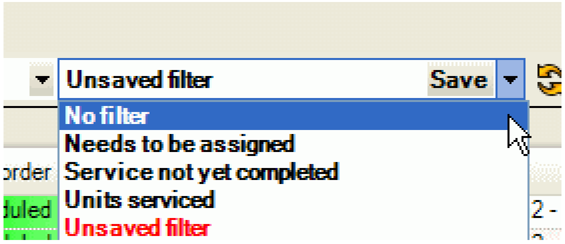
Selecting the **List All Workorders** command for a unit responds as if you had clicked on the service workorder **Items grid** and filtered by unit. This is via the Items grid as that is the first level that you can actually see units in the grid.





Selecting the **List All Workorders** command for a loan item responds as if you had clicked on the service workorder **Loan Items grid** and filtered by this loan item. This is via the Loan Items grid as that is the first level that you can actually see loan items in the grid.

If you do not want to save the filter, revert back to seeing all workorders by selecting the No Filter



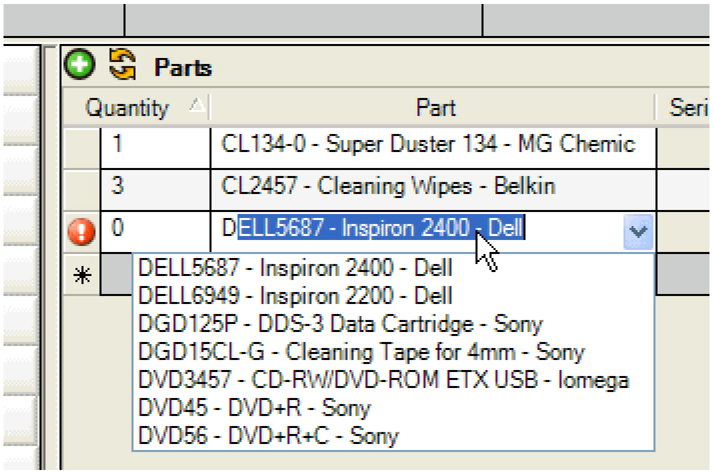
This **List All Workorders** feature is in addition to the filtering ability of any grid where you can filter by any of the columns.

See also:
[Filtering a grid]
[How do I quickly find workorders for client or a unit?]

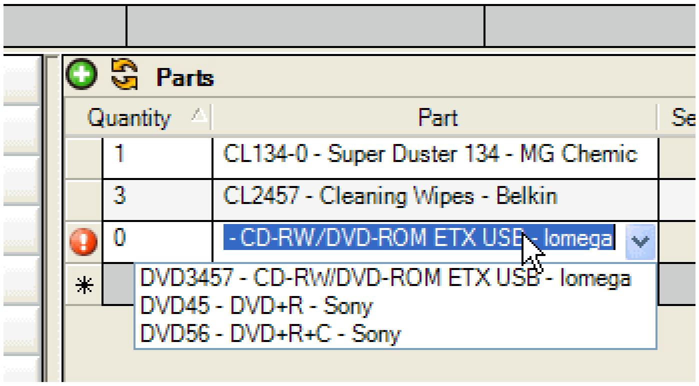
3.13 Drop-down fields

Start typing in the first couple characters of what you are looking for in a list and the **auto-suggest** feature of the drop down fields will list what matches what you have entered so far, so that you can easily select the correct one.

In the example taken from the Part subsection of a service workorder entry screen, the user typed in the first letter “d” and the drop down automatically lists all parts that begin with the letter "d"



If the user continues typing the characters “dv”, AyaNova will move to the next part that begins with those characters “dv”

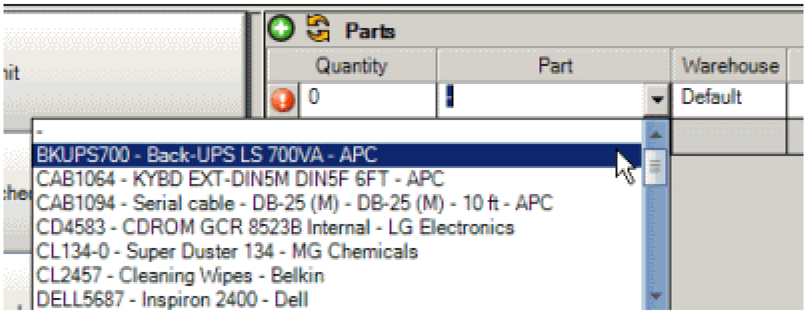


And of course you can use your mouse to select the drop arrow to display the list, and scroll down as needed too.

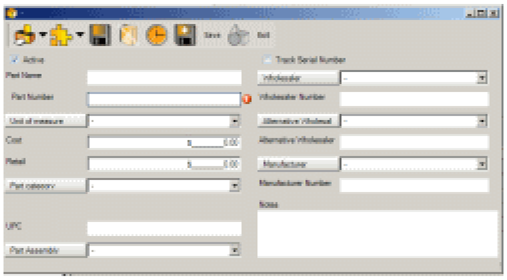
3.14 Part entry on the fly in a workorder

Use the "on the fly" part entry right in the workorder entry screen itself to create new parts if not listed. Saves you time!

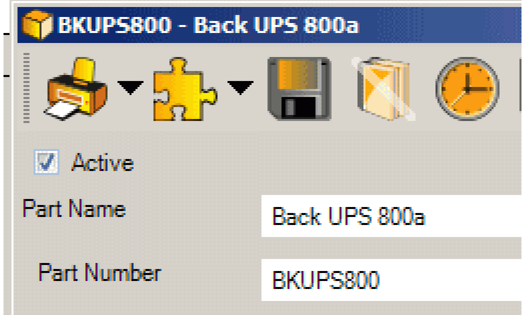
1. You have determined that the part is not listed for selection in your warehouses



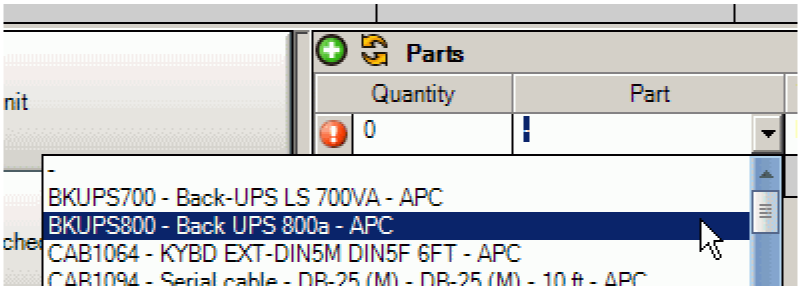
2. Select the New... part menu option within the Parts subsection of the workorder which will open a new empty part entry screen



3. Enter in the new part and save



4. Now you can select the part


Parts
Quantity
Part
0
-
BKUPS700 - Back-UPS LS 700VA - APC
BKUPS800 - Back UPS 800a - APC
CAB1064 - KYBD EXT-DIN5M DIN5F 6FT - APC

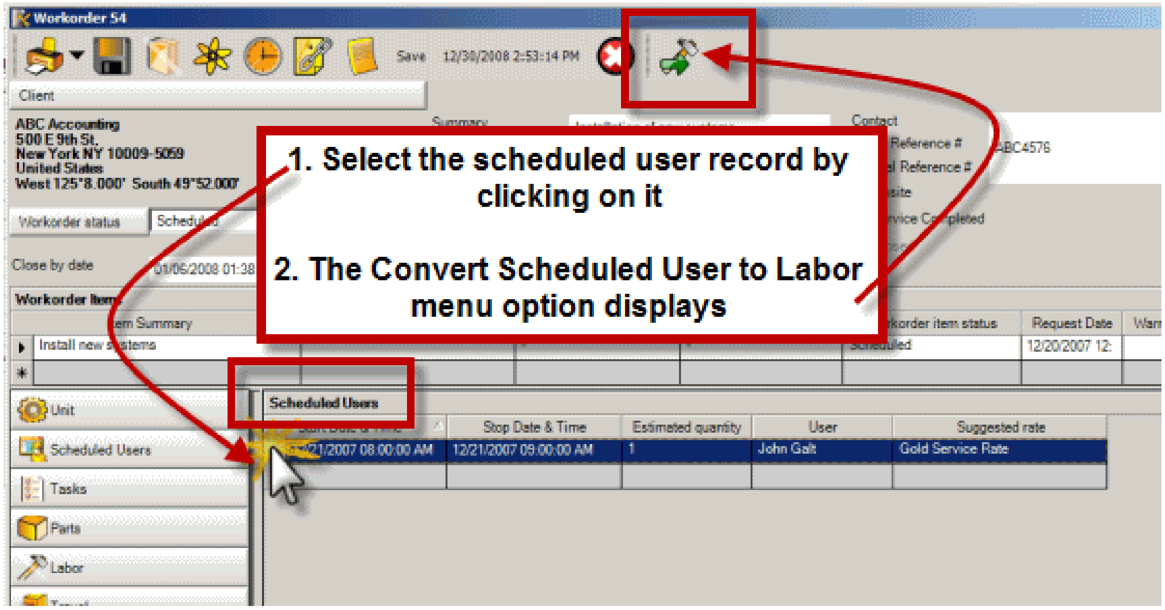
3.15 Convert scheduled items to labor easily

Take advantage of the time saving feature **Convert scheduled user to labor** so you don't have to re-enter data already entered in the Scheduled Users subsection into the Labor subsection of the service workorder.

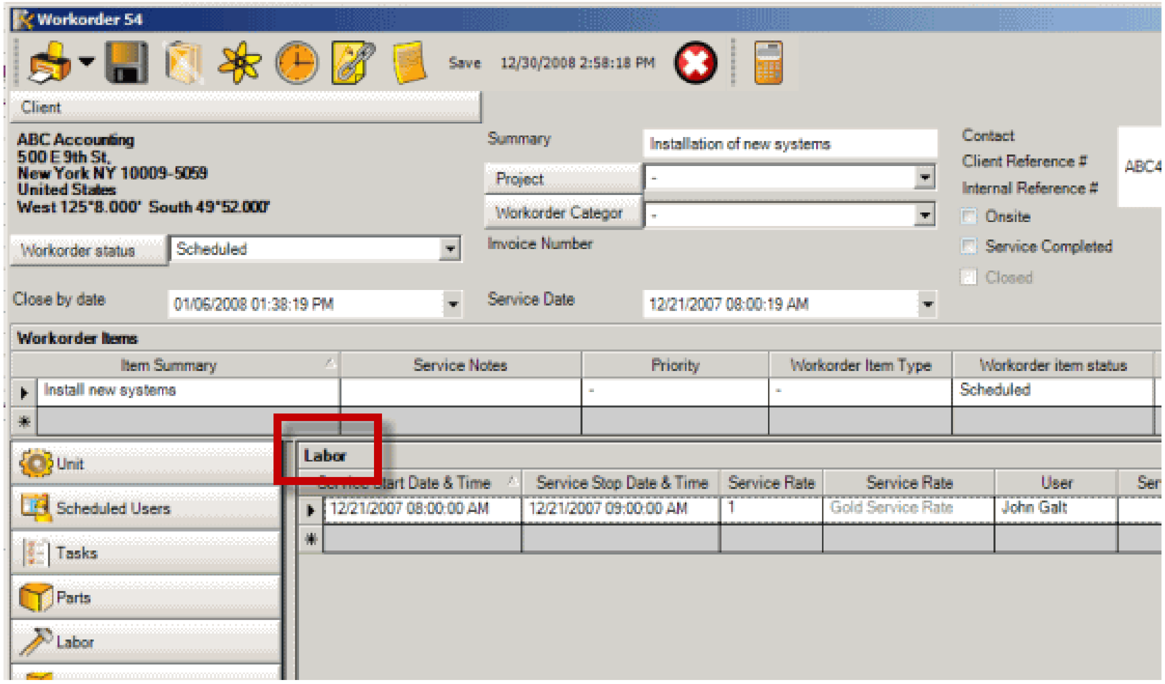
1. In the workorder entry screen, click within the Scheduled Users subsection

2. Identify the Scheduled User record you want to convert by selecting its row header

   When you do so, you will see that the menu option **Convert scheduled user to labor** now appears



3. Select this menu option, and the start and stop date/time, the user, the rate and the quantity from Scheduled Users will be used to automatically create a Labor record

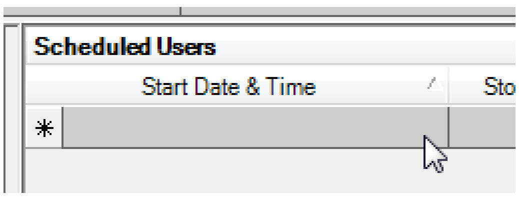

Workorder 54
Save 12/30/2008 2:58:18 PM
Client
ABC Accounting
500 E 9th St,
New York NY 10009-5059
United States
West 125°8.000' South 49°52.000'
Summary
Installation of new systems
Project
Workorder Categor
Invoice Number
Contact
Client Reference #
Internal Reference #
Onsite
Service Completed
Closed
Workorder status
Scheduled
Close by date
01/06/2008 01:38:19 PM
Service Date
12/21/2007 08:00:19 AM
Workorder Items
Item Summary
Service Notes
Priority
Workorder Item Type
Workorder item status
Install new systems
Scheduled
Unit
Scheduled Users
Tasks
Parts
Labor
Labor
Service Stop Date & Time
Service Rate
Service Rate
User
12/21/2007 08:00:00 AM
12/21/2007 09:00:00 AM
1
Gold Service Rate
John Galt

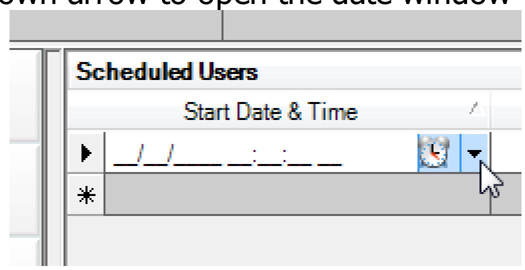
3.16 Date and Time selection

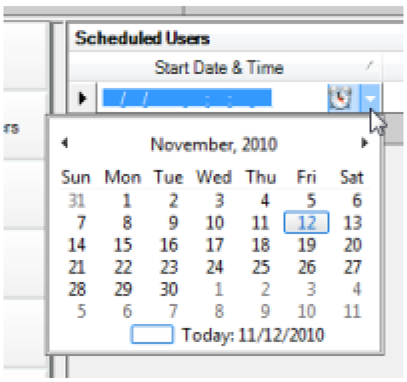
1. **Example of how to select and edit the date in a date/time field**
2. **Example of how to select and edit time in a date/time field**

Selecting and editing Date:

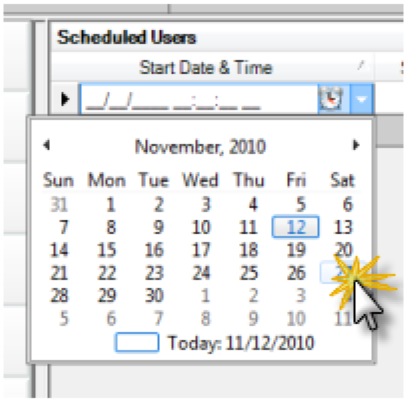
A. To select a date, select the drop down arrow to open the date window



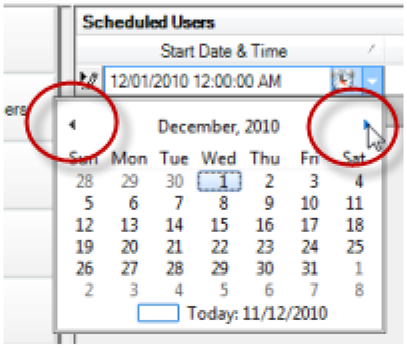




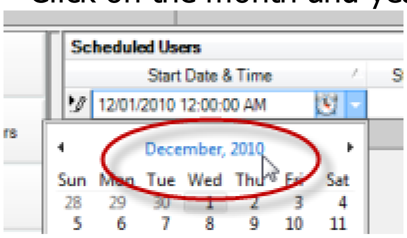
B. Click on a date



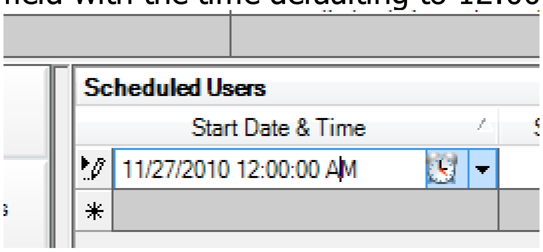
- Use the side arrows to move to different months



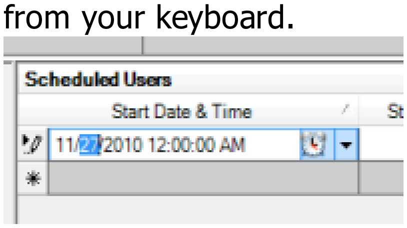
- Click on the month and year to select a different year or month.

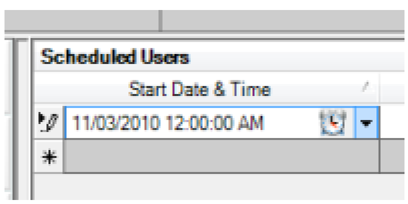


C. When you click on a date, it closes the date selection and returns you to the field with the time defaulting to 12:00 AM



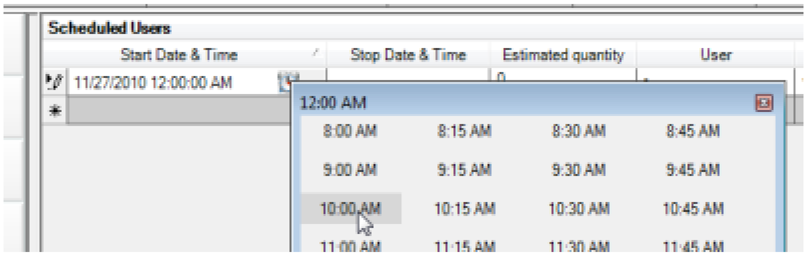
D. You can also manually edit the date by highlighting and typing the number from your keyboard.

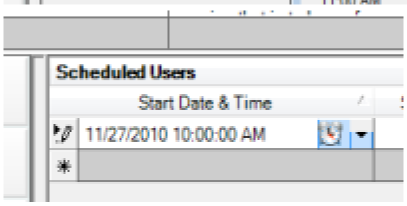




Selecting and editing Time:

A. To edit the time, click on the clock and select one of the time selections

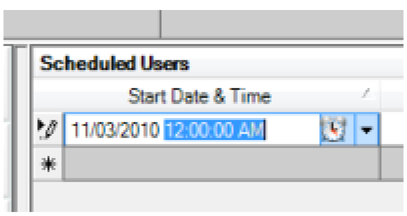


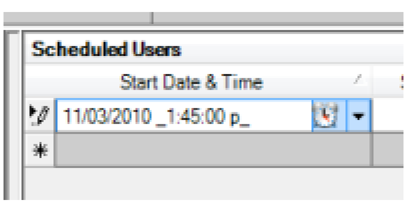


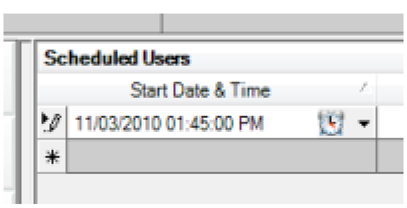
B. You can also manually edit the time by highlight, and type in the scheduled time including pm or am and then tab off.

For example, in these screen shots, we want to scheduled the start time for 1:45 PM.

Our time display includes showing for seconds, so we would type in “14500pm” and tab off. There is no need to type the colon or spaces as your operating system in this instance is set to use PM and AM, and therefore “knows” that there is not a time that would be 14:50PM. If the scheduled time was instead to be 1:00 PM, you would in this instance type in “0100pm”. Otherwise typing in “100pm” it would assume you meant 10:00PM.







- Also note too that you can click within the date time field, and use your keyboard **left or right arrow keys** to be in the hour, or minute or second to am/pm part of the time, and then use your up or down arrow keys to increment or decrement.

AyaNova will use your Regional Settings for Time format – if your time format is set to use 24 Hour, time will display in the AyaNova program and reports by default also as 24 Hour. If your time format is set to show seconds, then AyaNova will show seconds too

See also:

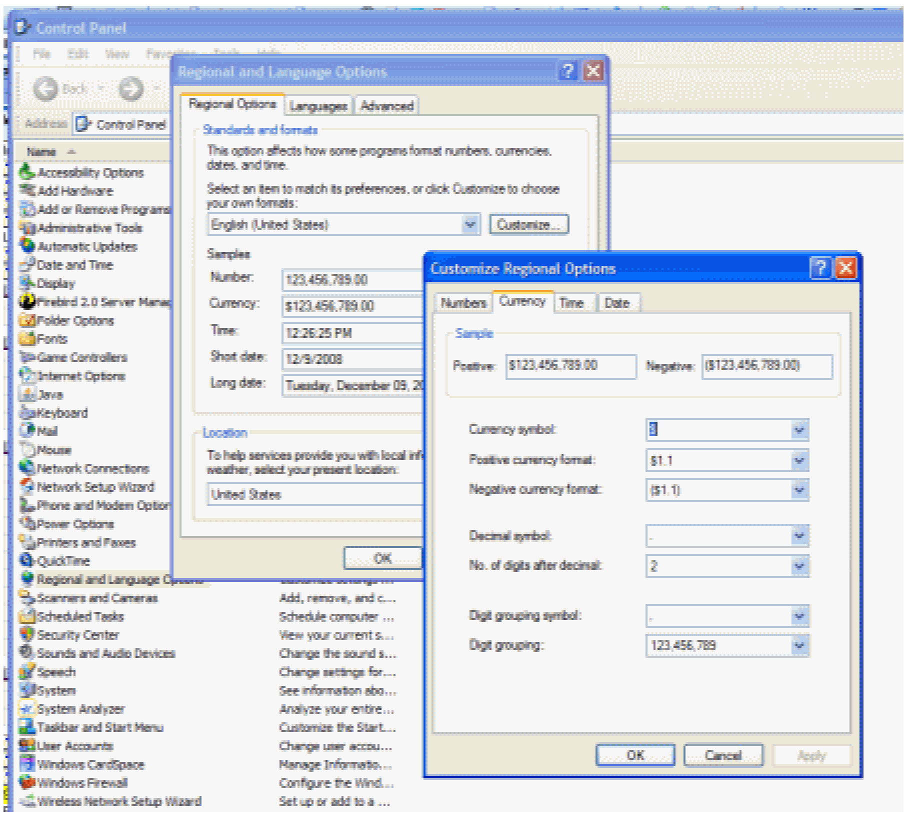
Currency, Date & Time Display

3.17 Currency, Date & Time Display

AyaNova does **not** decide how to display currency symbols or how many digits are shown in currency, or what format of Date or Time to use.

AyaNova instead "asks" your computer's operating system, Windows, what to use immediately before the AyaNova program opens and displays exactly as Windows "tells" it to.

If the currency symbol and format, or your Date or Time are not displaying how you want them to in the AyaNova program the change **needs to be made in your Windows Control Panel's Regional Settings**

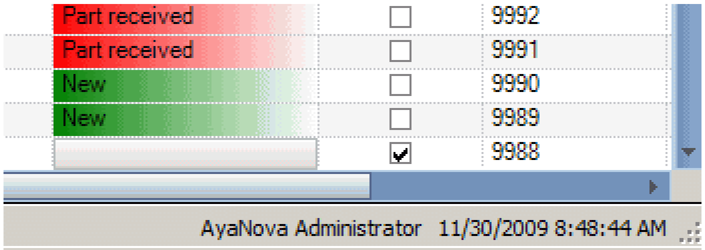


If the currency symbol, or date or time is displaying incorrectly in a report, it may be due to your Windows Control Panel setting – check first – **<u>or</u>** it may be that the symbol is preset in the report template, and you just need to customize the setting in the report template for that specific data field in that report template. Refer also to the AyaNova Support Forum section on report templates.

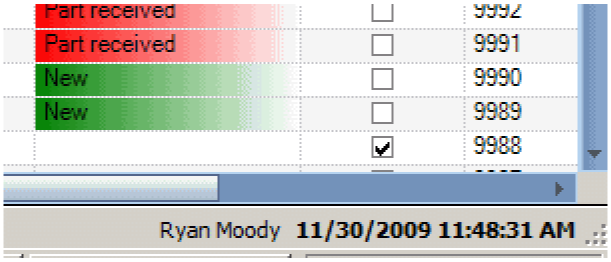
NOTE: Your Regional Settings for Time should include seconds so that you can select specific date/time when filtering on such columns as the Service Date in a workorder, the Labor's Service Start Date & Time, a PO's Ordered Date, a PO Receipt's Received Date, etc

- Certain date fields are automatically pre-entered for you when you perform something.
- For example - when you create a new service workorder, the Service Date defaults to today's date and time (including seconds); or when you place a PO on order, the Ordered Date is automatically taken from today's date and time (including seconds); or when you receive parts from a PO, the Received Date is automatically taken from today's data and time (including seconds)
- Because the date and time are stored internally in the database including seconds, for you to be able to select a specific date/time to filter by, you must be showing the seconds so that the filter results include the specific record date.
- Otherwise, if you do not have seconds displaying, your filter results may show nothing.

3.18 Time Zones & what date/time displays



AyaNova Administrator logged in with no Time Zone Override set with server located in PST (Pacific Time Zone)



Ryan Moody logged in with Time Zone Override of -5 set (5 hours less than GMT)

Time zones and their relation to how you have connected to the AyaNova database:

All dates/times in AyaNova are stored in the AyaNova database in GMT. How the AyaNova date/time data displays to the user depends on the time zone of that users computer.

By default, the time zone of that users computer is used if connecting via a direct network connection configuration. If connecting via anything else (WBI, MBI, data portal) than the time zone where the WBI server, Data Portal server, and/or MBI server resides is used.

If a user is in a different time zone than where the server is set for and the user wants to view date/times based on where he actually is, then:

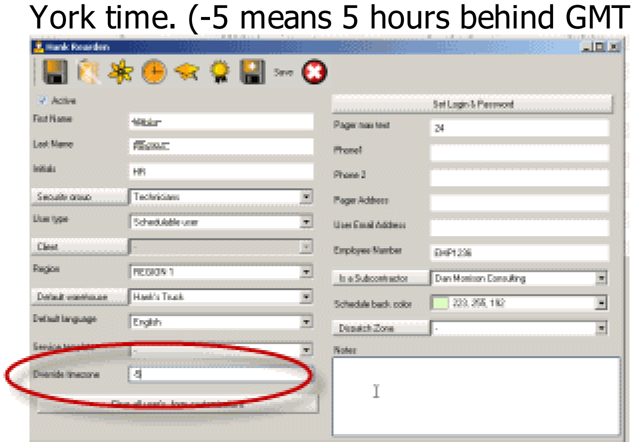
1. the AyaNova Administrator will want to edit that user's Override TimeZone field in that user's entry screen in the Windows AyaNova application to account for the different time zone
2. **or** the user can edit themselves via WBI in their [username] navigation pane area if have Read/Write to Object.User

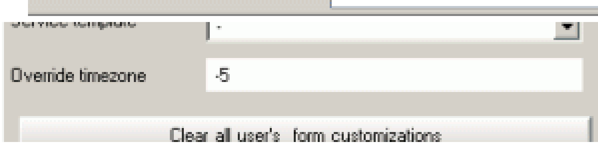
For example:

- The AyaNova database is configured for network use in an office in California (Pacific Time Zone).
- The time right now is 12:00PM (noon) Pacific Time Zone on November 12 2009 on the server where the AyaNova database resides.

- Bob the dispatcher is connecting to the AyaNova database **from within the local area network** of this office using the network SQL connection configuration in his config.txt file. His workstation also says 12:00PM as he is of course on the same time time zone and the same time as the server being in the same local area network.
- Bob's user entry screen field Override TimeZone <u>does not</u> need to be edited as he will be using the same time zone as the server:
  - Bob creates a new workorder and enters the Request Date/Time as today 12:00PM (noon) and saves the workorder.
  - Do note that although Bob has entered 12:00PM into this field, it is actually saved in the AyaNova database as 7:00PM GMT so that it can be converted from GMT to whatever time zone any other user is using.

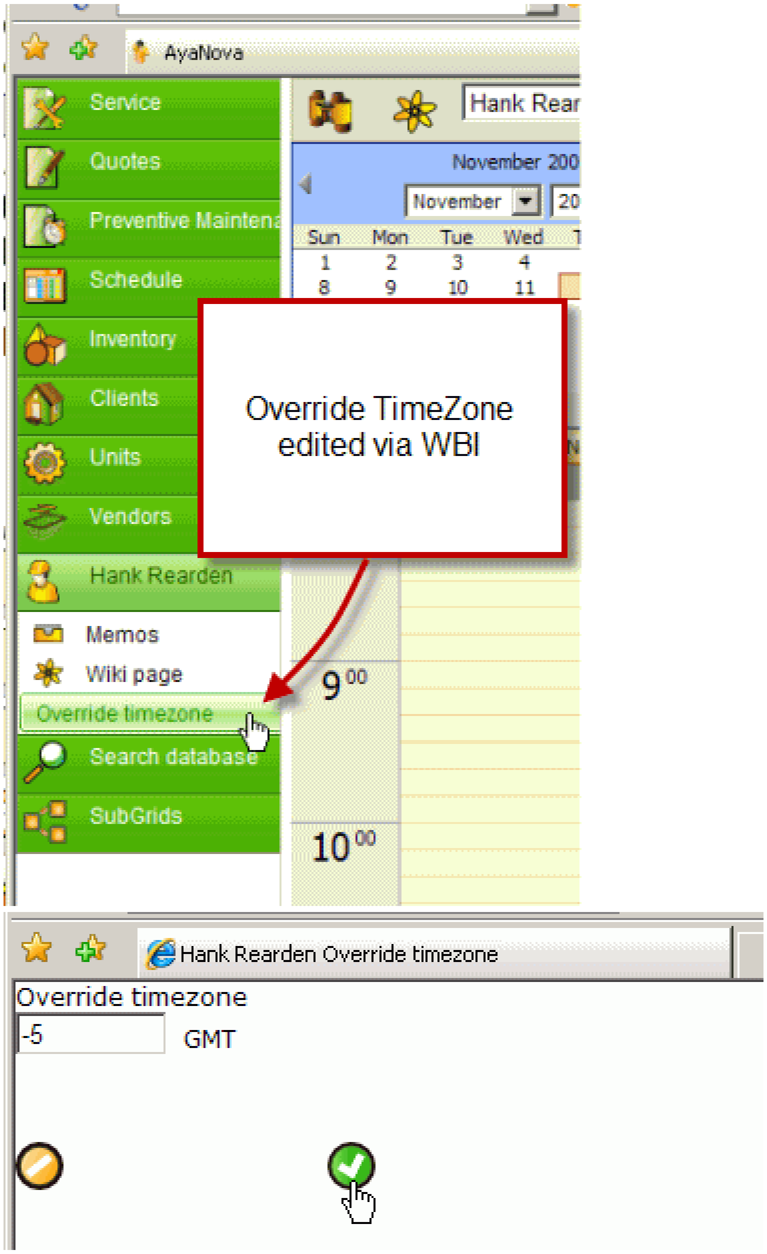
- Ryan another AyaNova user with this same database, is in New York (Eastern Time Zone) where it is 3:00PM right now on his computer (its 12:00PM in California where the server is)
- Ryan connects to the AyaNova database in California via a **data portal connection** configuration in his config.txt file
  - If Ryan's Override TimeZone is left at the default of empty, if he views that workorder just created by Bob, the Request Date/Time will show as 12:00PM to Ryan, even though it is actually 3:00PM right now in New York.
  - So Ryan <u>will</u> want to have the AyaNova Administrator edit Ryan's user entry screen's field Override TimeZone to -5 to offset any times to show in New York time. (-5 means 5 hours behind GMT at this time of the year)



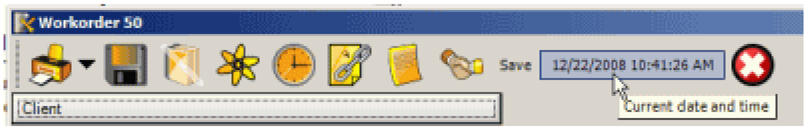


- Sally another AyaNova user is in Texas (Standard Time Zone) where it is 2:00PM right now on her computer (its 12:00PM in California where the server is)
- Sally **connects directly** to the AyaNova database in California **via a high speed VPN network connection** using the network SQL connection configuration in her config.txt file.
  - Sally views the same just created workorder
  - The Request Date/Time will show as 2:00PM - not 12:00PM
  - This is because Sally is connecting via a network connection configuration, and therefore the time zone of Sally's computer dictates what time zone to use for display.
  - Sally's user entry screen field Override TimeZone does not need to be edited as she is using her computer's time zone. But it would still be recommended to do so for consistency so with daylight saving time, her Override TimeZone field would be edited to -6 (6 hours behind GMT).

- Hank another AyaNova user is located in New York (Eastern Time Zone) where it is 3:00PM right now on his computer (its 12:00PM in California where the server is)
- Hank **connects over the internet** to the AyaNova database by logging in **via WBI**
  - Hank views this same just created workorder
  - The Request Date/Time will show as 12:00PM because the WBI server is running on the California server that is using Pacific Time Zone, but he wants to see what the time would be for him where he actually is.
  - Hank will want to edit his username's Override TimeZone setting in WBI entering and saving -5 (as Standard Time Zone is 6 hours behind GMT at this time of the year)
    - **NOTE**: The security group Hank belongs to must have Read/Write access to Object.User to be able to edit the Override TimeZone via WBI


AyaNova
Service
Quotes
Preventive Maintena
Schedule
Inventory
Clients
Units
Vendors
Hank Rearden
Memos
Wiki page
Override timezone
Search database
SubGrids
Override TimeZone edited via WBI
Hank Rearden Override timezone
Override timezone
-5
GMT

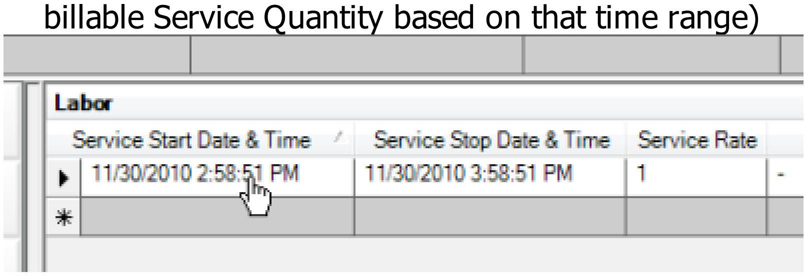
3.19 Current Date & Time feature in workorder entry screen as a timer



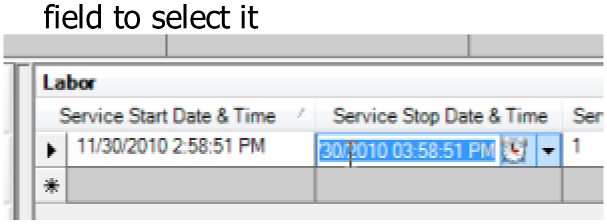
Displayed at the top of the service workorder entry screen is the present time and date. This can be used as a timer and/or entered into a text field.

Use as a timer (example: you track start and stop time in phone support)

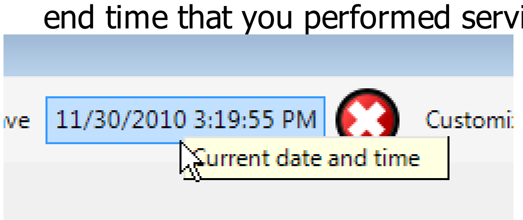
1. open a workorder for a client
2. move to the Labor sub-item
3. click within the empty Service Start Date & Time field which will automatically put in today's date and time (as well as Stop Date & Time based on the Global Settings *Scheduled/Labor Default Minutes* and the billable Service Quantity based on that time range)



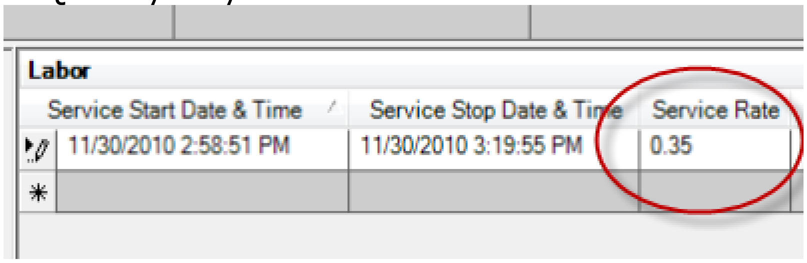
4. when your phone service is completed, click within the Stop Date & Time field to select it



5. now click on the Current Date and Time. This will automatically enter in the end time that you performed service to

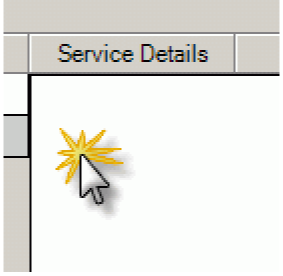


6. And tab off, and AyaNova will automatically adjust the billable Service Rate Quantity for you as well. Edit as desired.

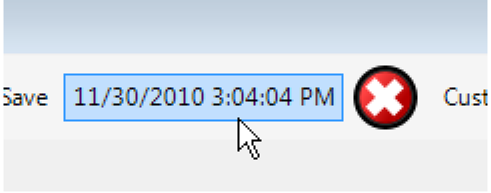


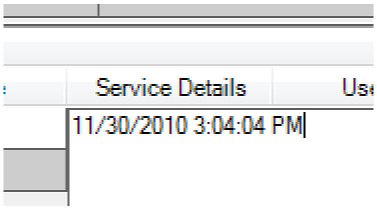
Enter the date and time within any text field (example: you want to note when you entered specific information)

1.Click within any text field



2.Click on the current date & time at the top of the service workorder to enter that date and time into the text field.

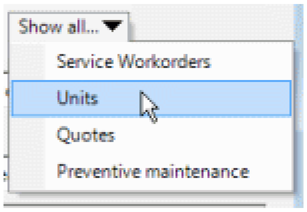




3.20 Common entry screen menu options

Each entry screen has menu options that are specific for that entry screen's object (i.e. client, head office, part, etc) you are viewing. Do note that not all entry screens have the same menu options. We have listed below menu options that are common to most object entry screens and what each is for.

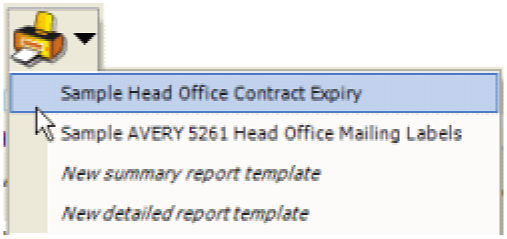
If a menu option is grayed out or not showing, that would indicate either you do not have rights to access or perform the feature and need to have your security group rights edited, or that entry screen does not have that menu option.



Show all...
This menu option provides quick access to all units of this client, all service workorders for this client, all quotes, and all PM's for this client

Customize text...
This menu option ONLY shows when logged in as the AyaNova Administrator.

Use the Customize text... menu option to localize labels of this entry screen on the fly or if accessed from the main menu bar, displays the labels of the main grids and main menu bar for quickly editing.

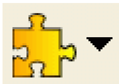


Print
Selecting this menu option drops down to display the list of available reports for the displayed entry screen.

For example, the screenshot above is for the Head Office entry screen. Whereas reports available for a Service Workorder would be different.

See also:

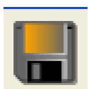
[Printing](#)

 **Plug-in**

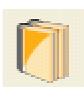
If this menu option shows, drop down to display available plug in's for this entry screen.

For example, if you have installed the import/export utilities and are viewing a client's entry screen, this drop down will list the ImportExport.csv plug-in utility for exporting this single client to a CSV file.

See also:
[PlugIns](#)

 **Save & Exit**

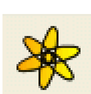
This menu option saves any changes to this entry screen and closes the entry screen.

 **Documents**

This opens up the list of associated documents with this object. You can also associated new documents via this screen.

NOTE: If a menu item is grayed out and a line through it, that means the object has no records. For example, this Documents menu option is grayed out and a line through it  - this way you can see at a glance there are no Documents entered for this workorder without having to open it.

See also:
[Documents](#)

 **Wiki**

This will open up the Wiki page for this specific object where you can embed files / documents, write notes or embed images.

See also:
[Wiki](#)

Record History

This opens up the Record History window displaying the user that originally created this object, and date of creation; and the last user that modified this object and date of modification.

Do note that the fields are not updated until the object has been saved and closed. For example, if you have just created a new client, and have not yet selected Save or Save & Exit – the creator and creation date will be blank.

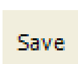
Follow Up

A Follow Up is a Schedule Marker that is tied to a particular object that you want to follow up on at a later date.

Select this menu option to either add a follow up for this object, or view existing follow ups for this object.

Follow Ups are available for Clients, Head Offices, Contracts, Units, Service Workorders, Quotes, and Preventive Maintenance

See also:
[How do I create and view Follow Up in a workorder?]



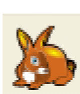
Save

This saves any changes made to the object without closing the entry screen.

Save & New

This saves any changes made to the object and opens a new empty entry screen so that you can create a new object without having to go back to the grid and selecting New...

This is useful if you are entering a number of similar objects (such as parts).



Duplicate

This makes a duplicate of the existing entries of this object and copies them to a new object entry screen.

For example, lets say you are entering a number of units for a client that are all same model, details etc except for the serial number. Save the first entry, and then select Duplicate. Edit its serial number. Save. Select Duplicate. Edit its serial number and so on.

See also:
How do I duplicate a Schedule Marker?

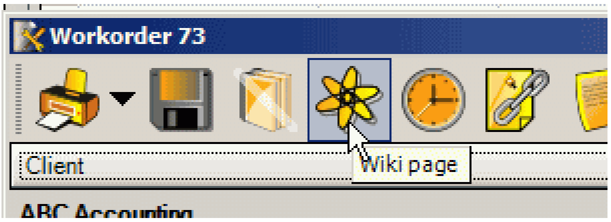
Delete

This deletes the **whole** object. Note that only if you have rights to do so will this toolbar option be available.

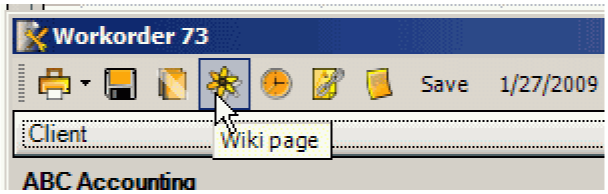
Delete is a permanent option. You are given one warning and chance to cancel and there is no "undo" option. If a user ignores the warning and deletes an item they should not have, the only options are to re-enter it from scratch or restore the entire database from a backup copy.

3.21 Changing menu images size (small or large)

Some people like menu options to be big and easy to select.

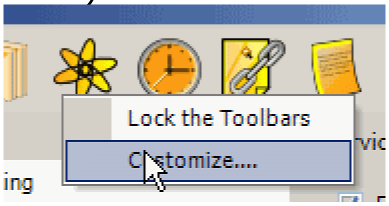


Some people like menu options to be small and out of the way.

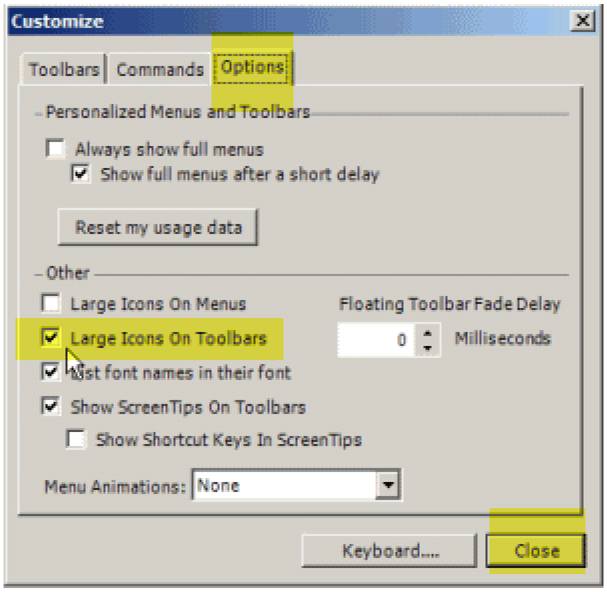


So to accommodate each different person, each AyaNova user can set their menus how they want and AyaNova will save it for that user logged in.

1. Right-click on any of the existing menu options of what you are viewing (i.e. a Part entry screen or the Service Workorders grid menu or the main menu etc) and select Customize....



2. Select the **Options** tab, check or uncheck the **Large Icons on Toolbars** option depending if you want the menu options to be large or small, and then select **Close**


Customize
Toolbars
Commands
Options
Personalized Menus and Toolbars
Always show full menus
Show full menus after a short delay
Reset my usage data
Other
Large Icons On Menus
Floating Toolbar Fade Delay
Large Icons On Toolbars
0
Milliseconds
List font names in their font
Show ScreenTips On Toolbars
Show Shortcut Keys In ScreenTips
Menu Animations:
None
Keyboard....
Close

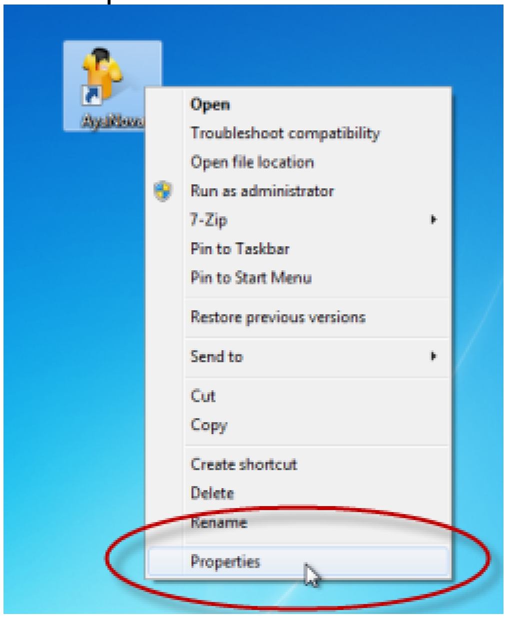
3.22 Change the font used in AyaNova to your OS's default font

Your AyaNova 7.4 (and above) desktop program displays text using the Segoi font.

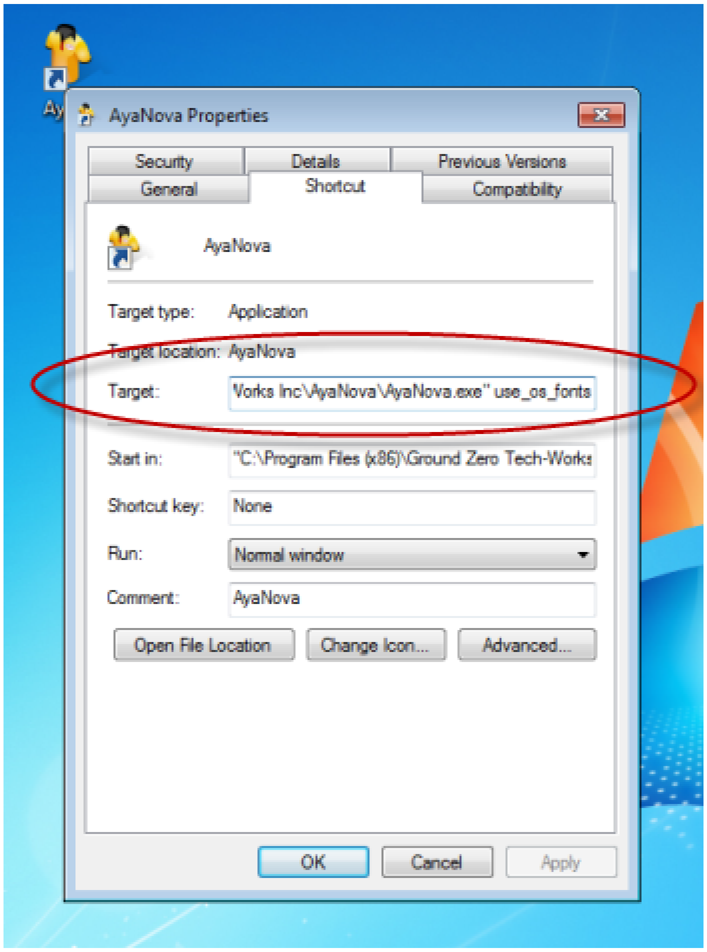
This is also Windows 10 default font.

If you have changed your Windows operating default system font and would like to have that same font also display in your AyaNova desktop program, here are the simple steps to do so!

Edit your Windows desktop shortcut to AyaNova to include the command to use your operating system's default font:

1. Right-click on the AyaNova icon on your desktop
2. Select Properties
   - 

3. Edit the Target: so that the additional text **use_os_font** is added to the end

- 

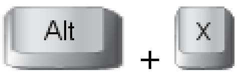
    1. If installed to a 64bit computer, the field will be:
        - **"C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\AyaNova.exe" use_os_fonts**
    2. If installed to a 32bit computer, the field will be:
        - **"C:\Program Files\Ground Zero Tech-Works Inc\AyaNova\AyaNova.exe" use_os_fonts**

4. Now when you next run AyaNova, the font displayed will be the same as your Windows default font.

3.23 Accelerator Keys

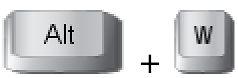
In addition to using your mouse to click on selections, AyaNova also provide Accelerator Keys which are key combination from your keyboard to automatically do something in the AyaNova program.

The Accelerator Key's save you time so that you do not have to go to the specific grid to click on the New... menu option to create the new object.



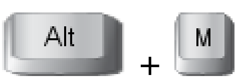
Alt-X **closes the entry screen or the entire AyaNova program** depending on whether you're in a sub-screen or not.

If have just entered new data into an entry screen, you will be prompted to save just as you would if you clicked the menu option Exit or the X in the upper right hand corner.



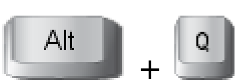
ALT-w will pop up the client selector so that you can select the client and template (if applicable) for **a new service workorder.**

Or if you are presently viewing the Client's entry screen, or a Unit screen, this key combination will start a new workorder with that client or that unit pre-selected



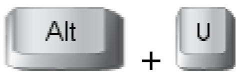
ALT-m will pop up the client selector so that you can select the client and template (if applicable) for **a new preventive maintenance order.**

Or if you are presently viewing the Client's entry screen, or a Unit screen, this key combination will start a new preventive maintenance order with that client or that unit pre-selected

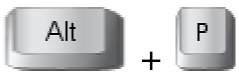


ALT-q will pop up the client selector so that you can select the client and template (if applicable) for **a new quote**

Or if you are presently viewing the Client's entry screen, or a Unit screen, this key combination will start a new quote with that client or that unit pre-selected



Alt-u Accelerator Key combination works from main grid or client entry screen to **create a new unit**. If used when within a client entry screen, the client is pre-selected in the new unit entry screen.



Alt-p Accelerator Key combination works from main grid only to **create a new part**.

In all cases of using Accelerator keys from sub forms like client and unit, if the client or unit is newly created and not saved, or the user does not have sufficient security group rights then the Accelerator keys do nothing with the exception of ALT-x

Customization of AyaNova

4 Customization of AyaNova

4.1 Localization - customize labels

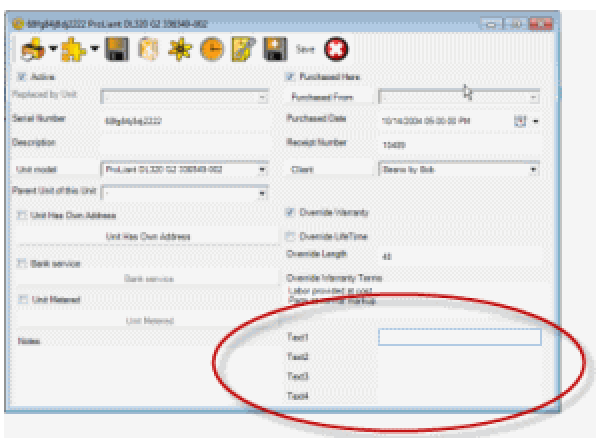
As no two service businesses work in the same way or have the same needs, you can customize AyaNova for **YOUR** specific requirements.

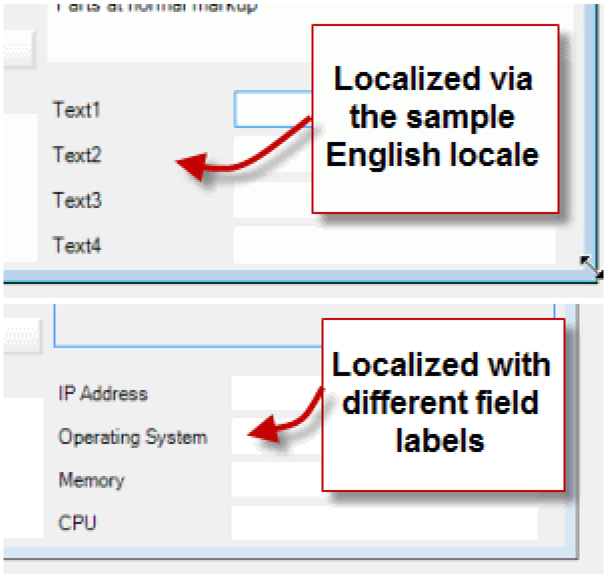
You can edit the labeling in AyaNova to what works for **YOUR** service

Follow along with the two tutorials How do I create new cusotm locale using Localized Text Design? and How do I customize an existing locale on the fly? for a walk through example of localizing in AyaNova with more details in the Localized Text Designer section.

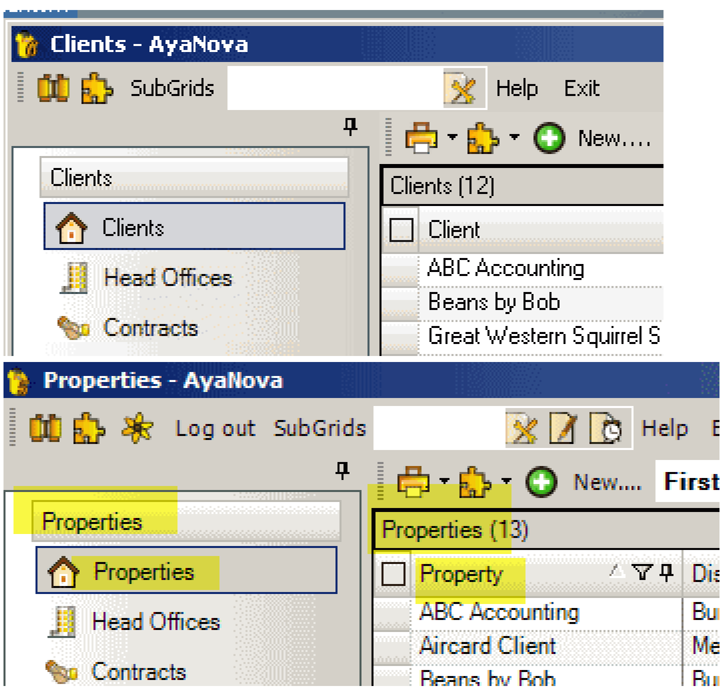
For example:

- You may provide internal IT service for a single company, and want to identify the IP address, Operating System etc in the unit screen for each computer and have that information available for reporting from a service workorder report.
- In which case, easily create your own custom locale that includes those fields presently labeled as Text1, Text2, Text3 in the Unit entry screen to be labeled as IP Address, Operating System etc.





• Another example is that you provide property management service, so where AyaNova presently is localized to Clients and Client, it may make more sense for your type of service if these were labeled as Properties or Property.



Do follow along with the two tutorials [How do I create new cusotm locale using Localized Text Design?] and [How do I customize an existing locale on the fly?] for a walk through example of localizing in AyaNova with more details in the [Localized Text Designer] section.

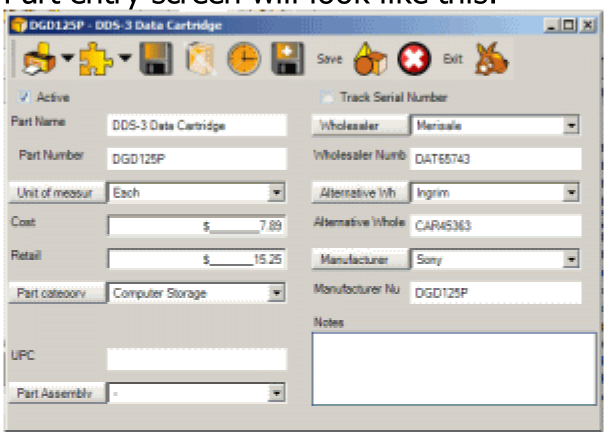
4.2 Custom Fields

What if you need additional fields to to track specific information for each unit or each part or each client or each workorder item?

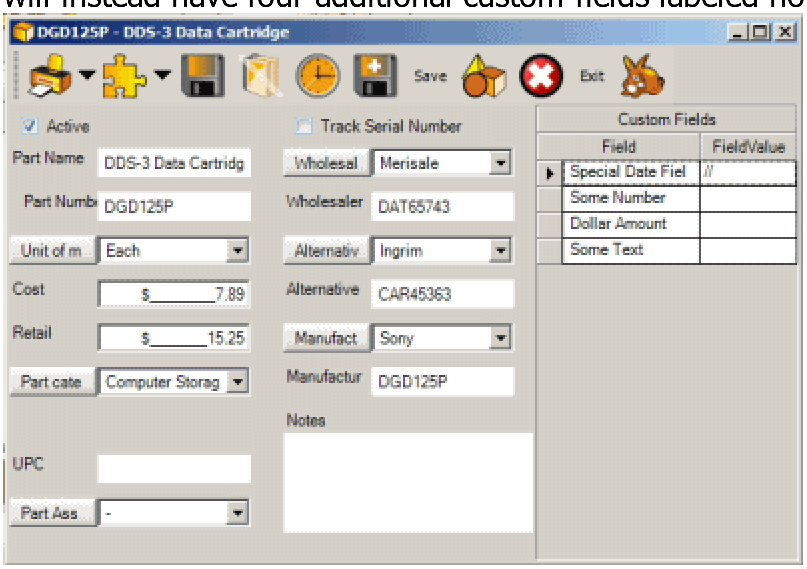
Just add custom fields!

Follow along with the How do I create custom fields for a unit? and How do I create custom fields for a workorder item? for a walk through example of adding custom fields to these entry screens.

For example, if custom fields are not enabled for the Part entry screen, the Part entry screen will look like this:



If you do enable four custom fields for the Part object, the Part entry screen will instead have four additional custom fields labeled however you need:



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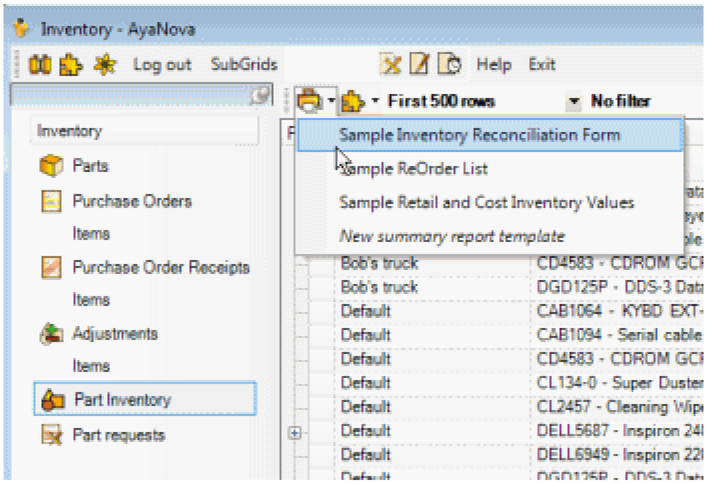
4.3 Report Templates

AyaNova includes **many sample report templates** from the detailed report showing billable amounts to send to your client in the Sample Detailed Service Workorder with Grand Total available from the Service Workorder and the Inventory Reconciliation Form report from the Parts Inventory grid.



- You can **customize any report template** such as adding additional data to display, changing font size, moving fields around, including your own logo - so much you can do.

  Follow along with the tutorial How to put my company logo on a report? as well as the other tutorials that will walk you through using the Report Template Designer

- You can also **create your own report templates**!

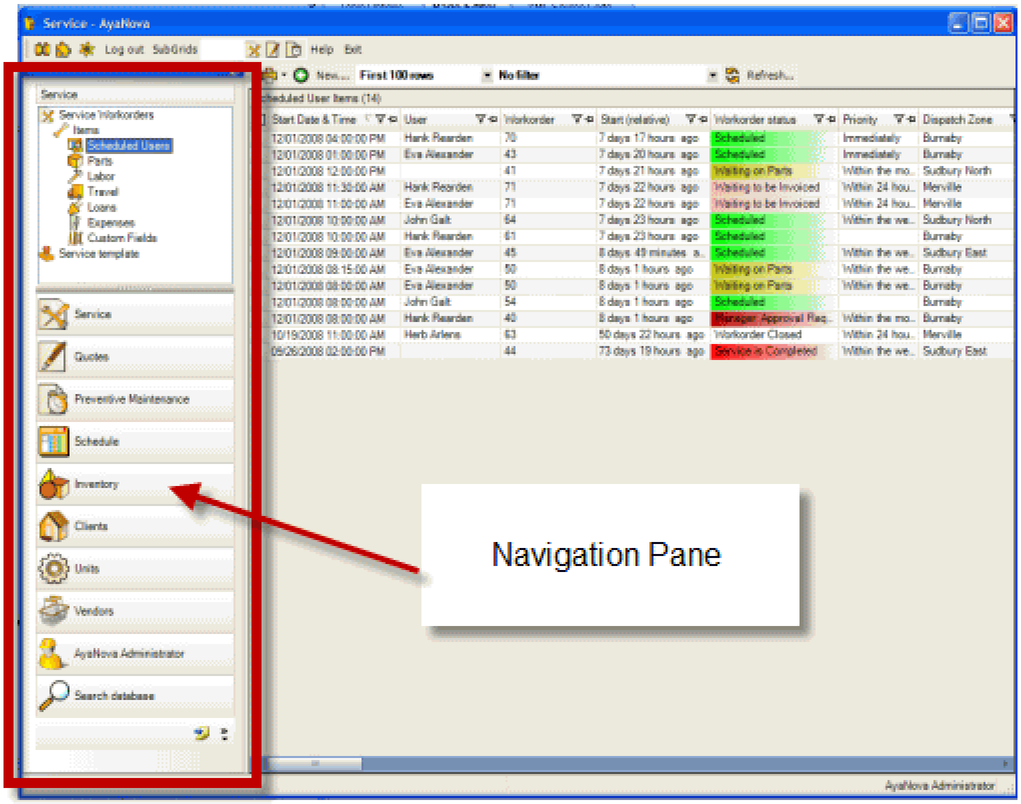
  Follow along with the tutorial How to create a report template using the Wizard?

  Also check out additional report template tutorials and examples on our AyaNova Support Forum

- You can also set who can **restrict access** to certain report templates by specifying which security group can only access that report template or restrict access to only users of a certain region.

4.4 Navigation pane display

The Navigation Pane of AyaNova on the left-hand side when you log in is where you can easily and quickly select to view and access different data in your AyaNova.



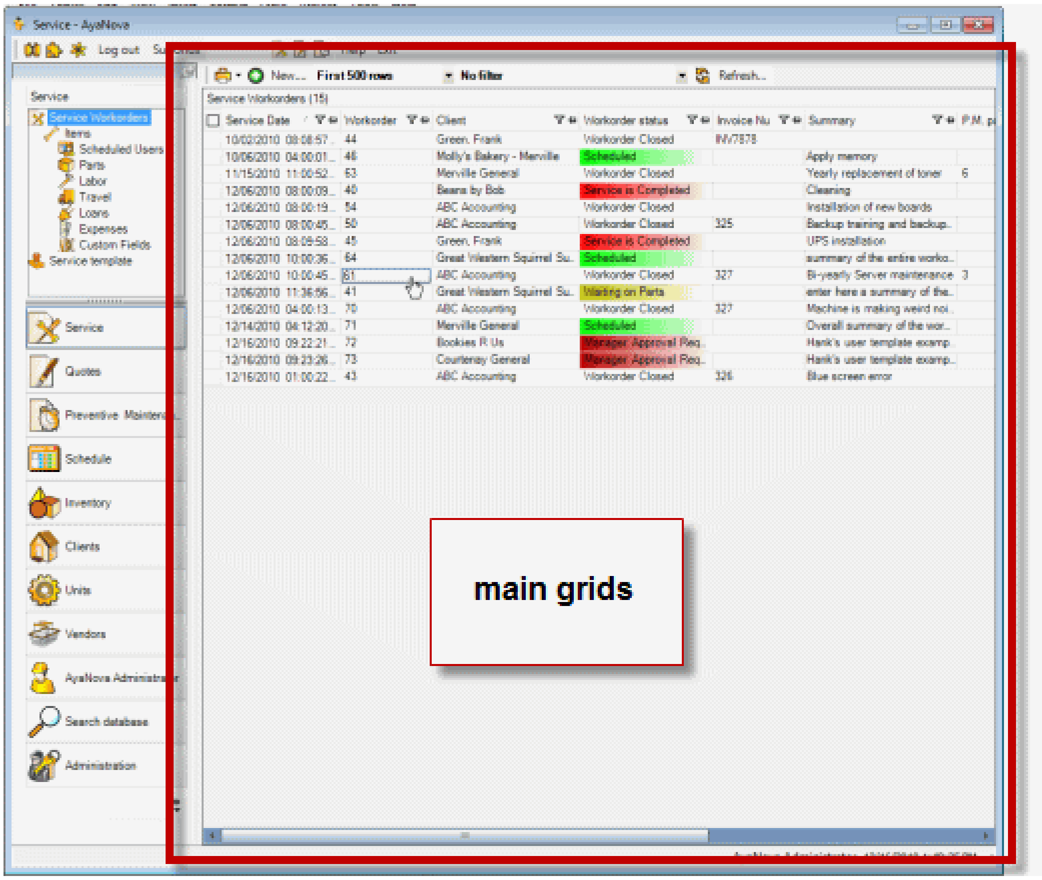
The screenshot above is showing the Scheduled Users grid in the Service navigation pane.

Customization of the Navigation Pane:

- You can set what order the panes display in, as well as remove panes so instead shows as a quick link icon.
- You can also pin, hide and dock the navigation pane to free up your viewing space in AyaNova.

4.5 Grid columns display

From main grids in AyaNova you can view one or more records at a time, select to open a specific entry screen, and print reports based on the records that are displaying.



The screenshot above is of the Service Workorders grid which shows service workorder records - in this case, sorted by the Service Date column without any additional filter(s).

When you exit out of AyaNova, what you had set for your grid settings are saved for your username, for the next time you log in.

Customization of main grids:

- Move and set which columns the grid is sorted by moving the desired sort column to the left.
- Change sorting from ascending to descending or vice versa by selection of the sort icon on the sort column.

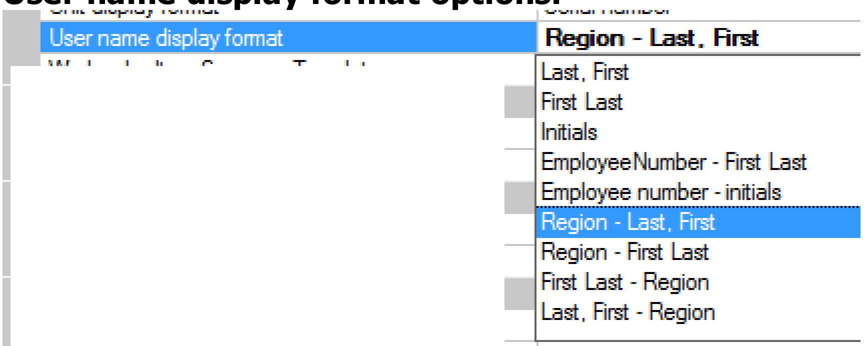
- Display or not display certain columns as needed
- Pin a column so that it always shows even if scrolling
- Filter what records show in the grid by filtering on one or more columns
- Save filters for quick selection at a later date to the Filter Drop List
- Set the maximum number of rows to display for speed

4.6 Name display format

Set how your user's, part's, and unit's display in your AyaNova - making it easier for you to identify and schedule correctly.

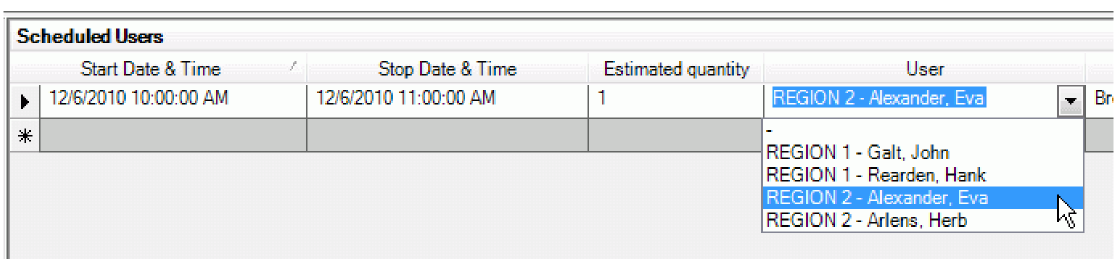
Do review Display options in the Global Settings Help section for details

User name display format options:

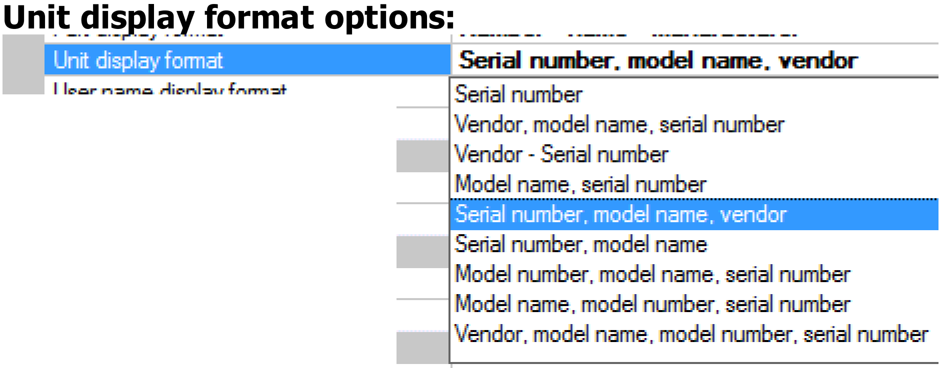


For example, by including the Region in your technician's names, you easily can see at a glance that you are assigning a technician of the same Region as the client so that it shows in that tech's Schedule when they log into AyaNova.

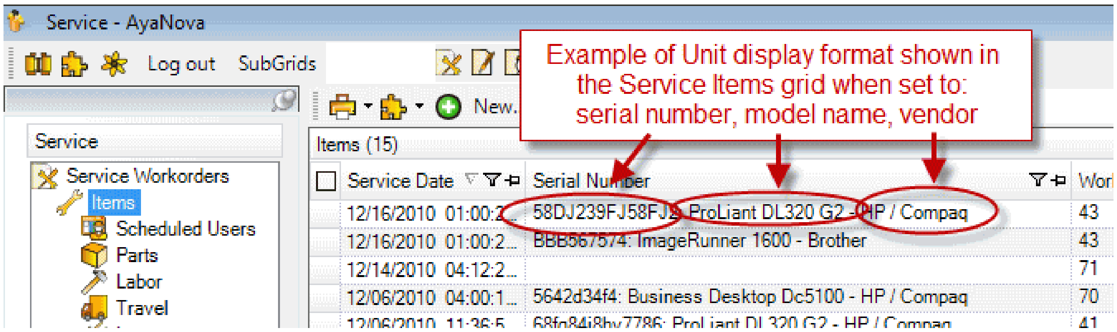
This would also show in the Schedule screen too, as well as in the grids where the user name displays.



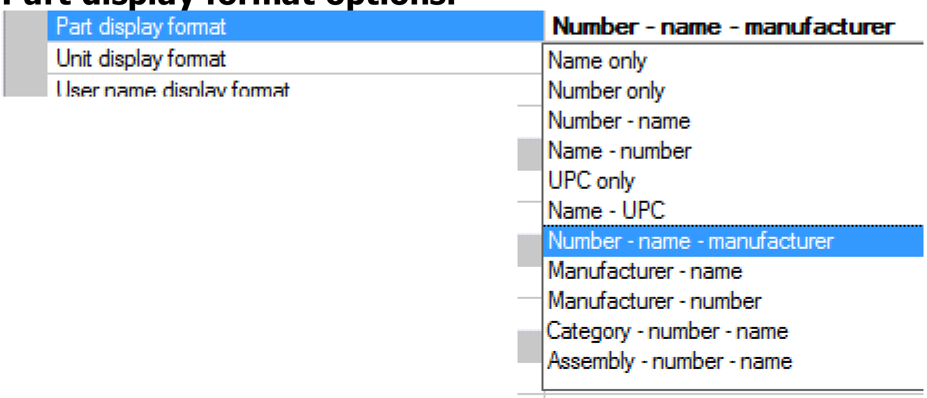
Unit display format options:



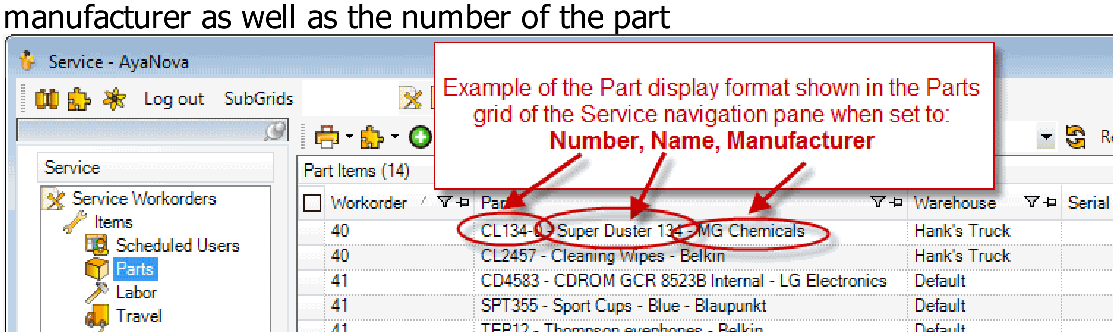
For example, you may find it easier to identify if you include the model name and vendor in the display of the unit's serial number.



Part display format options:



For example, you may find it easier to identify if you include the name and manufacturer as well as the number of the part

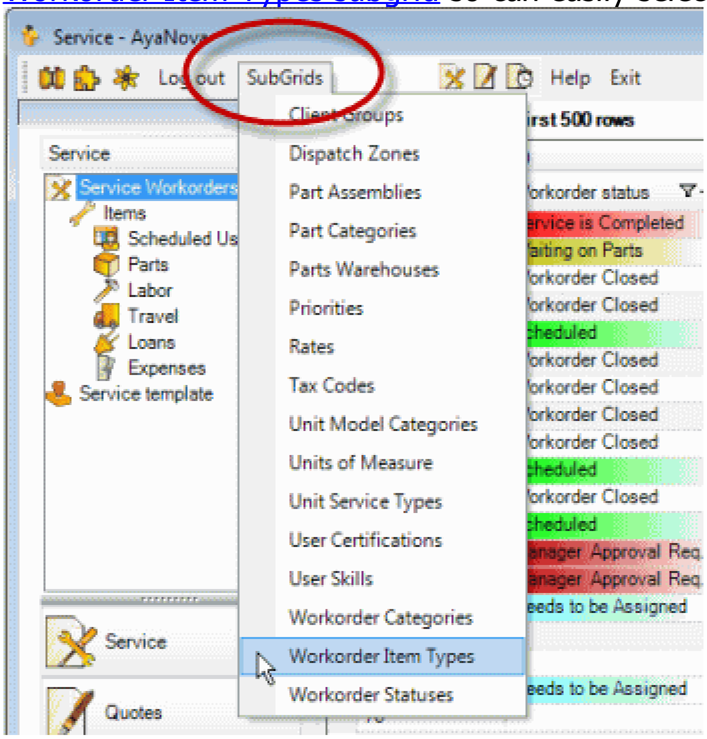


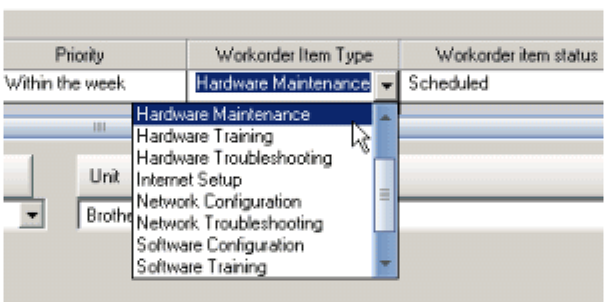
4.7 Selection lists - Workorder Statuses, Categories, etc

Rather than having to type out what the status is of a workorder each time for each workorder, or include in the name of a part its category, you can create these via their specific SubGrid so you can easily select where needed, as well as use to quickly filter data in grids.

Create as many as needed, and name however you want that works best for your company.

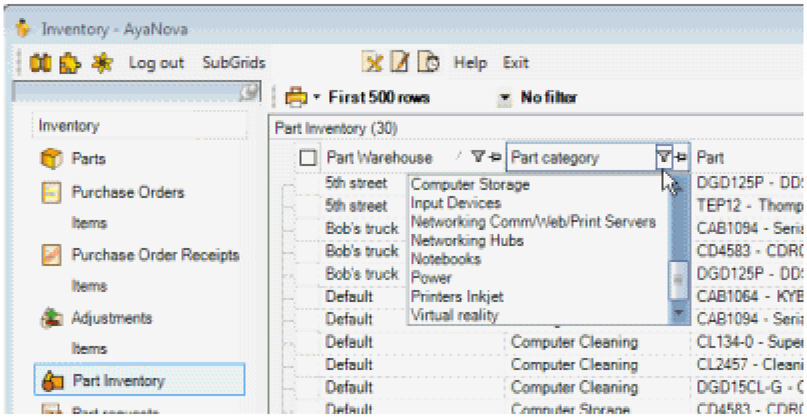
For example, create as many different Workorder Item Types as needed via the Workorder Item Types subgrid so can easily select in a workorder item.





You can also use these for easily filtering in grids so that you can quickly obtain a report based on those.

For example, if looking for a report of all parts of a certain category, because you have created different Part Categories, and have selected so in each Part entry screen, you can easily filter in the Part Inventory grid by Part Category if you wanted to see only inventory for parts of a certain category



4.8 Display/non-display of fields in order entry screen

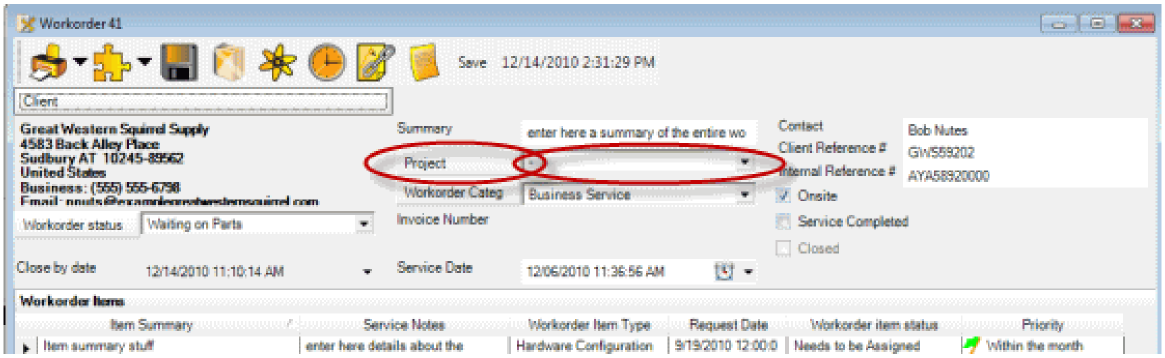
What if you don't want your AyaNova users to see certain fields in the order header area of a service workorder or a quote or a preventive maintenance?

Easy - just log in as the AyaNova Administrator, open up the entry screen, select the menu option **Customize...**, and toggle those fields and field labels to not show!

You can customize the service workorder entry screen, service workorder template entry screen, quote entry screen, quote template entry screen, preventive maintenance entry screen and preventive maintenance template entry screen each differently.

Below is an example of disabling the Project label and field within the service workorder entry screen:

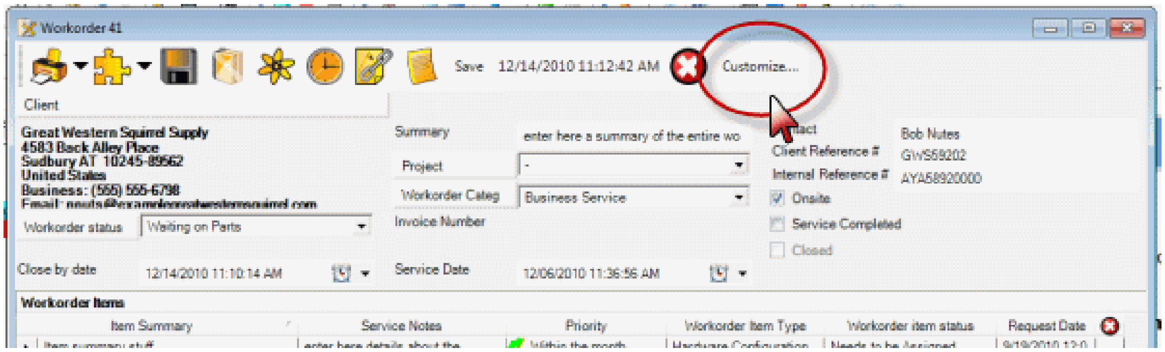
1. In this example, we do **not** want the Project label nor the Project field to display in the service workorder entry screen.



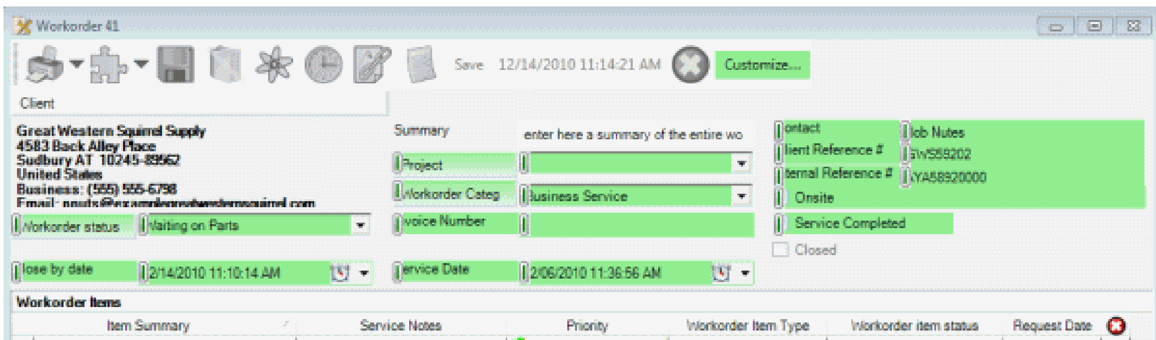
2. Log into AyaNova as the AyaNova Administrator (default is username of manager with password of letmein if you have not yet changed it)

3. Open any service workorder entry screen

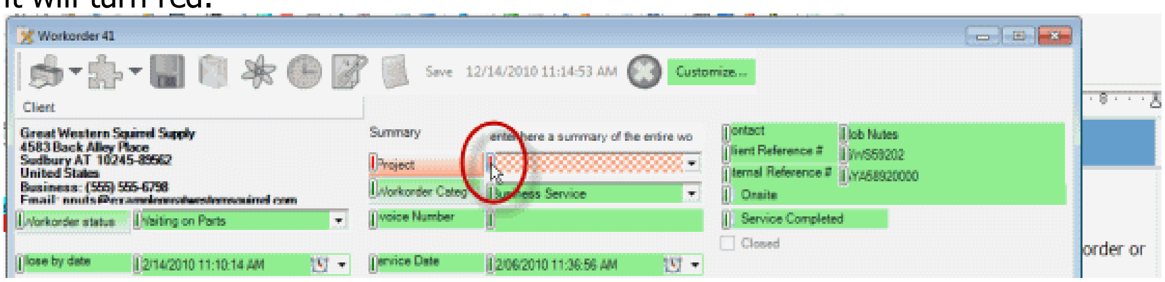
4. Select the menu option Customize.... which will display the entry screen in a special customization mode so that you can set which fields and their labels to display or not.

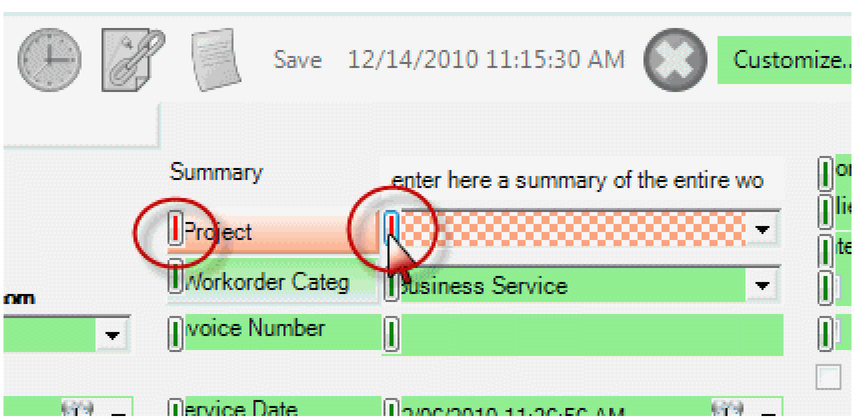


5. Fields and their labels that are showing will be displayed as green, fields and their labels that are not showing will be red.

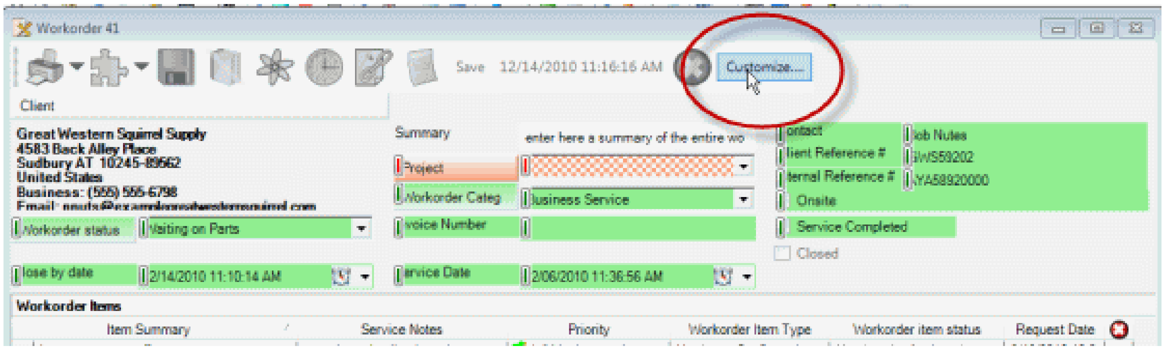


6. Use your mouse to click on the bar to the left of the field. When you click on it, it will turn red.

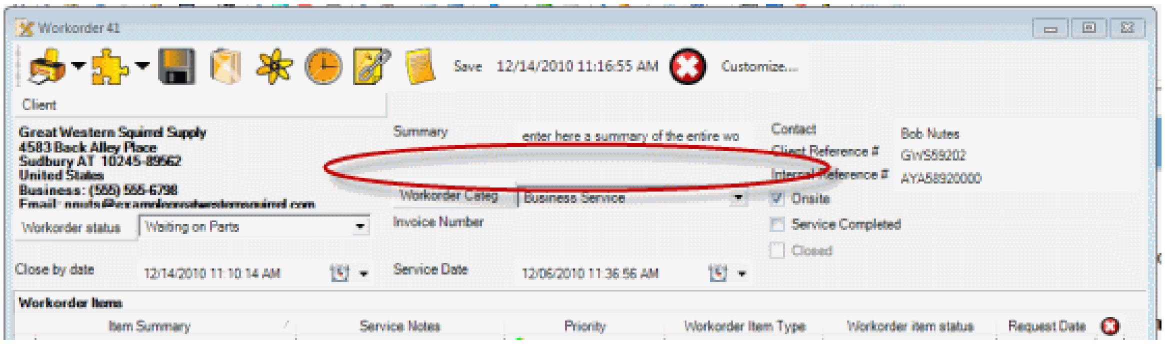




7. Select the Customize... menu option again to **save** your display changes and return to the entry screen.



8. The entry screen will now no longer show the Project label because you have toggled it to red. And will no longer show the Project field because you have toggled it to red.



NOTE: this does NOT remove any data in the Project field from any workorder. It just disabled the fields from showing.

NOTE: doing the above would affect ALL service workorder entry screens.

4.9 Display/non-display of subsections in order entry screen

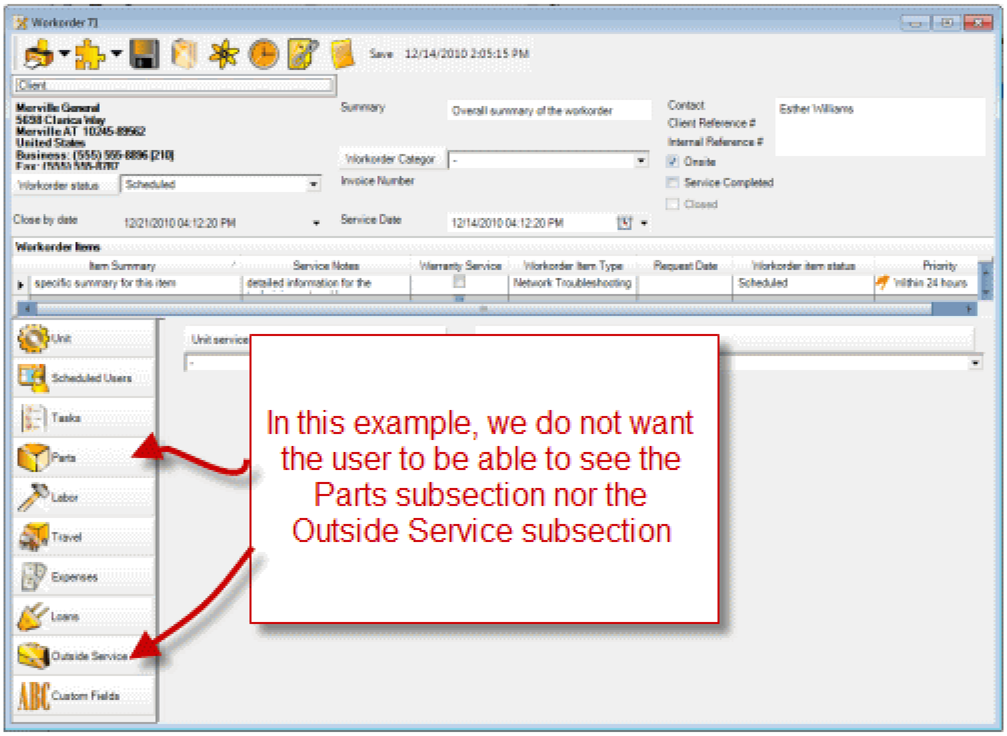
What if you don't want your AyaNova users to be able to view at all certain subsections of the service workorder entry screen such as the Loans subsection or Outside Service or Parts etc?

Easy - just set the **user's security group** Object for that subsection to **Forbidden**!

When a user of that security group next logs into AyaNova, they will no longer see that subsection.

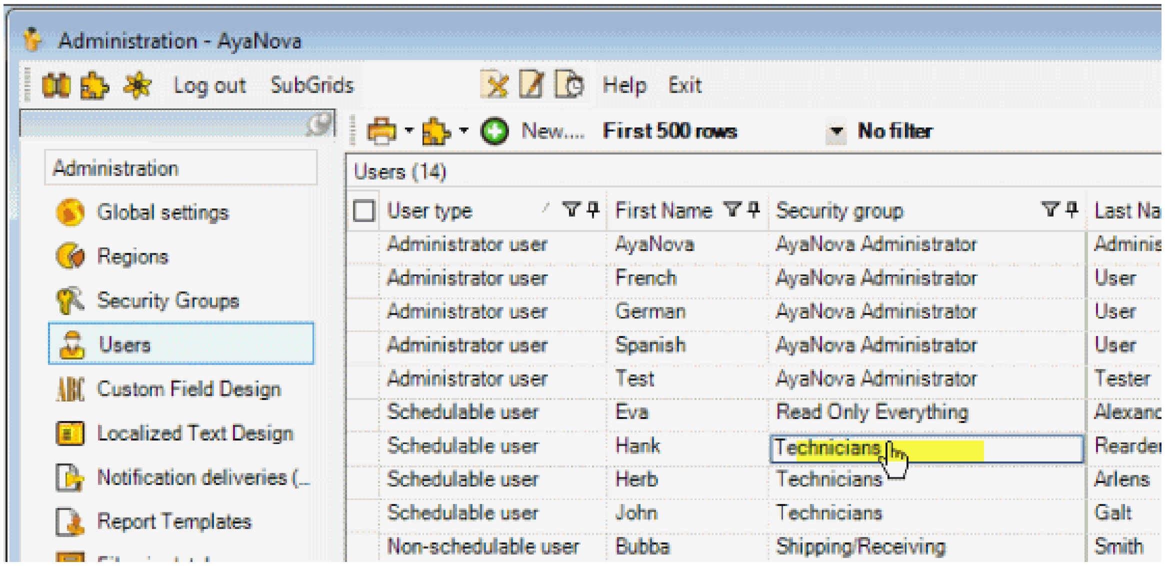
Below is an example of setting the Outside Service subsection and the Parts subsection so that they are not viewed by users assigned to the security group Technicians:

1. Right now when a user of the security group Technicians logs in, they can view a workorder's Outside Service and Parts subsection. In this example, you don't want them to be able to view this.

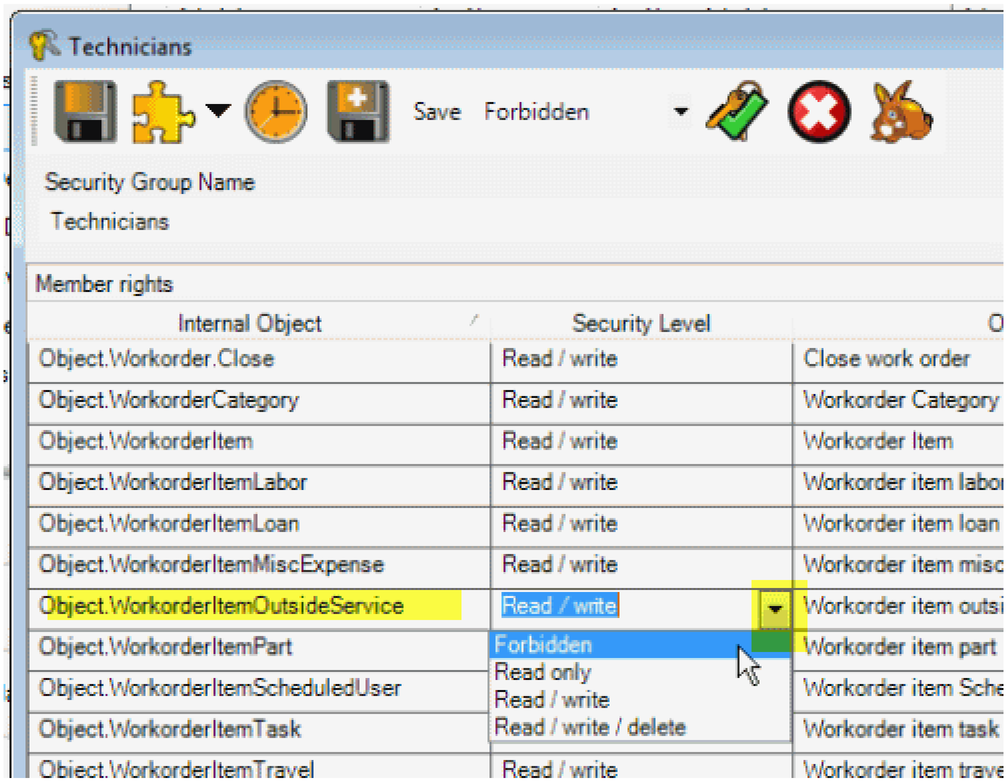


2. Log into AyaNova as an administrative user with rights to edit Security Groups (such as the AyaNova Administrator)

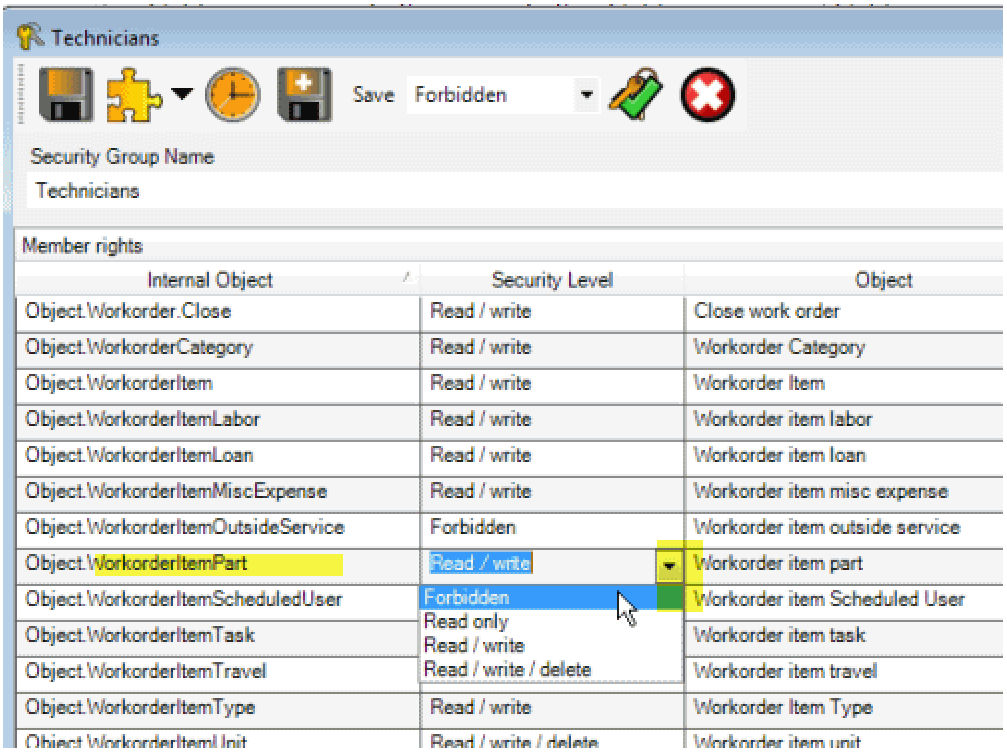
3. Open the Security Group of the users that you do not want to be able to see Outside Service and Parts subsection



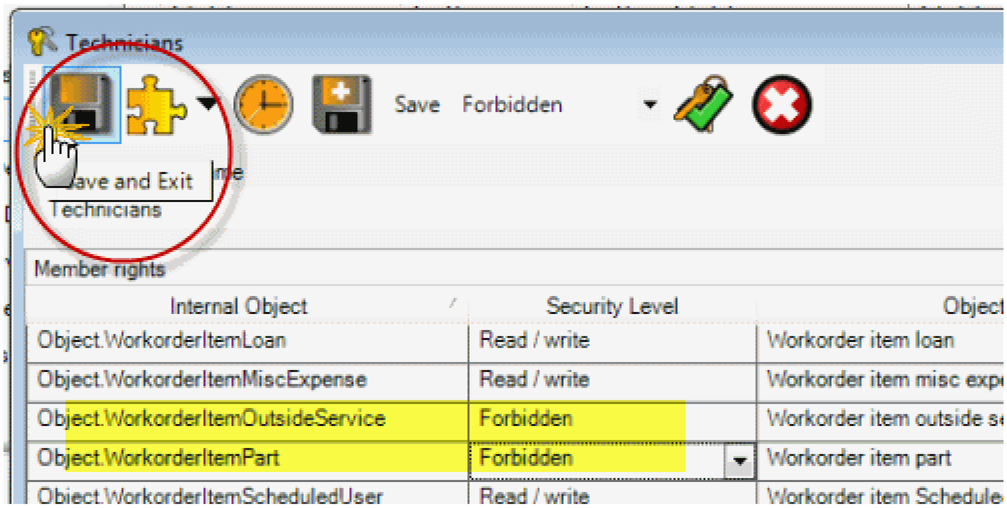
4. Set the Object.WorkorderItemOutsideService to Forbidden



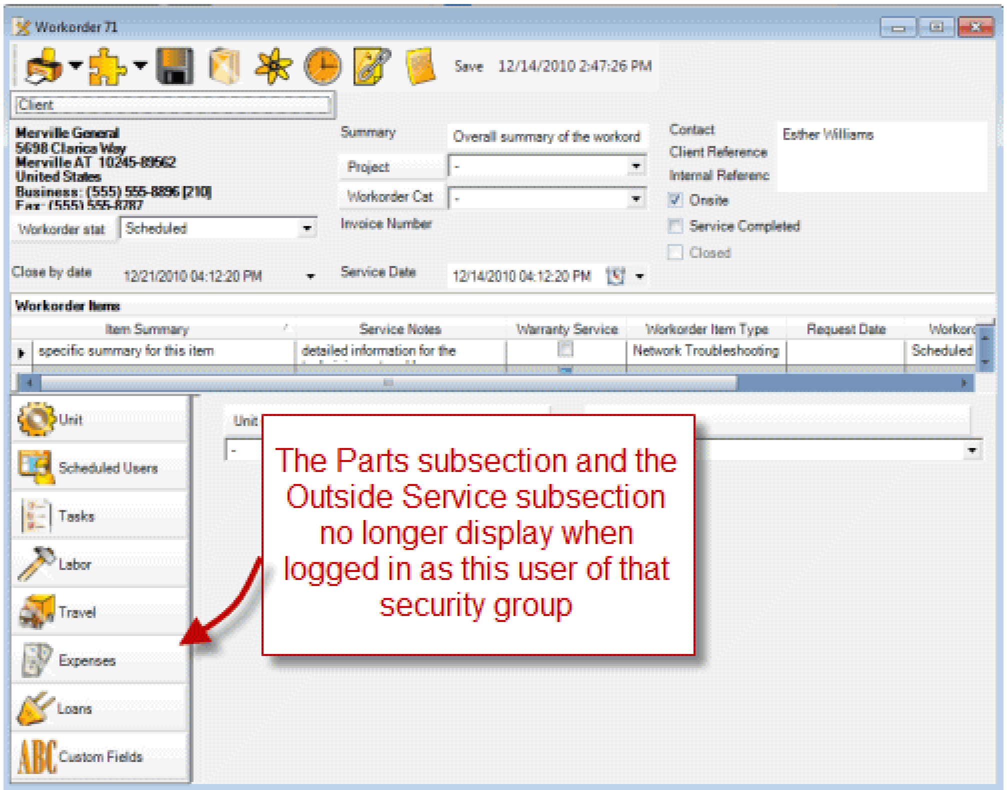
5. Set the Object.WorkorderItemPart to Forbidden



6. Save the security group



7. Have the user of that security log into AyaNova and open the workorder again. Will now see that the Outside Service and Parts subsection are no longer visible for that user.



NOTE: this does NOT remove any data in the Forbidden subsections from any workorder or quote or PM. It just disabled that subsection from showing for users of that security group.

NOTE: if for example, the user has Read/Write/Delete rights to Object.WorkorderService and Forbidden to Expenses, that user will of course be able to delete the entire workorder even though Forbidden is set on a subsection

NOTE: doing the above would affect ALL service workorder entry screens, all quotes and all PM's when logged in as a user of that security group.

Feature Details

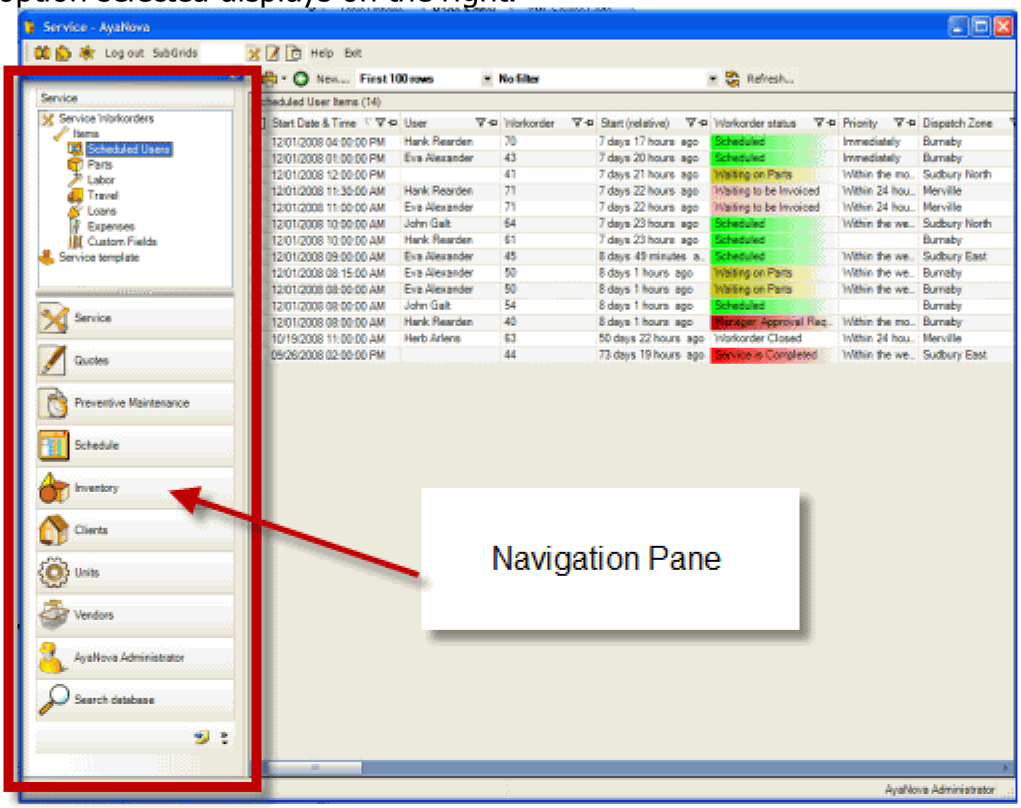
5 Feature Details

5.1 Navigation Pane

5.1.1 Navigation Pane overview

Major grids and screens in AyaNova are accessed via the **Navigation Pane**.

The AyaNova Navigation Pane is on the left side when you log into AyaNova and the option selected displays on the right.

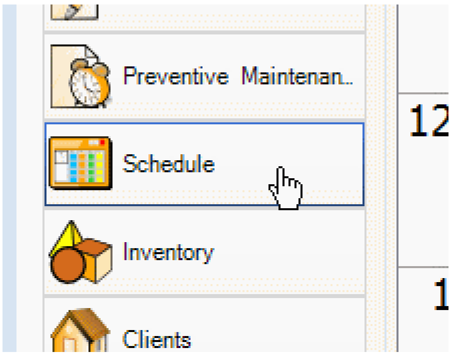


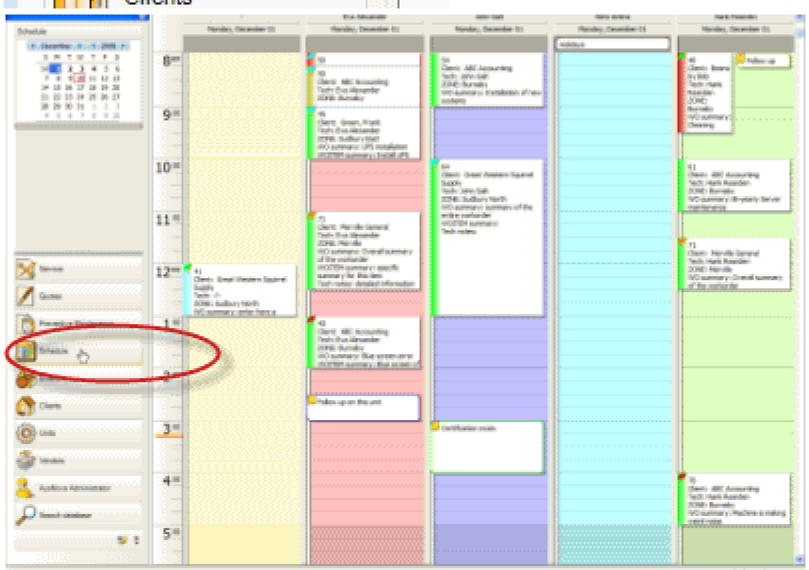
- In the screen shot above, you are viewing the **Service navigation pane** with the **Scheduled Users grid** selected
- When you exit out of the AyaNova program, AyaNova will “remember” what you were last viewing, and when you next log into AyaNova, will open to that same view.

  This is very useful if as a technician, you mainly view the Schedule screen, it would always open to this screen when you log in. Or if you are a receiver for parts for inventory, it would open to the Purchase Order Receipts screen if that was the last screen you were in when you closed out.

- It is recommended that every person using AyaNova has their own unique username to log in with. If multiple users are using the same username, who ever closed out last will overwrite what screen to open up to the next time that username is logged in.

Easily move to other areas of AyaNova by clicking the option in the Navigation pane. For example, to view the Schedule screen, click on Schedule.



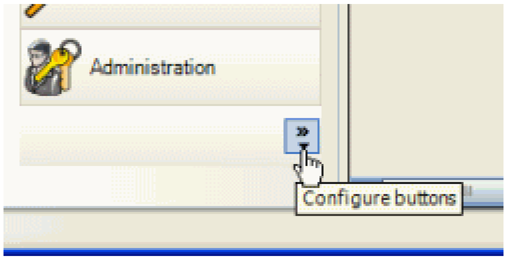


5.1.2 Setting the Navigation Pane order

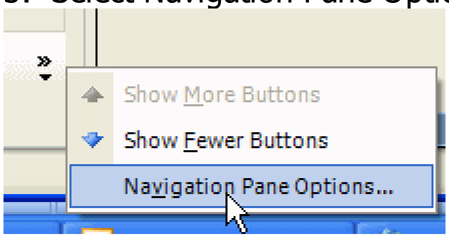
You can change the Navigation Pane order - for example, you may want to move the Vendors navigation bar to the bottom of the navigation pane:

1. The Navigation Pane is presently displaying the Vendors between Units and the user who is logged in

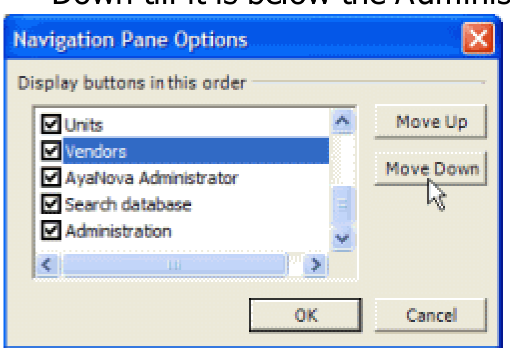
2. Select the configure button at the bottom of the Navigation Pane

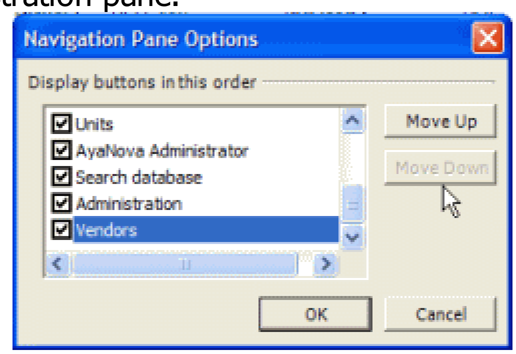


3. Select Navigation Pane Options



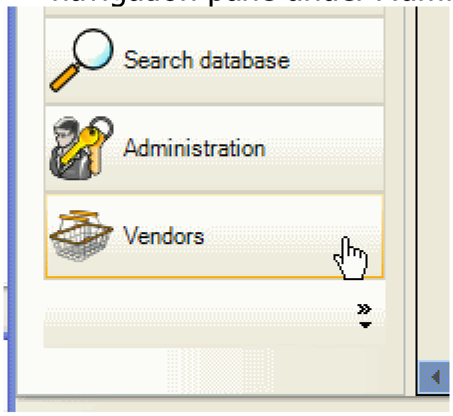
4. Select the Vendor pane which is what you want to move, and select Move Down till it is below the Administration pane.





5. Click on OK to save the Navigation pane options

6. The navigation pane will now display the Vendors bar at the bottom of the navigation pane under Administration



These settings will display the next time you log in under the same username as AyaNova maintains this information within its database for you as a user.

5.1.3 Setting the Navigation Pane display

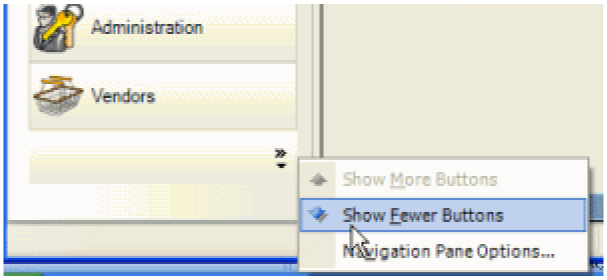
There are two ways to not have specific bars of the navigation pane display for a specific user:

1. Restrict access to the object in the Security Group that the user is a member of; if they have no rights to the object it won't display in the navigation pane.

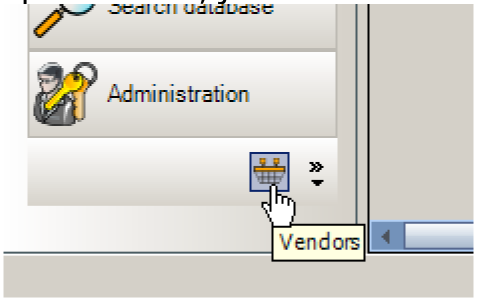
2. Or the user themselves when logged in can use the Configure Buttons of the navigation pane to move the bar so that it no longer shows when you log in, and instead shows as a quick link image.

For example, you do not want the Vendors bar to show on the navigation pane for visual reasons:

- First use the steps to move the Vendors pane to the bottom of the order.
- Now select the Configure Buttons at the bottom of the Navigation Pane and select Show Fewer Buttons



- It will move the bottom pane as an icon only to the very bottom. To open Vendors, just select it.

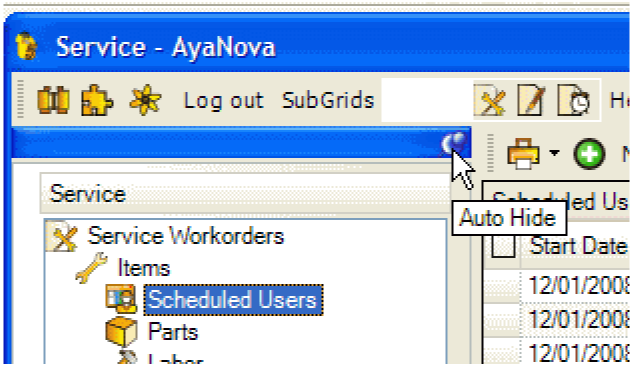


These settings will display the next time you log in as AyaNova maintains this information within its database for you as a user.

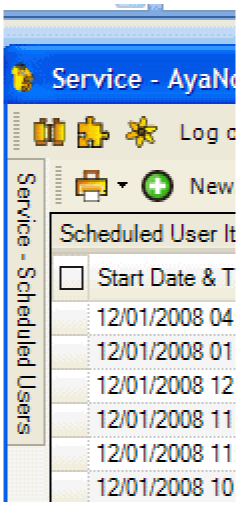
5.1.4 Pin, hide and dock the Navigation Pane

You can pin, hide and dock the Navigation Pane so that more space in main grids and the Schedule screen is freed up.

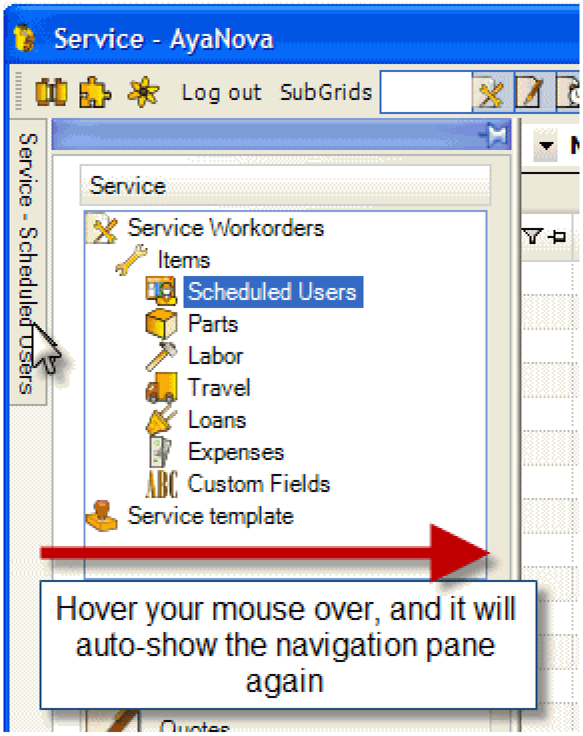
- Unpin the Navigation Pane by clicking on the Pinned symbol



- When you do that, the Navigation Pane will automatically move to the left out of your way while still showing what grid you have selected in what navigation pane.



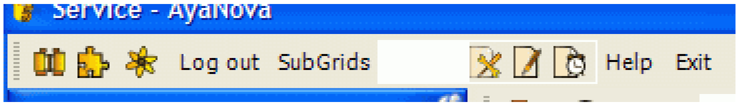
- Any time you want to bring the Navigation Pane back over, just hover your mouse over the tab for the Navigation Pane

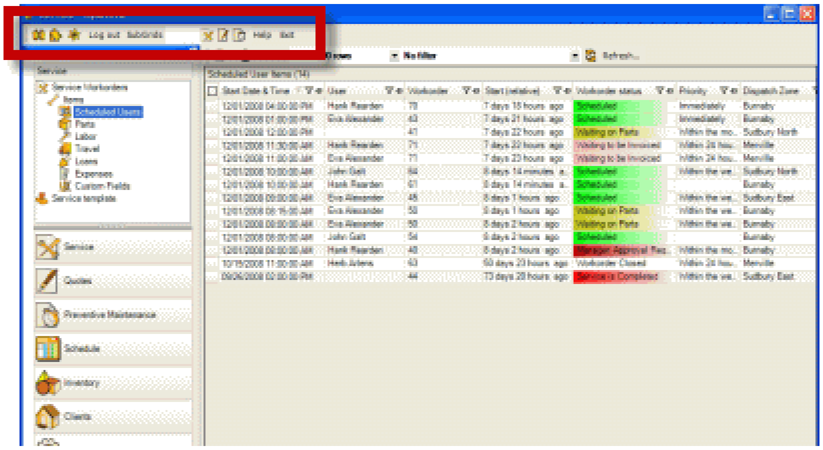


- You can also drag the navigation pane to dock at the bottom or the top as well as off the AyaNova screen.
- Do note that when you exit out of AyaNova and log back in, the navigation pane will be back to pinned and on the left hand side - so if you drag it off somewhere and can't get it to sit right, just exit and log back in.

5.1.5 Main AyaNova Menu Bar

The main AyaNova menu bar appears at the top





You can use the main menu bar options to list your recently accessed objects, plugins, open up the Global Wiki page, quickly log out of AyaNova, access the sub-grids within AyaNova, and quickly open a workorder, pm or quote by entering its number, access web information regarding AyaNova, check your AyaNova version, and also use the main menu bar to exit out of AyaNova.

***Recent....***

Useful to see the last objects you opened - for example, you just check marked Service Completed which has to close the workorder entry screen to apply the features, you can easily just drop down the Recent... to see the list of last viewed object and select that workorder to re-open it.

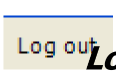
***PlugIns***

If any plug-ins are installed, then this menu option will show, such as QBI (QuickBooks interface), PTI (Peachtree interface), import/export CSV utilities.

See also: PlugIns

***Wiki***

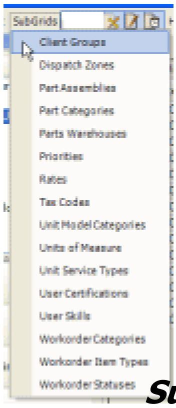
This opens up the Global Wiki page. The Global Wiki is not tied to any specific AyaNova object such as a specific client or workorder. You may find this useful area to enter mission statement, general overall notes, embed general documents or any information that should be viewable by all users.



Log Out

Selecting this will bring up the AyaNova login screen without having to close down the AyaNova program. This is useful if multiple users share the same computer so any entries performed by each user are identified in Record History by their username.

Note as with all text labels in AyaNova, depending on your locale, this may display with different text. Refer to the Localization Text Designer section for additional details.



SubGrids

Will open up the entry grids where the following items are created, viewed and edited. Note all are optional use.

Client Groups – used to group clients together. These are useful for filtering grids and reporting purposes. Client Groups are selected within the Client and Head Office entry screen.

Dispatch Zones – used to group clients in a geographical area groups. They are also used to group schedulable users responsible for these graphical areas. It is most useful for companies with a large client base that have technicians responsible for different geographical areas or groups of clients. A Dispatch Zone is selectable within the Client and User entry screens, and used in Schedulable User Groups for the Schedule screen.

Part Assemblies – used to group parts together. If you use Part Assemblies, you may want to set the Global Settings part name format to display drop down selection lists with the assembly name listed first. A Part Assembly is selectable in the Part entry screen.

Part Categories – used to group parts together. If you use Part Categories, you may want to set the Global Settings part name format to display drop down selection lists with the category name listed first. A Part Category is selectable in the Part entry screen.

Priorities - signifies how important a workorder item is, or how urgent a workorder item may be. When viewing the Schedule screen, a workorder item will display a colored flag with the selected color of the priority for the workorder item. Priority also displays on the Scheduled List Grid as its selected color.

Rates - used to indicate charges for labor and travel on workorders to the customer and as summarized data on various reports. You can add as many rates as desired.

Tax Codes – used to indicate taxes to be charged on parts, expenses, and service and travel rates.

Units of Measure – used to indicate the determinate or magnitude of the part designated. This displays within where a part is selected when entry quantity to specify the type of measure. For example, a part could be "each", "box", "case", "dozen", "gallon", "feet", "meter" etc.

Unit Service Types - whereas the Type column in the workorder item grid is to identify the type of service requested, we provide an additional service type selection on the Unit sub-item screen. Unit Service Type is to identify the service pertaining specifically to the unit within a quote, pm or service workorder.

User Certifications – this is a list of all possible user certifications that may be assigned to a user. What user certifications a schedulable user has may be used for dispatching purposes. User Certifications are selected for a user within a User entry screen, and used to determine groups in Schedulable User Groups for the Schedule screen.

User Skills – this is a list of all possible user skills that may be assigned to a user. What user skills a schedulable user has may be used for dispatching purposes. User Skills are selected for a user within a User entry screen, and used to determine groups in Schedulable User Groups for the Schedule screen.

Workorder Categories – used to group workorders together by selecting within the service workorder, quote or pm. This is useful for filtering grids and reporting purposes.

Workorder Item Types – used to group workorder items together within a service workorder, quote or pm. This is useful for filtering grids and reporting purposes.

Workorder Statuses – used to determine the progress of a work order as a whole, or the status of an individual workorder item. Status selected within workorder items will display their associated color when viewed in the Schedule screen. Status selected for the workorder as a whole does not affect the color displayed in the Schedule screen, as the Schedule screen displays workorder items associated with a scheduled user only.

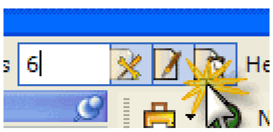
For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item’s status.

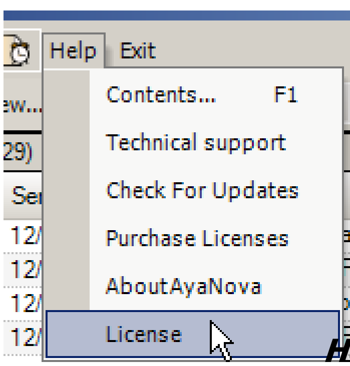
We provide both in AyaNova for you so that you can use what works best for your organization and company. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas. Use of Workorder Statuses is optional in AyaNova.

“Direct Open” feature

This feature provides the ability to open a service workorder, a quote or a preventive maintenance order by entering in its number and pressing the corresponding button.

For example, without having to go to the Preventive Maintenance grid, you can just enter in the PM# in this field and select the PM image





Help

Contents... – Opens this online Help

Technical Support – opens your web browser to the AyaNova Support Forum

Check for updates – checks online to see if your AyaNova is the latest version. If not, will open to a web page for details on updating to the latest version

Purchase licenses – opens your web browsers to the AyaNova web site Purchase page

About AyaNova – identifies your AyaNova program version, database server in use, location of database, registered to, and other technical information.

License – Only **if logged in as the AyaNova Administrator** can you erase or enter in an Activation key

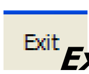
Opens up screen from where you can:

- enter/fetch your Activation Key to license your AyaNova
- delete all existing data

Customize text...

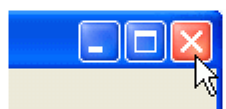
This menu option ONLY shows when logged in as the AyaNova Administrator.

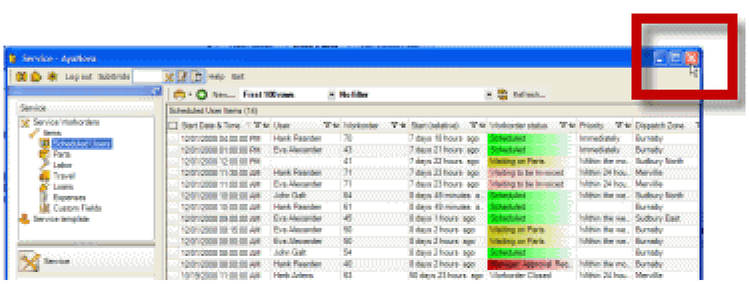
Use the Customize text... menu option to [localize labels of this entry screen on the fly] or if accessed from the main menu bar, displays the labels of the main grids and main menu bar for quickly editing.



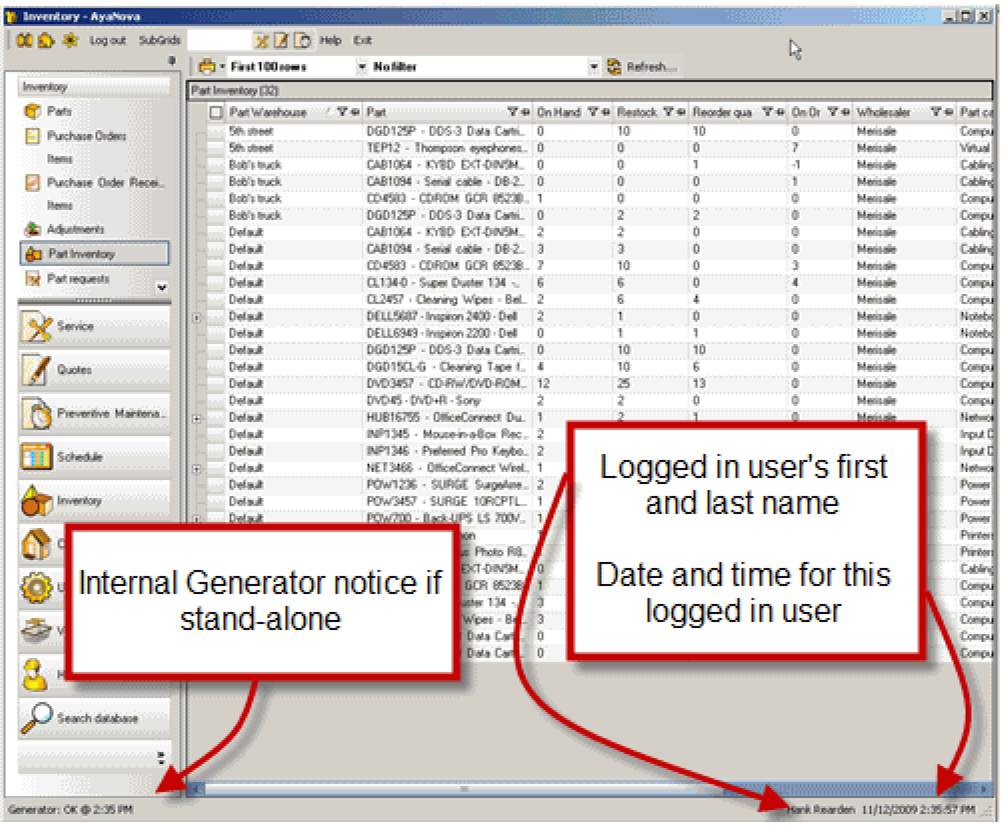
Exit

This exits out of AyaNova, closing the AyaNova program.

You can also select the X in the right hand corner  to close AyaNova.



5.1.6 Main AyaNova bottom bar



The main AyaNova bottom bar that displays at the bottom of the AyaNova user interface shows:

1. Shows when the internal Generator last ran on the left bottom
2. Shows the name of the user logged in on the right hand bottom
3. Shows the time used by the logged in user on the right hand bottom

1. Shows when the internal Generator last ran on the left bottom

If your AyaNova is installed for use on a stand-alone computer, than the internal Generator runs when logged in as any other AyaNova user other than the AyaNova Administrator.

See also [What is the Generator?]

If your AyaNova is configured for network use, than nothing will show on the left hand bottom of the pane.

2. Shows the name of the user logged in on the right hand bottom

The AyaNova user logged in will show - their first and last name as entered in their user entry screen.

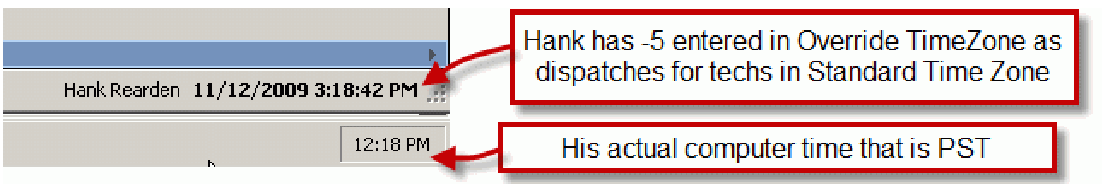
3. Shows the time used by the logged in user on the right hand bottom

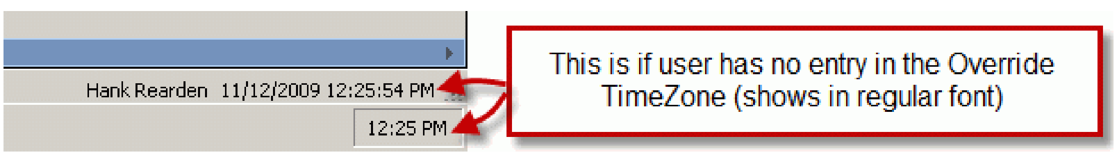
The date and time for this user that is logged in.

By default, this will be the same date and time as your computer you are logged into. If using this by default, the date/time will show in regular font.

If instead the user logged in has a specific Override TimeZone entry, than the date/time will show in BOLD (reminds user at a glance that their time setting is not based on their own computer).

Also review the **Override TimeZone** field details in the user entry screen as well as TimeZones & what date/time displays



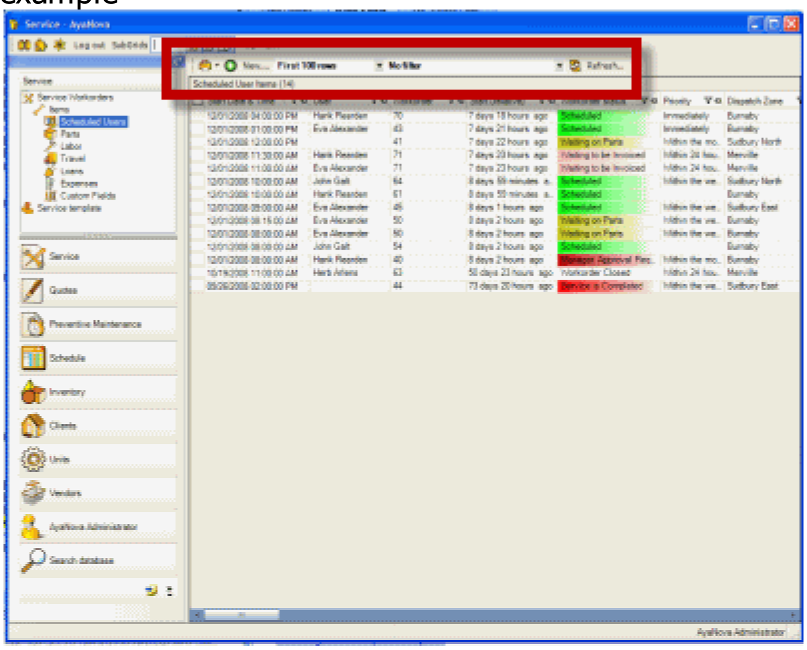


5.2 Grids

5.2.1 Grid menu options

The main grids in AyaNova have menu options available just overtop of the grid that are specific to that grid.

The screenshot below shows the grid menu options for the Scheduled Users grid as an example



These include the Print selection, the New... selection to create a new grid object, the maximum number of records to display in the grid, the Filter Drop List, and the Refresh button.

Main Grid menu options:

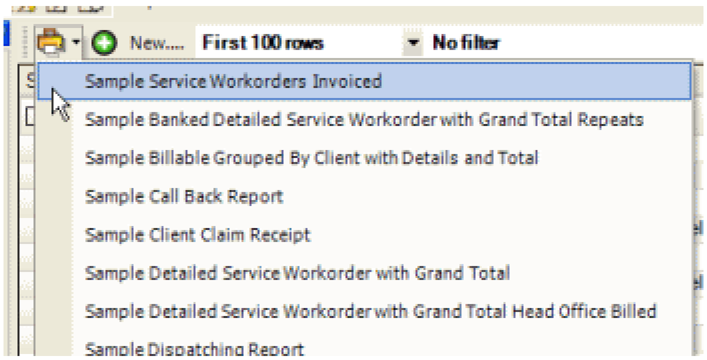
[Print](#)
[New...](#)
[Maximum Number of Rows](#)
[Filter Drop List](#)
[Refresh](#)

 **Print**

Selecting the Print icon menu option from a main grid allows selection of a report template to print the displaying data for **that** grid.

For example, if you were viewing the Service Workorders grid, and you had filtered to show only service workorders that are set to Service Completed, then only those workorders displaying in the grid would print their data on any report you select.

Do note you may or may not see the same reports shown in screenshots in this manual. Additional sample report templates can be downloaded from the AyaNova Support Forum https://forum.ayanova.com , or you may customize your own, and/or may contract a consultant to create specialty report templates.



New summary report and *New detailed report* are selected to create new custom reports from scratch. The *New summary report* provides access to all fields displaying in the grid, whereas if a *New detailed report* is displayed, additional fields not displaying in the grid may also be available for selection in a custom report template.

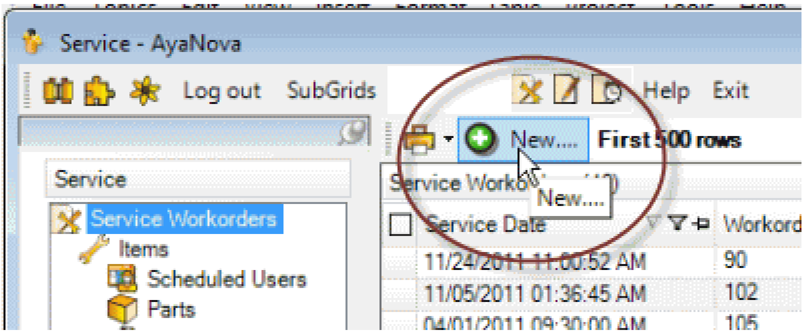
See also:
[Creating a new report template](#)

New...

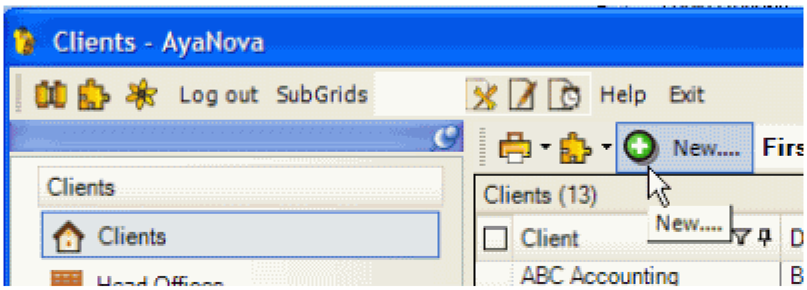
This menu option is to be selected to create a new object for the grid you are presently viewing.

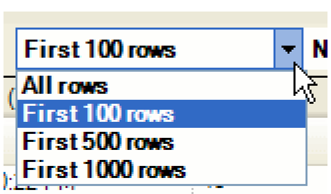
For example:

To create a new service workorder, view the Service Workorders navigation pane grid and select the menu option New… which will begin the process of creating a new service workorder. Additional details in this manual's section "Service Workorders"



To create a new client, view the Clients navigation pane grid and select the menu option New… which will open an empty client entry screen. Additional details in the manuals section "Clients"





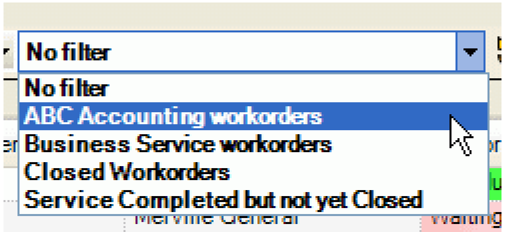
Maximum number of records to display

AyaNova will display the number of records based on what you had selected **the last time you were logged into** AyaNova.

You can of course change this to view more or less by default.

For example, if you want to see **all** records, regardless of the time it takes to display, then drop down and select All Rows – or if you want to see the first 500 that meet the sort and filter order, select First 500 rows – etc.

And the next time you log into AyaNova, all grids will also be set to that number of records to view by default.

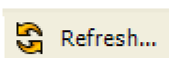


Filter Drop List

The Filter Drop List is where you can select to use no filter, or select a previously saved filter, or save a filter just created.

Save the filters you most likely use on a regular basis for future quick selection from the Filter Drop List instead of having to recreate the filter again.

See also:
[Filtering a grid]
[Using the Filter Drop List]



Refresh...

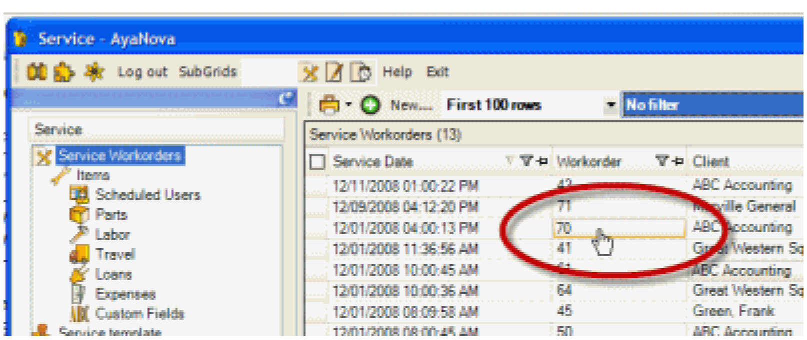
This is to refresh the grid to display recently entered data. AyaNova will automatically refresh all main grids approximately every 5 minutes but use this if you want to refresh immediately.

5.2.2 Accessing data displayed in main grids

Data displaying in main grids is **not** editable directly from these grids.

• Instead, open the entry screen to edit or delete the record.

For example, click on the Workorder # in the grid to **open** that service workorder entry screen and make any changes needed.

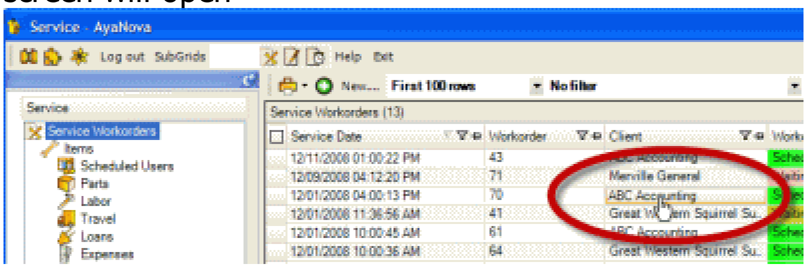


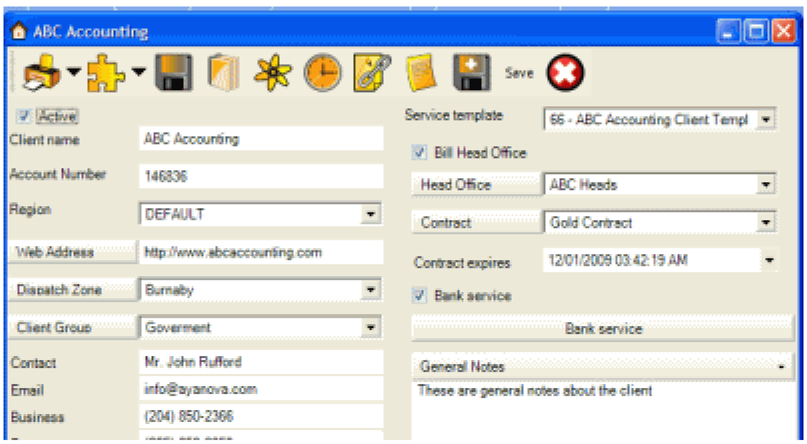
When you save it, you will be returned to the grid from where you opened it, and any changes you made will now show in your grid.

- You can also open the entry screen for many different objects in AyaNova from different grids.

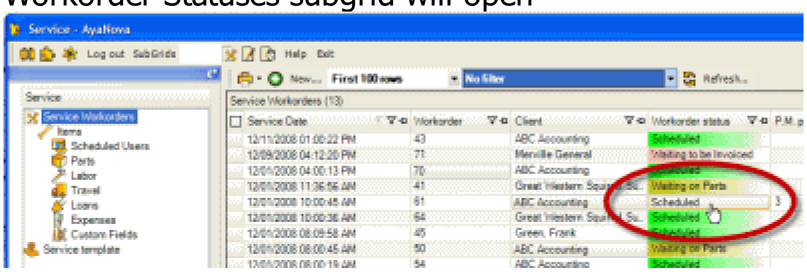
  Examples:

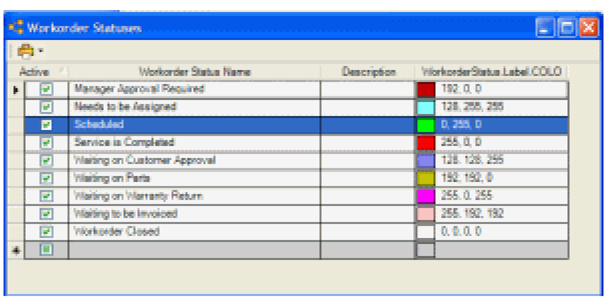
  From the Service Workorders grid, click on the client's name and the Client's entry screen will open





  From the Service Workorders grid, click on the a Workorder Status, and the Workorder Statuses subgrid will open





5.2.3 Filtering a grid

Filtering a grid provides the following:

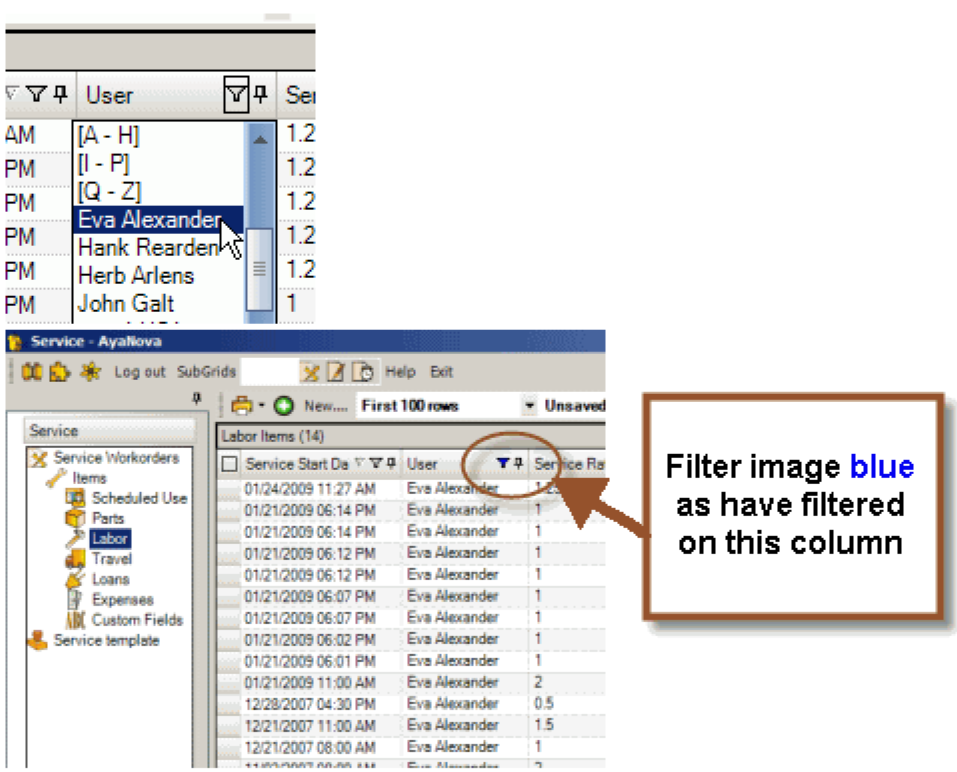
1. Allows you to **restrict what displays** based on the filter making it easier to find the record you need to access.
2. Also **restricts the amount of information** that needs to be retrieved from the database resulting in faster performance.
3. And also filter a grid so you can **report on <u>only</u> the records displaying in that grid**

Follow along with these tutorials for step by step walk throughs on filtering:

[How do I filter a grid and print a report for the records that show?]()
[How do I create a custom filter?]()
[How do I quickly find workorders for a client or a unit?]()

Also see more details on [Using the Filter Drop List]()

An example of use is that you might filter on the User column in the Labor grid to only show records where that user performed service so that you can print out a report on that user's billable hours.



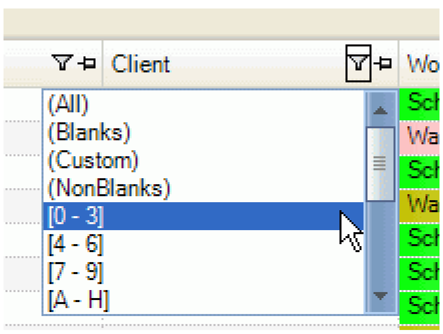
- Filtering can be via one column or multiple columns in one grid.

- A clear  on the column header indicates no filtering by this column is occurring.

- A colored  on the column header indicates that filtering by this column is occurring.

- You will note that the Filter Drop List will show **No Filter** in the Filter Drop List if a filter is not set, or it is in the middle of a filter not yet saved or if you are presently viewing a previously saved filter

- Click on the  object in the column heading to drop down a selection list of what to filter by. There are many choices depending on the type of data the column lists.



- You could select <ALL> to set no filtering, or depending on the type of data displaying in that column possibly [A – H] to display only data that begins with the letters A through H, and so on, or scroll further down to select a specific already displayed data to filter by.

- It is suggested that you try different scenarios till you get the results you need. You can always return to (ALL) or any other filtering easily.

The last viewed filter(s), sort order, pinning and navigation pane grid showing when you as an AyaNova user exited out will be the filter and navigation pane grid showing when you next log in.

For example, if you are a schedulable user, you may always want to initially view the Scheduled Users grid but filtered by your owned name to only show workorder items where you are scheduled.

If the username you use is used by multiple users, do note that if that username is logged in multiple times, any filtering you set may be overwritten by others also logged in under that same username.

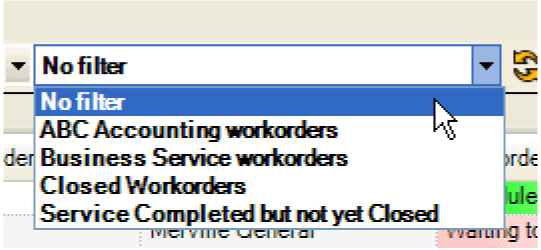
For this reason, it is recommended to have every user log in under an individual username.

5.2.4 Using the Filter Drop List

With the Filter Drop List you can:

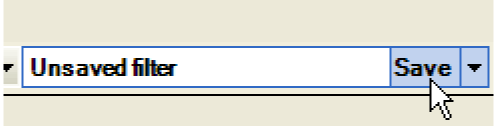
- **Display with no filters**
- **Save a filter**
- **Select a previously viewed filter**
- **Edit a previously saved filter**

To display with no filters

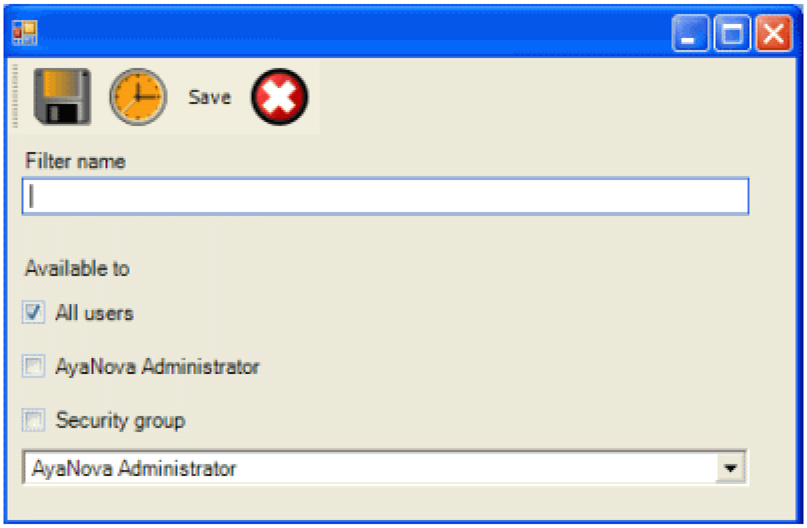
- Drop down the Filter Drop List and select **No Filter**
- 

To save a filter in the Filter Drop List

- Filter the desired column(s)
- You will note as soon as you set any new filters, the Filter Drop List displays as Unsaved filter with a Save button.



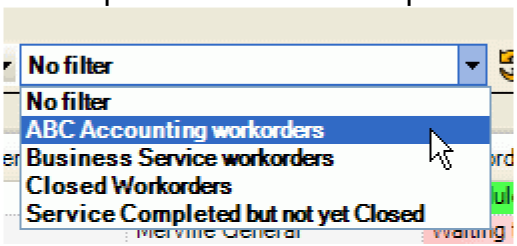
- When you are finished with the filter settings, click on the Save button in the Filter Drop List to display the saved filter's edit screen



- Enter in the Name desired for the saved filter and select what users have access.
  - o **NOTE:** you have to be a member of that security group to be able to set it to that security group – otherwise it will not take.
  - o For example: if you are a member of the security group Dispatching, but you want to set up filters specifically only for the security group Managers to have in their selection list, you must be logged in as a user of the security group Managers for the availability to take.
- Select Save & Exit
- The Filter Drop List will now display that filter as selected in the list

To select a previously saved filter

- Drop down the Filter Drop List and select the saved filter by its name



To edit a previously saved filter

- Drop down the Filter Drop List and select the saved filter by its name
- Select **Open** button in the Filter Drop List to display the saved filter's edit screen

- Edit as needed
- Select Save & Exit

To delete a previously saved filter

- Edit the previously saved filter
- Select the Delete menu option 

Saved filters save only the filter settings. The sort order, sizing and pinning of the grid is an individual user setting.

NOTE: If a user does not show the Open or Save button in the Filter Drop List or the Delete menu option in the saved filter's edit screen, that would indicate that the security group they belong to does not have enough rights to *Object.GridFilter* in the security group they are a member of.

See also:
Security Groups

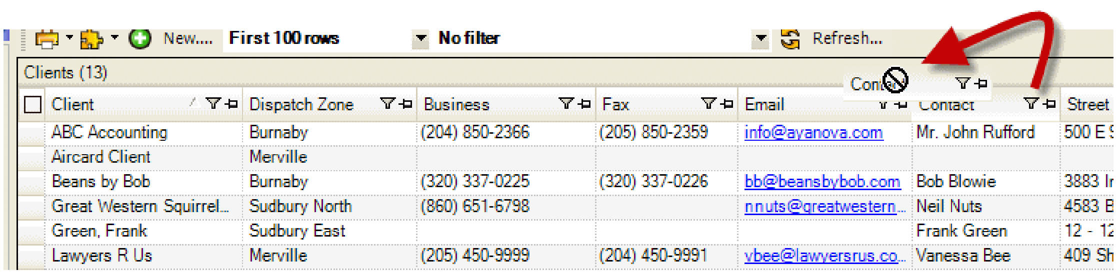
5.2.5 Moving and sorting columns in a grid

When you exit out of the AyaNova program, AyaNova will "remember" the grid settings of any screens viewed including the order of columns.

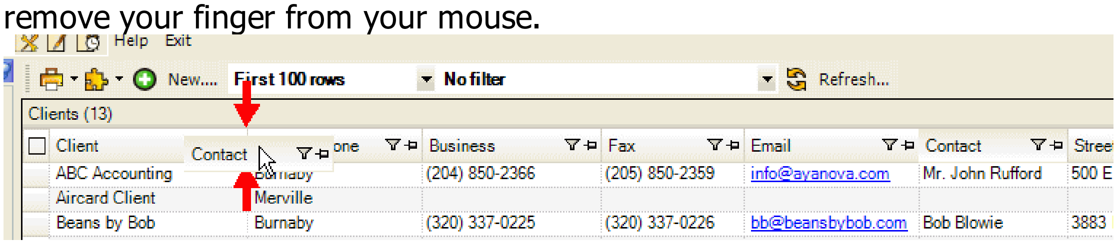
The first 4 columns in a grid denote the sort order.

All grids can have their columns rearranged.

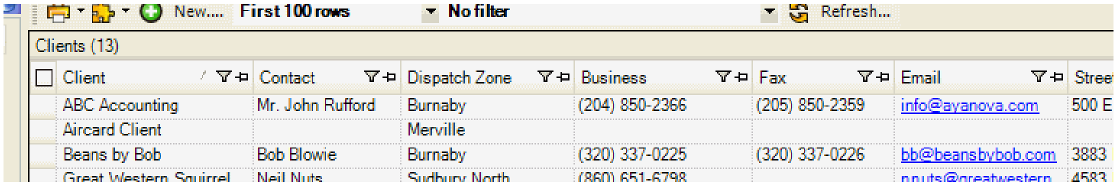
Use your mouse to click and hold the column header and then drag to the new location
See how the column header appears to be moving?



Red arrows indicate the location where it will be placed if you "drop" or remove your finger from your mouse.



Sort order also affects how some reports print out dependant on whether or not the report template itself has an overriding Grouping setting.



5.2.6 Ascending / descending the sort order

Setting the Ascending / Descending column (sorting):

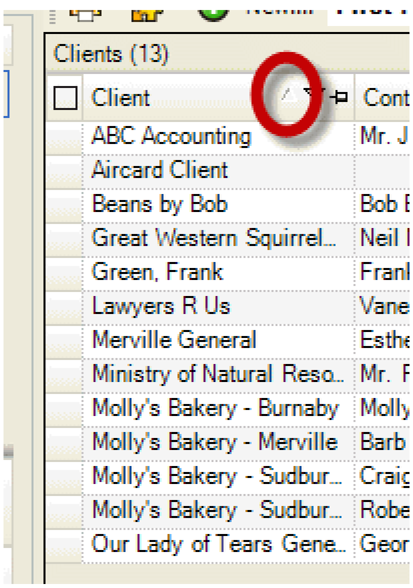
Most grids include the ability to set ascending/descending aspect of the **first** column.

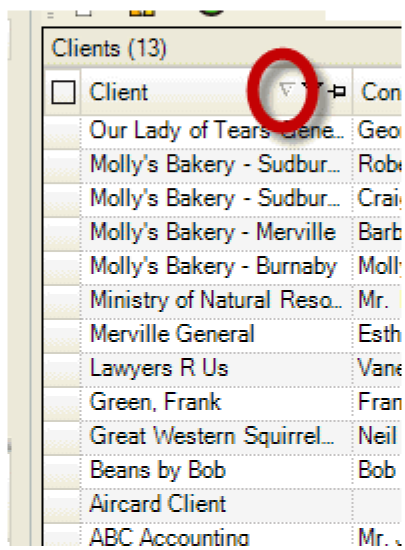
^ indicates Ascending – numbers listed first, then A, B and so on in order

Descending order – Z listed first, then Y and so on in reverse order

Easy way to think of it is – when its an "upside down triangle" the biggest part of the triangle is at the top – therefore largest numbers are at the top if sorting by numbers; if sorting by letters, Z is listed first and so on

Ascending Descending





Do note that the following columns in grids (*which are based on a number of fields – i.e. Part may be Part Name – Number – Part Category*) sort by one specific field, regardless of how they are set to display in the Global Settings

Part – will always sort by the Part Number

User – will always sort by the Last Name

Unit/Serial Number – will always sort by the Serial Number

You can change which is the first column of every grid by moving the column as per the previous section “Moving the order of columns”

The sort order is dependant on the database server used.

If a main grid does not display the Ascending/Descending image on the first column – just click on the first column header to make it show up.

If the sort image does not appear, then you know that the grid does not use sort.

By default, the Firebird server (whether using the default stand-alone embedded or the network Firebird configuration) uses ASCII-Sort order.

The ASCII (American Standard Code for Information Interchange) guidelines are followed. This means internationally accepted standards for character values are used when determining sort order when using Firebird database server.

When you sort the client grid, for example, that the customer name Baker displays before the customer name baker, since B precedes b in ASCII sort order.

The SQL Server (and the free SQL Express) sort alphabetically without taking into consideration case.

The following chart lists characters in ascending order used by Firebird. Reverse the order to display in descending order.

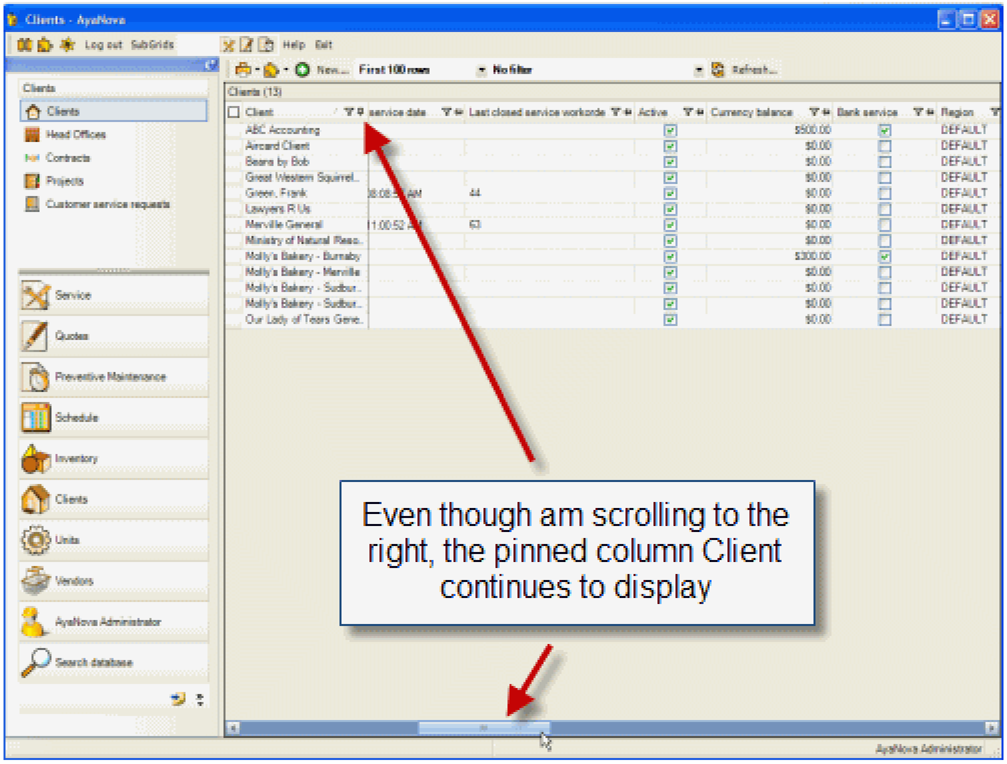
space	8	P	h
!	9	Q	i
"	:	R	j
#	;	S	k
$	<	T	l
%	=	U	m
&	>	V	n
'(apostrophe)	?	W	o
(	@	X	p
)	A	Y	q
*	B	Z	r
+	C	[	s
,(comma)	D	\	t
-(dash)	E	]	u
.(period)	F	^	v
/	G	_(underline)	w
0	H	`(tickmark)	x
1	I	a	y
2	J	b	z
3	K	c	}
4	L	d	|
5	M	e	{
6	N	f	~
7	O	g	DEL

5.2.7 Pinning a column

Pinning a column (or columns) in a grid is useful if the grid has a large number of columns, and you want to scroll sideways to view the info, but maintain which main info this is for.

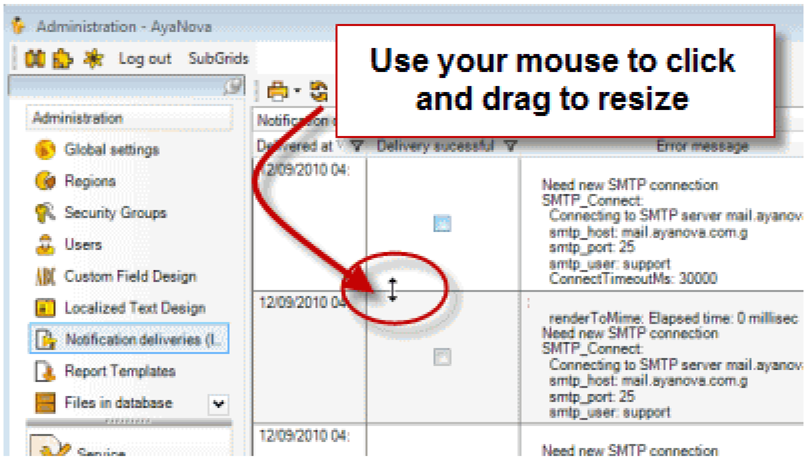
For example, in Client grid, pin the Client column by clicking on the to set it to the pinned state as denoted by the symbol

If you now scroll to the right, the Client column remains visible.



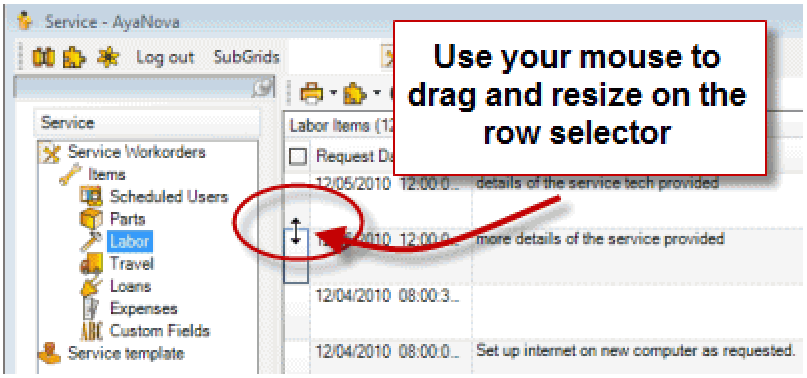
- When you exit out of the AyaNova program, AyaNova will "remember" the grid settings of any screens viewed including what columns are pinned.
- A pinned column always automatically moves itself to the far left of the grid and remains viewable no matter how far you scroll to the right.

5.2.8 Resizing grid rows



Another useful feature so that you can easily see details right from the main grid is using your mouse to change the height of the rows for that session.

Resizing of a grid is not saved on exit.



5.2.9 Setting what columns display in a grid

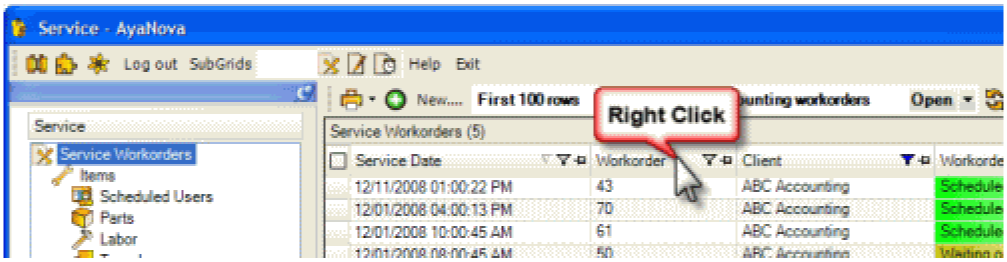
What if you do not want every possible column to show in the grid?

Right-click on any column heading, and uncheck the columns listed that you do not want to show.

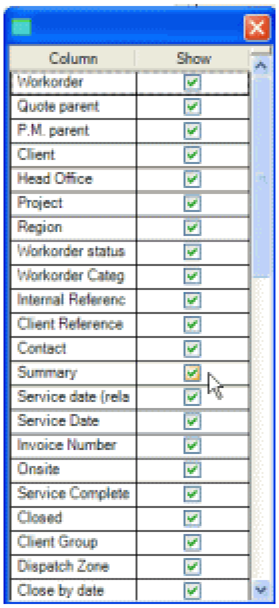
When you exit out of the AyaNova program, AyaNova will "remember" the grid settings of any screens viewed including what columns you have set to display in a grid.

Setting what columns display in a grid is useful if the grid has a large number of columns and you don't want all of them to show so that you can easily view the data you do want to see.

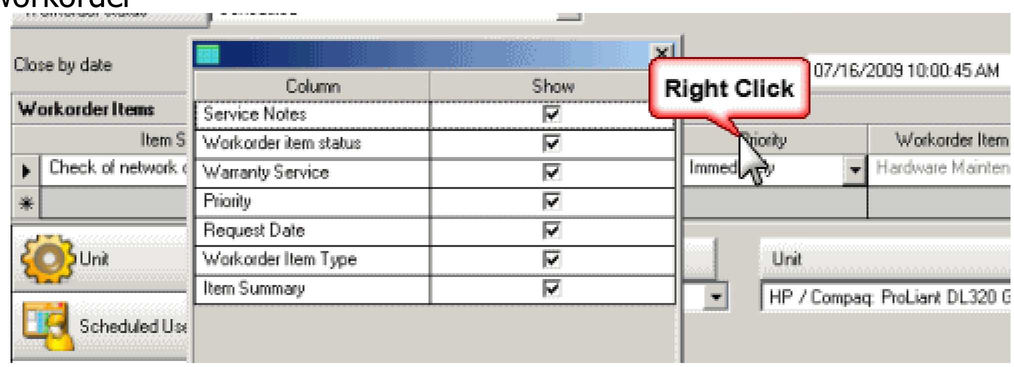
- Place your mouse over any of the column headings and right-click to bring up the column selection screen.



- This will bring up that grids column display selection window



- Column labels with a checkmark will display, whereas column labels without a checkmark will not display in that grid
- This feature is also available for the Workorder Items grid in a service workorder



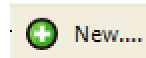
- If you right-click on a grids column headings, and nothing happens, that means that grid is not editable in what columns can show and not show.

Performance Note: Although the latest AyaNova has vastly improved performance returning records in grids, it is still recommended for full performance that if you do not use Banked Service to remove these columns from displaying if not needed in the Client, Head Office, and Service grids; and to remove the Banked Service and/or Meter Reading from displaying in the Units grid if not needed. This is irrelevant if you have a small number of units or clients.

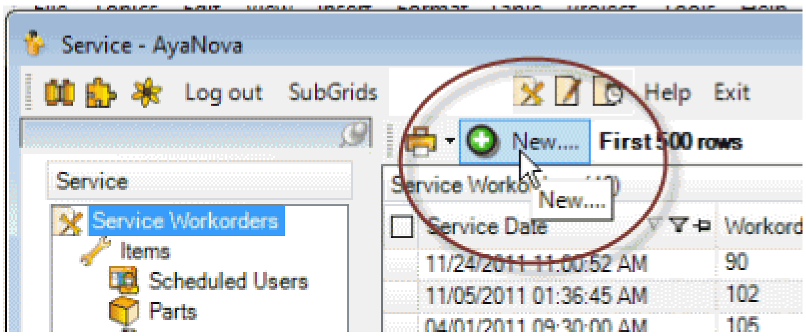
5.2.10 Main grids - Adding, editing and deleting data

Main grid screens in AyaNova are those accessible from the main navigation pane of the AyaNova program such as the Clients grid, Service Workorder grid and so on.

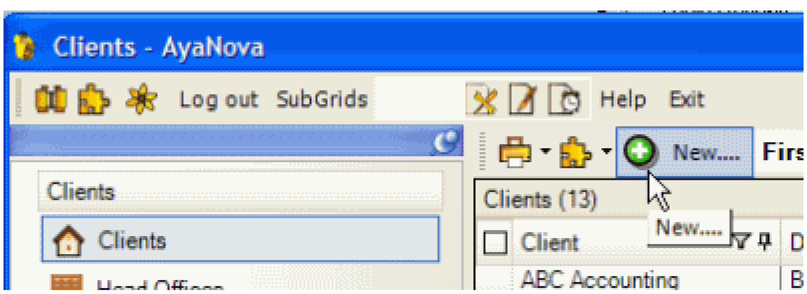
[To add new data for main grid screens](#)
[To edit to an existing record](#)
[To delete an existing record](#)

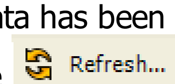
To add new data for main grid screens, you will find a  New... button at the top of the grid you are viewing.

Example: To **create a new service workorder** (note you are displaying the Service navigation pane) just click on the New... menu option in the Service Workorders grid.



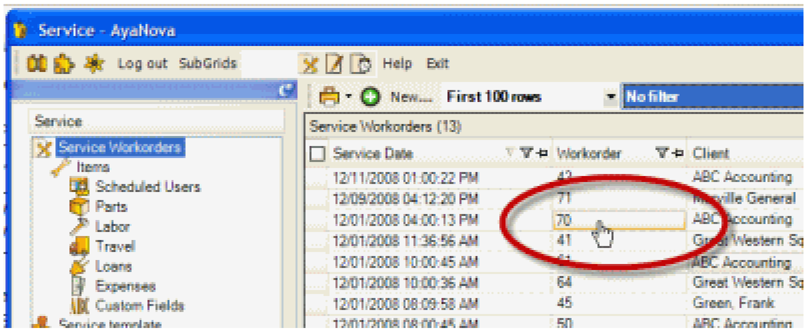
Example: To **create a new client** (note you are viewing the Clients grid) just click on the New... menu option in the Clients grid.



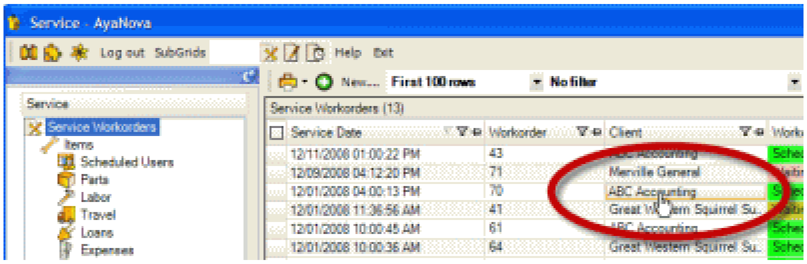
If new data has been entered by someone else that would display in the grid, select the  Refresh... to refresh the grid screen (AyaNova will automatically refresh the display for you every 5 minutes)

To edit an existing record, select to open that objects entry screen record.

Example: To open an existing service workorder, click on the Workorder number



Example: To open an existing client, click on the client's name.

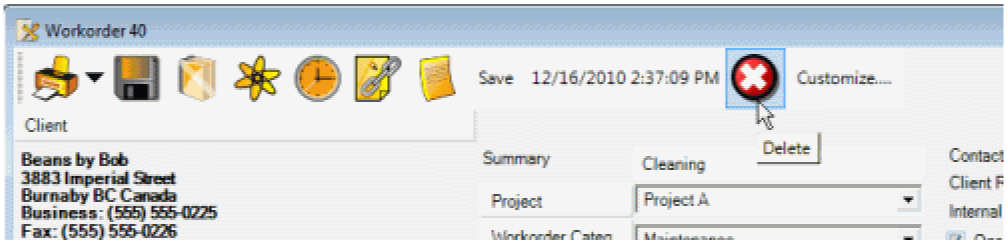


To delete an existing record, you must select to open that entry screen, and than you can select on the Delete menu option of the entry screen itself.

You can not delete from the main grid.

If there is not a Delete menu option in the entry screen:

- You may be logged in as a user that does not have security group rights to delete
- If a service workorder, it may be set to Service Completed or Closed

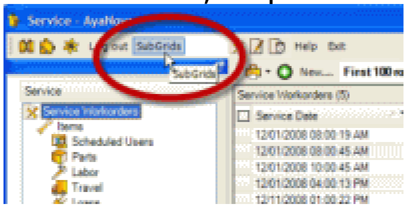


5.2.11 Subgrids - Adding, editing and deleting data

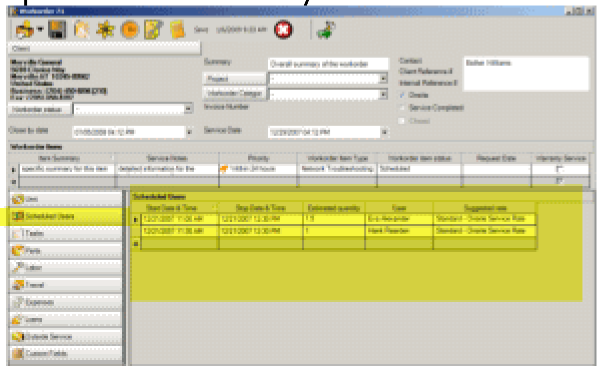
[How to add new data into a subgrid table](#)
[How to edit an existing row of data](#)
[Two ways to delete an existing row of data](#)
[How to set an existing row of data to inactive](#)
[Some grid tables require selection of a menu option to add new rows of data](#)

When we refer to "subgrids", we mean:

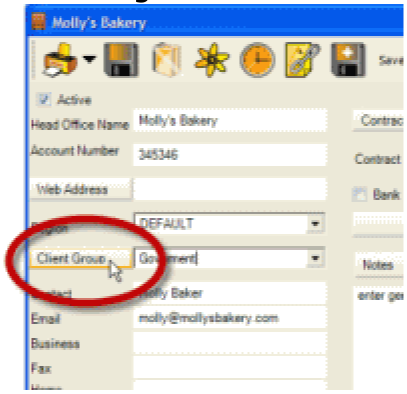
- the subgrids listed under the main AyaNova menu option SubGrids where you access Rates, Dispatch Zones etc.



- the subgrids within an entry screen such as the Purchase Order Items in a purchase order entry screen or Scheduled Users subsection of a workorder

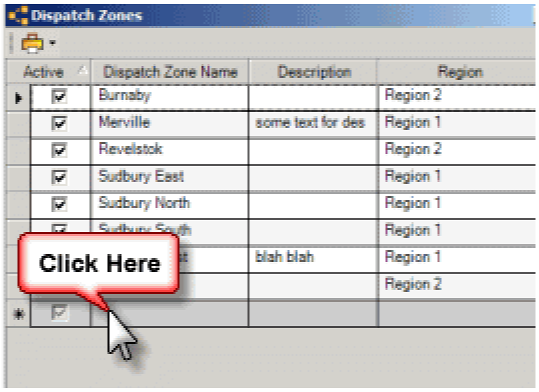


- the subgrid that is accessible from jump buttons within entry screens

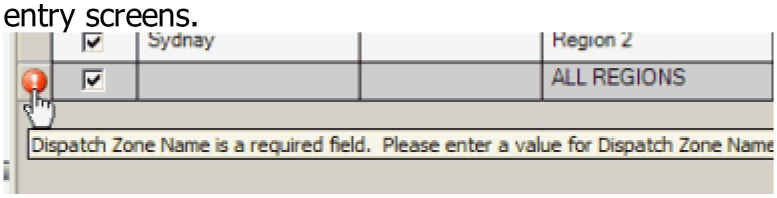


To add new data into a subgrid table:

Click your mouse cursor in any of the columns in the grayed row.



This begins a new row that you can enter data in. You may also note the red exclamation mark which reminds you of required fields – in the screen shot below, Name is a required field so that the Dispatch Zone can be selected within entry screens.



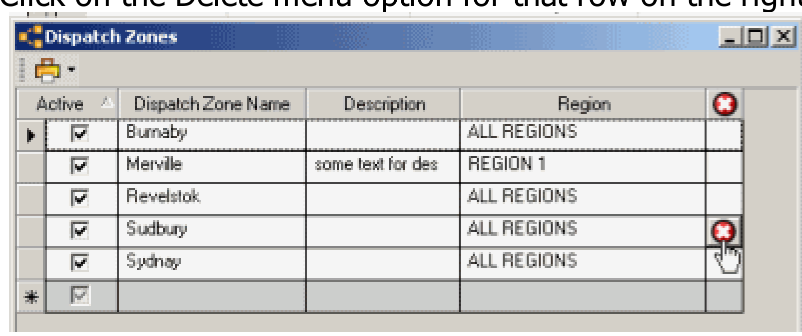
As soon as you begin typing, it does so in a new row.

To edit an existing row of data

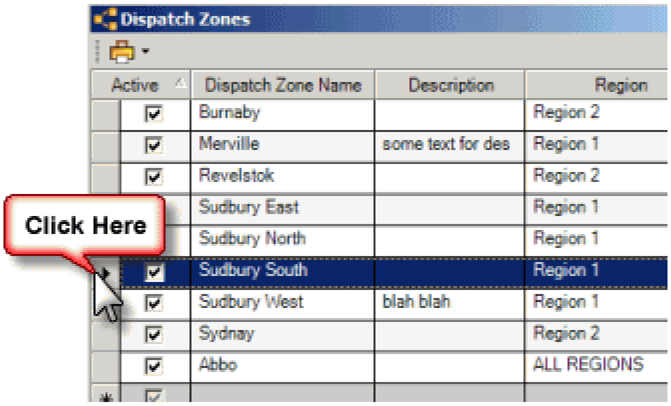
just place your mouse in the column field that you want to edit and do so.

Two ways to delete an existing row of data

1. Click on the Delete menu option for that row on the right



2. Click your mouse on the row header which will highlight the entire row then press the Delete button on your **keyboard**.



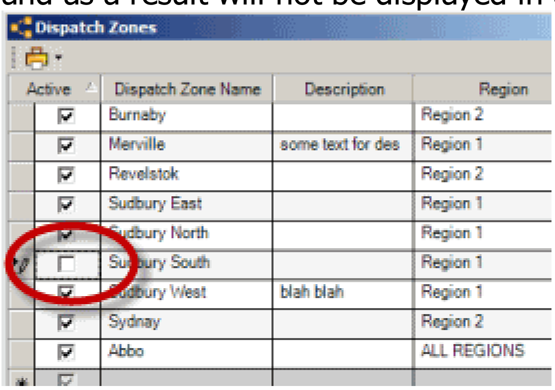
If the row of data has been linked elsewhere in the database, you may not be able to delete that record.

Do note that some grid tables, once a row is entered, cannot be deleted even if it appears to have not yet been selected elsewhere – such as Tax Codes, Part Warehouses. If you do not want this item selected, uncheck the **Active** field for that item.

To set an existing row of data to inactive

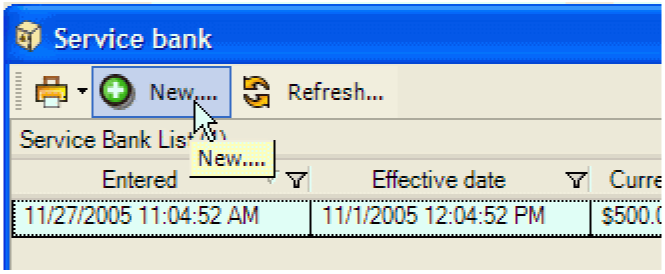
Just uncheck the Active field for that record row, and exit out of the subgrid to save.

The screenshot below shows that the Dispatch Zone Sudbury South is inactive, and as a result will not be displayed in an selection lists elsewhere in AyaNova.

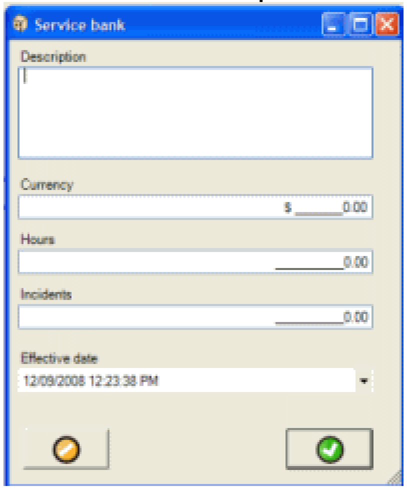


Some grid tables require selection of a menu option to add new rows of data:

For example, the Meter Reading grid table or Banked Service grid table. This is easy to determine by the menu option available at the top of the grid screen.

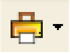


Select the menu option New... to open a new entry screen



5.2.12 Printing from a grid

To print from a grid:

1. First filter, sort, and/or specify what records you want to print
2. Then select the Print  option for that grid
3. Which drops down the list of available report templates for that grid.

See also:
[Filtering a grid]
[Moving and sorting columns in a grid]
[How do I filter a grid and print a report for the records that show?]
[Printing -> Printing from a grid]

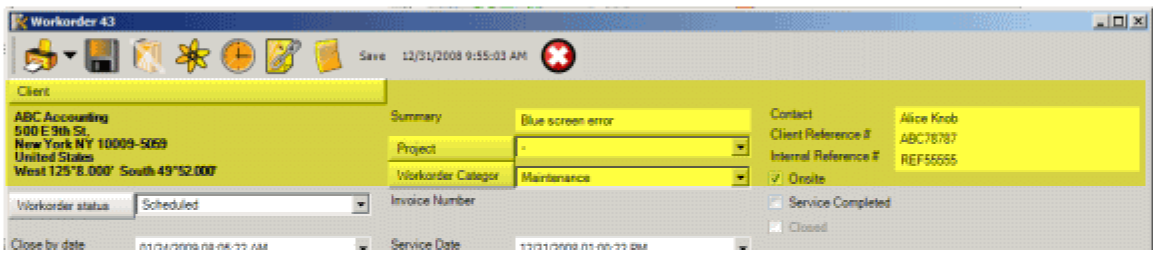
5.3 Service Workorders

5.3.1 What do I use a service workorder for?

The Service Workorder is where data about the service to be performed is entered, and where the data about the service actually provided is entered.

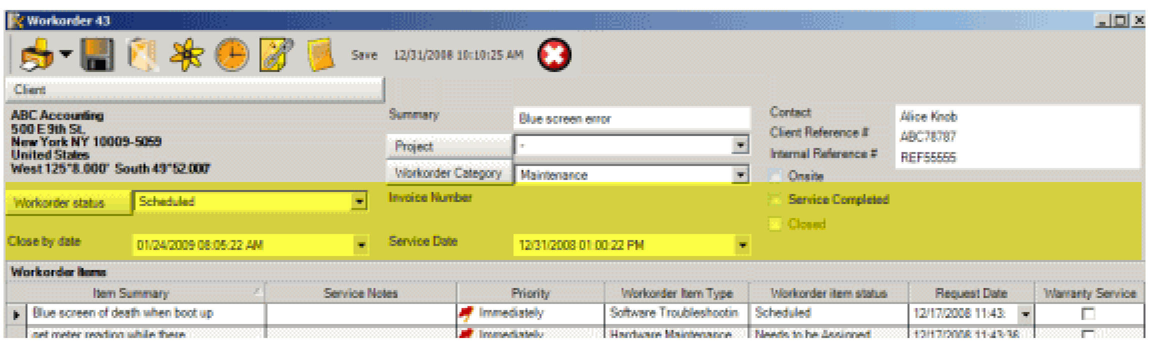
A service workorder gives you the ability to easily see what is scheduled on the Schedule screen and to maintain an easily accessible history of service.

Use AyaNova service workorders to:



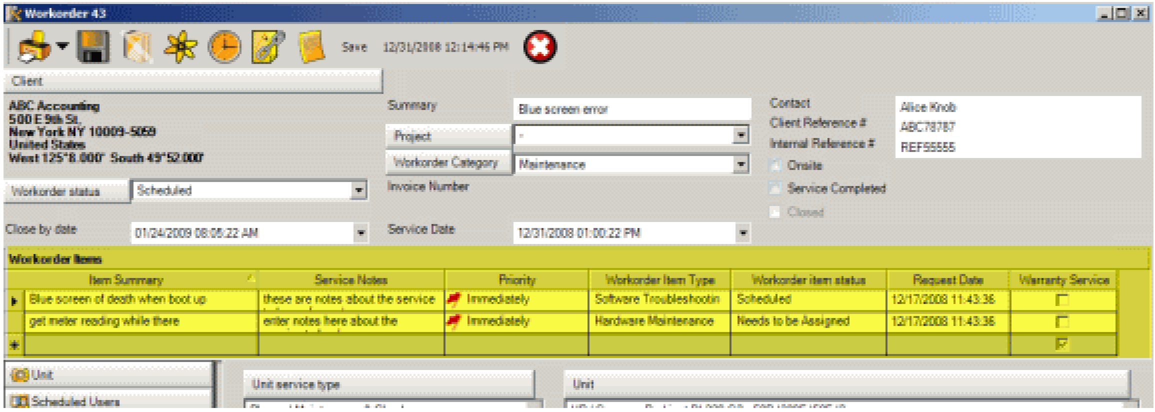
Identifies the following:

- which client the order is for
- what project to apply the order to
- and what category the order applies to via the order header



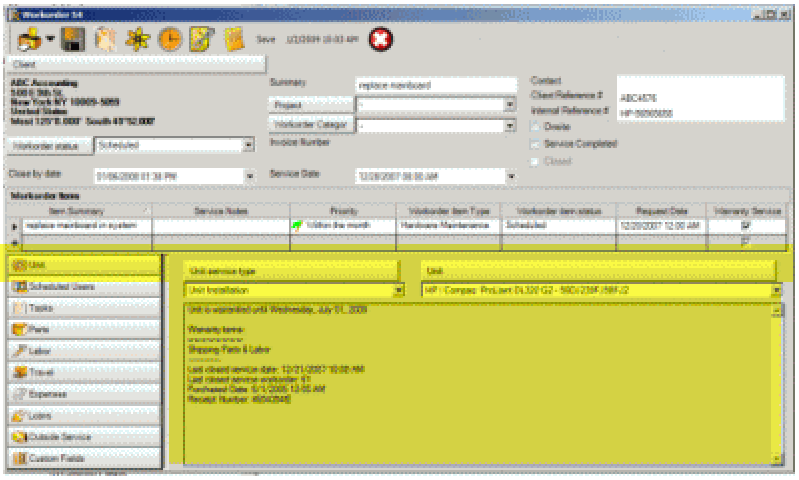
Identifies information that is pertinent to a service workorder via the Service Workorder header – such as:

- the present workorder status as a whole (tied to user notifications and client notifications)
- the close by date (tied to when to notify subscribed users if not completed (via Notification Subscriptions) by a certain time period)
- the invoice number when completed
- service date information for the workorder as a whole
- whether service has been completed ("locking" edit of parts and labor entries)
- and whether the workorder as a whole is completed and Closed (tied to automatic notification of client with attached report of completed workorder).



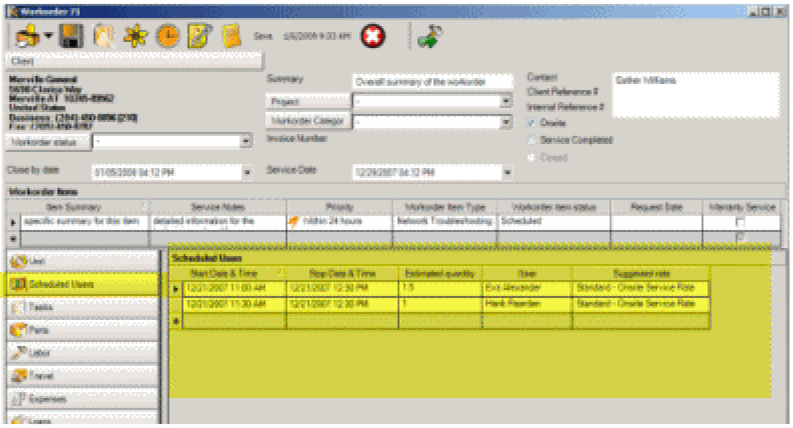
Workorder Item(s) is where you would:

- enter in a summary on service is to be performed
- enter details on service to be performed for scheduled users
- the actual request date (useful if date of entry is different from the date the client requested the service)
- the status of the workorder item as a whole (displays on the Schedule screen)
- and the priority of the individual workorder item



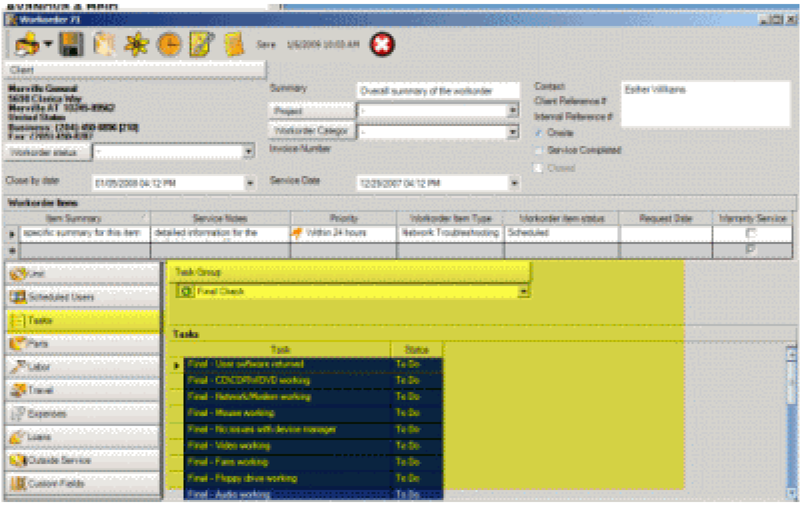
The Unit subsection of each Item is where you would:

- select unit to be serviced via the workorder item
- displays warranty information on the unit
- and identify type of unit service.
- You can also enter in meter reading entry for a unit and view meter reading history for selected unit



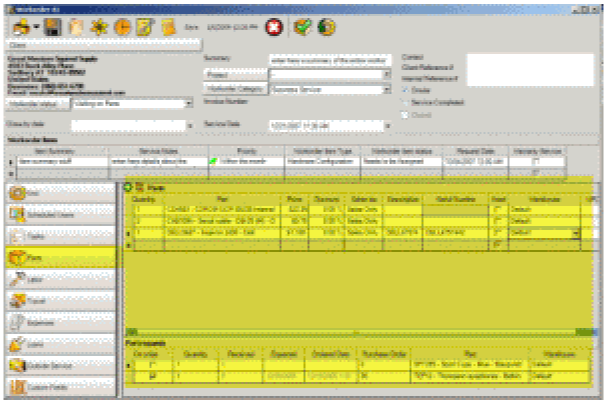
The Scheduled Users subsection of each Item is where you would:

- schedule one or multiple users to perform the service in this workorder item which will also show in the graphical Schedule screen



The Tasks subsection of each Item is where you would:

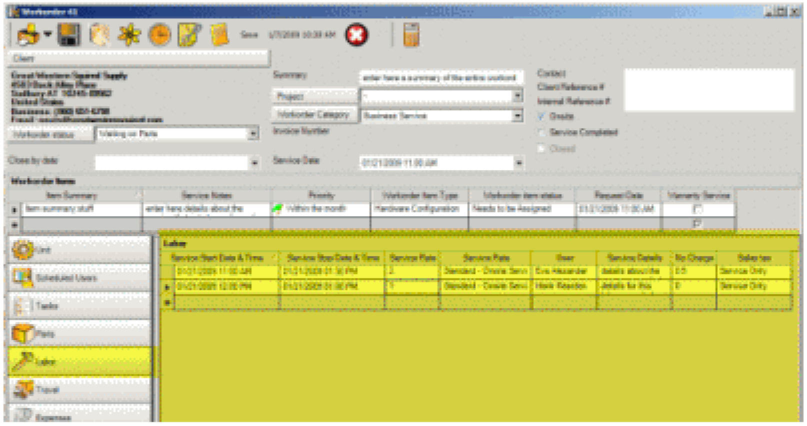
- select common TO DO tasks to be performed in service without having to retype every time, and identify status of these tasks performed



The Parts subsection of each Item is where you would:

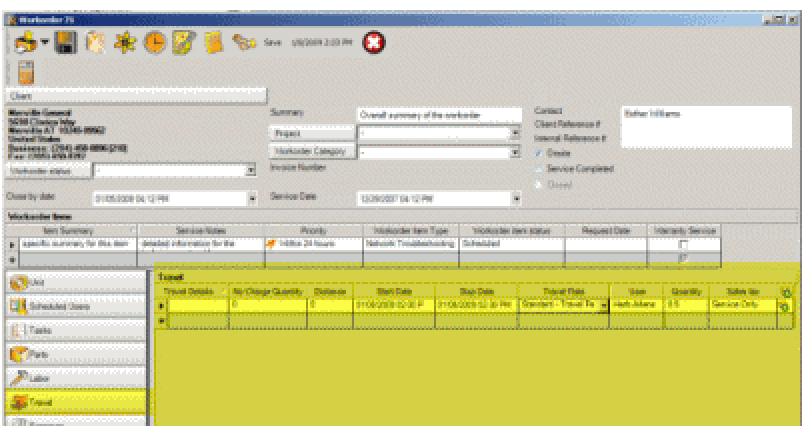
- identify one or more parts to be used in service (tech to take onsite) or parts that have been used in service.

- And maintain inventory of parts.
- And request parts if not in stock and identify order status of parts requested (tied to automatic notification of users when parts are received).
- And generate a new unit from a sold part.



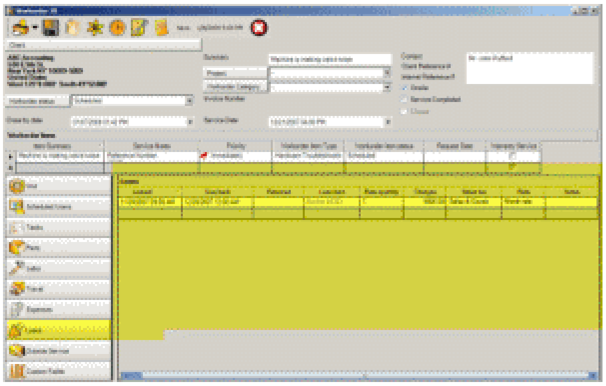
The Labor subsection of each Item is where you would:

- identify one or more schedulable users that performed the service for this workorder item
- enter in the details of service performed
- enter in the billable hours, non-billable hours, and service rate to charge
- Also too where you can auto-debit the billable amount against banked service for client or selected unit if applicable
- This is where you can view a history of service performed for the client and unit if applicable, as well as data for reports and future reference about the service provided



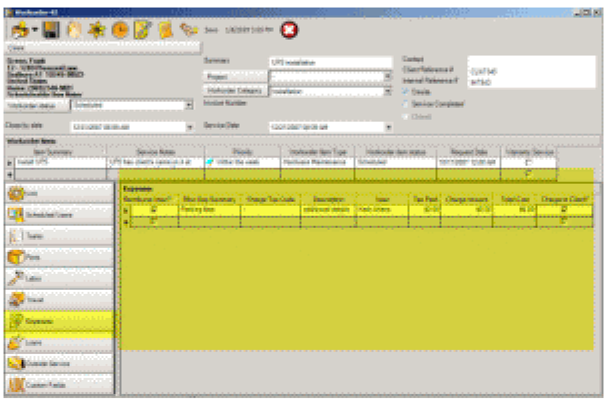
The Travel subsection of each Item is where you would:

- identify users that performed the travel,
- enter in the billable travel time, non-billable travel, and travel rate to charge
- And too where you can auto-debit the billable amount against banked service for client or selected unit if applicable



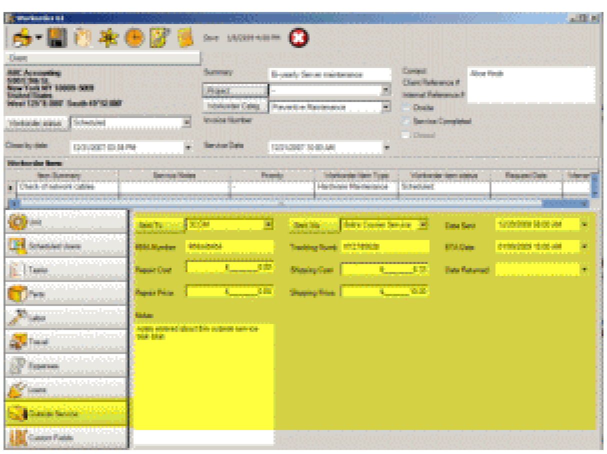
The Loans subsection of each Item is where you would:

- identify one or more loan items provided with this workorder item
- enter in the loan out date, loan return ETA data, and actual return date, and any loan charges



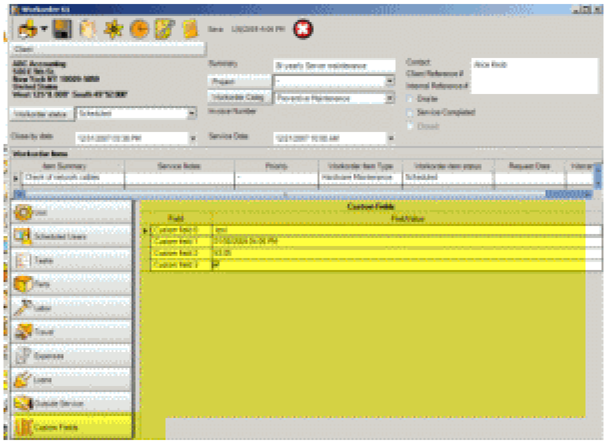
The Expenses subsection of each Item is where you would:

- identify additional expenses incurred for this workorder item that would not be parts or service
- and identify if chargeable to client or not



The Outside Service subsection of each Item is where you would:

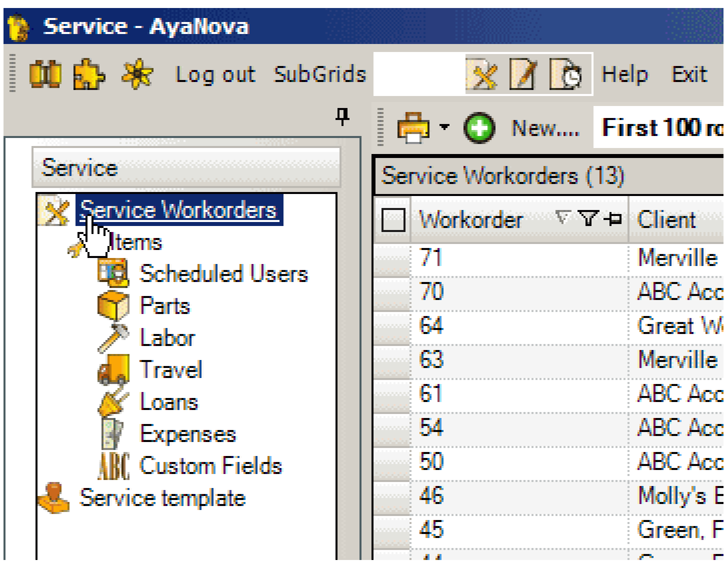
- identify information regarding units sent out for repair such as RMA number, related dates, who shipped to and via, and possible charges



The Custom Fields subsection of each Item is where you would:

- enter in information in up to 10 additional custom fields that could be text, date, currency or true/false format fields.

5.3.2 Service grids

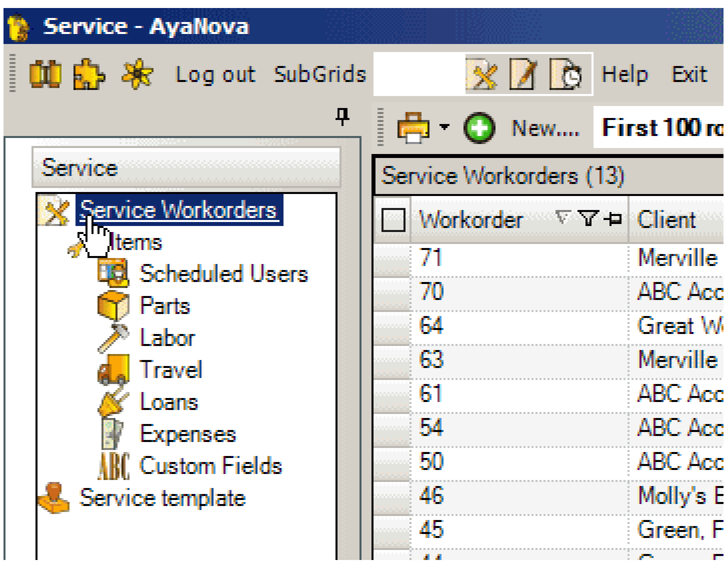


The Service navigation pane provides access to service workorder related grids:

- Service Workorders
  - Items
    - Scheduled Users
    - Parts
    - Labor
    - Travel
    - Loans
    - Expenses
    - Custom Fields
- Service Template

Security Group internal object: Object.WorkorderService
Forbidden : User of that [security group](#) can not see the Service navigation pane grids at all *Read Only* : User can view the Service navigation pane grids and entry screen but can not create new service workorders *Read/Write* : User can view the Service navigation pane grids and create new service workorders and service templates *Read/Write/Delete:* User can view the Service navigation pane grids and create new service workorders and delete existing service workorders and service templates

5.3.2.1 Service Workorders grid



The **Service Workorders** grid displays information about the service workorder **as a whole** – such as the client, workorder number, project assigned to, overall summary, overall category, overall service date, overall status, overall category, summary, originating pm or originating quote and more.

<u>The Service Workorder grid is used to:</u>

- create a new workorder
- open and view a workorder from the grid
- easily and quickly see an overview of what workorders for what clients are in progress, completed, invoiced, or closed. For example, the dispatcher may view the screen to quickly filter what workorders for a client are presently open.

- obtain a "detailed type" report template on the records that are showing in the grid - for example, even though Parts and Labor information does not show as columns in the Service Workorders grid, if you filter to show only records for a specific client for a specific month, you can print a report that displays total billable in all of those workorder records for that client.

Information about labor, parts etc in a single workorder would **not** show in this grid as it is possible to have multiple labor items, multiple parts, etc in a single workorder. That information would show on subsequent grids or print out a "detailed" report template which will provide that.

See also:
[Accessing data displayed in main grids]
[Filtering a grid]
[Using the Filter Drop List]
[Moving and sorting columns in a grid]
[Pinning a column]
[Setting what columns display in a grid]
[Create a new service workorder]
[Edit an existing service workorder]
[Listing all workorders for a specific client or unit]
[Printing from a grid]

5.3.2.2 Items grid

The **Items** grid displays information from:

- the Service Workorder grid above
- from each workorder item in a Service Workorder such as the workorder item summary, status, priority, type and request date
- from each workorder item's selected unit (unit service type, unit serial and model)
- and from outside service (RMA number, sent date, who shipped by, who sent to and, tracking number and ETA)

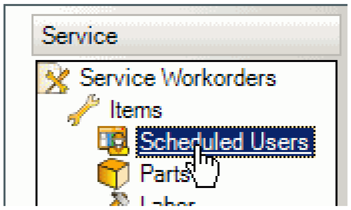
The Items grid is useful for:

- create a new workorder
- an overview of each workorder items status and priority
- for a receiver/shipper to view information on items sent out for service (Outside Service sub-screen in a Service Workorder)
- to view units that were/are selected for service

- and to filter and sort columns to display specific records for printing a report that is related to its available columns

See also:
Service Workorder Items
Service Workorder Items - Unit
Service Workorder Items - Outside Service
Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid
Pinning a column
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client or unit
Printing from a grid

5.3.2.3 Scheduled Users grid



The **Scheduled Users** grid displays information:

- on each scheduled user record along with information from its workorder item and Service Workorder.

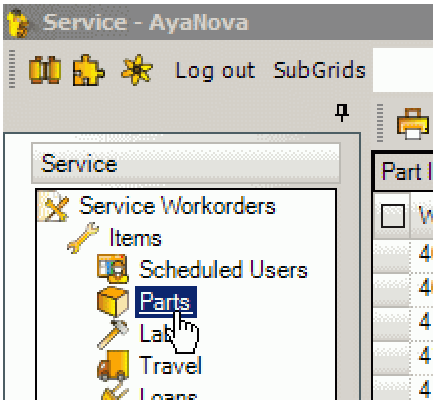
The Scheduled Users grid is useful for:

- create a new workorder
- filtering to quickly view who is scheduled and when, and for what workorder items and service workorders.
  For example:
  - it may be used by a dispatcher to only display workorder items that are open for a certain date range so they can schedule future items.
  - used by the scheduled user to view their own schedule by filtering to view for only themselves.
- filter and sort columns to view and obtain specific reports on scheduled users
  For example:
  - a report that lists each schedulable user along with the workorders scheduled for

See also:

[Service Workorder Items - Scheduled Users]
[Service Workorder Items]
[Service Workorder Items - Unit]
[Service Workorder Items - Outside Service]
[Accessing data displayed in main grids]
[Filtering a grid]
[Using the Filter Drop List]
[Moving and sorting columns in a grid]
[Pinning a column]
[Setting what columns display in a grid]
[Create a new service workorder]
[Edit an existing service workorder]
[Listing all workorders for a specific client or unit]
[Printing from a grid]

5.3.2.4 Parts grid



The **Parts** grid displays information:

- on each part selected within a workorder along with information from its workorder item and Service Workorder

The Parts grid is useful for:

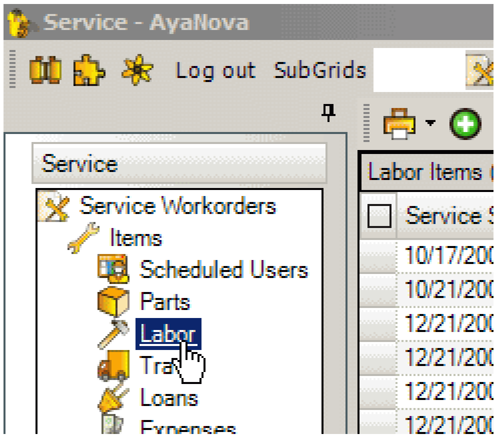
- create a new workorder
- filtering to quickly view what workorder has what parts selected with it
- filter and sort columns to view and obtain specific reports on parts entered in multiple workorders
  For example:
  - a report on part profit/cost report
  - a report on parts used in the last month
  - a report on parts used in a specific project

See also:

[Service Workorder Items - Parts]
[Service Workorder Items]
[Service Workorder Items - Unit]
[Service Workorder Items - Outside Service]

[Accessing data displayed in main grids](#)
[Filtering a grid](#)
[Using the Filter Drop List](#)
[Moving and sorting columns in a grid](#)
[Pinning a column](#)
[Setting what columns display in a grid](#)
[Create a new service workorder](#)
[Edit an existing service workorder](#)
[Listing all workorders for a specific client or unit](#)
[Printing from a grid](#)

5.3.2.5 Labor grid



The **Labor** grid displays information:

- on each labor record along with information from its workorder item and Service Workorder

The Labor grid is useful for:

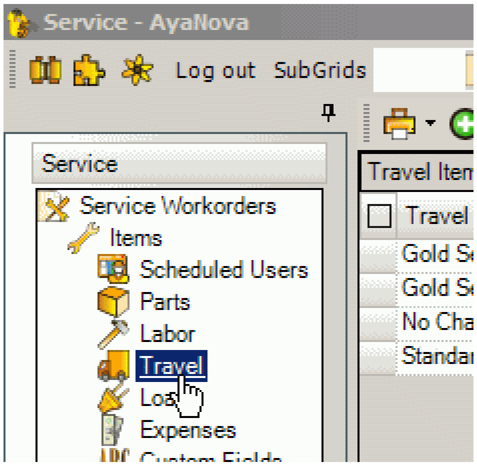
- create a new workorder
- filtering to quickly view what workorder has been serviced and by whom
- filter and sort columns to view and obtain specific reports on labor entered in multiple workorders
  For example:
  - a report on labor hours from all workorders for a specific client
  - a report on labor billable hours for the month
  - a report on when labor records were applied to Banked Service

See also:

[Service Workorder Items - Labor](#)
[Service Workorder Items](#)
[Service Workorder Items - Unit](#)
[Service Workorder Items - Outside Service](#)
[Accessing data displayed in main grids](#)
[Filtering a grid](#)

[Using the Filter Drop List](#)
[Moving and sorting columns in a grid](#)
[Pinning a column](#)
[Setting what columns display in a grid](#)
[Create a new service workorder](#)
[Edit an existing service workorder](#)
[Listing all workorders for a specific client or unit](#)
[Printing from a grid](#)

5.3.2.6 Travel grid



The **Travel** grid displays information:

- on travel entered along with information from its workorder item and Service Workorder

The Travel grid is useful:

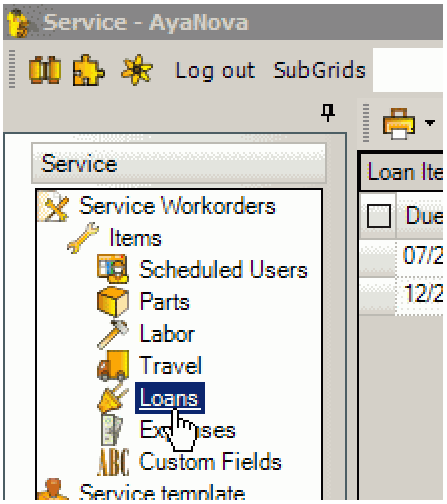
- create a new workorder
- filtering to quickly view what workorder has travel selected with it
- filter and sort columns to view and obtain specific reports on travel entered in multiple workorders
  For example:
  - a report on billable travel time for that month
  - a report on when travel was applied to Banked Service

See also:

[Service Workorder Items - Travel](#)
[Service Workorder Items](#)
[Service Workorder Items - Unit](#)
[Service Workorder Items - Outside Service](#)
[Accessing data displayed in main grids](#)
[Filtering a grid](#)
[Using the Filter Drop List](#)
[Moving and sorting columns in a grid](#)

Pinning a column
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client or unit
Printing from a grid

5.3.2.7 Loans grid



The **Loans** grid displays information:

- on each loan item loaned out along with information from its workorder item and Service Workorder

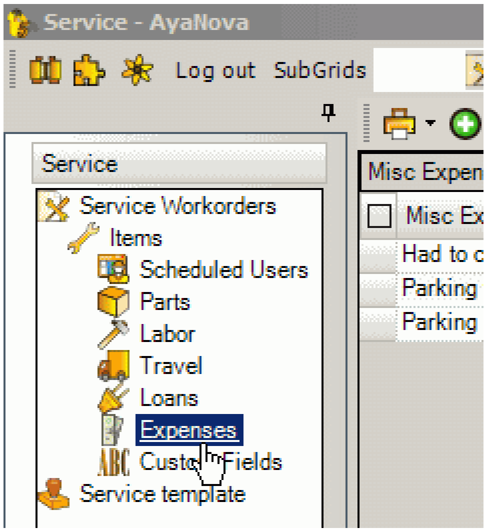
The Loans grid is useful for:

- create a new workorder
- filtering to quickly view what workorder a loan item has been loaned out on
- filter and sort columns to view and obtain specific reports on loaned items entered in multiple workorders
  For example:
  - a report all workorders where a specific loan item was loaned out on

See also:
Service Workorder Items - Loans
Service Workorder Items
Service Workorder Items - Unit
Service Workorder Items - Outside Service
Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid

[Pinning a column](#)
[Setting what columns display in a grid](#)
[Create a new service workorder](#)
[Edit an existing service workorder](#)
[Listing all workorders for a specific client or unit](#)
[Printing from a grid](#)

5.3.2.8 Expenses grid



The **Expenses** grid displays information:

- on expenses for a workorder item and its Service Workorder

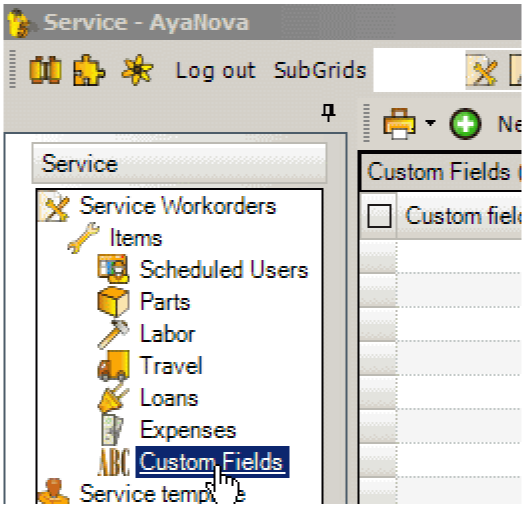
The Expenses grid is useful for:

- create a new workorder
- filtering to quickly view what workorder has additional expenses
- filter and sort columns to view and obtain specific reports on expenses entered in multiple workorders
  For example:
  - a report on all additional expenses for a specific project

See also:
[Service Workorder Items - Expenses](#)
[Service Workorder Items](#)
[Service Workorder Items - Unit](#)
[Service Workorder Items - Outside Service](#)
[Accessing data displayed in main grids](#)
[Filtering a grid](#)
[Using the Filter Drop List](#)
[Moving and sorting columns in a grid](#)
[Pinning a column](#)
[Setting what columns display in a grid](#)

[Create a new service workorder]
[Edit an existing service workorder]
[Listing all workorders for a specific client or unit]
[Printing from a grid]

5.3.2.9 Custom Fields grid



The **Custom Fields** grid displays information:

- on custom fields entered within each workorder item for each Service Workorder.

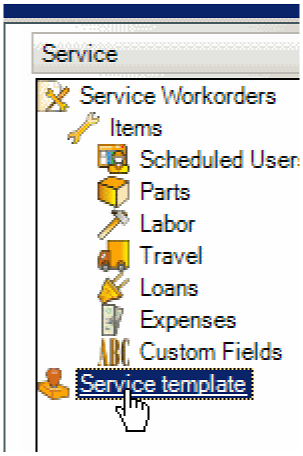
The Custom Fields grid is useful to:

- create a new workorder
- filter and sort columns to view and obtain specific reports on custom fields entered in multiple workorders

See also:

[Service Workorder Items - Custom Fields]
[Service Workorder Items]
[Service Workorder Items - Unit]
[Service Workorder Items - Outside Service]
[Accessing data displayed in main grids]
[Filtering a grid]
[Using the Filter Drop List]
[Moving and sorting columns in a grid]
[Pinning a column]
[Setting what columns display in a grid]
[Create a new service workorder]
[Edit an existing service workorder]
[Listing all workorders for a specific client or unit]
[Printing from a grid]

5.3.2.10 Service Template grid



The Service Templates grid display a list of existing Service Templates that have been created and may be in use, identifying each Service Template's creation date, template description, and workorder templates number.

See also:

[Accessing data displayed in main grids]
[Filtering a grid]
[Using the Filter Drop List]
[Moving and sorting columns in a grid]
[Pinning a column]
[Setting what columns display in a grid]
[Create a new service workorder]
[Edit an existing service workorder]
[Listing all workorders for a specific client or unit]
[Printing from a grid]
[Service Workorder Templates]

5.3.3 Security group rights to create/edit a workorder

What sections of a service workorder that a user has access to depends on that user's security group Object rights.

First example: Want users of security group to be able **to create and edit** a service workorder and **all** its subsections:

Set the following security objects to **Read/Write**:

Object.WorkorderService
Object.WorkorderItem
Object.WorkorderItemUnit
Object.WorkorderItemScheduledUser
Object.WorkorderItemTasks
Object.WorkorderItemLabor
Object.WorkorderItemParts

Object.WorkorderItemTravel
Object.WorkorderItemOutsideService
Object.WorkorderItemMiscExpenses
Object.WorkorderItemLoan

And the following set to minimum **Read Only** (not set to Forbidden):
Object.Client
Object.Contract
Object.ContractRate
Object.Unit
Object.UnitModel
Object.Task
Object.TaskGroup
Object.TaskGroupTask
Object.Region

Second example: Want users of security group to be able to only view but not edit the scheduled items in the workorder, edit the status of their Tasks, enter in their labor details and what parts used in service, but not see Outside Service, Loans, Expenses or Travel:

Set the following security objects to **Read/Write**:
Object.WorkorderService
Object.WorkorderItem
Object.WorkorderItemUnit
Object.WorkorderItemTasks
Object.WorkorderItemLabor
Object.WorkorderItemParts

Set the following security objects to **Read Only**:
Object.WorkorderItemScheduledUser

Set the following security objects to **Forbidden**:
Object.WorkorderItemTravel
Object.WorkorderItemOutsideService
Object.WorkorderItemMiscExpenses
Object.WorkorderItemLoan

And the following set to minimum **Read Only** (not set to Forbidden):
Object.Client
Object.Contract
Object.ContractRate
Object.Unit
Object.UnitModel
Object.Task

Object.TaskGroup
Object.TaskGroupTask
Object.Region

See also:
Security Groups
How do I create a security group

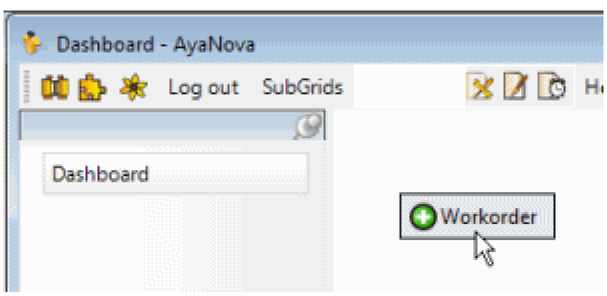
5.3.4 Create a new Service Workorder

A new service workorder can be created **nine** different ways:

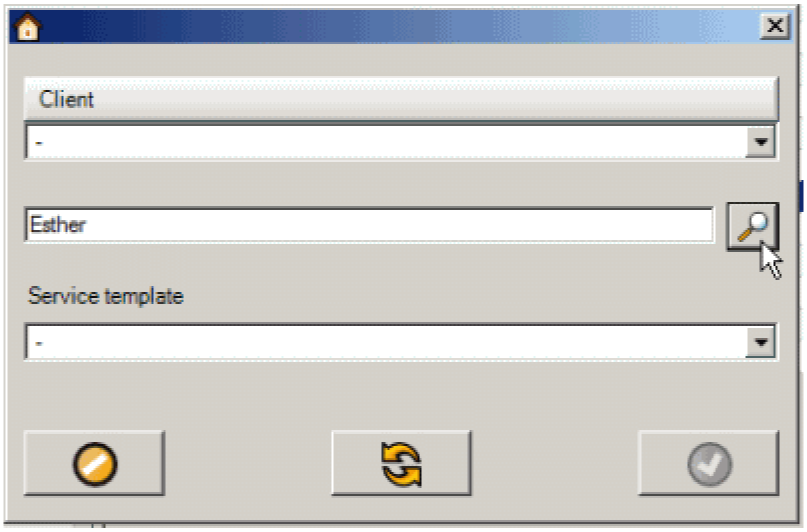
1. **Create new workorder via the Dashboard**
2. **Use the Accelerator Key combination**
3. **Select the New... menu option in any of the Service navigation pane grids**
4. **Right-click on the client's name in any grid and select Workorder**
5. **Right-click on the unit's name in any grid and select Workorder**
6. **Generate a service workorder from a quote**
7. **Generate a service workorder from a preventive maintenance**
8. **Create a new workorder via the Schedule screen**
9. **Generate a new service workorder from a customer service request**

1. Create new workorder via the Dashboard

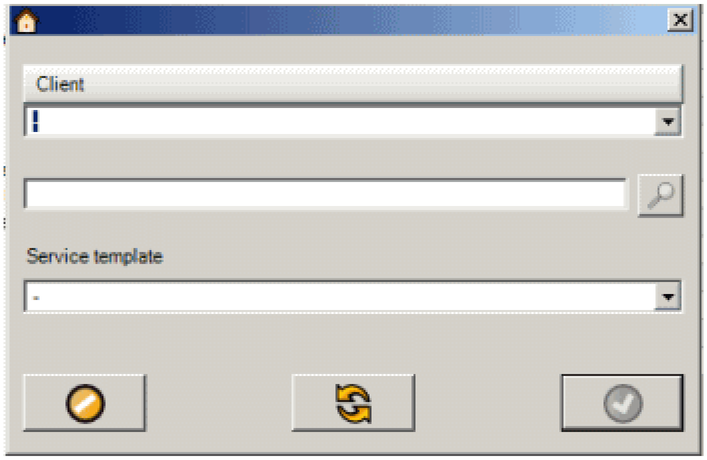
a. From the Dashboard, select the menu option to create a new workorder



b. The client selection window will appear. Select an existing client, create a new client if not yet entered, or use one of the methods already covered above to find the client for selection



2. From any main grid, press the **Accelerator Key combination ALT-w** using your keyboard which will bring up the client and service template selection window.



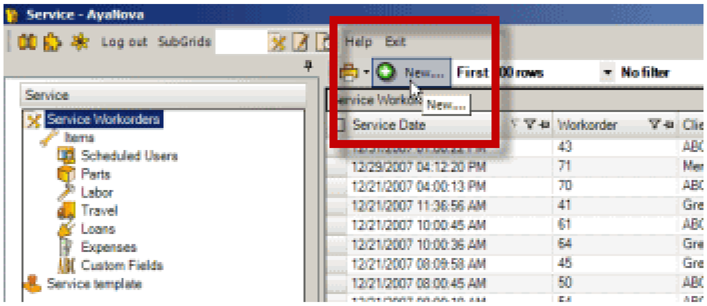
Select the client (and template if desired). Select  and a new service workorder entry screen for this client will open

See also for more details:
[Accelerator Keys]

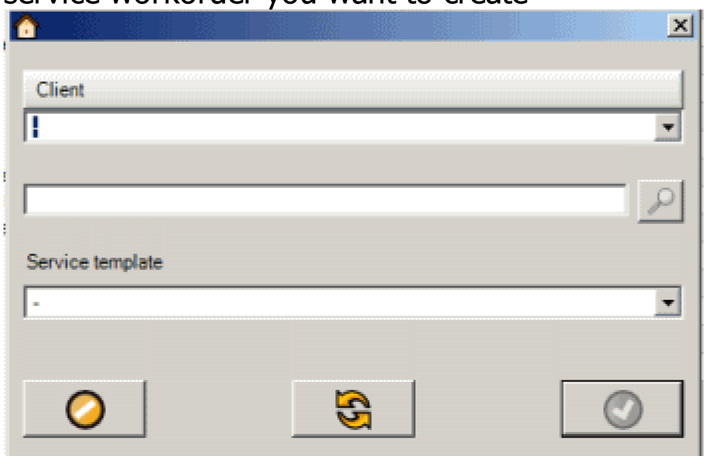
The template selected by default will depend on your Global Settings, User settings or the selected Client entry screen settings.

See also:
[Global Settings]
[Users]
[Clients]

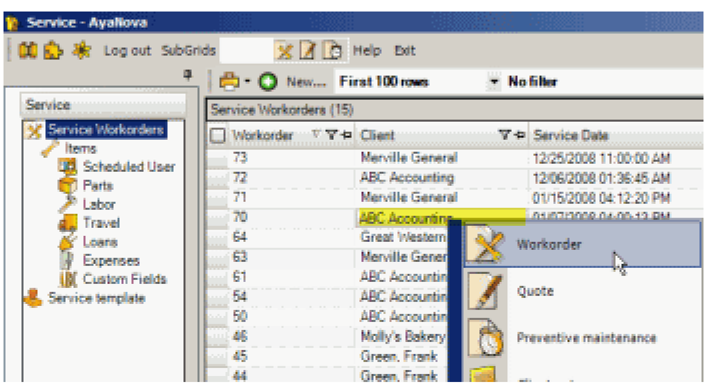
3. Viewing any of the Service navigation pane grids (except for the Service Templates grid), **select the New... button**.



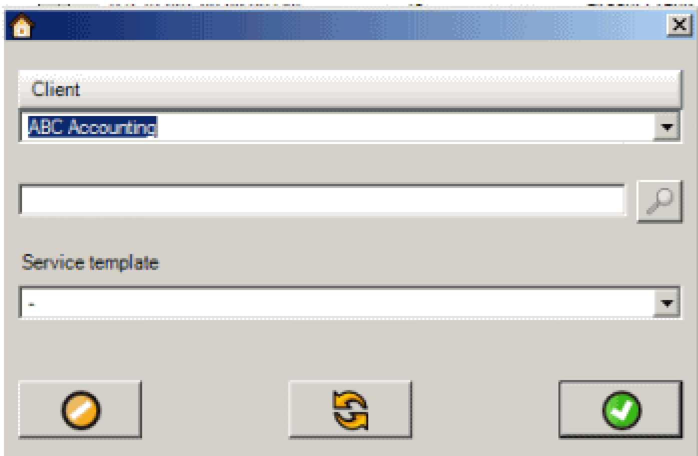
This will bring up the client and service template selection window for the service workorder you want to create



4. **Right click on the client's name** in any grid and select Workorder

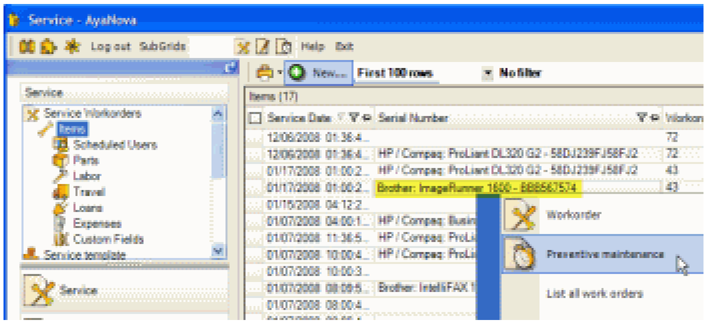


This will bring up the client and service template selection window with the client pre-selected.

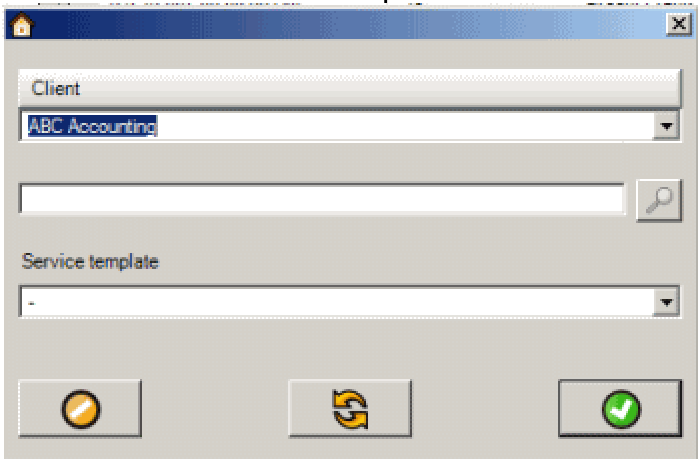


Select a service template if desired and click on the  OK button and the service workorder entry screen will open.

5. **Right click on a unit's serial number** in any grid and select Workorder



This will bring up the client and service template selection window with the client that "owns" this unit pre-selected.



Select a service template if desired and click on the  OK button and the service workorder entry screen will open.

6. Generate a service workorder from a quote

See also:
How do I generate a service workorder from a quote?

7. Generate a service workorder from a preventive maintenance

See also:
How do I manually generate a service workorder from a preventive maintenance?
How do I automatically generate a service workorder from a preventive maintenance?

8. Create a new workorder via the Schedule screen

See also:
How do I schedule a user for new workorder item via the Schedule Screen?
New Service Workorder via the Schedule screen

9. Generate a new service workorder from a customer service request

See also:
Accepting a Customer Service Request to a new service workorder

5.3.5 View an existing Service Workorder

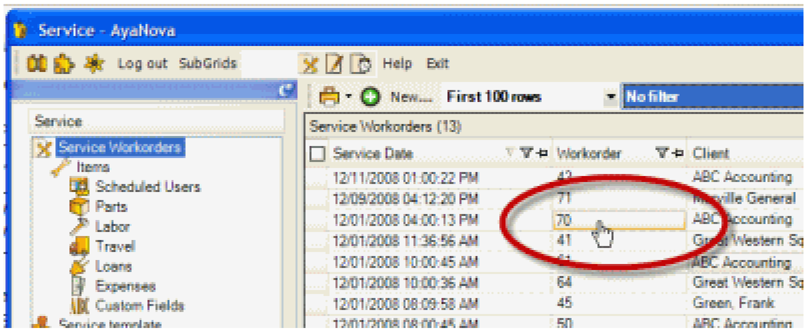
An existing service workorder can be viewed, as well as edited by opening that service work order's entry screen and editing as needed, as long as you have sufficient Security Group rights to edit a workorder, and that the workorder is not check-marked Closed.

A new service workorder can be viewed and edited four different ways:

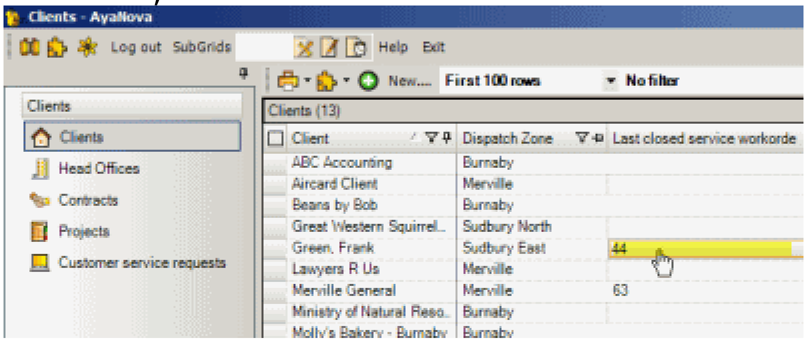
1. **Select the workorder number that shows a link in any grid**
2. **Enter the workorder number in the Direct Open menu option**
3. **Select a recently edited service workorder via the Recent menu option**
4. **Open the workorder item from the Schedule screen**

1. Select the workorder number that shows a link in any grid

For example, in the Service Workorder grid, use your mouse to click on a workorder number

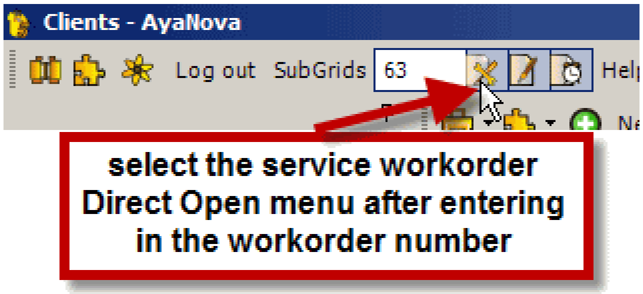


Another example, in the Clients grid, view the column Last Closed Service Workorder, and click on that shows a workorder number



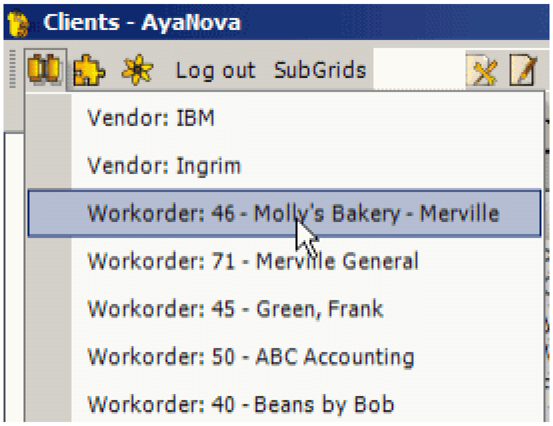
See also:
[Security Groups]
[Adding, editing and deleting data for display in a main grid]

2. Enter the workorder number in the Direct Open menu option on main toolbar and select the service workorder link



See also:
[Main AyaNova Menu Bar]

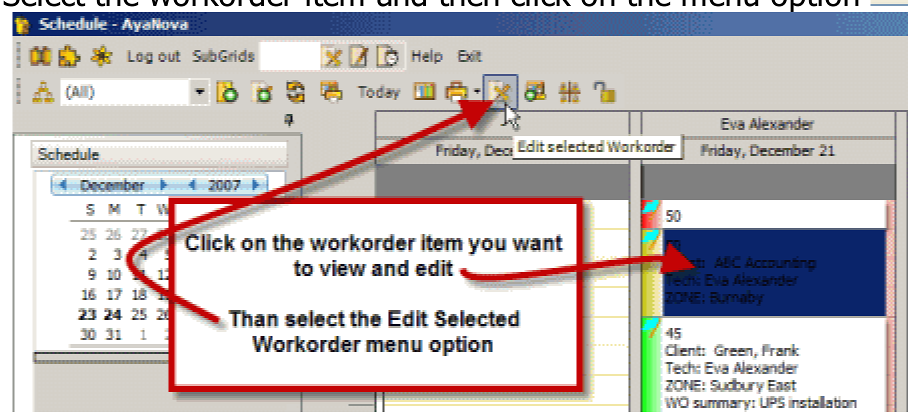
3. Select a recently edited service workorder from the Recent menu option on the main toolbar



See also:
[Main AyaNova Menu Bar]

4. Open the service workorder from the Schedule screen

a. Double-click on the workorder item in the Schedule Calendar
or
b. Select the workorder item and then click on the menu option 



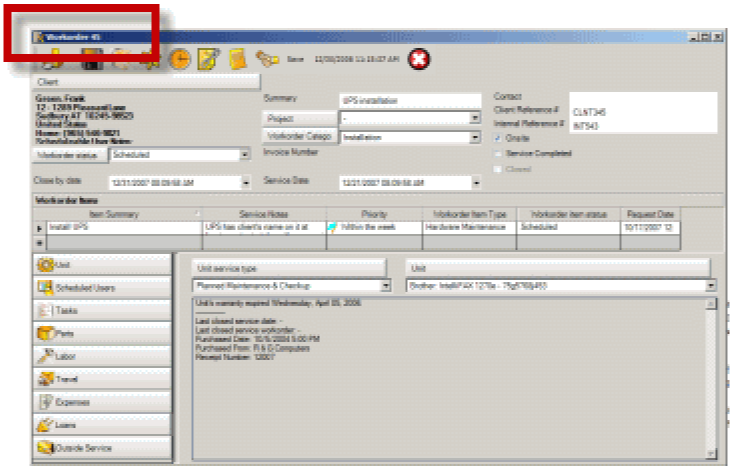
See also:
[Edit selected workorder item]

c. From an existing Follow Up Schedule Marker via the Schedule screen

See also:
[How do I create and view Follow Up in a workorder?]

5.3.6 Service Workorder entry screen

5.3.6.1 Workorder numbers



At the very top of the screen in the title bar, the screen is identified as a workorder, and the work order number is displayed.

- Work order numbers are **never** re-used. What this means is if 5000 were the highest work order number and you were to delete that work order (*if have rights to delete and service workorder has not been set to Completed or Closed*), the next work order would be number 5001 even though there is no longer a workorder 5000 in the database.

- When a new workorder is first created, a workorder number is not assigned to it **until** the first time that workorder is saved. This allows you to safely delete a newly created workorder without “using up” a workorder number.

- Service workorder templates also "use up" a workorder number.

- Because of the inevitable deletions of work orders that can happen as well as that service templates will also "use up" a number, do not count on the work order number as being an accurate representation of how many actual work orders your organization has processed. You can set whether security groups have the ability to delete workorders or not to prevent this.

  See also: Security Groups on *Object.Workorder* and *Object.WorkorderService* to Read/Write for security groups of yours that you do not want to be able to delete a saved numbered workorder.

- If a workorder is set to Service Completed or Closed, it can not be deleted. If you need to delete a workorder that has been checkmarked Service Completed or Closed, you need to un-check-mark those fields first.

- There is no need to “purge” the database of “old” workorders. Use your grid filters to only view workorders that are pertinent. By not "purging" old workorders, you can still refer back to them if needed or bring up old reports as needed.

- Starting workorder number is set in Global Settings in the Administration navigation pane.

5.3.6.2 Order entry screen security settings

The following is the structure of a workorder entry screen’s rights

Object.WorkorderService = parent
  Object.WorkorderItem = child
    Object.WorkorderItemUnit =grandchild
    Object.WorkorderItemScheduledUser = grandchild
    Object.WorkorderItemTasks = grandchild
    Object.WorkorderItemLabor = grandchild
    Object.WorkorderItemParts = grandchild
    Object.WorkorderItemTravel = grandchild
    Object.WorkorderItemOutsideService = grandchild
    Object.WorkorderItemMiscExpenses = grandchild
    Object.WorkorderItemLoan = grandchild
    Object.WorkorderItemCustom = grandchild

- All object settings under the parent apply to all three: service workorders, quotes **and** PM's entry screens.

  For example, the Scheduled Users subsection will NOT show in **any** service workorder entry screen, quote entry screen **or** PM entry screen for users of that security group **if** you set Object.WorkorderItemScheduledUser to Forbidden in that security group.

  This is because what you set for Object.WorkorderItemScheduledUser is applied to all three - service workorders, quotes and PM's.

- Note how the WorkorderItem is a "child" of the Workorder; and the WorkorderItemLabor is a child of the WorkorderItem and a "grandchild" of the Workorder

- If the object is a “child” of another object, the “child” will only ever have at maximum the rights of the “parent”
- Only access rights set for a “child” less or equal to the rights of the “parent” will take effect
- Access rights set for a “child” that are greater than the rights of the “parent” will not take effect.
- A "grandchild" will only be given the maximum rights set of the "child" regardless what you set in the security group. And the "child" will only be given the maximum rights set of the "parent" regardless what you set in the security group.

Example 1:
If you have set Read Only access to the Service Workorder root object (Object.WorkorderService) for a security group, even if you set Read/Write access to any of the child objects – Read / Write access will be ignored as the Service Workorder root object access right takes precedence. Users of the security group where you set this will only be able to view a workorder and its items and subsections (labor, parts, etc) but not edit.

Example 2:
If you want users of the security group to be able to view and edit all aspects of the workorder except only view the Scheduled Users subsection, you would set all the workorder related objects to Read/Write, but set Object.WorkorderItemScheduledUser to Read Only

Example 3:
If you want users of a specific security group to not even see the Expenses subsection nor the Loans subsection but be able to create and edit all other parts of the workorder, you would set all the workorder related objects to Read/Write but set Object.WorkorderItemMiscExpense and Object.WorkorderItemLoan to Forbidden.

Object Name in Security Group screen	What this object refers to	What to set to give users of this security group minimum ability to edit and create a service workorder
Object.WorkorderService	service workorder entry screen	Read/Write

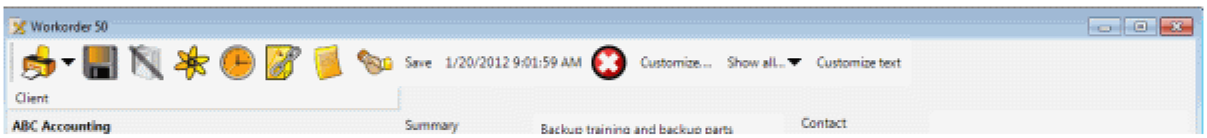
	NOTE: access given to this affects all Object.WorkorderItem type objects which are children of Object.Workorder	
Object.WorkorderItem	Workorder item section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemUnit	Unit section of a service workorder, quote or PM	Read/Write
Object.WorkorderItemLabor	Labor section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemLoan	Loans section of a service workorder	Read/Write
Object.WorkorderItemMiscExpress	Misc Expenses section of a service workorder	Read/Write
Object.WorkorderItemOutsideService	Outside Service section of a service workorder	Read/Write
Object.WorkorderItemPart	Parts section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemScheduledUser	Scheduled Users section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemTask	Tasks section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemTravel	Travel section of a service workorder, quote and preventive maintenance	Read/Write
Object.Workorder.Close	Close checkmark field in Service Workorder entry screens **Example of use: you do not want users of a certain security group to be able to Close a workorder until you yourself as mgmt have checked it. **	
Object.WorkorderService.CloseByDate	Close By Date field in the Service Workorder entry	

	screen **Example of use: if mgmt is subscribed to be notified if a workorder is not closed by a certain time period and you do not want your staff to change the Close By Date**	
The Objects listed below must be set to **minimum Read-Only** for the users of the Security Group to be able to view in a workorder		
Object.Client	To be able to select a client	
Object.Contract	To be able to select a client with a contract	
Object.ContractRate	To be able to select a client with a contract	
Object.Task	To be able to select the Task jump button	
Object.TaskGroup	To be able to select the Task jump button	
Object.TaskGroupTask	To be able to select the Task jump button	
Object.Unit	To be able to select a unit	
Object.UnitModel	To be able to select a unit	
Object.Priority	To be able to view the Priorities subgrid	
Object.Project	To be able to view the Project jump button	
Object.Report	To be able to print	
Object.WorkorderCategory	To be able to view via the Workorder Category subgrid	
Object.WorkorderStatus	To be able to view the Workorder Statuses subgrid	
Object.WorkorderItemType	To be able to view the Workorder Item Types subgrid	
Object.ScheduleMarker	To be able to view Follow Ups	
Object.ServiceBank	To be able to view client's banked service	

Object.UnitMeterReading	To be able to view unit's meter reading	
Object.Part	To be able to create a new part from within a workorder	
Object.Region	To be able to have client notifications sent out if enabled	

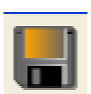
5.3.6.3 Workorder entry screen menu options

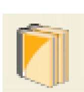
5.3.6.3.1 Main Workorder entry screen menu options



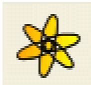
 **Print...**
Selecting this menu option drops down to display the list of available reports for the displayed entry screen.

Reports that are available from the Service Workorders grid are also available here for the individual service workorder.

 **Save & Exit**
This menu option saves any changes to this workorder entry screen and closes the entry screen bringing you back to the previously viewed screen.

 **Documents**
This opens up the list of associated documents with this service workorder. You can also associated new documents via this screen.

> **NOTE**: If the Documents item is grayed out with a line through it, that means it has no records.
> For example, in the screenshot at the very top of this section, the Documents menu option  is grayed out with a line through it - this way you can see at a glance there is no Documents entered for this workorder without having to open it.



Wiki

This will open up the Wiki page for this specific service workorder where you can embed files / documents, write notes or embed images.

See also:
Wiki

Record History

This opens up the Record History window displaying the user that originally created the workorder, and date of creation; and the last user that modified this workorder and date of modification.
Do note that the fields are not updated until the object has been saved and closed. For example, if you have just created a new workorder, and have not yet selected Save & Exit – the creator and creation date will be blank until this is performed.

Follow Up

Select this to either add a follow up for this workorder, or view existing follow ups for this workorder. Can be added to a Closed workorder as well as an open workorder

See also:
How do I create and view Follow Up in a workorder?

Client Note

This opens up the Client Note grid screen where you can enter notes pertaining to that client selected within this workorder.

> Client Notes are accessible from the client's entry screen's menu option as well as from any workorder for that client
>
> **NOTE:** If you wish to enter notes pertaining to this workorder itself but not in any of the existing fields provided or not in the Client Notes, it is suggested to attach a document via Documents, or create a text custom field that would be available in the workorder item Custom Fields sub-item screen. Refer to the section on Documents and to the section on custom fields for more information.

Or if not utilizing a text field that comes standard with AyaNova, you could edit the field label so that it describes what you are actually using that field for in all service workorder entry screens. For example, if you do not use the Client Reference #: field as it was intended for, you could localize the field label to display instead what you wish. Refer to the section on localization for more information on editing field labels.

Contract

Before the workorder entry screen loads, it first checks if the client or the clients head office has a contract. **If** this button displays, this indicates that the client or the clients head office has a contract. This opens up the Contract screen for this client or this client's head office.

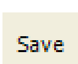
If this button does not display, that indicates that the client or its head office does not have a contract.

If you have set a contract for the client or that client's head office since the workorder was opened, this button will still not show until you have closed the workorder and reopened – because it only checks for this when the workorder is first opened.

Do note that if a client has a contract, that overrides any selected contract in the client's head office. If a head office has a contract selected, any clients where that head office is set as their head office that do not have a specific contract set, will have that head office's contract applied.

Contract affects what rates (service and travel) will display for selection in the workorder, as well as what discount will be automatically applied to parts selected in a workorder for this client.

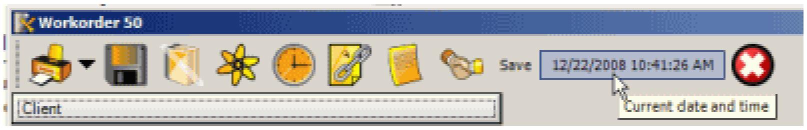
See also:
Contracts



Save

This saves any changes made to the workorder without closing the workorder screen. This does not close the screen allowing you to save any changes made to date and continue working, which is recommended to do on a regular basis in the event that there is a problem between you and the database, so that data is not lost.

Changes made to a screen in AyaNova are not automatically saved until you have actually indicated to save it either by selecting a menu option to save, or on closing indicated that it should be saved.



Current Time & Date
This is displayed at the top of the service workorder is the present time and date.

A useful tool for when you want to enter the present date and time in a field is to place your cursor in the field and then use your mouse to click on the Date & Time at the top menu. This will insert the present date and time. Or select to enter the time in a text field in the workorder

See also:
Current Date & Time feature in workorder entry screen as a timer

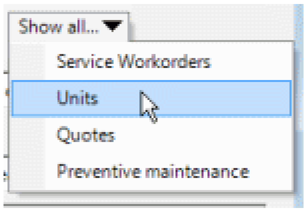

Delete
This deletes the **whole** workorder. Note that only if you have rights to do so will this toolbar option be available.

Any object in AyaNova that is deleted is deleted permanently. There is not an "undo" button or option. If you went ahead and accepted the confirmation message and deleted something you should not have - your options are to re-enter it from scratch, or restore your database from your last backup.

Do note that once a workorder has been check-marked Closed, a workorder can not be deleted as it is now permanently historical information only for reporting and viewing.

Customize...
This menu option ONLY shows when logged in as the AyaNova Administrator.

The Customize menu option is used to set whether certain header fields and labels display in the service workorder (or quote or PM) entry screen.



Show all...

This menu option provides quick access to all units of this client, all service workorders for this client, all quotes, and all PM's for this client

Customize text...
This menu option ONLY shows when logged in as the AyaNova Administrator.

Use the Customize text... menu option to localize labels of this entry screen on the fly or if accessed from the main menu bar, displays the labels of the main grids and main menu bar for quickly editing.

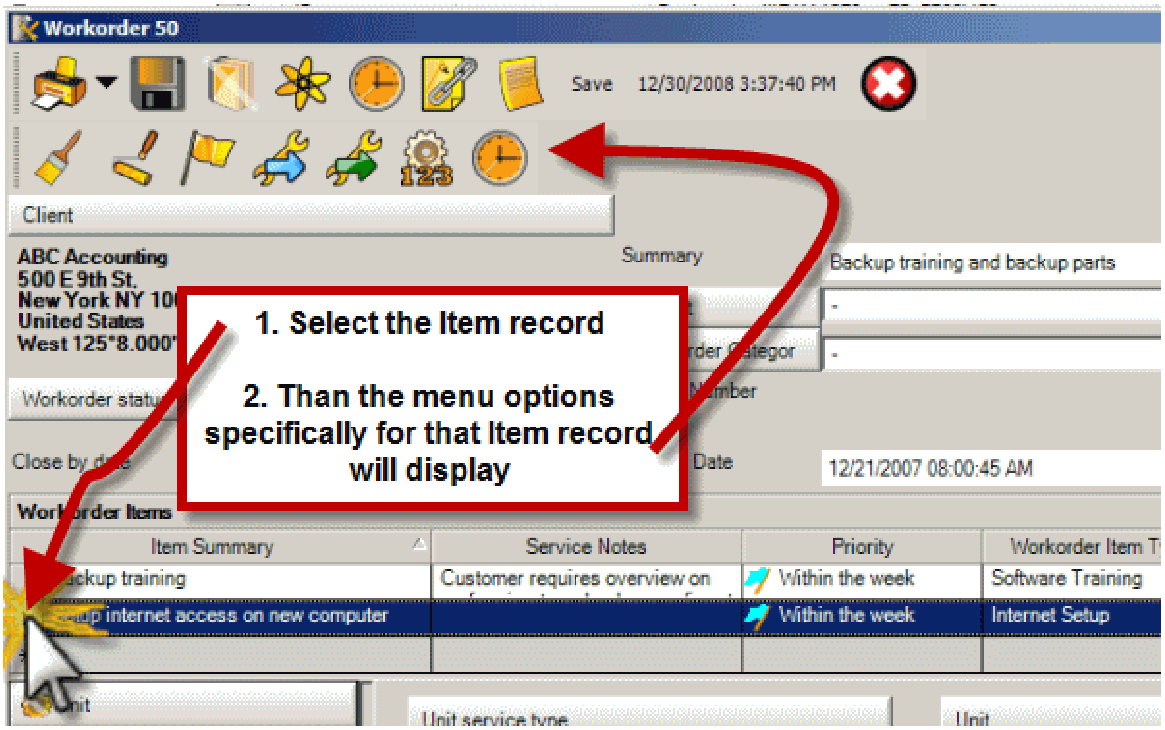
If a button/menu option is grayed out, or does not respond when clicked, that would indicate either:

- either you do not have rights to access or perform the feature,
- or the button is not available at this time,
- or that there is no data via that menu option (time saving feature so you know you don't have to open to check).

5.3.6.3.2 Workorder Item menu options

The following toolbar menu options display when you have clicked within that specific section of the service workorder.

For example the **Move Workorder Item** menu option only displays when you have specifically clicked and made active a workorder item by selecting an item record



See also: Convert scheduled items to labor easily

Note: if you have enough screen space you can drag this and all other workorder form toolbars up to the same level as the main toolbar to free up more screen space.

If Workorder Item is selected (the specific row or a specific field in a row) then the following menu options will show:

Workorder Item Types

Types are selectable from the workorder item grid. This toolbar item opens up the Workorder Item Types subgrid whereby you can create new or edit existing workorder item types.

Workorder Statuses

Statuses are selectable from the workorder item grid. This toolbar item opens up the Workorder Statuses subgrid whereby you can create new or edit existing statuses. This is the same grid as when you select the Workorder Status button within the Service Workorder header.

You will note that there is a Workorder Item Status as well as a Workorder Status field in the workorder

Priorities

Priorities are selectable from the workorder item grid. This toolbar item opens up the Priorities subgrid whereby you can create new or edit existing priorities. You can also create and edit Priorities via the main toolbar menu SubGrids.

Move Workorder Item to Different Workorder/quote for this client

This toolbar item allows you to move the workorder item that presently has the focus (where you mouse was clicked, or where you were typing in) to another open workorder for the same client.

The workorder (or quote) must have more then one workorder item.

The user logged in must be a member of a security group that has full Read/Write/Delete rights to all workorder objects

See also:
How do I move a workorder item from one service workorder to another?

Copy Selected Workorder Item to an existing workorder/quote for this client

This toolbar item allows you to copy the workorder item that presently has the focus (where your mouse was clicked, or where you were typing in) to another open workorder for the same client.

Meter Reading

Selecting this opens up the Meter Reading grid for the selected unit within this workorder item. Entering a meter reading for the selected unit via this method auto-enters the workorder number into the meter readings Workorder column field for that record, and makes that specific Unit Meter Reading display in the Items grid for that specific workorder item; as well as making it available to a detailed report template dataset for Service Workorders and Items, and in a summary report template dataset for Items.

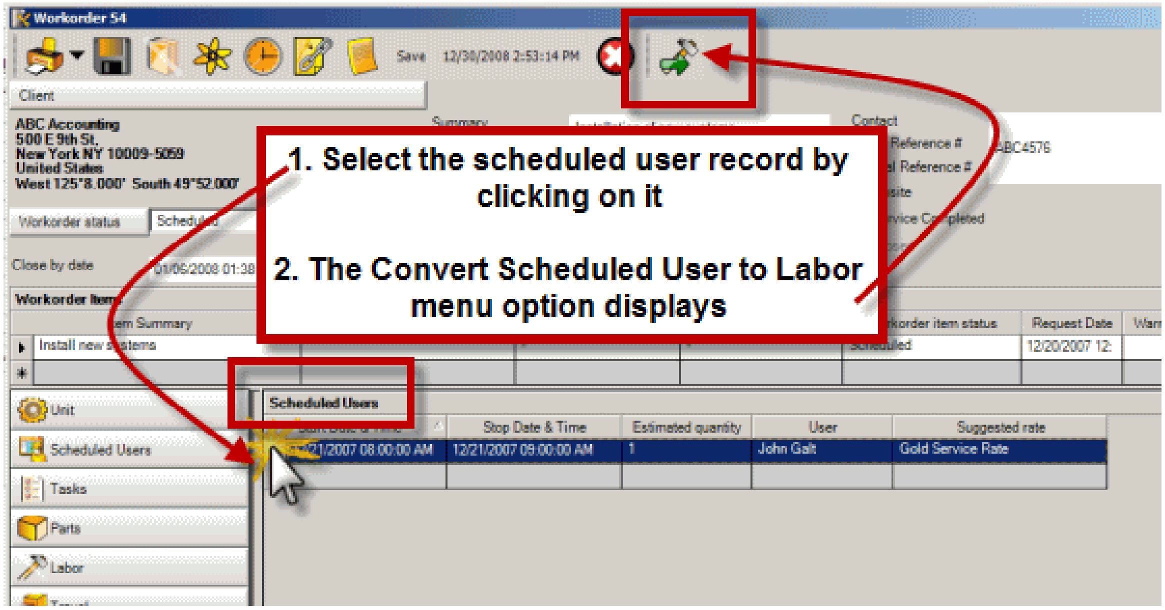
See also:
Unit Meter Reading

Record History

This opens up the Record History window displaying the user that originally created the workorder item, and date of creation; and the last user that modified this workorder item and date of modification.

Do note that these fields are not updated until the object has been saved and closed. For example, if you have just created a new workorder item, and have not yet selected Save & Exit – the creator and creation date will be blank until this is performed.

5.3.6.3.3 Scheduled Users menu option



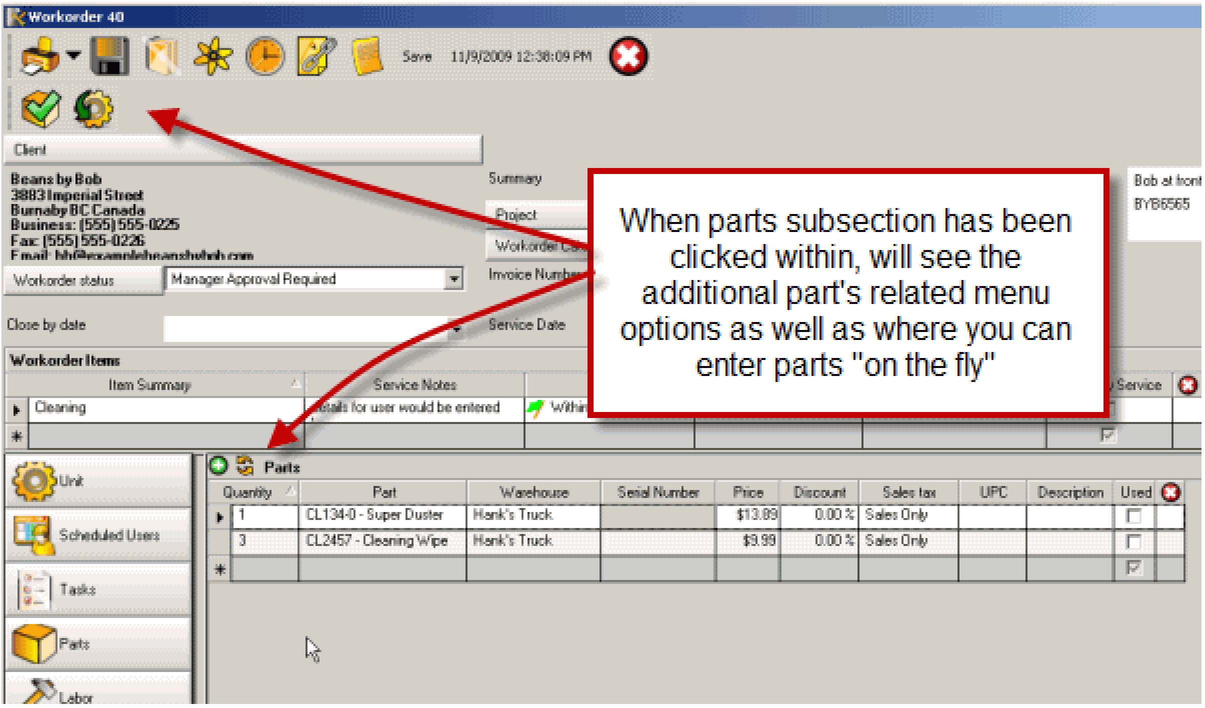
If Scheduled Users sub-section of a workorder item is selected the menu option displays:

Convert Scheduled User to Labor
Selecting this will copy over the selected scheduled user, start and stop date and time, estimated quantity and suggested rate to the Labor sub-screen.

This is a time-saving feature to be used if the actual service provided coincides with the scheduled user and times. Of course you will still need to enter the details of the service provided into the Labor sub-screen.

See also: Convert Scheduled Users to Labor easily

5.3.6.3.4 Parts menu option



There are three additional Parts menu options:

1. At the top of the Parts subsection grid itself are menu options for **adding parts and refreshing the list** from within the workorder entry screen

See also:
[Part entry on the fly in a workorder]

2. and 3. If Parts sub-section of a workorder item is selected two menu options display:

 **Set All Parts to Used**
Selecting this will set all parts in the Parts grid to “Used”. Only when Parts are set to Used in service are they taken out of inventory. You should remove the parts listed that were not used in service before completing service and closing the service workorder.

This is a time-saving feature so you do not need to go and click on Used for every part, which is useful if the dispatcher had identified all the parts that were to be used that the scheduled user took onsite for service, and now that service has been entered, they can quickly identify that all parts were used so that the workorder can be closed.

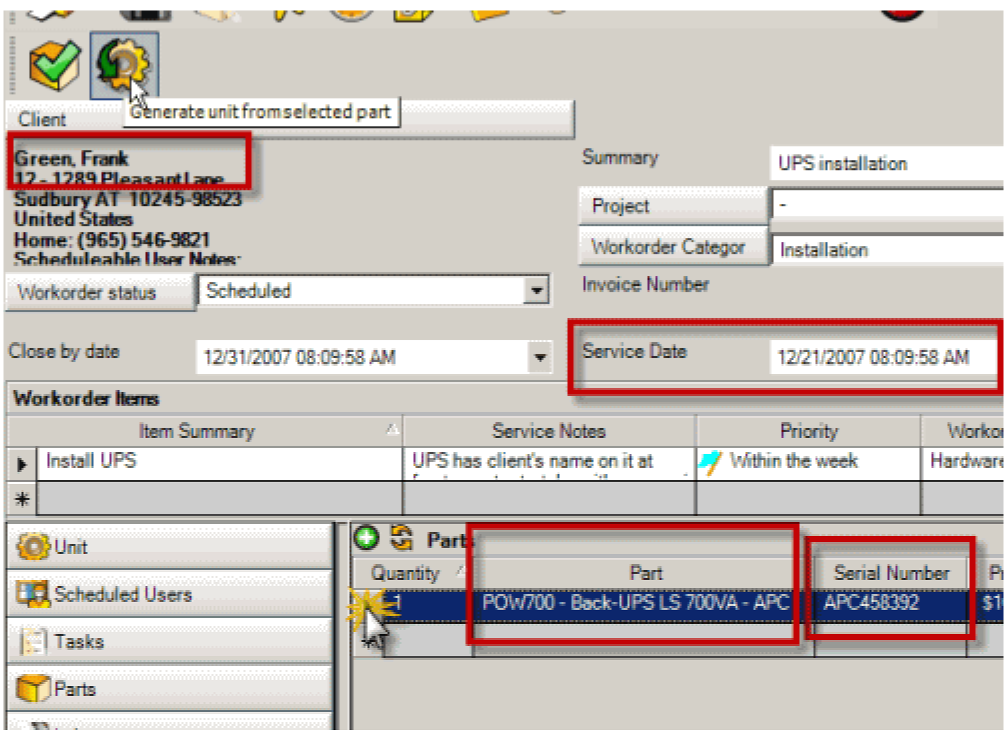
Generate Unit from Selected Part

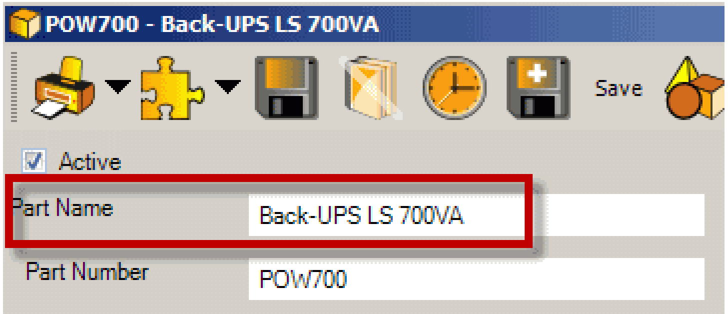
Select the specific part record and then select this menu option which will open up the Unit entry screen with details from the part record pre-entered for you to save time.

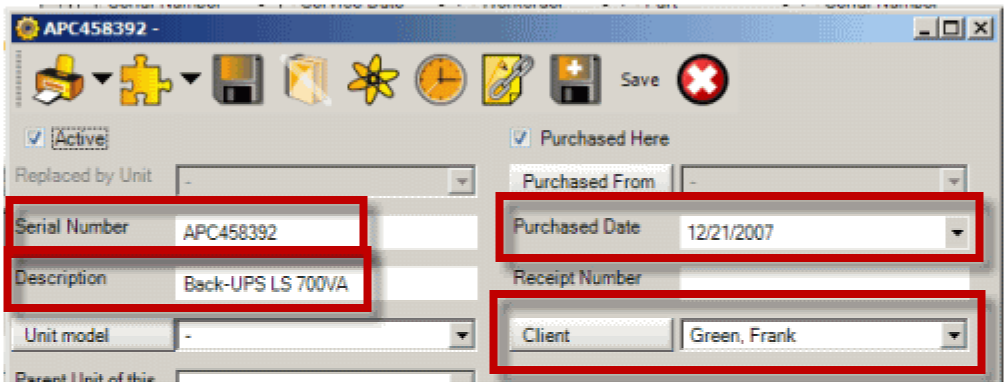
The Client name from the workorder is placed in the Client name in the Unit entry screen
The Service Date from the workorder is entered as the Purchased Date in the Unit entry screen
The Serial Number from the part in the workorder is entered as the Serial Number in the Unit entry screen

- If no serial number, then AyaNova will enter todays date and time as a placeholder in the Serial Number field for you to edit as needed.

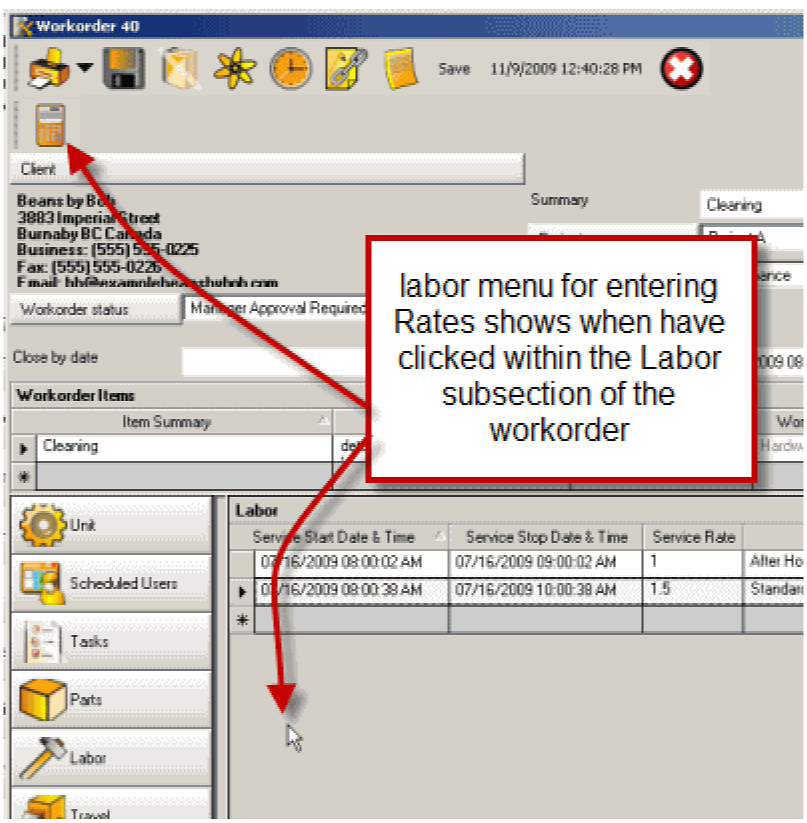
The Part Name from the part is entered in the Description field in the Unit entry screen







5.3.6.3.5 Labor menu option



If the Labor sub-screen sub-section of a workorder item is selected the menu option displays:

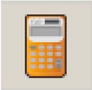
 Rates

This opens the Rates grid to allow you quick access to add or edit existing rates so they are selectable from the Labor grid. Rates can also be edited and created via the main toolbar menu SubGrids. Refer to the Rates section in this manual for more information.

See also:
Rates
Convert Scheduled Users to Labor easily

5.3.6.3.6 Travel menu option

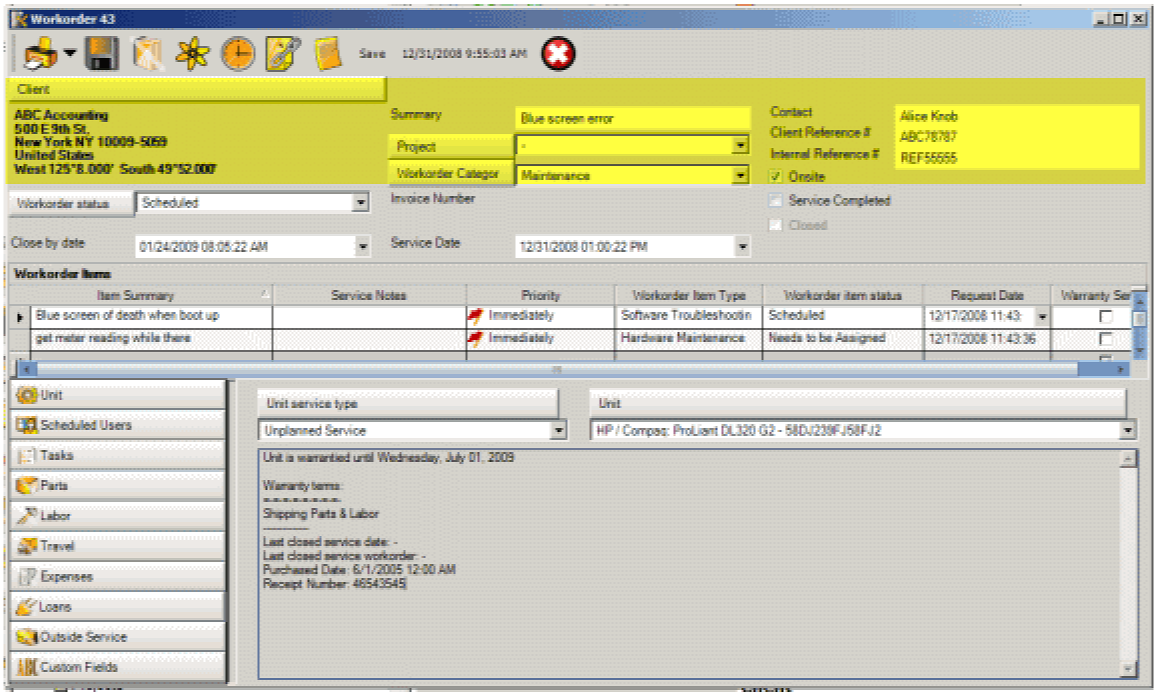
If the Travel sub-section of a workorder item is selected the menu option displays:

 Rates

This opens the Rates grid to allow you quick access to add or edit existing rates so they are selectable from the Travel grid. Rates can also be edited or created via the main toolbar menu SubGrids. Refer to the Rates section for more information.

See also:
Rates
Convert Scheduled Users to Labor easily

5.3.6.4 The Order Header



The order header identifies the workorder as a whole

- which client the order is for
- what project to apply the order to
- what category the order applies to as a whole
- who the contact is for the whole workorder
- what client reference # for the whole workorder is
- and what internal reference # for the whole workorder is.

*NOTE: As a preventive maintenance item and a quote both can be "turned into" a service workorder, you will notice that this "header" part at the top of a workorder **is the same** for a quote, for a preventive maintenance order as well as for a service workorder.*

Also see the section on toggling off fields or their labels from displaying.

Fields of the Order header:

Client

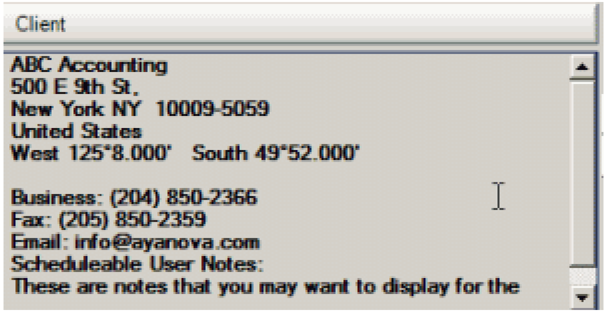
The client is selected prior to opening of the order. When a service workorder is loaded, much of the client specific information is also loaded and "made ready", therefore a client cannot be changed from within a workorder.

It is **not** possible to select a different client from within an existing workorder as once a client is selected, a number of options are pre-set such as contract discount and rates to apply, possible units of this client for selection, unit meter readings for these units, Client Notes, etc.

Notice the time saving feature of the Client "jump" button above the Client display.

> In many areas of the program where there is a drop down selection list, there is also a button above or to the left of the drop down selection.
>
> The purpose of the buttons above or beside drop down selection lists is to take you directly to the screen where the data contained in the drop down list is entered or edited.
>
> This is a very important feature, it means that if you are in the middle of entering a work order, you don't need to abandon it part way through to edit or add new information.
>
> Also this provides quick access to any information within the Client entry screen, such as Banked information, contact information, etc.

Client contact info



Contact information about the Client, including schedulable user notes are displayed immediately below of the Client button.

For space saving reasons, only the first few lines of the clients address and contact information is initially shown. If you click within the field itself, it will expand automatically, as well as display a scroll bar to the right if there is a lot of information.

Or just click on the Client button to open up and "jump" to the Client entry screen directly.

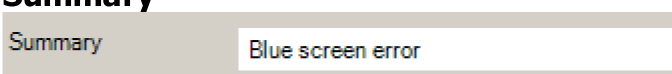
This information is taken from the client record as it was entered on the Client entry screen and is displayed for your convenience if you need to contact the customer while in the process of entering a work order.

The client contact info box is grayed to indicate this is not directly editable. If information here needs to be changed, select the Client button at the top to open this client's Client entry screen, perform the needed changes, save & exit which will return you to this service workorder.

As stated previously, only when the service workorder is first opened does all information regarding the client get obtained – so if you edit Contract information, or address information, to display these changes, close the service workorder and open it back up.

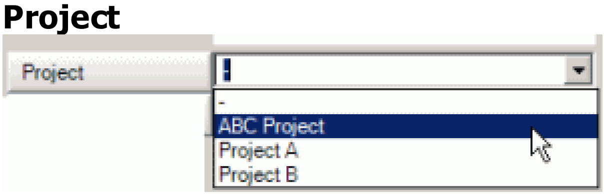
See also:
Clients

Summary



This text field is a single line of text that summarizes all the work to be done on this work order as a whole. It is used to indicate to AyaNova users the purpose of the work order as a whole in summary with no details (details are entered in the workorder item grid below).

Project



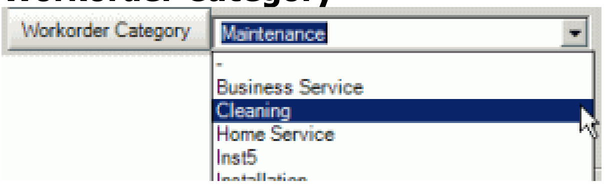
Projects are a means of linking together a group of work orders for grid display and reporting purposes. You can create an unlimited number of projects from the projects screen.

Projects are useful for both filtering the main service workorder list grid and for generating management reports that are filtered by project.

Although you can use them for any purpose you wish, they are usually used to link together all work done for a particular project so that a total of all hours / parts etc that went into a project can be printed from a grid screen. This is useful for billing purposes or for comparing the actual costs of a job to the amount quoted for that job.

See also:
Projects

Workorder Category



This drop down selection field allows you to categorize the service workorder as a whole. This is useful for both filtering the Workorder grid and for generating management reports that are filtered by category. A category can be anything you want it to be.

For example: AyaNova may be used by a service business with different departments who want to see management reports based on each department separately.

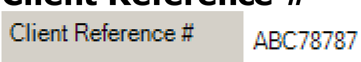
See also:
Workorder Categories

Contact

By default when a new workorder is created for a client, the client's text from its Contact field is automatically copied to this field. This can be edited as needed.

This text field intended use is to indicate a client contact person, usually the person who requested the service or is the person to contact once onsite. This is useful if you use it to display in Dispatch reports so that the schedulable user knows who requested the service. As this field is a text field, you could easily localize the label, call it whatever you wish and enter what whatever you wish.

Client Reference

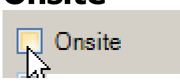


This text field's intended use is to record a customer reference number so that the clients can match up the work order to their own internal paperwork system. As this field is a text field, you could easily localize the field label, call it whatever you wish and enter what whatever text you wish.

Internal Reference

This text field intended use is to record your company's additional internal reference to the workorder number. As this field is a text field, you could easily localize the field label, call it whatever you wish and enter what whatever text you wish.

Onsite

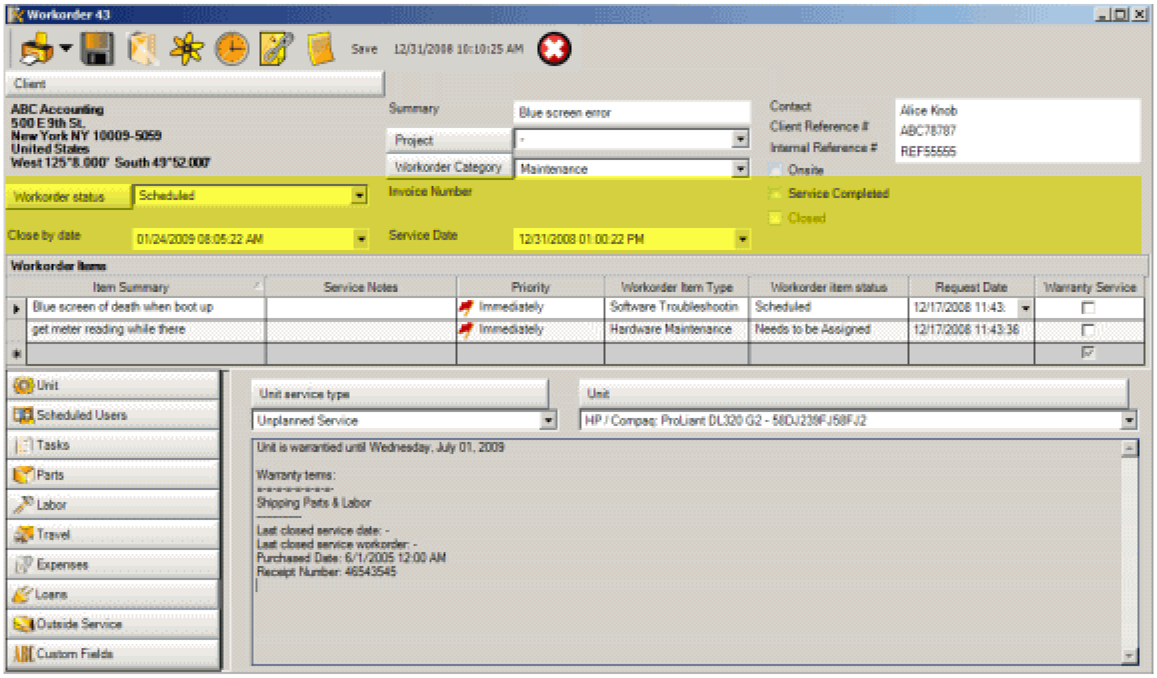


This is used to indicate whether the work was done in-house or on-site. This is useful to identify in house or onsite service by filtering within grids. By default a new service workorder is check-marked on-site

Also note that as with any field label in AyaNova, you can localize any field label in the Workorder header to display whatever text you want in whatever language you want.

See also:
[Localized Text Designer]

5.3.6.5 The Service Workorder Header



The service workorder header identifies information that is pertinent only to a service workorder that would not appear on a quote or a preventive maintenance order

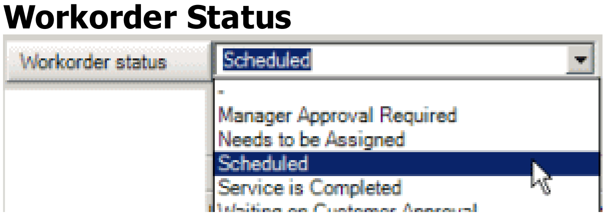
- such as the present workorder status as a whole (also used in notifications)
- the Close by date (used in reference to notifying if not completed by this date)
- the invoice number when completed
- service date information for the workorder as a whole
- whether service has been completed ("locking" edit of parts and labor entries)
- and whether the workorder as a whole is completed (Closed) ("locking" edit of entire workorder) (also tied to automatic client notification to receive detailed report on service provided).

NOTE: When viewing a quote or a preventive maintenance, you will notice that this area of the order will have a "quote header" or a "preventive maintenance header" with different fields than the "service workorder header".

Also see the section on toggling off fields or their labels from displaying.

<u>Fields of the Service Workorder header:</u>

Workorder Status

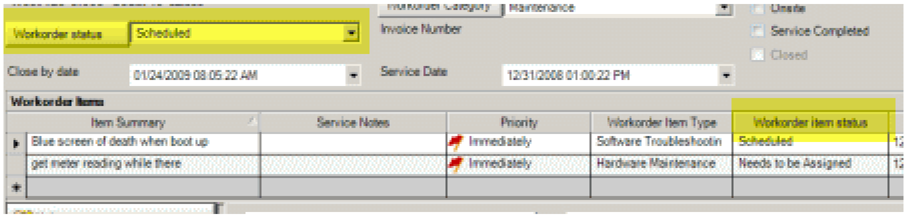


This drop down selection field is used to indicate the overall status of a service workorder. This would be useful to a service manager to determine the progress of a work order as a whole. It would also be useful to other company staff when fielding questions from customers about the progress of their work order.

Users can be automatically notified when a Workorder Status is changed. Clients can also be automatically notified when a workorder status changes.

NOTE: The statuses displayed here are examples only - you can create whatever statuses you want.

NOTE: Workorder Status can be selected both for the service workorder as a whole, as well as for individual workorder items.



NOTE: Workorder Status selected for the workorder as a whole do not show on the graphical Schedule Screen as the Schedule screen pertains to individual workorder items - Workorder Item Status color does show on the Schedule screen calendar.

For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item's status.

We provide both here for you so that you as an organization can use what works best for yourself. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas.

The Global Setting's Workorder Closed Status can be set so there is no forgetting to set this when you close a workorder.

See also:
Notification Subscriptions
Global Settings
Workorder Statuses

Close by Date

This date field's intended use is to determine this service work order's “stale” date.

Subscribe to Workorder “Close By Date” Passed notification subscription event so that when a new service workorder is created and the Close By Date is set, if that date comes and goes without the service workorder being set to the Closed state, you would be automatically notified.

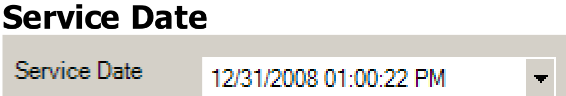
> This would be useful for service managers to ensure service workorders are being completed and entered so that they can be invoiced out to the client. If your scheduled users have a habit of “forgetting” to enter in data so the workorder can be closed and the client invoiced for the service, you should subscribe to this.
>
> Do note that you would be notified only if the subscription is already set up. If you select this date, and then subscribed, you would not be notified as you set this date before subscribing. This date is editable.

This date can be set to default so many minutes from the service workorders creation date via the Global Settings under the Administration navigation pane.

You can also set a security right to the object *Object.Workorder.CloseByDate* to Read Only or Forbidden so that users that are members of a security group where this is set

See also:
Notification Subscriptions
Global Settings
Security Groups

Service Date



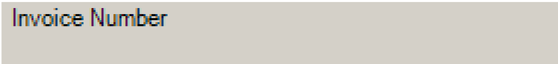
This is a date field with which you can identify a single date for the entire service workorder.

Its intended use is to indicate the scheduled date for the service workorder as a whole; you may use it to indicate the date all service was completed, you may even localize the field label to display as Invoiced Date or some such.

As the workorder items where scheduled date and time for each individual workorder item is not displayed in the Service Workorder List grid, entering an “overall” service date here will display in the Service Workorder List grid which is useful for filtering workorders and displaying.

By default, the date the workorder was created is pre-selected for you, but you can edit as needed and change this date.

Invoice



This text field used to indicate the invoice or sales receipt number that your organization has used to bill this work order to the client.

NOTE:This field is grayed (unable to be edited) until the workorder has been set to Service Completed.

If you filter the Service grid by the Invoice Number, you can see very easily what workorders have not yet been invoiced.

By leaving it blank you indicate that the work order has not yet been billed out.

It also serves as a cross reference to match up a service workorder to an invoice from your accounting software. This is helpful for both your organization’s accounting staff and your customer’s accounting staff. Check out the QuickBooks optional interface and Peachtree optional interface

If a work order is “no charge” or not billed, you should enter something (i.e. “no charge” or any text) in this field so that this work order will not appear on a report listing not invoiced workorders.

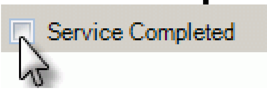
You can leave this field blank if you are not concerned with tracking which work orders have been billed or not, however unless you are a non-profit organization or are using AyaNova for internal use only, you should seriously consider the benefits of using it.

Many of our clients have told us that this feature alone more than repaid their investment in AyaNova as it eliminated work orders forgetting to be billed.

And as with all labels within AyaNova, if a field is not labeled as would be used in your organization, you can edit the label as needed via the Localized Text feature.

For example, if your organization would not ever use this field but you wish to identify something else in a service completed workorder, you could edit the field label to something else required in a workorder header. Just remember it will be this way for every workorder. Refer to the section on Localized Text Designer

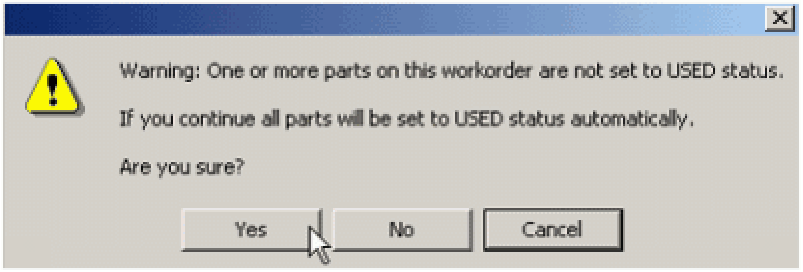
Service Completed



The following occurs when a service workorder is set to Service Completed

1. AyaNova confirms with you that you want to set the workorder to closed, and if all parts are to be set to the Used status.
2. Once set to Service Completed, the only fields that are editable are the Workorder Status field, Service Completed, Closed and the Invoice Number field

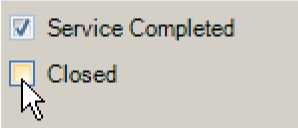
If parts that were selected were not actually used in service, you should select NO or Cancel and remove those parts from selection in the workorder items that were not used in service, then return to selecting Service Completed.



The service workorder can not be deleted, workorder items cannot be edited, nor can workorder items can not be moved or copied to another service workorder if Service Completed has been checked.

This feature is to prevent accidental workorder item changes once a workorder service has been completed, but the workorder is not yet ready to be closed – for example, an invoice has not yet been prepared.

Closed



Once a service workorder is set to Closed, it is no longer editable. This is a security measure, to ensure that further editing of a closed workorder is not performed after it has been closed.

Do note that you **can** open a Closed workorder again so that it can be edited if needed if logged in as the AyaNova Administrator.

The Global Setting's Workorder Closed Status can be set so that when you do accept Closing a workorder, it will ensure that the Workorder Status is set to what you always want it to be.

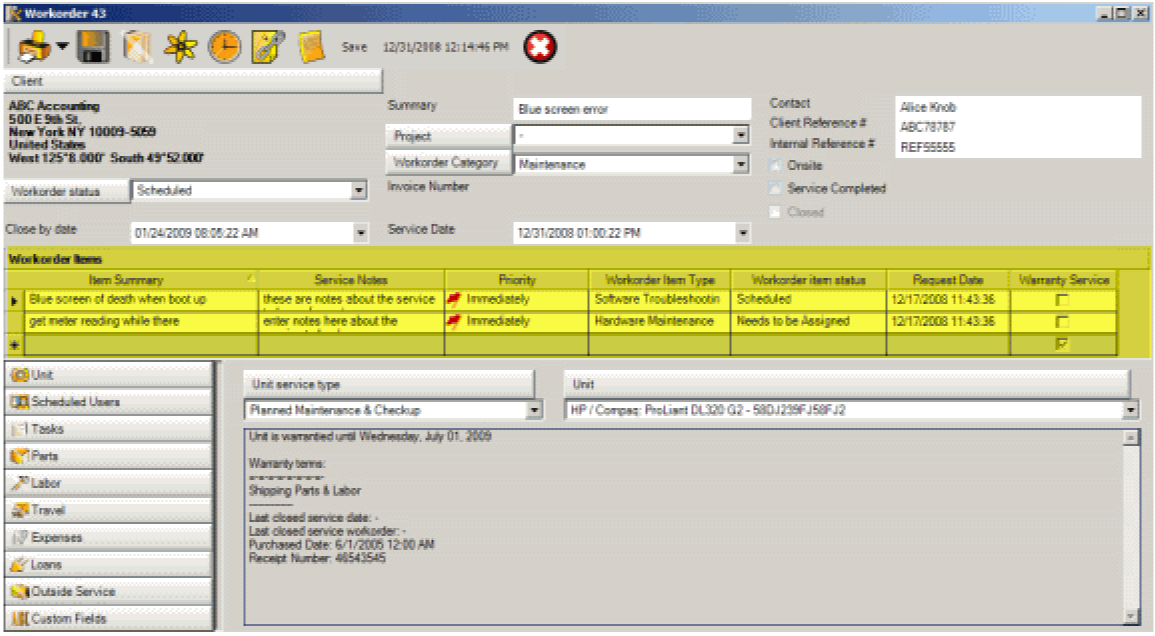
You can also set up so that the client is automatically notified with a copy of a report detailing service provided.

See also:
Global Settings
Client Notifications
Security Groups

Also note that as with any field label in AyaNova, you can localize any field label in the Service Workorder header to display whatever text you want in whatever language you want.

See also:
Localized Text Designer

5.3.6.6 Service Workorder Items



The workorder item is where a summary on service is to be performed, details on service to be performed for scheduled users, actual request date (useful if date of entry is different from the date the client requested the service), status of the workorder item as a whole, and priority of the individual workorder item.

- You can have just one workorder item per service workorder, **or** have multiple workorder items.

  Examples of why you might have more than one workorder item per workorder:

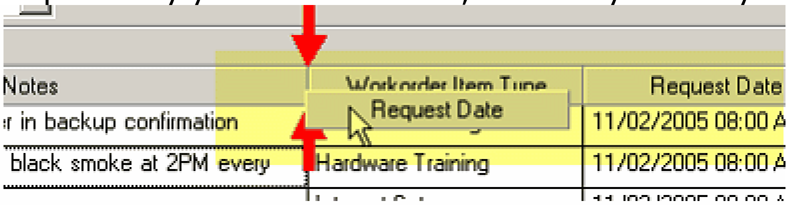
  - You are servicing multiple units (equipment owned by the client) and want to track the specific labor and parts used when servicing each unit.
  - There are multiple issues to be resolved at the same time and you want to specifically identify each as a different workorder item and its specific parts used, its specific labor, etc
  - A workorder spans service provided over the course of a month, but you want to keep all service combined under the same workorder, just each service provided is identified by its own workorder item and that workorder items Scheduled Users, Labor, Parts, etc

- You will note that the workorder item fields and sub-screens will be similar for a quote, for a preventive maintenance order as well as for a service workorder. This is because a quote and a preventive maintenance order can be “copied” to a service workorder, and this way there is no need to re-enter information.
- A workorder may be created to perform service for a single issue. Or a workorder may be created to perform service for many different issues, for multiple pieces of equipment and to schedule many schedulable users. Or it may be for something in-between.
- A single issue would be entered into a workorder item row. When this row is active whether by the cursor being placed within one field or on the row in its entirety, the workorder item sub-items below it correspond to what ever workorder item is presently selected – allowing you to always see at a glance what everything is in relation to.
- Every service workorder has at minimum one workorder item, with no practical limit to the number of workorder items.
- You can move non-completed workorder items to a new workorder for this client. This is very useful if you have multiple workorder items but not all of

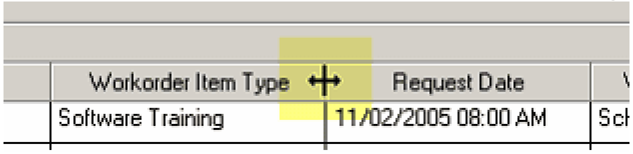
them are completed, but you want to invoice out what you have performed so far.

See also:
How do I move a workorder item from one workorder to another?

- Drag and drop columns to desired grid position. AyaNova will maintain your grid settings for the next time you log into AyaNova, so once you have a grid set up the way you want to view it, it will stay that way.



- Place your mouse between columns and drag to change the width of columns.



See also: Moving and sorting columns in a grid

NOTE: As with any field label in AyaNova, you can localize any field label in Items to display whatever text you want in whatever language you want.

See also:
Localized Text Designer

Fields of the service workorder item record:

Summary

This text field is where you can enter a brief description of what service is to be performed or required.

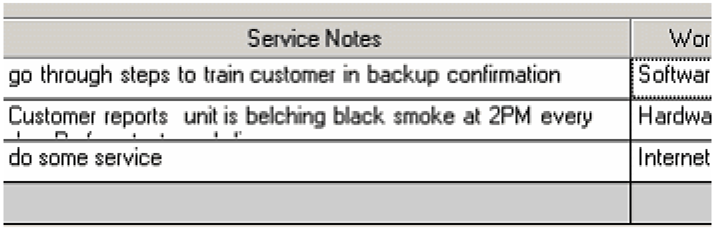
The Summary field is limited to 255 characters.

The information entered here displays on the Scheduled List grid Summary column, and is viewable from the Schedule screen if selected to display via the Workorder Summary Template editor in Global Settings.

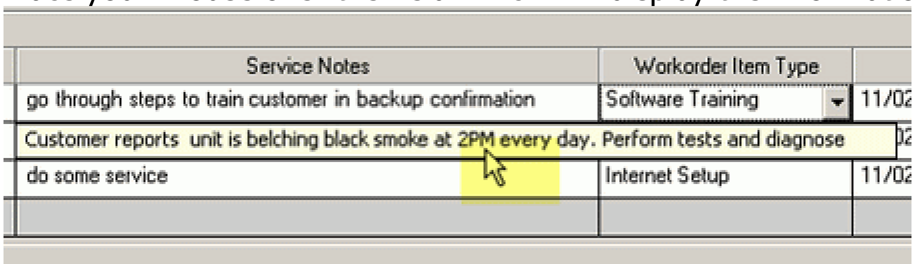
See also:
Global Settings - Workorder Summary Template

Service Notes

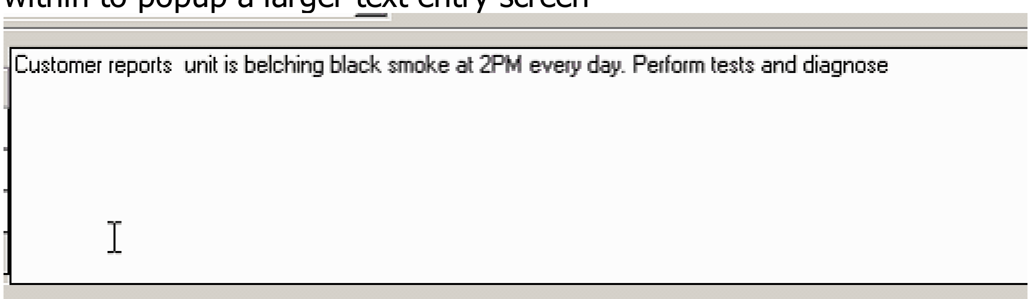
This is a text area where you can provide detailed information for the scheduled user in relation to what is being serviced.



Place your mouse over the field which will display the information expanded.



To enter information, and to view all text information in this field, select within to popup a larger text entry screen



Workorder Item Type

This drop down selection is to identify what type of service is being performed for this workorder item. This is useful for reporting and for filtering the grid view.

For example, if you run a yard and mower maintenance service business, you may want to identify lawn maintenance from yard repair like fence or gate repair. Or if you run a computer service shop, although the Workorder Category may be Networking, you may want to further distinguish the individual workorder items that are networking related even further such as Network Cabling, Network Configuration, Network Hardware, Network Software and so on

You can create or edit additional Types by selecting the Types toolbar item at the top of the workorder screen, or via the main toolbar menu SubGrids.

See also:
Workorder Item Types

Request Date

Intended use is the date service was requested by the client. A workorder may not be created till the following day, but you may want to track when a client requested service against when you were able to schedule a user to perform it, or against when service was actually performed to determine if you need to hire additional staff to meet your client's needs.

Workorder Item Status

As a workorder item progresses, you will want to change the Status of that workorder item to advise others of this, as well as to remind yourself. Changing the status here allows other users to know what is happening with this workorder item at a glance from grids and from within the service workorder. Selecting the Status for the individual workorder item identifies the progress of **that particular workorder item**.

Although drop down selection is the same Status selection as identified within the service workorder header, Workorder Item Status sets the color for a workorder item in the graphical Schedule screen

Workorder Status set in the service header is for the workorder as a whole – Workorder Item Status identifies the status for **this** particular workorder item.

From the Schedule screen, the workorder item description will display its background color as the color associate with the Status. This is useful for scheduled users to view at a glance the status of a workorder item.

For some organizations, they may wish to only identify status via the Workorder header and not use the status color for individual workorder items – while other organizations usually because they have more than one workorder item per workorder - will identify each individual workorder item's status.

We provide both here for you so that you as an organization can use what works best for yourself. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas.

Status is suggested to be other than Open or Closed. For example, you may have Status's that denote the stages between receiving the service request to receiving payment from the client – therefore may have status such as

"Scheduled", "Waiting on Parts", "Waiting on Unit Warranty Replacement", "Customer Notified, Waiting on Pickup", "Customer Billed, Waiting on Payment" etc.

Status can be what ever you want that will allow you to better filter your workorders and keep up on the progress.

You can create or edit additional Statuses by selecting the Status toolbar item at the top of the workorder screen.

See also:
Workorder Statuses

Priority

Priority is different from Status as it signifies how important a workorder item is, or how urgent a workorder item may be.

When viewing the Schedule screen, a workorder item will display a colored flag with the selected color of the priority for this workorder item.

You can create or edit additional Priorities by selecting the Priorities toolbar item at the top of the workorder screen.

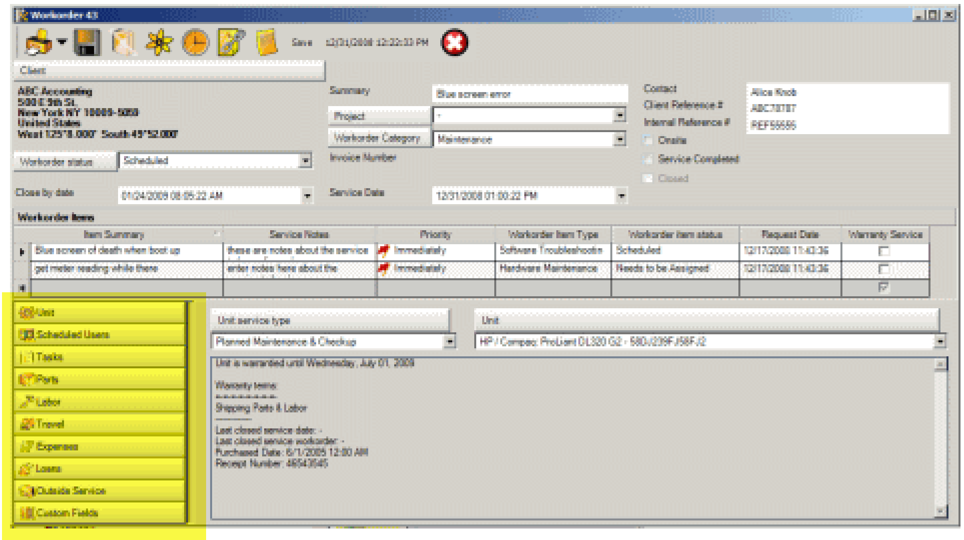
See also:
Priorities

Warranty Service

This checkmark field can be used for whatever you wish. Using the default locale, it is localized to Warranty Service so that you can place a checkmark here if desired. As with any field label in AyaNova, you can localize any field label in Items to display whatever text you want in whatever language you want.

See also:
Localized Text Designer

Each workorder item contains a number of sub-items where you can indicate additional information regarding the workorder item.



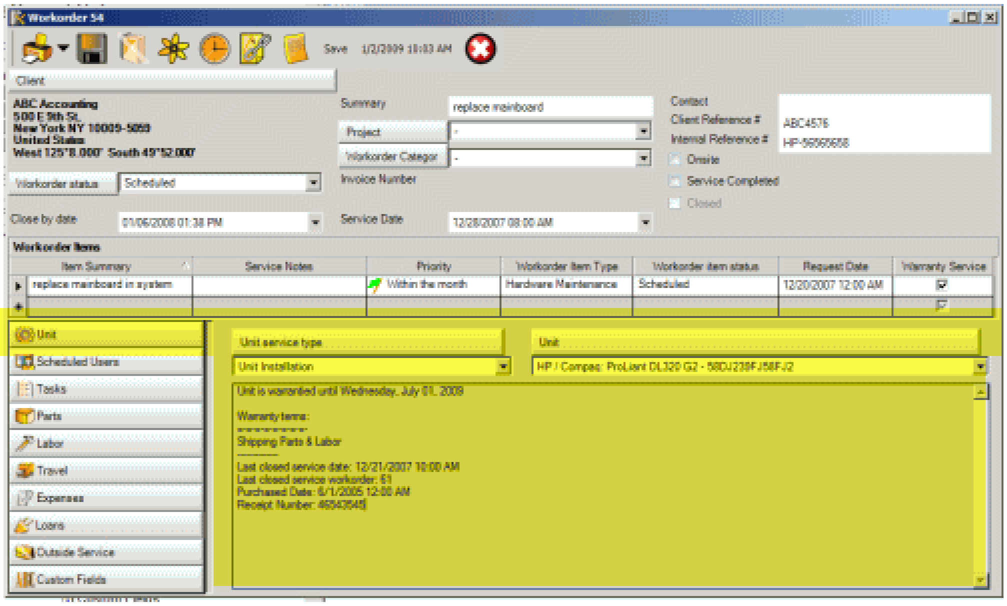
These include:

- the unit selected for service to be performed on
- scheduled users for this workorder item
- tasks assigned to be completed
- parts on order or used in service
- additional expenses incurred in performance of this service that may or may not be charged back to the client
- outside service incurred whether warranty or a third party repair center and the shipping costs incurred
- details of the labor performed in the course of service including user that performed service, details of service performed, start and stop time and rates applied
- details of travel incurred to perform the service
- loaned items and related dates and charges
- Custom fields containing additional information that is needed to be documented.

There is no practical limit to the number of workorder items that a service workorder can have.

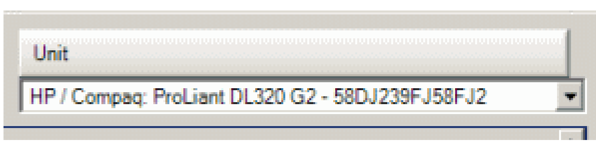
5.3.6.7 Service Workorder Items SubItems

5.3.6.7.1 Unit

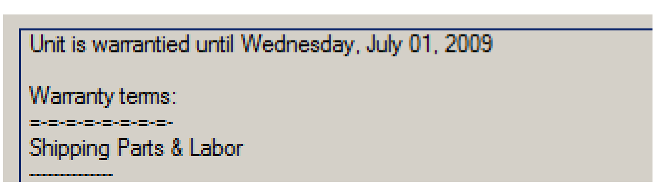


[If you do not want the Unit subsection to show in the entry screen](#) for users of a certain security group, just set the security group Object.WorkorderItemUnit to Forbidden

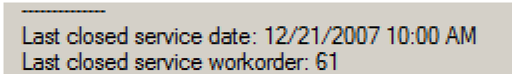
Fields of the Unit sub-screen:



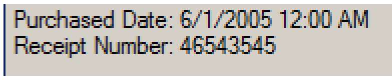
- Identifies the unit to be serviced via this workorder item.
  NOTE*: Display format (whether Vendor - Model - Serial Number, whether just Serial Number etc) is based on the Unit display format set in [Global Settings](#)*
- Only units "owned" by the client of this workorder display for selection so you can easily select
- Click on the Unit [jump button](#) to either edit the existing selected unit; or if no unit selected, create a new unit for this client



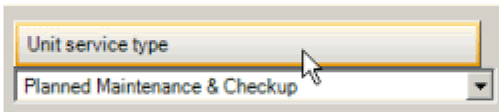
- Displays warranty information on the unit based from the [Unit's entry screen](#)



- Displays Last Closed Workorder number and the service date of that last Closed workorder



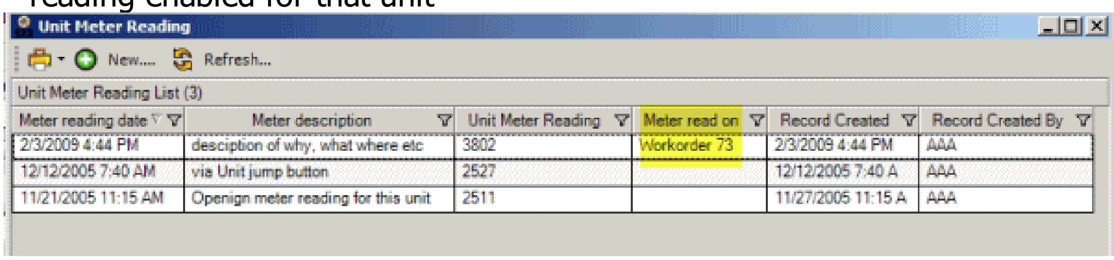
- Displays Purchased Date and Receipt Number for that purchase as set in the [Unit's entry screen]



- Identifies type of unit service

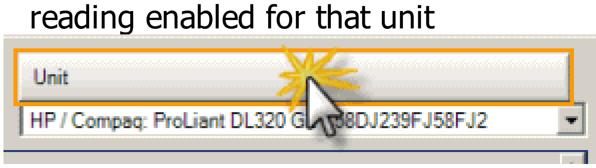
See also:
Unit Service Types

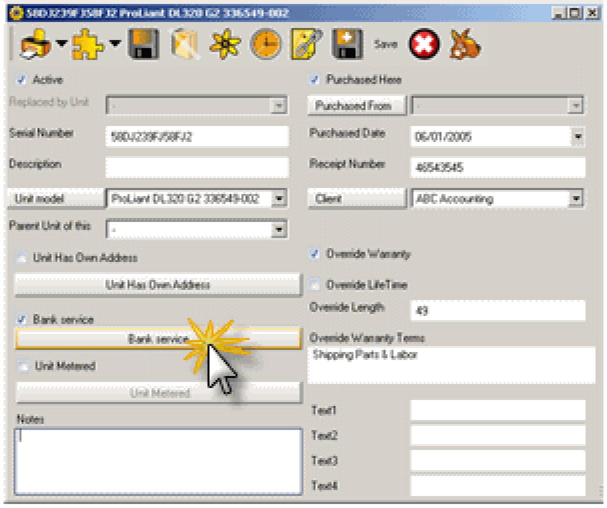
- Provides meter reading entry via the Workorder Items menu option if meter reading enabled for that unit



Meter reading date	Meter description	Unit Meter Reading	Meter read on	Record Created	Record Created By
2/3/2009 4:44 PM	desciption of why, what where etc	3802	Workorder 73	2/3/2009 4:44 PM	AAA
12/12/2005 7:40 AM	via Unit jump button	2527		12/12/2005 7:40 A	AAA
11/21/2005 11:15 AM	Openign meter reading for this unit	2511		11/27/2005 11:15 A	AAA

- Provides viewing of meter reading history via the Unit jump button if meter reading enabled for that unit



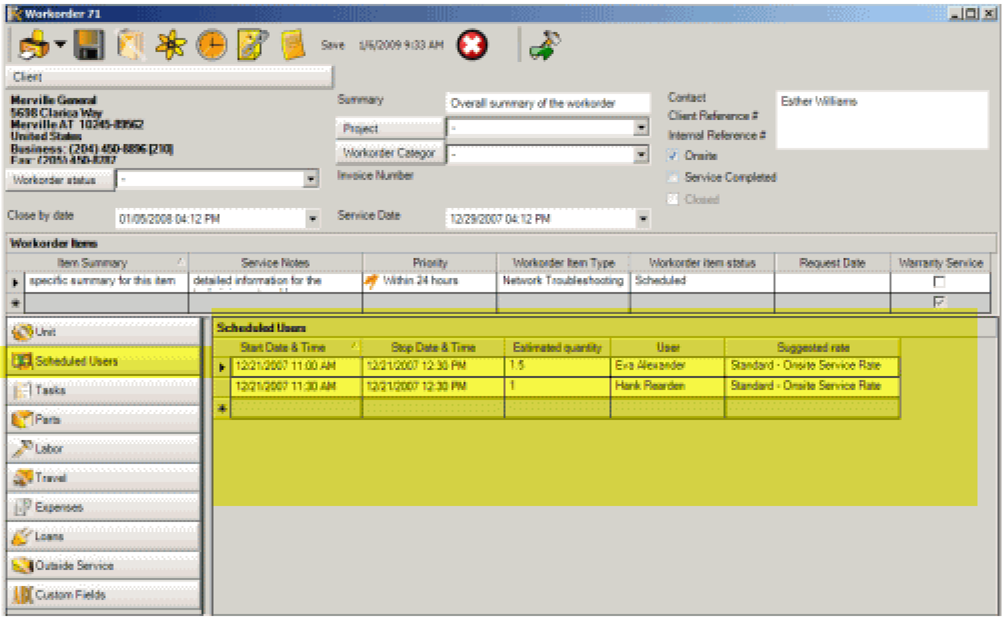


To be able to maintain a service history for each Unit, only one Unit is selectable per workorder item.

In this way, parts used in service of this Unit, the amount of labor, outside service required will all be maintained for this individual unit.

You can select multiple units in a service workorder by selecting each unit within a separate workorder item within that service workorder.

5.3.6.7.2 Scheduled Users



The Scheduled Users sub-screen
Additional information about this Scheduled Users subsection

Fields of the Scheduled Users subscreen

The Scheduled Users sub-screen:

- Identifies one or multiple users scheduled to perform the service in this workorder item
- Identifies start date and time, stop date and time
- Identifies suggested service rate and estimated hours of service
- Provides ability to copy this information to a Labor item as time saving feature

Additional information about this Scheduled Users subsection:

Scheduled users for this workorder item are selected here. What is selected here shows on the graphical Schedule Screen.

You can schedule as many different users as needed.

The scheduled user is assigned to the workorder item, not to the workorder as a whole. In this way you could have different scheduled users for different workorder items within a single workorder.

If your workorder has only one workorder item, then by default the scheduled users are assigned to that workorder item. And if you have more than one workorder item, you can assign different scheduled users to the different workorder items as needed.

If you do not want the Scheduled Users subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemScheduledUser to Forbidden

You can pre-set via the Global Settings field Scheduled Default Time what time you want a new record created through the service workorder or quote or PM to default to - saving yourself time in selection.

Scheduled users can be automatically notified when newly scheduled, or when the scheduled date is near.

See Also:
Scheduled Users menu option
User notifications
Moving and sorting columns in a grid

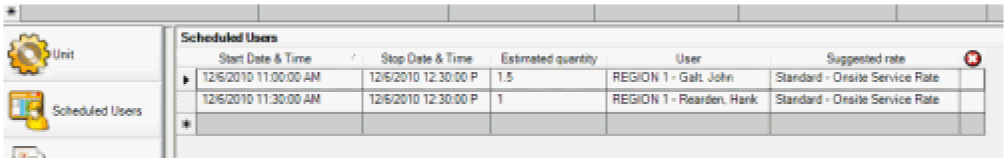
The graphical Schedule screen requires **at minimum the following three fields** to be able to correctly display for a scheduled user.

1. Start Date & Time
2. Stop Date & Time

3. User

See also:
[Schedule Screen]

Fields of the Scheduled Users subscreen:



Start Date & Time and Stop Date & Time

These columns are where you would indicate the start and the stop date and time for the selected scheduled user.

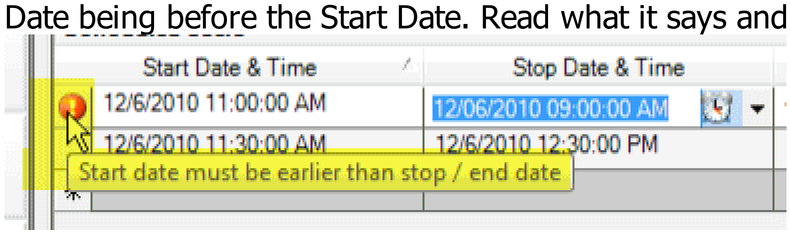
As a time saving feature, when you enter a start date and time and tab off of it, the Stop Date & Time will automatically default to the time range set in **Global Settin**gs for **Scheduled / Labor Default Minutes** after the Start Time; and the Estimated Quantity will automatically be derived from the start and stop time.

And another time saving feature is the **Global Settings** for **Scheduled Default Time**. If you almost always have your techs scheduled at a set start time (i.e. all jobs start at 8am) than you can set it in that Global Setting so that time is always the default when you create a new scheduled user record.

You can easily edit these fields as needed by placing your mouse in the fields and editing.

See also:
Date and Time selection

If an exclamation mark appears on the left of a row that indicates that there is a potential issue with the entered information such as the Stop Date being before the Start Date. Read what it says and fix.



Estimated Quantity

This column as a time saving feature, automatically enters the number of hours derived from the Start and Stop Date & Time. You can of course edit it as needed.

The Estimated Quantity field is also useful if no date and time are selected, but the dispatcher wants to advise the scheduled user of an approximate length so they can schedule themselves appropriately.

The Estimated Quantity field is also useful if you use the Convert Scheduled User to Labor menu option, as that menu option will pre-enter in the estimated hours into the actual hours, saving double-entry.

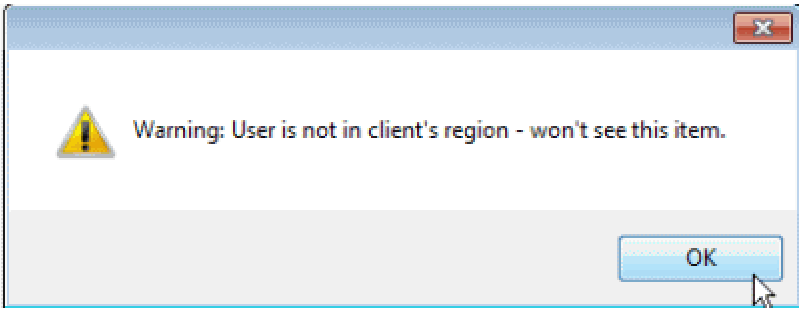
User

This is a drop down selection of schedulable users that are active and can be selected. Selecting a user and setting the corresponding Start Date & Time and Stop Date & Time will then show the workorder item within the Schedule screen for this user, as well as on the Scheduled List grid.

If a user does not display in this drop down selection, it may be because the user is not set as a scheduled user, nor as active.

See also Users section of this Help docs

If the user selected is a member of a different region than the client, a warning message will pop letting you know that user when logged in won't be able to see the service workorder because this client is a member of a different region. Also review the Regions section of this Help docs



Suggested Rate

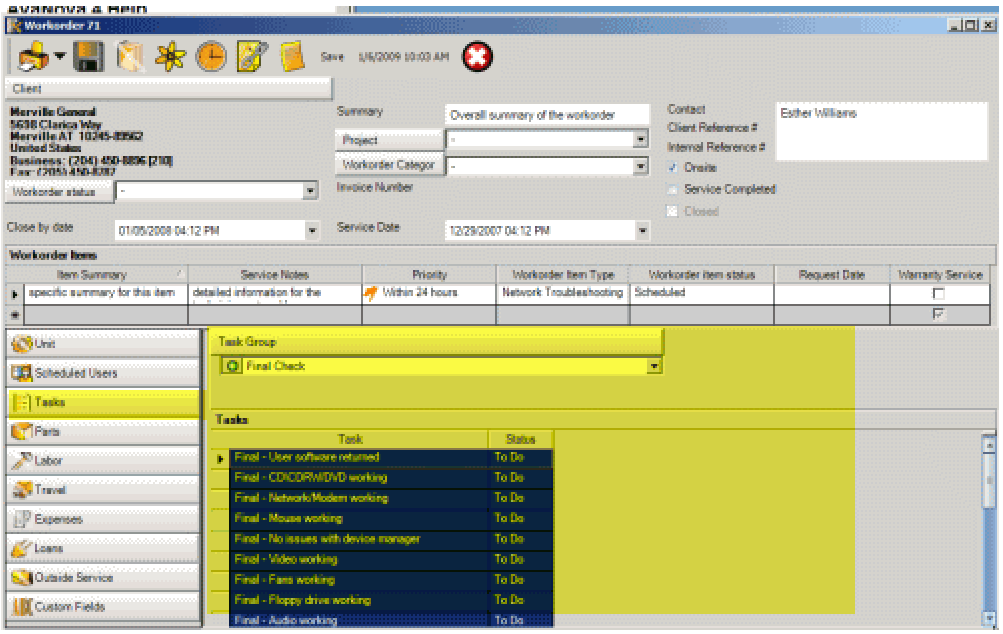
Use the drop down arrow when you place your mouse in this column to select the suggested rate that the service is to be billed at. This is useful if the dispatcher wants to advise the scheduled user of the type of rate to use. This is also useful if you use the Convert Scheduled User to Labor, it will pre-enter in the estimated rate into the actual rate, saving double-entry.

If this client in addition to the "regular" rates for selection also may have a contract or agreement to receive specific rates for certain services, it would be suggested to set up a Contract selected in that client's entry screen, so that those specific rates will also be available for selection in addition to "regular" rates.

Or if this client would only ever be charged a specific rate or rates, it is suggested to assign a Contract to this client, specify Limit to Contract Rates Only and set contract rates that would be only be selectable. Refer to the Contracts section for more information.

See also:
[Rates]
[Contracts]

5.3.6.7.3 Tasks



The Tasks sub-screen:

- Identifies common tasks to be performed in this service
- Identifies status of these tasks performed
- Select instead of having to re-type in every time

[Additional information about Tasks]
[Tasks are selected by performing the following]
[Fields of the Task subsection]
[Task Groups & Tasks]
[How to create a new Task Group]
[How to edit an existing Task Group]

Additional information about Tasks:

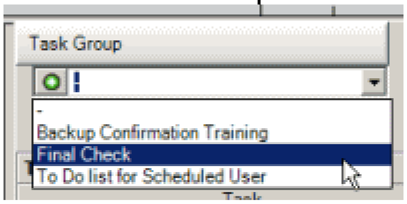
Use tasks to identify common tasks to follow for service maintenance, thereby saving having to type in repetitive tasks, as well as a reminder of common repetitive tasks.

The order that the Tasks will display are based on the order they are selected in the Task Group entry screen. You can also click on the Task column header to sort by alphabetical order, but they will return to the selected order in the Task Group entry screen when you re-open the workorder.

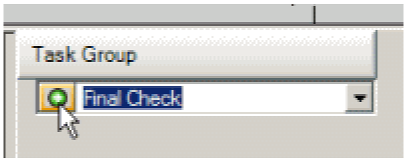
If you do not want the Tasks subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemTask to Forbidden

Tasks are selected by performing the following:

1.Click on the drop down arrow of the Task Group field and select a Task Group



2.Click on the + to add the tasks of that Task Group into the Task List below



You can add more than one Task Group to display

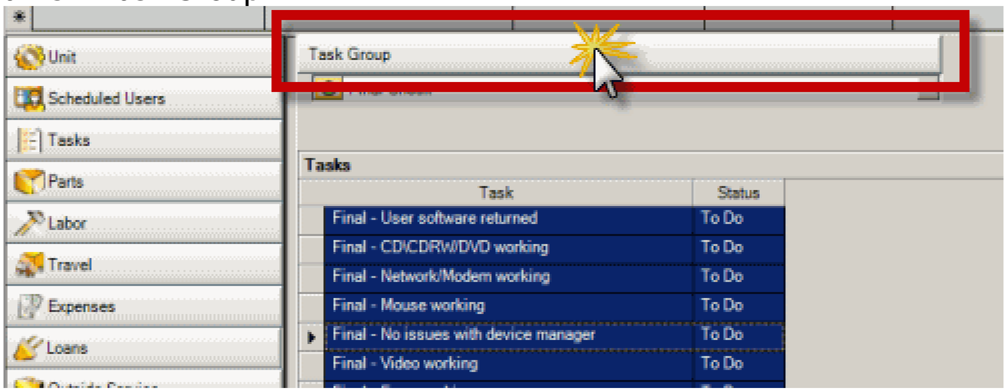
And if a Task Group is not yet entered, you can create a new Task Group with new tasks.

See Also:
Task Groups & Tasks

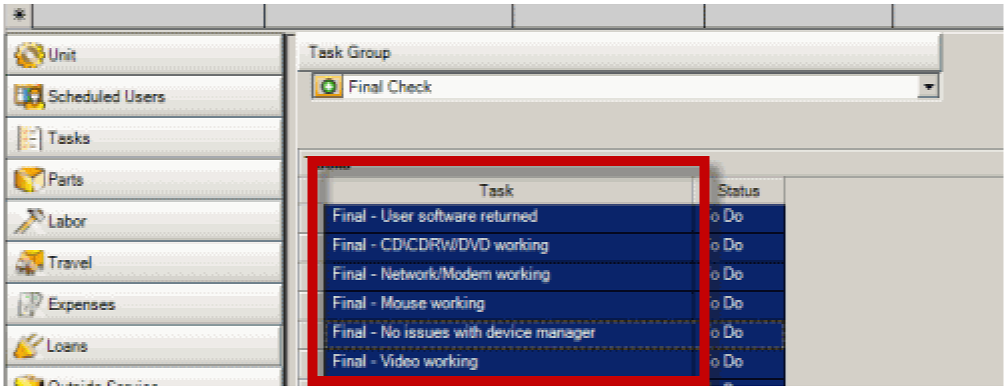
If a task does not apply to this particular service, you can select the status of N/A, or you can also delete individual tasks by selecting the row, and hitting your Delete key on your **keyboard**.

Fields of the Task subsection:

Task Group
From here you can select a pre-entered task group that identifies a list of tasks required for this workorder item. From the Task Group jump button, you can open up the Task Group entry screen to edit an existing Task Group or create a new Task Group.

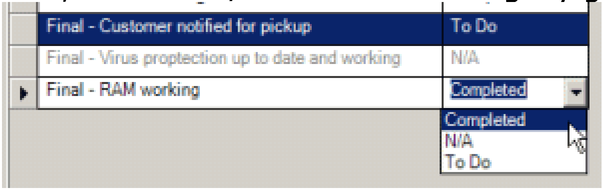


Task
This column identifies an individual task



Status
This column identifies the status of the task, whether the task is To Do, Completed or N/A for "not applicable".

For quick viewing, you will note that tasks set as To Do are highlighted in blue, whereas N/A tasks font are slightly grayed, and Completed are white.



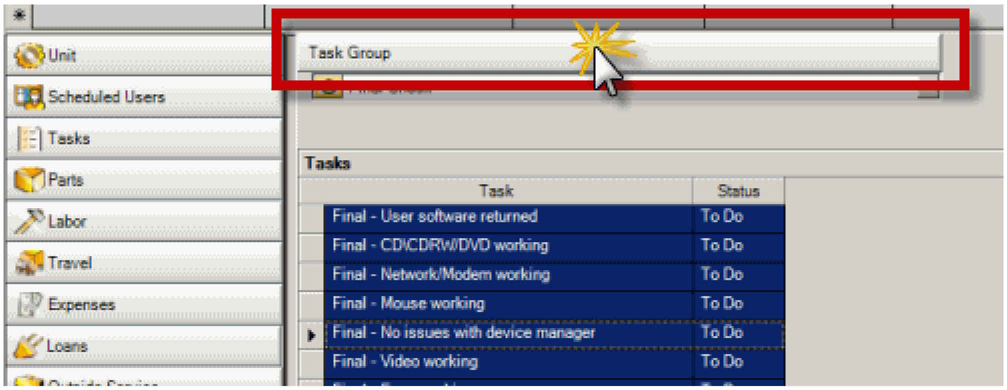
***

5.3.6.7.3.1 Task Groups & Tasks

Task Groups group tasks together so that you can easily select a group of tasks for a workorder item without having to type it out. This saves having to type out for every workorder common tasks that occur for service.

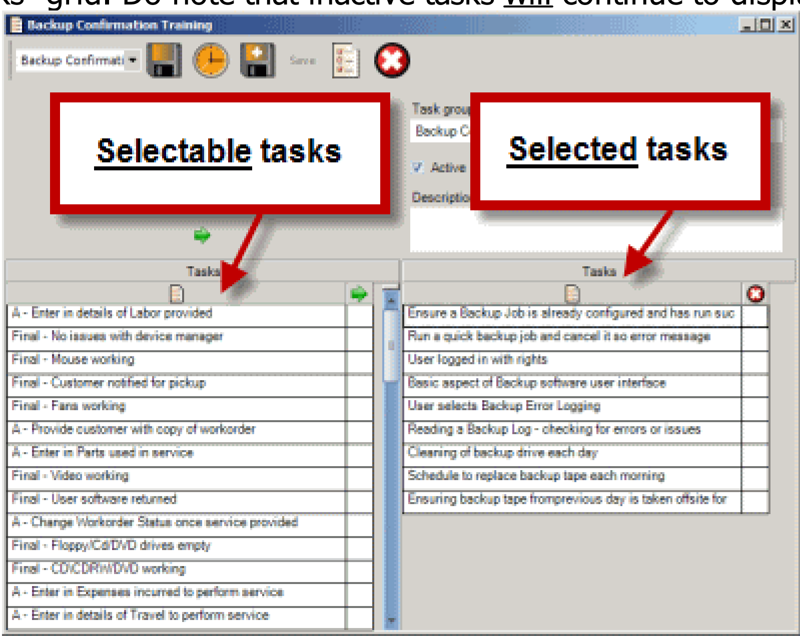
How to access the Task Group entry screen:

Access Task Groups from the service workorder item sub-grid **Task Group** jump button



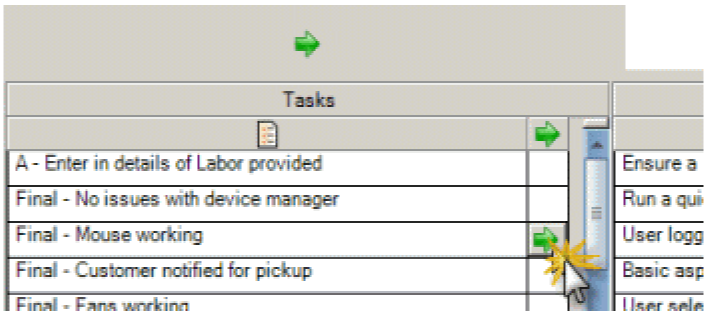
The individual Tasks in a Task Group

Individual selectable tasks are listed in the column on the left – the "selectable tasks" grid. Do note that inactive tasks <u>will</u> continue to display here.

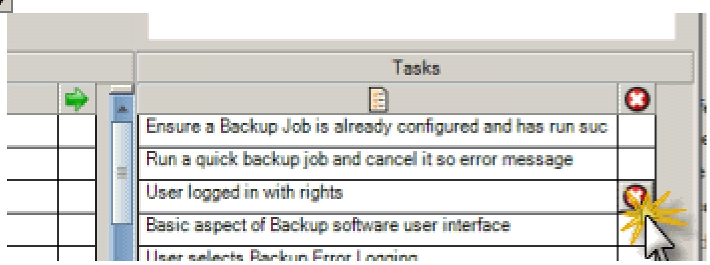


Tasks that are selected for the Task Group display on the right side – in the "selected tasks" grid. Again, even if an individual task is set to inactive, it will continue to display here.

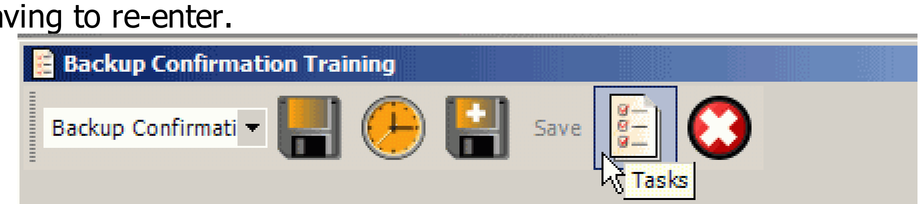
Individual tasks can be placed within the Task Group by clicking within the arrow column for that task  which "moves" them into the Task List on the right. The order that the Tasks are listed here will be the order that the Tasks display within a service workorder item.



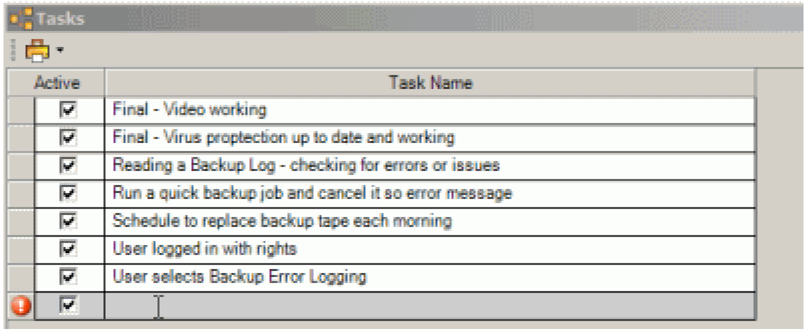
Remove an individual task from the Task Group by selecting the delete image 



Selectable tasks are created by selecting the Tasks toolbar button from the menu bar. As an individual task may be part of many different Task Groups, the individual tasks are all created in the same grid so they can be re-selected without having to re-enter.



This opens up the Task entry grid where you can create individual tasks. As with any subgrid, click within the gray record to begin entering a new task



Note on Active column: setting a task to inactive means only that this task will not be added to a workorder via a Task Group even if selected in a Task Group.

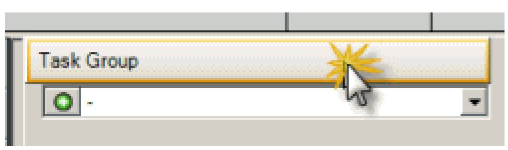
Only if a task is deleted from this Tasks grid does the task no longer display as selectable in the Task Group entry screen left grid (the "selectable tasks" grid)

5.3.6.7.3.2 How to create a new Task Group

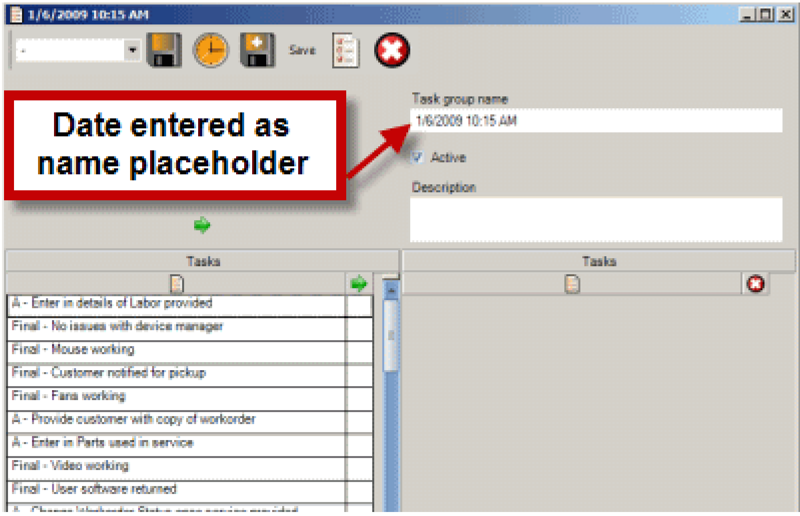
How to create a Task Group:

There are **two** ways to create a new Task Group:

1. Have no Task Group selected and then click on the Task Group jump button to open up an empty and new Task Group entry screen.

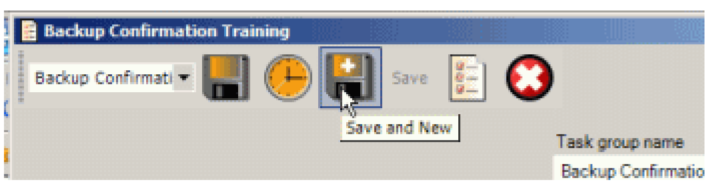


Note that the creation date and time is entered into the Task Group Name field as a "holder". You can of course edit the name to whatever you wish



2. Or if there is a Task Group selected, when you click on the Task Group jump button it will open up that Task Group for viewing and editing

Click on the Save & New menu button to open up an empty and new Task Group entry screen.

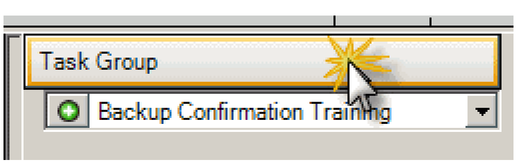


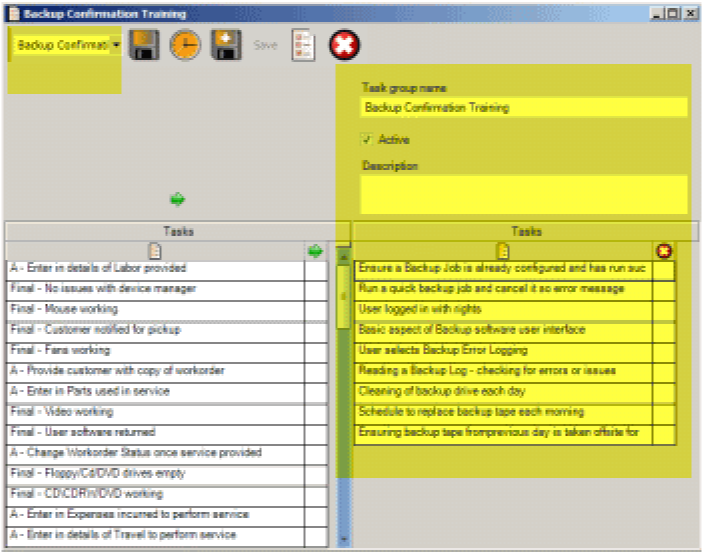
Again, note that the creation date and time is entered in the Task Group Name field just as a “holder”. You can of course edit the name to whatever you wish.

5.3.6.7.3.3 How to edit an existing Task Group

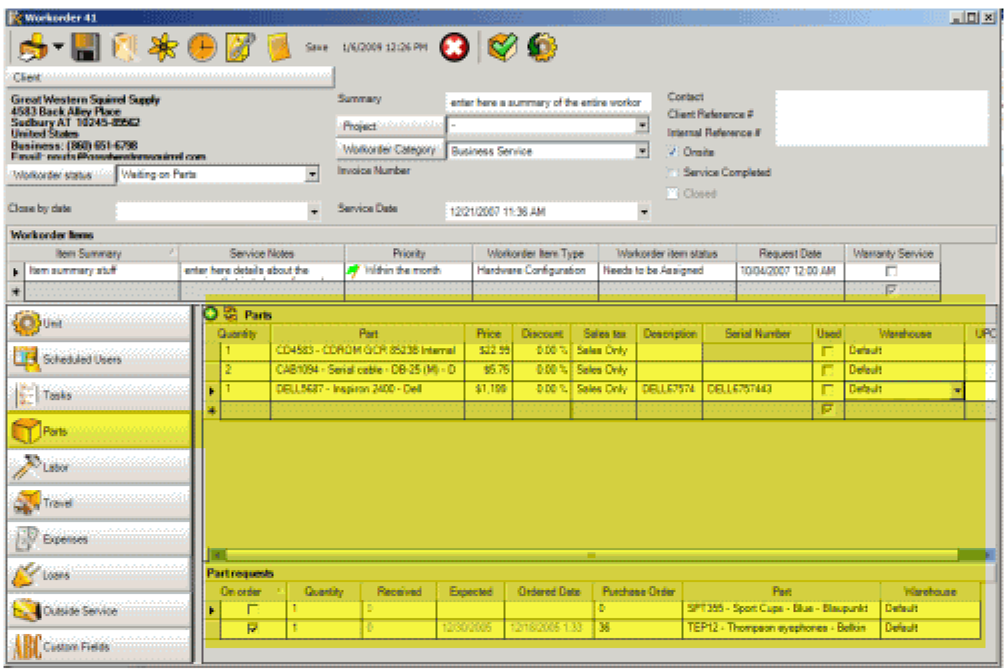
How to edit an existing Task Group:

Within the Tasks sub-screen in a service workorder, select the Task Group from the drop down selection list, and then click on the Task Group jump button to open that Task Group entry screen.





5.3.6.7.4 Parts



The Parts sub-screen:

- Identifies parts and their quantities to be used in service (tech to take onsite) and/or parts that have been used in service.
- Identifies serial numbers of parts
- Maintains inventory
- Identifies discount to be applied from client/unit contract or via manual entry
- Request parts if not in stock (and be automatically notified when the part is received into inventory)
- Identifies order status of parts requested

- Create new parts
- Generate unit from part

If you do not want the Parts subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemPart to Forbidden

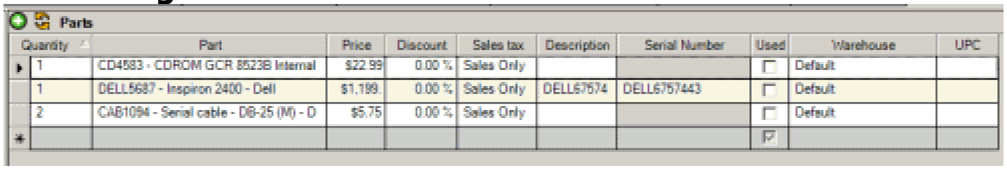
The Parts sub-screen will display two areas if applicable

1. the **Parts subgrid** subsection
2. and the **Part Requests subgrid** subsection- note that the Parts Requests subgrid does not show until at least one part is requested to be ordered via this workorder.

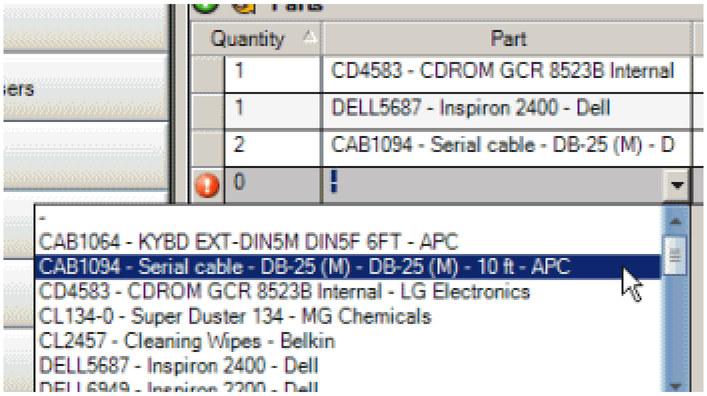
See also:
Parts menu options
Workorder - Parts subsection
Workorder - Part Requests subsection
Moving and sorting columns in a grid

5.3.6.7.4.1 Parts subgrid

Parts subgrid



Part



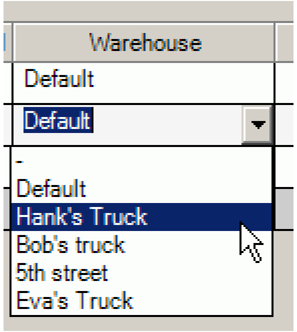
Select the part from this column.

How parts display in the selection is dependant on the Global setting for Part Display Format within the Administration pane – whether part number + part name + part manufacturer or part name + part number or etc.

See also:

Parts
Global Settings
Drop Down Fields

Warehouse



This is a drop down selection column where you can select from which warehouse the part is from.

What warehouses show for selection depend on the Region set in your logged in AyaNova User entry screen for Region.

When you first select a part in a service workorder, the warehouse will default to your Default Warehouse as also set in your User entry screen.

> Note: If your **User Type** is Scheduleable User, your administrator may have set to a specific warehouse as default. This is useful if as a schedulable user you tend to use stock that is accounted for in your own trade truck rather than stock that is within the office. One less column selection, but still allowing you to maintain inventory correctly.

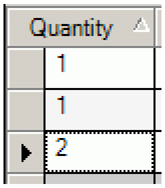
Warehouses can be actual buildings where stock is kept, or it can be each scheduled users "stash" of parts on hand so that inventory out of the store is tracked. Up to you how you use.

This is useful to maintain accurate stock counts if you have multiple locations where stock is located

And of course, the example warehouses in the screenshot are just that - examples - as you can enter your own Part Warehouses.

See also:
Part Warehouses

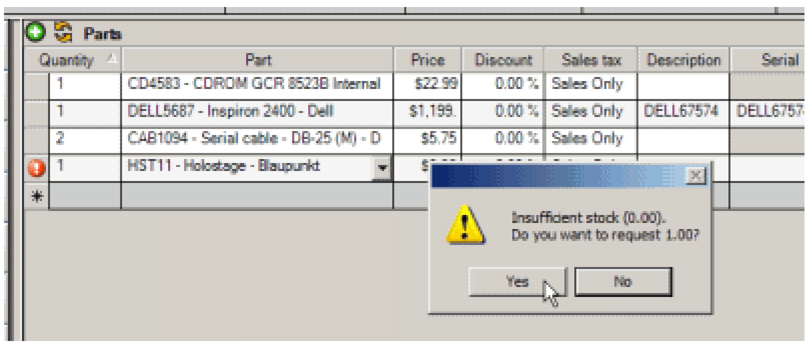
Quantity



Enter here the quantity of the selected part.

NOTE: If inventory is set to True in Global Settings then:

- If a part is serialized, a quantity of 1 can only be entered as only one serial number can be selected per part.
- If there is less number of parts in stock for the selected warehouse than the number that is entered here, a pop-up will appear asking if you wish to request parts to be ordered via purchase order.



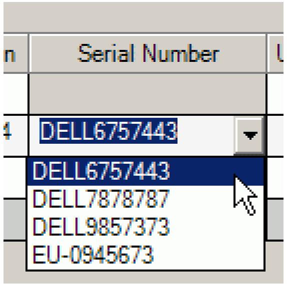
In the screenshot above, 1 was entered as the needed quantity, but there are 0 in stock of the part. If you select "YES", a part request for a quantity of 1 of this part will be created for you, and the quantity showing will be 0.

If you select "No", the quantity for this selected part will revert back to 0 and you can delete the record.

NOTE: When a purchase order receipt for part requests is saved AyaNova will automatically update the workorder creating a workorder item part based on the part request and also select the serial number correctly if applicable. Also removes the empty record in the workorder item parts originally made during the original request. Basically you do not have to delete the 0 quantity except set the part record to used in service.

See also:
Workorder - Part Requests subgrid
Global Settings - Use Inventory
Inventory Adjustments
Parts selected in a Quote
Parts selected in a PM

Serial Number



If the part has been indicated within the Part entry screen is serialized and serial numbers have been provided for this part in inventory, you can select the serial number from the drop down list here.

Otherwise if the part is not serialized, this field will not be selectable.

You can not type in a serial number here, only select what is already entered into inventory. This is to maintain standards with inventory.

If Use Inventory has been set to False in Global Settings or you do not receive serial numbers into your inventory, you can manually enter serial numbers etc into the Description column if needed.

Do note that if you had entered quantity of parts into inventory and then afterwards set the part to track serial numbers, when you select the part in a workorder it may only show a bunch of zeros for serial number selection because right now there are no serial numbers for those parts in inventory.
You should perform the following:
1. Uncheck "Track Serial Numbers" from the part entry screen
2. Enter in an Inventory Adjustment removing the parts from inventory
3. Checkmark the parts attribute "Track Serial Numbers"
4. Enter in an Inventory Adjustment adding the parts into inventory, and enter in the serial numbers at that time.

UPC

If you have entered UPC codes within the Part entry screen for the part, you can place your mouse cursor in the field and use your keyboard scanner to scan in the UPC which will automatically bring up the part associated with it so you do not have to select from the Parts column.

Discount

If the client or the head office of this client has a contract, any entered discount within that contract will automatically display here.

You can also manually enter in a discount to apply specifically for this part selection.

See also:
Contracts

Price

When the part is selected, the part's Retail Price is obtained from that part's entry screen.

You can edit the part retail price as needed.

Do note that if a discount amount is entered in the Discount column it is applied against this price. This is not the price with the discount already applied.

Description

This is where you can enter additional information about the part.

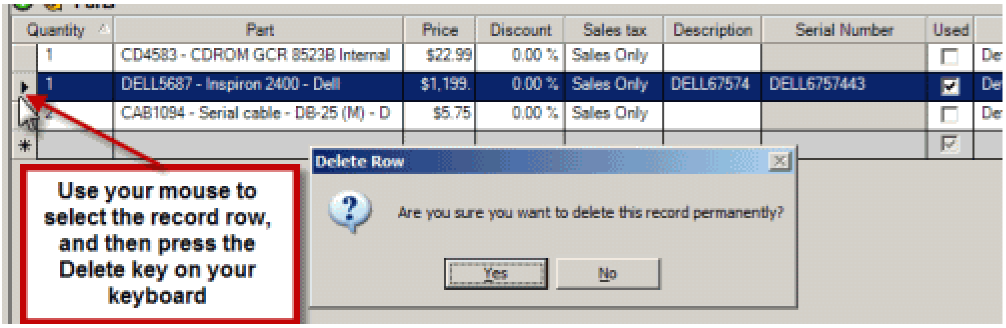
By default if the part is serialized, the serial number will also appear here, but is editable.

If you do not use inventory, a suggestion is to use this to enter in the serial number of the part sold.

Used in Service

This is a check-mark selection column where you can select whether the quantity of this part has been used in service.

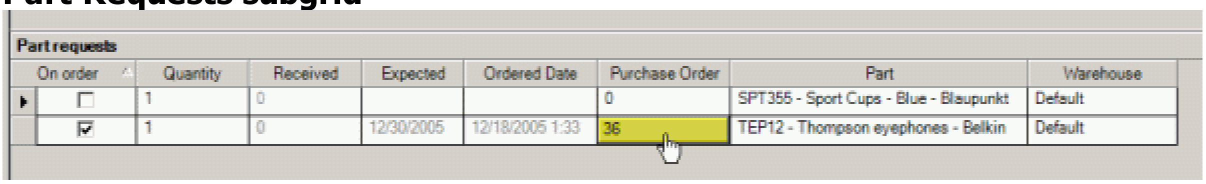
Once a part is set to "Used" and the service workorder saved, it is taken out of inventory. Your can not uncheck this to "put it back" into inventory. If a part was mistakenly set as "Used" when it was not, delete the entire row for this part (select the row, and then your Delete key on your **keyboard**) and save the workorder to put the part back into inventory.



If this is not check-marked, the quantity of the part is not affecting inventory. This is useful if you want to advise your schedulable user what quantity of what parts to take with them when they go onsite to perform service. Once service is completed, and the parts actually used, then check-marked this field.

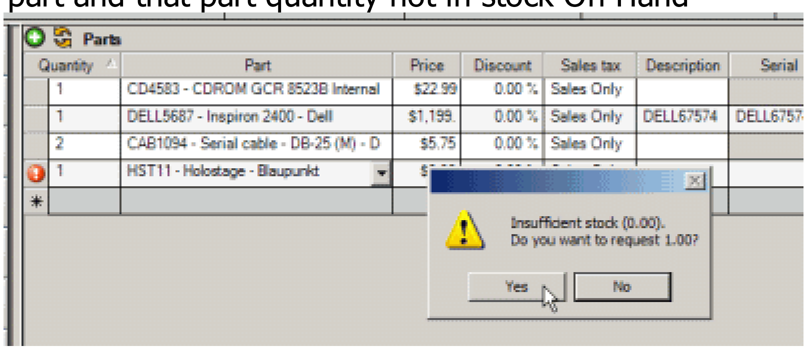
5.3.6.7.4.2 Part Requests subgrid

Part Requests subgrid



Part requests are created when a quantity of a part is not in stock, and you accept to request that quantity.

- Part Requests can not be manually entered - requires entering a quantity of a part and that part quantity not in stock On Hand



- Part Requests once made can not themselves be edited. If you no longer need it, or there is a change in quantity, you need to delete the record itself.

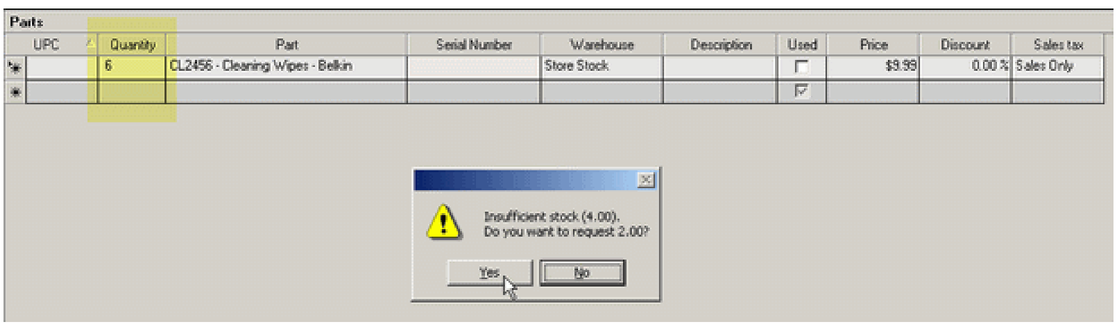
Deleting a Part Request:

- A Part Request **can** be deleted if not yet ordered.
- A Part Request **can not** be deleted if ordered but not yet received.
- A Part Request **can** be deleted if ordered **and** received. A reason for keeping the part request that has been ordered and received is to maintain tracking with the service workorder itself of the part request.
- If an ordered Part Request is no longer needed, you must first receive the ordered part into inventory, then you can delete that part request. You will need to make an Adjustment to take that received part out of inventory as you did not actually receive it.

NOTE: When a purchase order receipt for a PO from part requests is saved AyaNova will automatically create a workorder item part based on the part request and also select the serial number correctly if applicable. Also removes the record in the workorder item parts originally made during the original request that was at quantity of 0. Basically you do not have to do anything such as deleting the 0 quantity record in the Parts subsection except setting the part record to used in service.

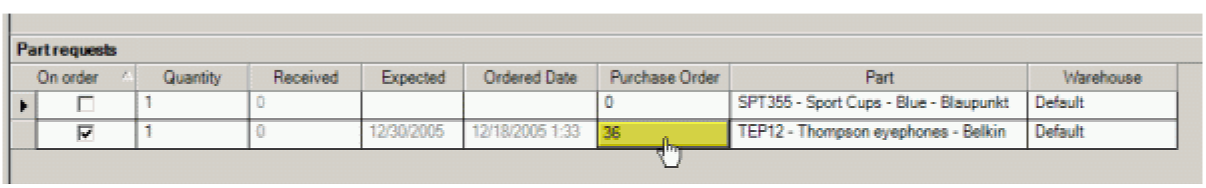
- You can not set a service workorder to Service Completed if there are part requests not yet ordered or part requests not yet received.
- You do not need to delete the received part request to be able to set the service workorder to Service Completed.

For example of a part request, let's say that there is presently a quantity of 4 of the part CL2456 in the warehouse Store Stock. If we select the part CL2456 in the Parts area, and enter in a quantity of 6, it will display a message asking if you want a quantity of 2 placed in the Part Requests to be ordered



If you select YES, it will enter a quantity of 4 in the Parts area, and place a quantity of 2 in the Part Request area (total = 6)

Part Requests **require** the following:
- The setting Use Inventory is set to True via Global Settings
- The part quantity selected is not in stock



Part

This is the part that has been requested. The part format name displays as set within Global Settings.

Quantity

This is quantity of the part that has been requested, or if part is ordered, the quantity that is ordered.

Warehouse

This is the warehouse that the part has been requested for. If only one warehouse, it will default to that.

On Order

A checkmark indicates that the part has been ordered via a purchase order.

Ordered Date

This displays the date the PO was set to Ordered status.

Expected

This displays the date entered within the PO for the ETA of receiving for the benefit of the user viewing this service workorder.

Received

A checkmark indicates that the part has been received.

Purchase Order

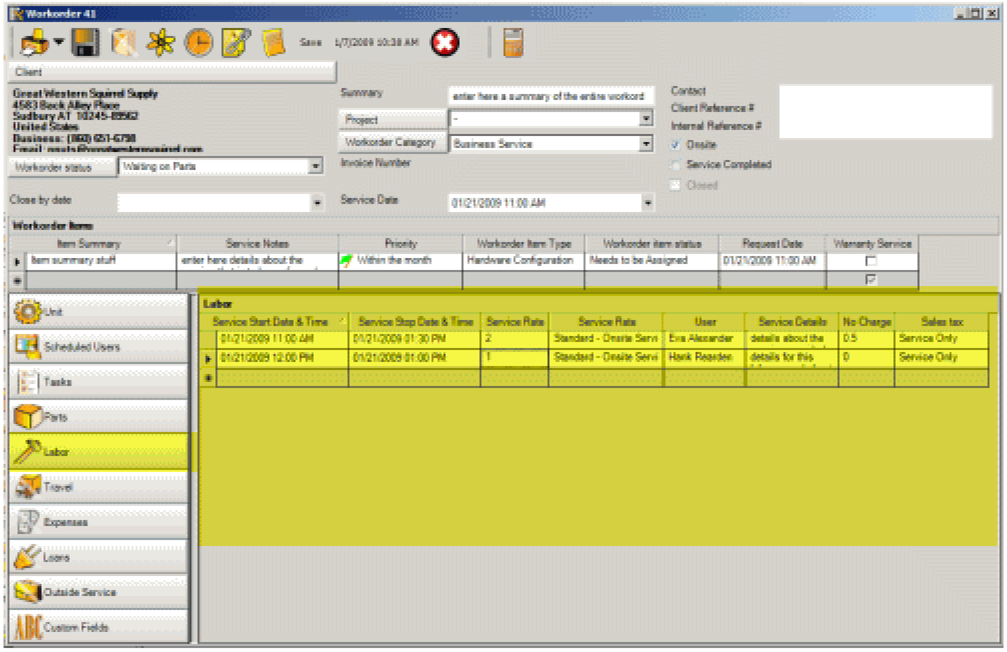
The Purchase Order number will display here that the part quantity was ordered on. You can click on this which will open that PO so that you can review.

Parts are set to a checkmark indicating they are ordered only when a purchase order has been placed based on this particular Parts Request.

Once a part that was showing in the Part Requests has been ordered and is received, if the scheduled user has subscriptions enabled for notification, they will be notified that the part is now in stock so that the service workorder can be continued. As the part is now in inventory, the user can now select the quantity of the part within the Parts subgrid.

The Part Requests will continue to display for historical information even when the part has been received into inventory.

5.3.6.7.5 Labor



[The Labor sub-screen](#)
[Fields of the Labor subsection](#)
[Labor Banked Service](#)

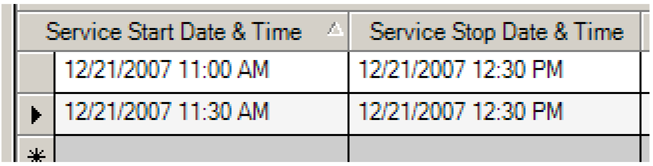
The Labor sub-screen:

- Identifies one or more schedulable users that performed the service for this workorder item
- Identifies the details of service performed for each labor record
- Identifies billable hours, non-billable hours, and service rate to charge for each labor record
- Provides ability to auto-debit the billable amount against banked service for client or selected unit for each labor record (and be automatically notified when the client's Banked Service zeros out)
- If client has contract, displays rates for selection based as set in contract
- Provides a history of service performed for the client and unit if applicable, as well as data for reports and future reference

If you do not want the Labor subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemLabor to Forbidden

You can move and sort the columns in this grid

Fields of the Labor subsection:



Service Start Date & Time and **Service Stop Date & Time**

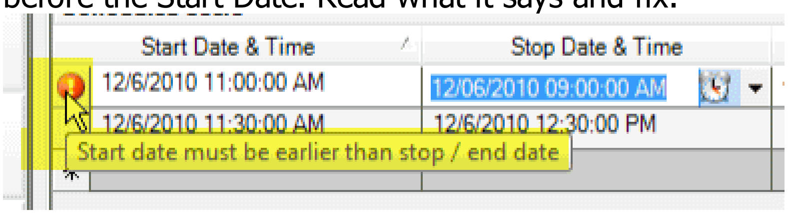
These columns are where you would indicate the start and the stop date and time for the selected scheduled user that performed the service.

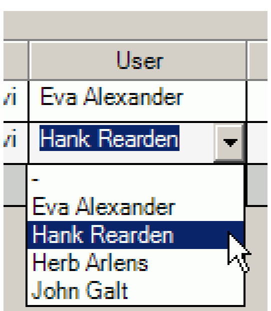
As a time saving feature, when you enter a start date and time and tab off of it, the Stop Date & Time will automatically default to the time range set in Global Settings for **Scheduled / Labor Default Minutes** after the Start Time; and the Service Rate Quantity field will automatically be derived from the start and stop time.

You can easily edit as needed by placing your mouse in the fields and editing.

See also:
Date and Time selection

If an exclamation mark appears on the left of a row that indicates that there is a potential issue with the entered information such as the Stop Date being before the Start Date. Read what it says and fix.

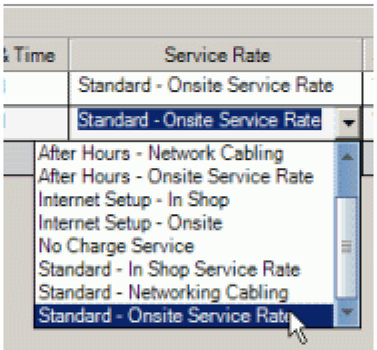




User

Select the schedulable user that performed the actual service. This allows you to obtain reports on billed time by each schedulable user as well as other information.

See also:
Users



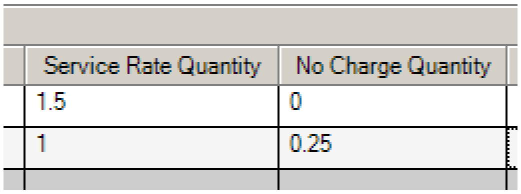
Service Rate

This drop down list shows all the rates entered into the rate entry screen in AyaNova that are marked as service rates and not travel rates.

The rate selected would be used in conjunction with the Service Rate Quantity and No Charge Quantity to calculate the charges on a completed format work order report and for various management reports.

What rates display are dependant on whether the rate is set as a Service Rate in the Rates subgrid, and if this client has a contract that limits or provides additional rates for selection.

See also:
Rates
Contracts



Service Rate Quantity

The Service Rate Quantity is the quantity of billable time.

The Service Rate Quantity will automatically reflect in hours up to two decimal points derived from the Start Date & Time and Stop Date & Time.

If you do not use "hours" as your quantity, edit this field manually after selecting Start and Stop Date & Time.

Edit as needed. Do note that if you change the Start or Stop Date & Time, this will automatically change the Service Rate Quantity, so edit after setting the Start and/or Stop Date & Time.

No Charge Quantity

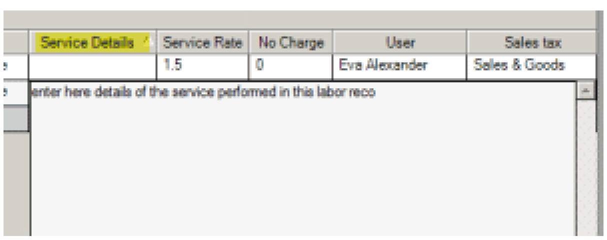
This would be the numeral amount of the rate not billed. You enter this amount manually.

Entering no charge amounts can be used to indicate on workorder reports to a client how much free work they received.

Both the Service Rate Quantity and the No Charge Quantity columns allow you to enter in the number of hours to charge the customer for the work provided. You can enter whole numbers or fractions of hours (e.g. 1.5, 1.25).

For example, a technician was onsite for 4 hours total: The decision is to charge the client only for 1 hour. Therefore Service Rate Quantity will have the number 1 for the number of hours that are actually billable. The No Charge Quantity will have 3 entered to indicate the total number of hours that are not billed. The two combined fields total the total number of hours.

In many service industries it is sometimes necessary to perform some work at no charge; this gives you an opportunity to indicate this clearly to the customer and gain goodwill by making it apparent to the client that they have not been charged for something.



Service Details

In this area you can type up to 65,535 characters of text.

When you begin typing, the field "opens" up so that you can easily enter a lot of text

While it is not necessary to enter anything here, it can be used on a service workorder report to explain to the client what they are being charged for and in our experience the more you enter here the fewer questions you will get from your clients about the bill.

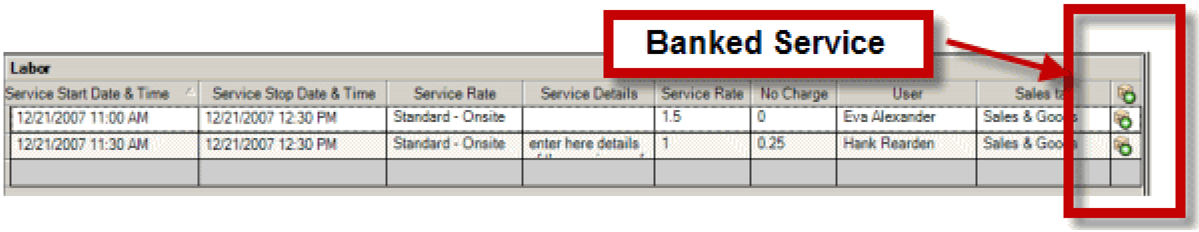
Depending upon the type of service you provide you may want to type in a great amount of detail on every work order.

This is because the text entered here is indexed for quick retrieval on the search screen and may be of benefit to other service personnel at a later date when they come across the same problem that needs to be fixed.

See also:
[Search Database]

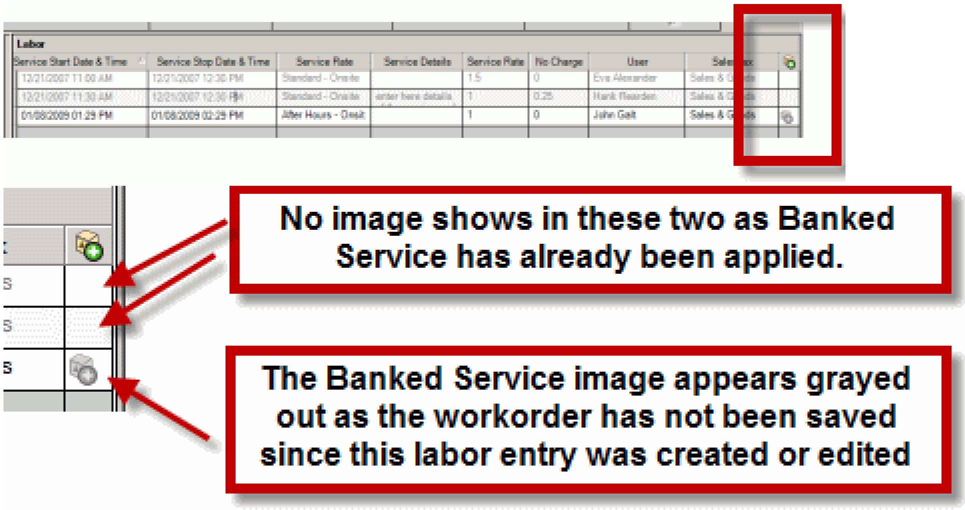
Banked
Refer to Labor Banked Service

5.3.6.7.5.1 Labor Banked Service



The Banked column and image button will appear at the end of the grid itself and the labor records if:

- The service workorder has been saved
- And/or the unit selected in this workorder item has Banked Service activated in its entry screen
- And/or the client of this workorder has Banked Service activated in its entry screen
- And/or the head office of this client has Banked Service activated in its entry screen



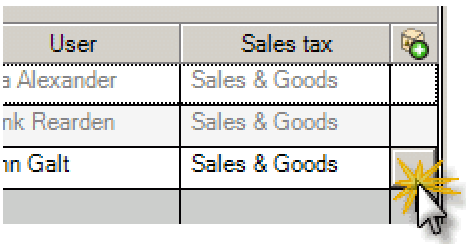
NOTE: If no image shows in the Banked Service column, that indicates that this record has already been banked

NOTE: if a "grayed" banked button shows, this indicates that you have not yet saved the service workorder since entering or editing that labor record

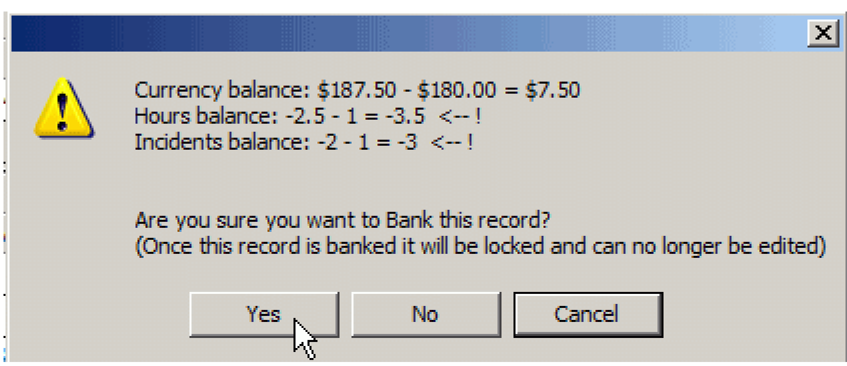
See also:
[How do I apply Labor against Banked Service automatically via a Service Workorder?]
[Banked Service]
User Notifications (be automatically notified when the client's Banked Service zeros out)

How to Apply Banked Service to the Labor Record

1. Use your mouse to click on  Banked icon for that labor record



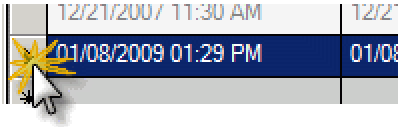
2. When you do so, AyaNova will display a popup letting you know **before** you accept what the result **will be** if you accept to the Currency Balance, the Hours Balance and the Incidents Balance. As you could have set this client's Bank Balance to use any of these three balances, AyaNova shows all three, and you look at the balance that actually affects you.



In the screenshot above as the example data for this client is using Currency Balance, it shows that there will be a Currency Balance of $7.50 after we apply this labor record. So we select Yes to accept as we can easily see that it won't be going over the balance.

3. Once Banked Service for this labor item row has been applied and the service workorder saved, this Labor row will be grayed and un-editable.

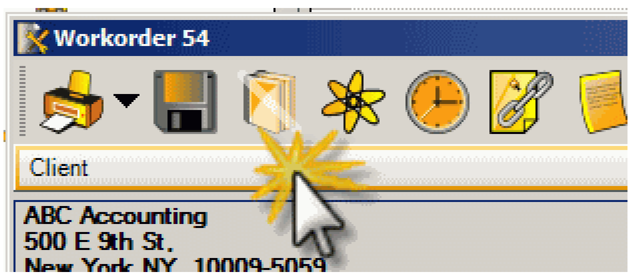
4. If you have incorrectly applied this labor item row to Banked Service, select the row and press your Delete key on your **keyboard** to delete the entire row which will enter an adjusting entry into the Banked Service.

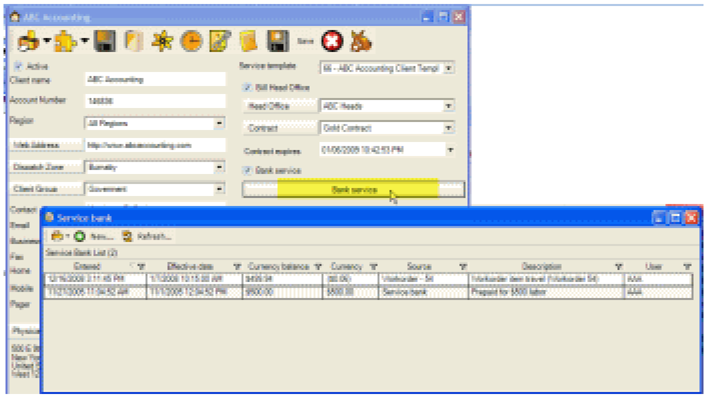


There are two ways you can see what the present balance is BEFORE you apply the labor:

1. View the balance via the Banked Service subgrid itself

Click on the Client jump button at the top of the workorder to open the client entry screen, and click on the Banked Service button in the client entry screen

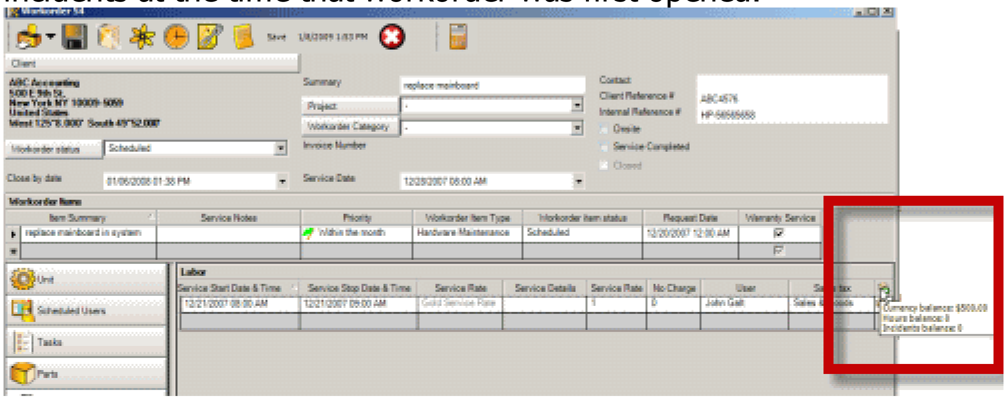


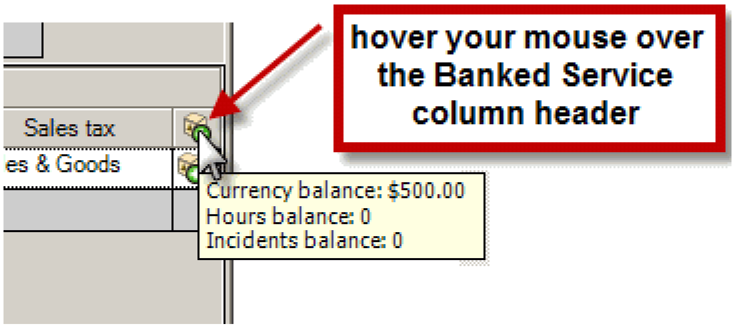


Have the Banked Service grid sorted by the Entered date so that you can easily what the Balance is as of the last entry.

2. View the balance via the Banked Service column popup

Or hover your mouse over the Banked Service column at the top of the Labor grid records, and it will display what the balance is for currency, hours and incidents at the time that workorder was first opened.





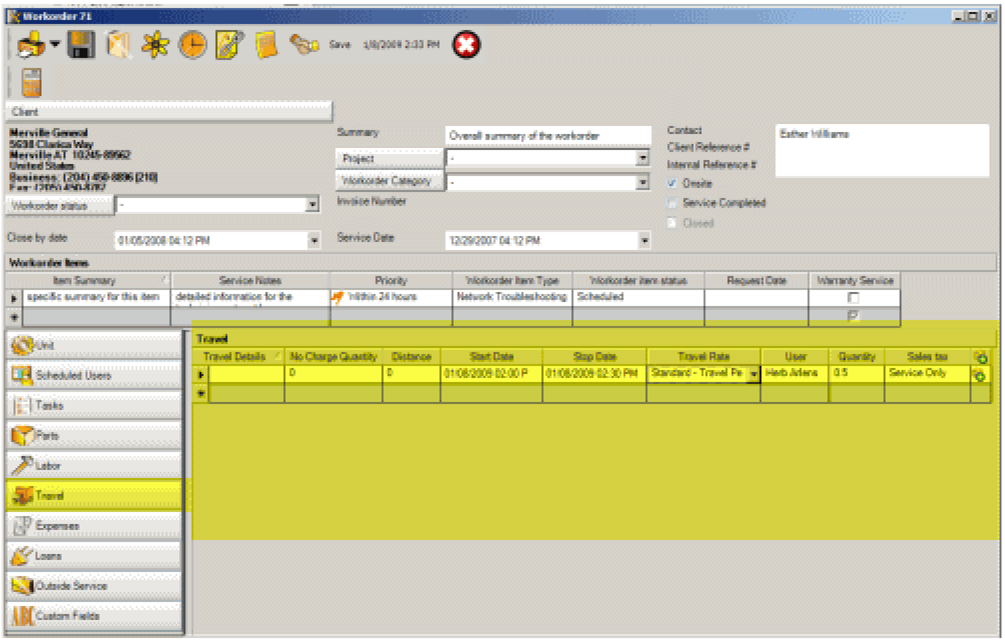
The screenshot above shows that at this time this workorder was opened the balance for currency is $500.00 and there is no balance for Hours or Incidents - which tells you that only currency has been entered.

See also:
Banked Service

NOTE: Currency is displayed according to your computer's Regional settings. For example, a negative currency amount may be displayed as ($50.00) with brackets around it. If instead you want it to display with a minus symbol, you need to exit out of AyaNova, edit your windows Regional Settings, reboot your computer and then log back into AyaNova.

See also: Currency, Date & Time Display

5.3.6.7.6 Travel



[The Travel sub-screen](#)
[Fields of the Travel subsection](#)
[Travel Banked Service](#)

The Travel sub-screen:

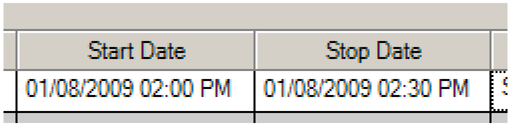
- Identifies one or more schedulable users that performed the travel for this workorder item
- Identifies the details of travel performed for each travel record
- Identifies billable travel time, non-billable travel, and travel rate to charge
- Provides ability to auto-debit the billable amount against banked service for client or selected unit for each travel record (and be automatically notified when the client's Banked Service zeros out)
- If client has contract, displays rates for selection based as set in contract
- Provides a history of travel performed for the client and unit if applicable, as well as data for reports and future reference

You may wish to enter travel charges if billable back to the client, or if you reimburse your employees for the amount of travel time they use their own vehicles for.

If you do not want the Travel subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemTravel to Forbidden

You can move and sort the columns in this grid

Fields of the Travel subsection:



Start Date and Stop Date

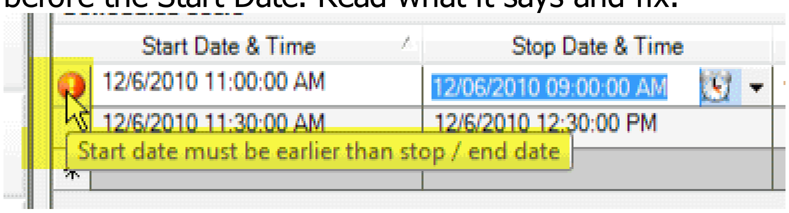
These columns are where you would indicate the start and the stop date and time for the selected scheduled user that performed the travel.

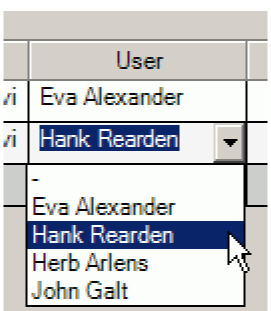
As a time saving feature, when you enter a start date and time and tab off of it, the Stop Date will automatically default to the time range set in Global Settings for **Travel Default Minutes** after the Start Time; and the Quantity field will automatically be derived from the start and stop time.

You can easily edit as needed by placing your mouse in the fields and editing.

See also:
Date and Time selection

If an exclamation mark appears on the left of a row that indicates that there is a potential issue with the entered information such as the Stop Date being before the Start Date. Read what it says and fix.

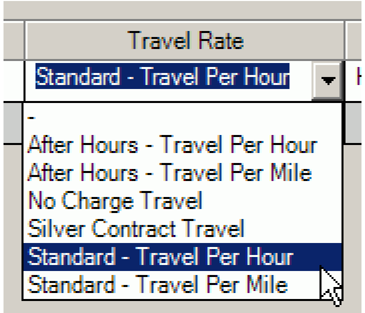




User

Select the schedulable user that performed the travel. This allows you to obtain reports on billable travel by each schedulable user as well as other information.

See also:
Users



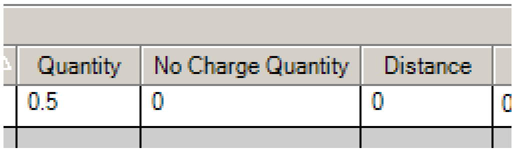
Travel Rate

This drop down list shows all the rates entered into the rate entry screen in AyaNova that are marked as travel rates and not service rates.

The rate selected would be used in conjunction with the Quantity and No Charge Quantity to calculate the charges on a completed format work order report and for various management reports.

What rates display are dependant on whether the rate is set as a Travel Rate in the Rates subgrid, and if this client has a contract that limits or provides additional rates for selection.

See also:
Rates
Contracts



Quantity

The Travel Rate Quantity is the quantity of billable travel time.

The Travel Rate Quantity will automatically reflect in hours up to two decimal points derived from the Start Date & Time and Stop Date & Time.

If you do not use "hours" as your quantity, edit this field manually after selecting Start and Stop Date & Time.

Edit as needed. Do note that if you change the Start or Stop Date & Time, this will automatically change the Travel Rate Quantity, so edit after setting the Start and/or Stop Date & Time.

No Charge Quantity

This would be the numeral amount of the rate not to charge. Entering no charge amounts can be used to indicate on workorder reports to a client how much free work or travel time they received.

Both the travel rate Quantity and the No Charge Quantity columns allow you to enter in the number of hours to charge the customer for the work provided. You can enter whole numbers or fractions of hours (e.g. 1.5, 1.25).

For example, you do not charge for travel, but you want to maintain information on it for management purposes as well as to show the customer they are not being charged for this time. Travel to the client started at 1/23/2005 2:00PM and stopped at 1/23/2005 2:15PM for a No Charge Quantity of .25 and a Travel Rate Quantity of 0 with a Travel Rate selected where the charge is set to a retail of $0. Travel from the client would be entered on a new row, with a start of 1/23/2005 4:35PM and stopped at 1/23/2005 4:50PM for a No Charge Quantity of .25 and a Travel Rate Quantity of 0

Distance

If you track miles or kilometers, enter that here. You can then refer to this field when printing out reports

Travel Details

In this area you can type up to 255 characters of text.

You may wish to enter information regarding this travel such as explanation of charges.

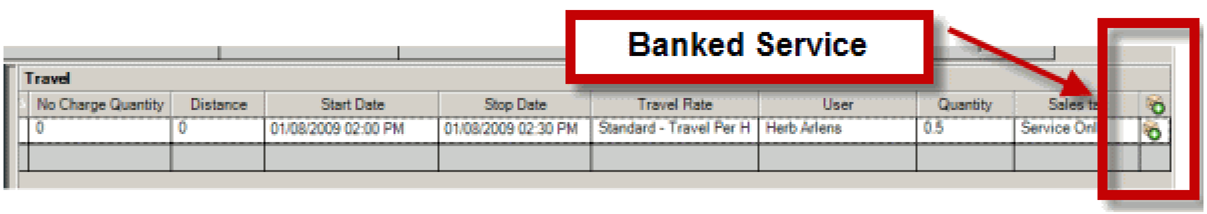
While it is not necessary to enter anything here, a suggestion is to use this to provide explanation to the customer what they are being charged for.

See also:
Search Database

Banked

Refer to Travel Banked Service

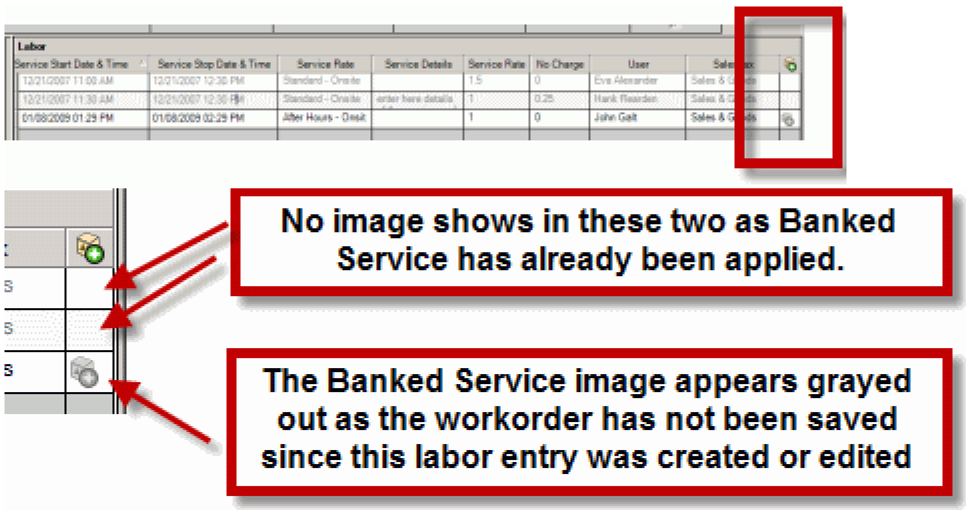
5.3.6.7.6.1 Travel Banked Service



The column for and the Banked image button will appear at the end of the grid itself and the travel records if:

- The service workorder has been saved

- And/or the unit selected in this workorder item has Banked Service activated in its entry screen
- And/or the client of this workorder has Banked Service activated in its entry screen
- And/or the head office of this client has Banked Service activated in its entry screen



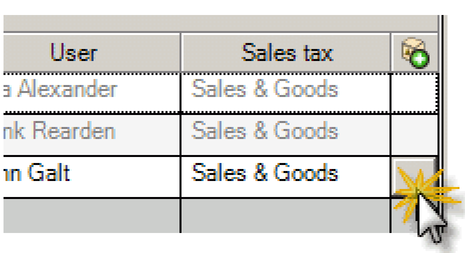
NOTE: If no image shows in the Banked Service column, that indicates that this record has already been banked

NOTE: if a "grayed" banked button shows, this indicates that you have not yet saved the service workorder since entering or editing that travel record

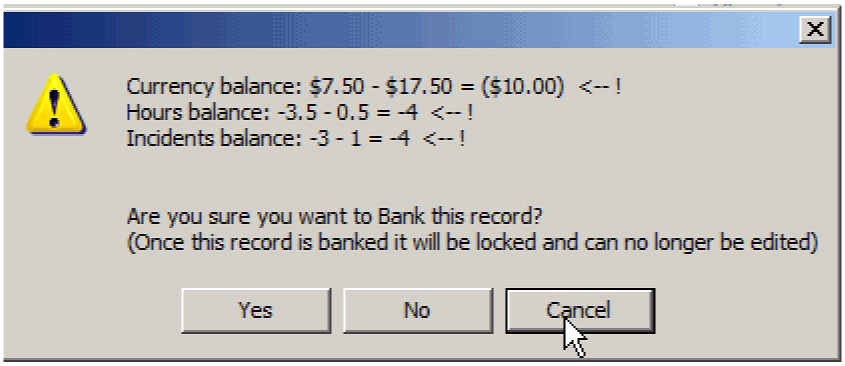
See also:
[How do I apply Labor against Banked Service automatically via a Service Workorder?]
[Banked Service]

How to Apply Banked Service to the Travel Record

1. Use your mouse to click on  Banked icon for that travel record



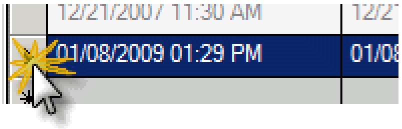
2. When you do so, AyaNova will display a popup letting you know **before** you accept what the result **will be** if you accept applying this to the Currency Balance, the Hours Balance and the Incidents Balance. As you could have set this client's Bank Balance to use either of these three balances, AyaNova shows all three, and you look at the balance that actually affects you.



In the screenshot above as the example data for this client is using Currency Balance, it shows that there will be a Currency Balance of ($10.00) after we apply this travel record. As this would put the balance into a negative amount, you would more than likely select Cancel as you can easily see it will put you over the balance.

3. Once Banked Service for this labor item row has been applied and the service workorder saved, this Labor row will be grayed and un-editable.

4. If you have incorrectly applied this labor item row to Banked Service, select the row and press your Delete key on your **keyboard** to delete the entire row which will enter an adjusting entry into the Banked Service.

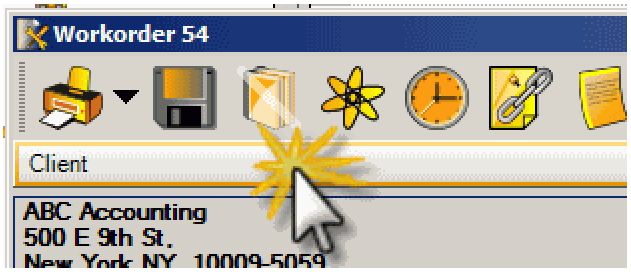


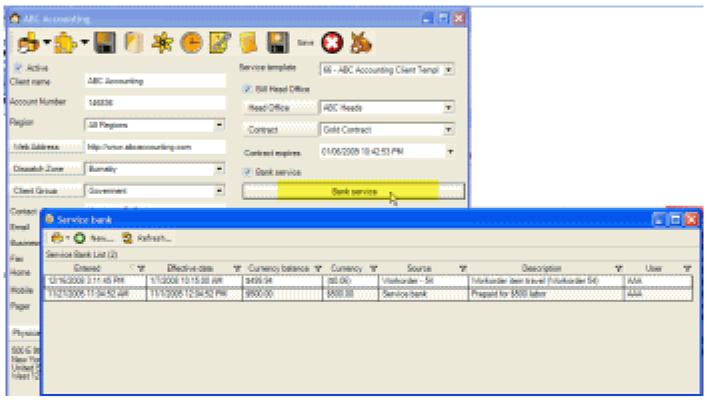
There are two ways you can see what the present balance is BEFORE you apply the labor:

1. View the balance via the Banked Service subgrid itself
2. View the balance via the Banked Service column popup

1. View the balance via the Banked Service subgrid itself

Click on the Client jump button at the top of the workorder to open the client entry screen, and click on the Banked Service button in the client entry screen

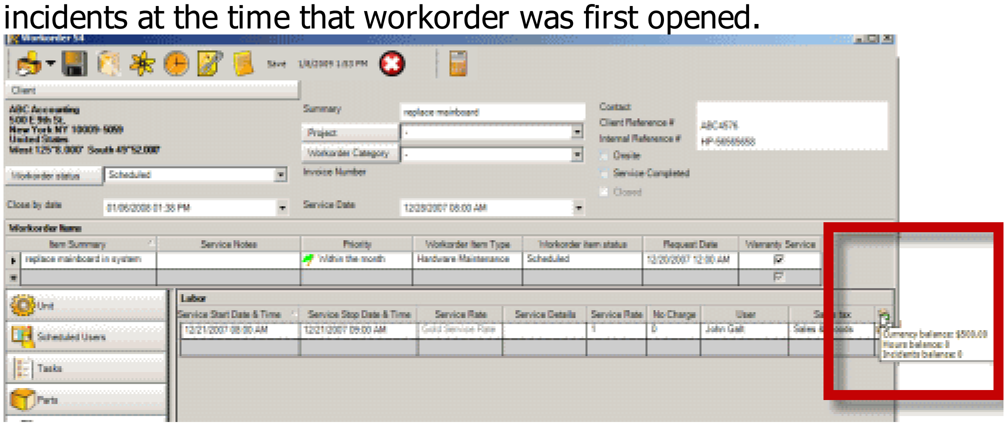


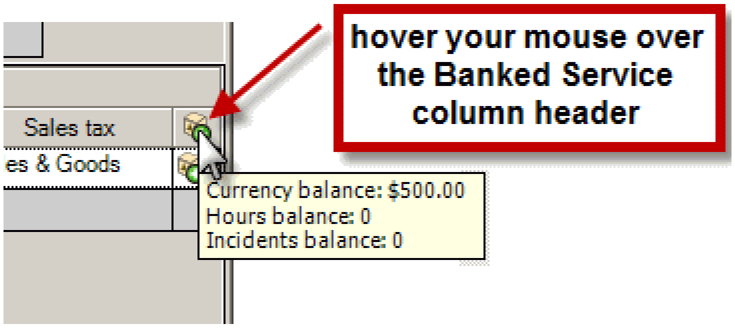


Have the Banked Service grid sorted by the Entered date so that you can easily what the Balance is as of the last entry.

2. View the balance via the Banked Service column popup

Or hover your mouse over the Banked Service column at the top of the travel grid records, and it will display what the balance is for currency, hours and incidents at the time that workorder was first opened.





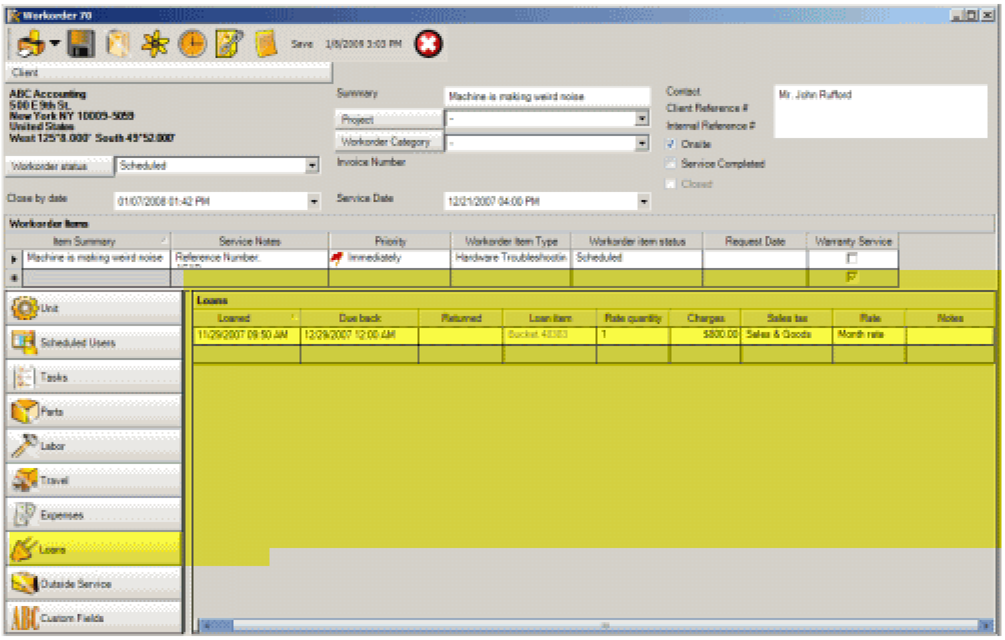
The screenshot above shows that at this time this workorder was opened the balance for currency is $500.00 and there is no balance for Hours or Incidents - which tells you that only currency has been entered.

See also:
Banked Service

NOTE: Currency is displayed according to your computer's Regional settings. For example, a negative currency amount may be displayed as ($50.00) with brackets around it. If instead you want it to display with a minus symbol, you need to exit out of AyaNova, edit your windows Regional Settings, reboot your computer and then log back into AyaNova.

See also: Currency, Date & Time Display

5.3.6.7.7 Loans



The Loan sub-screen:

- Identifies one or more loan items provided with this workorder item
- Identifies loan out date, loan return ETA data, and actual return date
- Identifies any loan charges

The Loans sub-item is where you would identify loan items provided with this workorder item, identify loan out date, loan return ETA data, and actual return date, and identify any loan charges – using either the Rate quantity and Rate, or manually entering in an amount in the Charges field

Information entered in here will display on the Loan Items grid and the Workorder Loan Items grid for quick viewing – such as when a loan item is due back, or what workorder number it was last loaned out under and who the client was, and so on.

If in the event a Loan is provided in a workorder, but you wish to complete service on that workorder but keep the loan active, use the Move Workorder Item menu feature to move the workorder item for this Loan Item to a new workorder for the client.

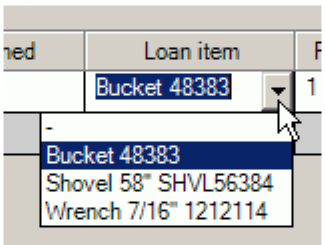
If you do not want the Loans subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemLoan to Forbidden

And you can easily view all loan items in the Loan grid so that you can easily see at a glance which loan items are rented out and to what client and workorder, when due back and more.

See also:
[How do I move a workorder item from one workorder to another?]
[Moving and sorting columns in a grid]

Fields of the Loan subsection:

Loan Item

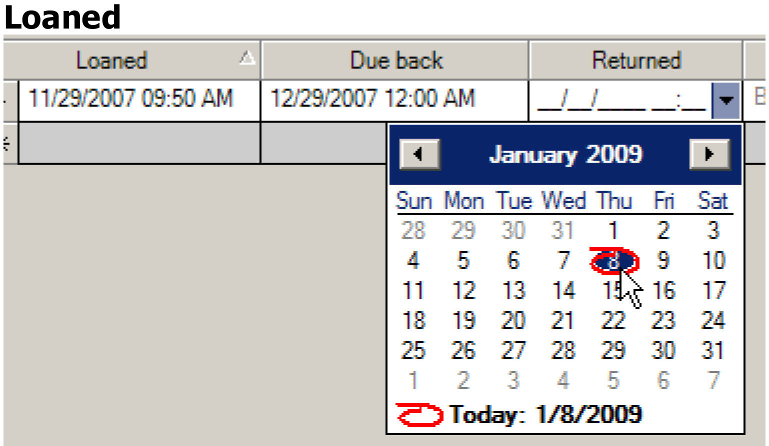


This is a drop down selection field where you can identify the loan item by its name and serial number.

Only active loaned Loan Items will display as if you do not physically have the loan item, then you could not loan it out.

You can refer to the Loan Items grid in the Units navigation pane for a list of all loan items and their present status.

Loaned



This is the date that the item was loaned out on. It defaults to today's date and time but you can edit to reflect any actual date if different.

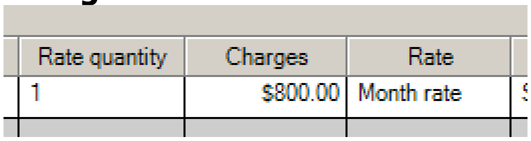
See also:
[Date and Time selection]

Due Back

This would be the date you expect the item to be returned. Entering a date here allows you to view on the Loan Items grid and the Workorder Items Loans grid at a glance when items should be returning.

Returned
This is the date the loan item was actually returned. Entering a date here identifies that the loan item is available for loaning elsewhere, as well as providing a record of its activity.

Charges



Rate quantity	Charges	Rate
1	$800.00	Month rate

You can manually enter in currency amount any charges related to loaning this item.

Or select a Rate first and then enter in the Rate Quantity – when you tab off, the Charges field will automatically display the calculated amount.

Rate
Select one of the rates set in this Loan Item's entry screen. When combined with the Rate Quantity field, the Charges field will automatically display the calculated amount.

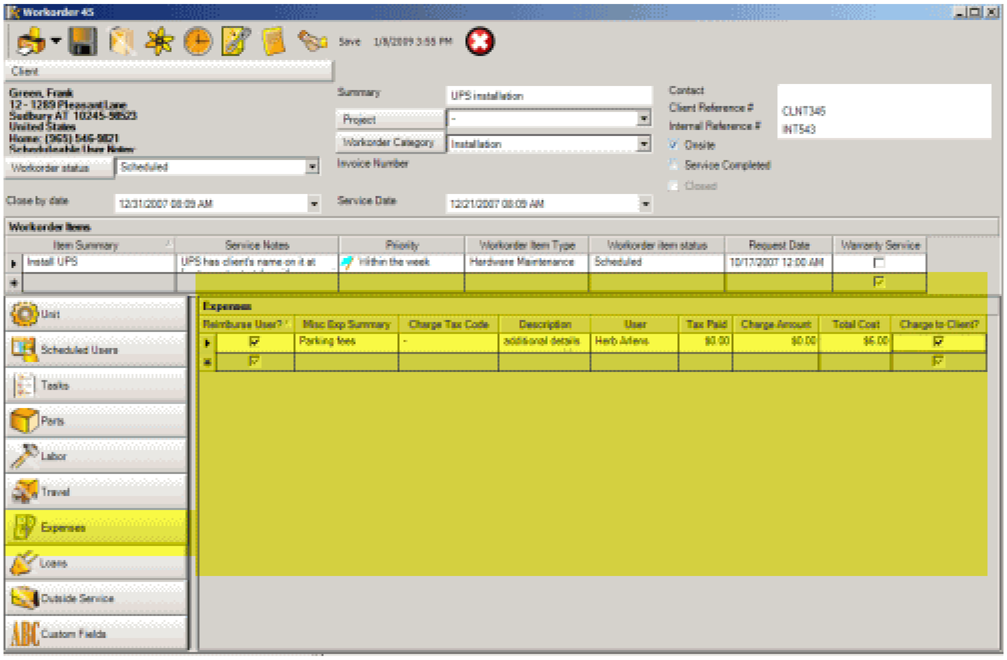
See also:
[Loan Items]

Rate Quantity
Enter in the quantity for a selected Rate. When combined with a selected Rate, the Charges field will automatically display the calculated amount.

Sales Tax
If a charge is incurred, select tax to be applied to the charges if applicable. This is useful for reports where parts, rates and loan charges may have different tax percentages – this selection allows you to ensure the correct tax is applied in reports for any charges entered here for the loan items.

Notes
This is a text field where you may enter in additional information pertaining to this loan.

5.3.6.7.8 Expenses



The Expenses sub-screen:

- Identifies additional expenses incurred for this workorder item that would not be parts or service
- Identifies if chargeable to client or not

A suggested use is for additional expenses that are not Parts, Travel, Outside Service or Labor. For example, you may indicate overnight accommodation charges here that a client reimburses you for, miscellaneous items that are not identified in inventory, or it may be that you reimburse your staff for gas purchases if they use their own vehicle.

If you do not want the Expenses subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemExpense to Forbidden

You can move and sort the columns in this grid

Fields of the Expenses subsection:

Charge Amount

Charge Amount	Tax Paid	Total Cost
$0.00	$0.00	$6.00

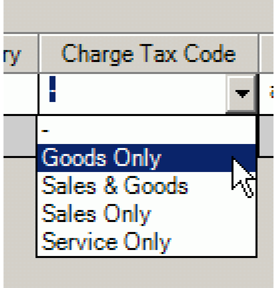
This currency field is where you could enter in the amount of the expense before taxes.

Tax Paid
This currency field is where you could enter in the amount of the taxes if you paid it.

Use of the two fields Tax Paid and Charge Amount if you wish to identify these separately, whereas Total Cost would be the two combined.

Total Cost
Suggested use is that the total amount is what you would enter if billing back to the client.

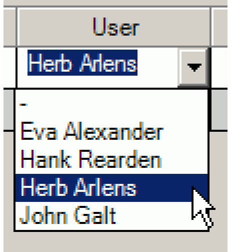
Charge Tax Code



Select what tax code to apply against the Charge Amount column if you are billing it back to the client.

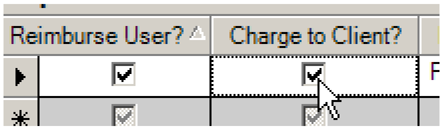
Of course, the taxes listed in the screenshot above are examples only, as you can create whatever Tax Codes you wish.

User



Drop down selection field to identify the schedulable user that is to be reimbursed, or incurred the additional expenses.

Reimburse User



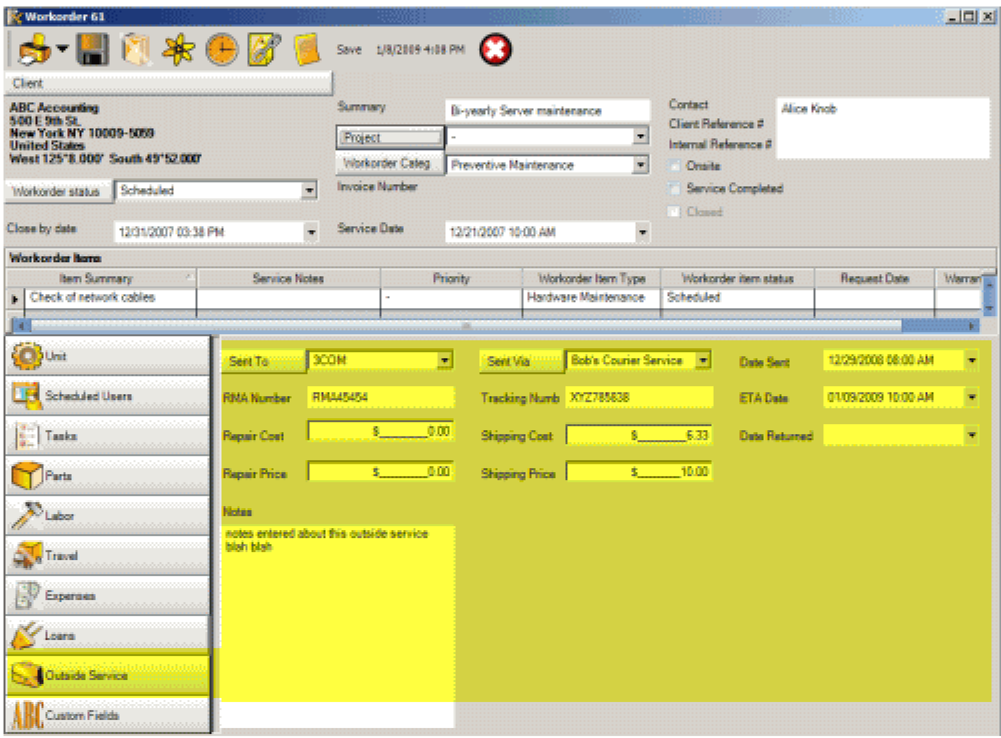
You might use this to identify that you need to reimburse the selected user for these expenses. Selecting here will allow you to create reports where this is selected to list those that need to be reimbursed, separate from those not to be reimbursed.

Charge to Client
You might use this to identify that you need to charge the client for these expenses, or even localize to different text. Selecting here will allow you to identify within a report whether this charge should show on for example a workorder report for the client.

Misc Exp Summary
This text column is where you could enter in a brief description of the expense.

Description
This text column is where you could enter additional information on the expense. The Description field is limited to 255 characters.

5.3.6.7.9 Outside Service

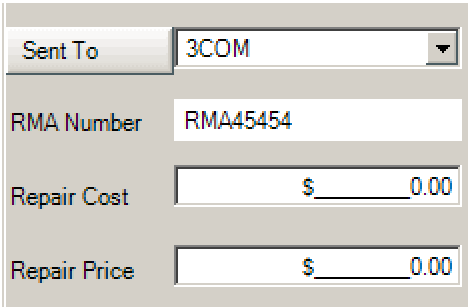


The Outside Service sub-screen:

- Identifies and track information regarding the unit sent out for repair such as RMA number, related dates, who shipped to and via, and possible charges
- If you do not want the Outside Service subsection to show in the entry screen for users of a certain security group, just set the security group Object.WorkorderItemOutsideService to Forbidden

Fields of the Outside Service subsection:

Sent To



Drop down list where you select the organization that the unit was sent to. This can be a manufacturer (warranty) or another repair organization. Clicking on the manufacturer or repair centers hyperlinks above the Sent To drop down list allows you to quickly enter new organizations or view information about the presently selected.

RMA Number

This field is used to enter a tracking number supplied by the repair center that the unit is being sent to. In many cases this would be referred to as an RMA number or Authorization number and is the number usually required when inquiring with the repair center about the status of a unit sent to them.

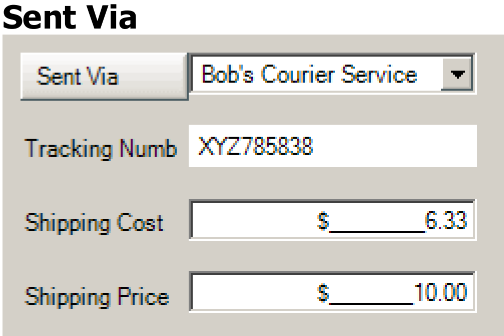
Repair Cost

This field would be used to indicate the internal costs involved.

Repair Price

This field would be used to indicate the charges to the client for repair of the unit if applicable.

Sent Via



This is used to select the shipping company used to send the unit for repair. New vendors can be added via the Sent via hyperlink above this list which will take you to a screen where you can add / edit new vendors and also look up phone numbers and other contact information if the shipper needs to be contacted.

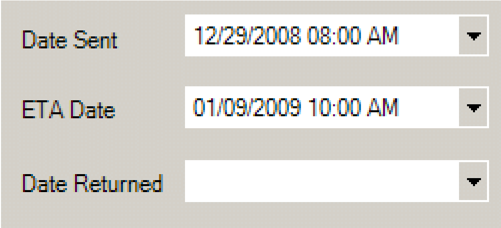
Tracking Number

This field is used to enter the tracking number provided by the organization responsible for transporting the unit. Typically this would be a waybill number. The field is provided as a reference field in case the shipper needs to be contacted about the delivery.

Shipping Cost
This field is used to indicate the internal costs involved in shipping the unit.

Shipping Price
This field is used to indicate the charges to the client for shipping of the unit if applicable.

Date Sent



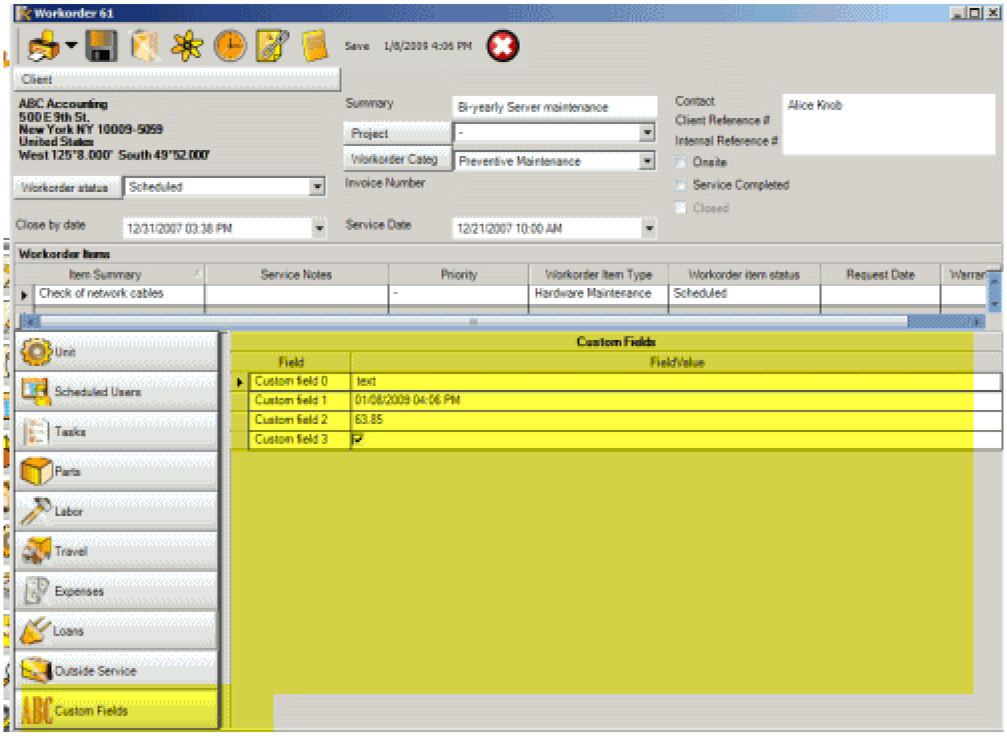
This is the date the unit leaves your organization.

ETA Date
This would be the estimated time unit will be returned back to your organization for informational purposes.
Entering an ETA date allows you to quickly see via the Items grid which items are overdue for return and follow up on them.

Date Returned
This would be the actual date item returned. Setting this allows you to filter by the Items grid on this column also with Date Sent column to see what units are still not yet returned.

Notes
A typical use might be to indicate specific notes about the shipping.

5.3.6.7.10 Custom Fields



The Custom Fields sub-screen:

- Provides ability to include up to 10 additional custom fields that could be text, date, currency or true/false format fields for workorder item.

The Custom Fields screen is where you would have additional custom fields to enter in information for this workorder item that do not fit any existing fields or sub-screens.

You can add up to 10 custom fields to display for the workorder item via the Custom Field Designer

- The same Custom Fields show for all workorder items
- If the Custom Fields bar to the left is not showing, that is because custom fields have not been set up via the Custom Field Designer for workorder items.
- What fields actually display and what type (text, date, currency, true/False, etc) is totally dependant on what you have customized for the workorder item screen.
- If you have set up Custom Fields for the workorder item, but the field name is still displaying "Custom field 0" etc, this is because you have not exited out of AyaNova and logged back in.

***

5.3.6.8 Multiple users editing the same workorder at the same time

AyaNova is a fully networked application in that multiple users can access and view the same data at the same time.

As with any networked application there can arise a situation where two people are attempting to save an edited copy of the same record at the exact same time. There are only two ways for a software developer to resolve this conflict: first to save "wins" or last to save "wins".

We've chosen to resolve these potential conflicts with the **first to save wins** method even though it is more complicated for us to implement because it ensures that there is **no possibility** of a person saving their work and **having it overwritten without their knowledge**.

What this means is that if two people open the same record, both edit it independently then both save it, the first person to save will be successful, the second person to save will receive an error message indicating their local copy of the record is now outdated and they can not save it.

Because of this potential for conflict some common sense needs to be practiced; if two technicans do work on the same workorder and both arrive together back at the shop at the same time they should arrange who will enter their data first on that particular work order to avoid conflict.

Once all users are aware of this potential for conflict it's very rare to see it occurring going forward.

For example:

When user #A opens a workorder, a copy of every object associated with that workorder record is opened (i.e. last modified time, items, labor, parts etc)

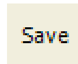
When user #B opens the same workorder, they also get a copy of everything that is in the database for that workorder record.

This allows both users to open and view the same workorder record.

If user #A then edits the workorder and saves, the actual workorder record’s last modified time is updated and all data for the workorder record refreshed as a whole (much faster than identifying and saving individual fields)

If user #B still has the workorder record opened from when he initially opened it, but now edits and goes to save, the last modified time of the actual workorder record in the database is checked to see if it's the same as the one that is in the local copy from when the workorder record was first retrieved

As the last modified time of the actual workorder record is now different because User #A has saved the workorder record, User #B will receive a message that the record has been modified, and that they must close without saving, re-open, and then they can edit.

It is recommended to use the Save 

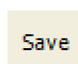
menu option frequently when editing records.

When using networked software where multiple users will be editing the same workorder record, users should be saving often if they need to have a workorder open for a long period, and are entering in data when there is a possibility of other users needing to edit the same workorder.

For example:

User #A opens the workorder. If User #A hasn’t edited right away - they should select the Save option on the menu just before they do want to edit. This way they are ensured they are starting with the actual last modified time of the record. If another user has saved edits to the same record, User #A will receive the message, and know they need to reload the workorder record before editing.

As users are editing they should save every minute or so conscious that at any point their save could fail if someone else saves before they do. This will ensure that people either won't lose any time at all, or if they do it's only a minute or so at most

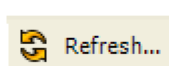
It is recommended to **use the Save** 

menu option frequently when editing records.

5.3.6.9 Having multiple workorders viewable at the same time

With AyaNova, you can open multiple workorder entry screens in the same instance of the AyaNova program.

For example, if you open workorder #44 and minimize; you can also open workorder #56. Both workorder entry screens will show on your task bar on your Windows desktop, and can be selected as needed to view and edit

Use the Refresh menu option 

on the grid to see the latest details of new or edited workorders.

If you attempt to close AyaNova from the main form and any of the open work order forms have unsaved changes, the work order form with the unsaved changes will be brought to the front so you can save, or close that form without saving, before you can then close the main AyaNova application window.

If there are open workorder forms but they do not have any unsaved changes then closing the main AyaNova form will automatically close the open workorder forms as well.

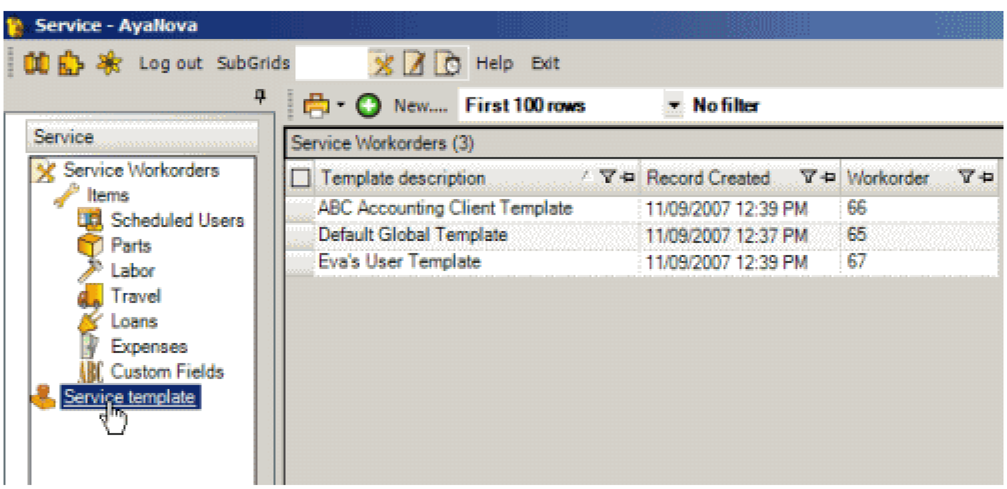
Workorder forms appear in the task bar but are not separate applications so the Windows features for tiling, stacking or side by side view (right click on task bar) open windows etc do not apply to work order forms, however minimize all and maximize all do work.

5.3.7 Service Workorder Templates

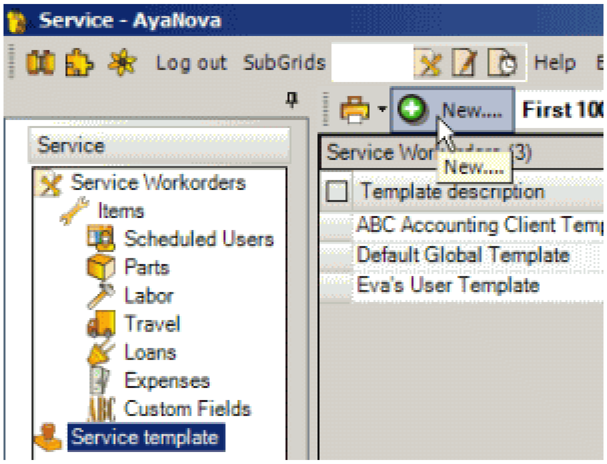
Service workorder templates allow you to pre-enter or pre-select common information for a new service workorder entry screen. Service workorder templates are a great time saver.

NOTE: If instead you are looking for **report** templates, AyaNova comes with a number of sample report templates including for service workorders and dispatching. These are accessible from the Print menu option in the service workorder entry screen and can be further customized using the report template designer such as the tutorial on customizing the Sample Dispatching Report.

You can view, edit and create service templates via the Service Templates grid via the Service navigation pane

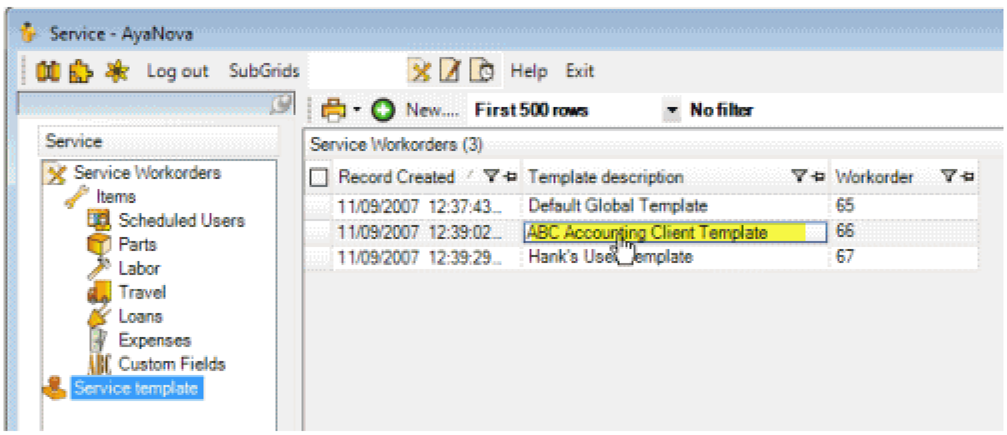


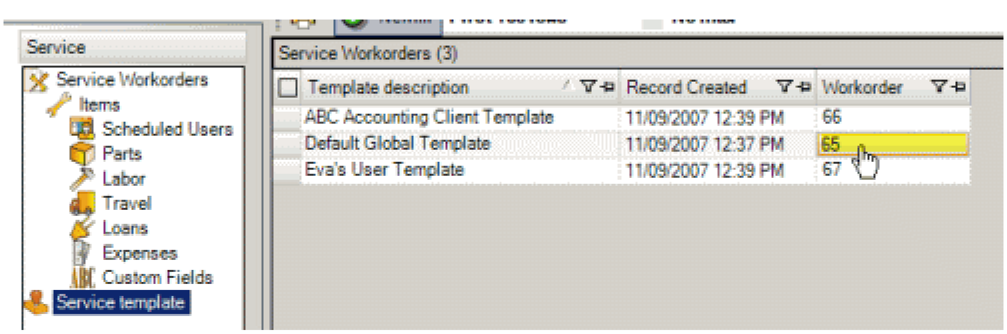
Create a new Service Template by selecting the New... menu option.

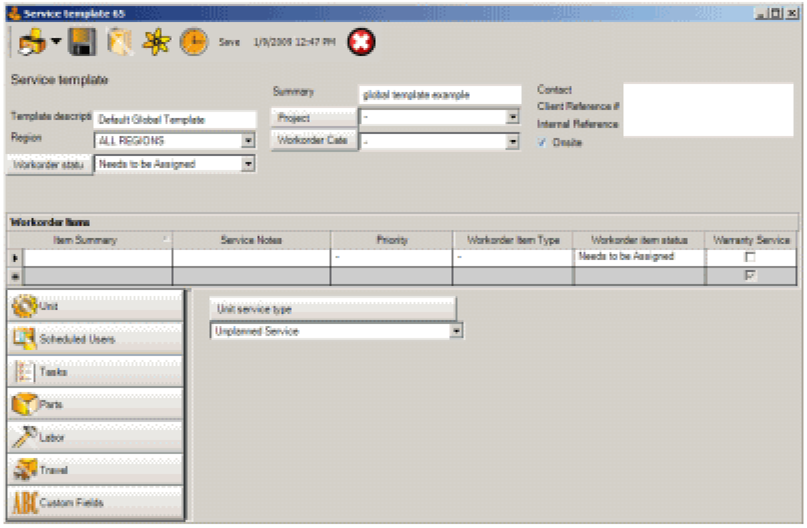


You can create as many templates as you want.

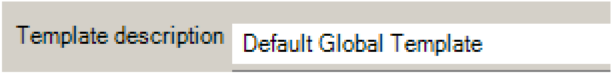
You can edit or view the details on an existing Service workorder template by clicking its number under the Workorder column <u>or</u> by click on its Template description



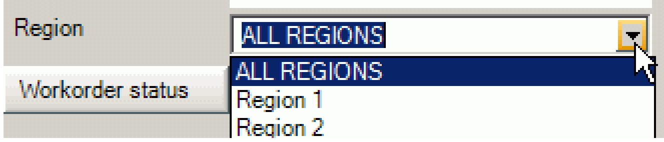




- Enter a template description to make it easy for you to differentiate it from other templates so that you can select the right template for a service workorder.



- Select a specific region if you want only users from that region (and the default for all regions) to have access to this template; or select the default for all regions if you want all users to have access to this template



Also see: Regions

- If you create specific templates for each client, suggestion is to name it with that client's name i.e. ABC Accounting's Template. If you create specific templates for different work performed, suggestion is to name it with that type of work i.e. Onsite Network Service Template. Or if you create specific templates for each user, name it with that user's name i.e. Bob's Service Template.

- Enter and select those details that you want this template to enter in any new service workorder created from it - such as the Workorder Status, Priority, etc.

- You will note that client selection does not show, nor does unit, nor does any date related fields - because a template could be for any client, any unit or any date in the future.

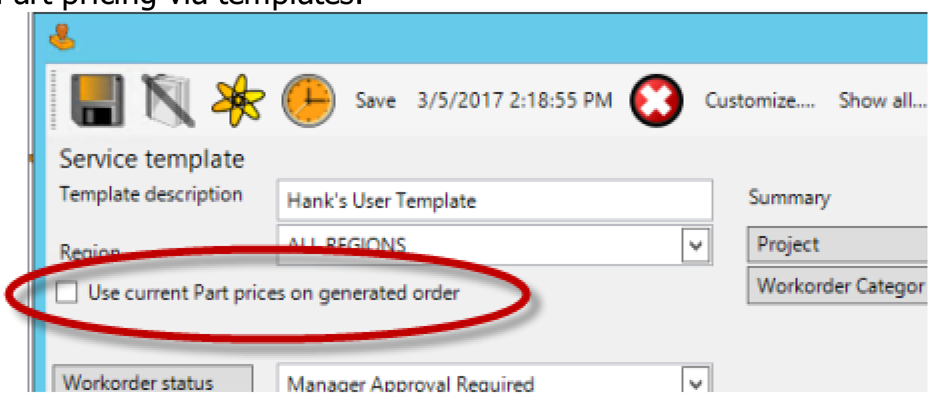
- Service Template Number  is automatically +1 of the last service workorder.

- If you select a rate in Scheduled Users, Labor or Travel that a client is not capable of having (prevented by contract, or template has a contract rate selected), that record is not transferred to the WO.

  For example: If you create a new workorder using a template that has a contract specific labor rate in the Labor section of the template; but the client you created it for does not have that contract rate selected in its contract or even a contract - the Labor record will not be made in that new workorder at all.

- Selecting Parts in a service template:
  - Selecting a part in a service template does not affect inventory.
  - Inventory is only affected when you set the actual Quantity in a service workorder that is created from the template and set that record to service completed.

- Part pricing via templates:



  - When "Use current Part prices on generated order" is unchecked: The part price that will be used with the generated workorder will be the price stated on this template.
  - When "Use current Part prices on generated order" is checkmarked: The part price that will be used with the generated workorder will be the Retail price stated in the Part record itself
    - this is very useful that when your part prices change, your templates will use the latest price regardless what is stated in the template.

See also:
Global Settings
Client entry screen

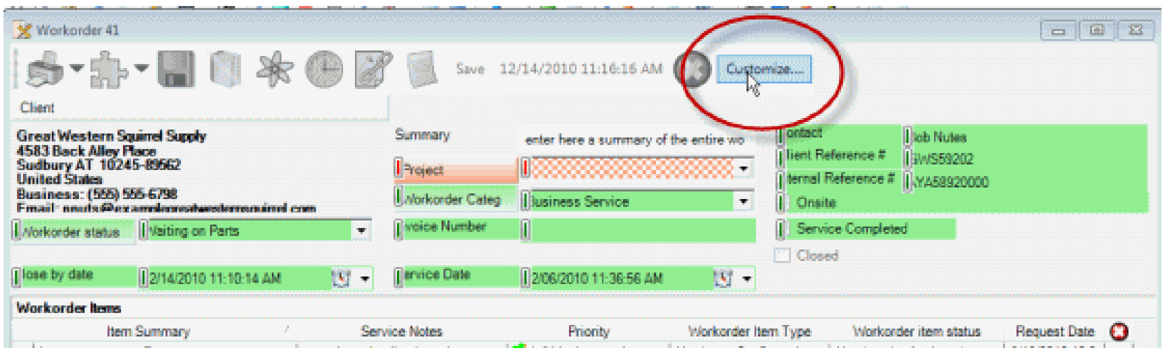
User entry screen

5.3.8 Customize what fields display in Service entry screen

You can remove fields from showing in the Service Workorder header portion if not needed.

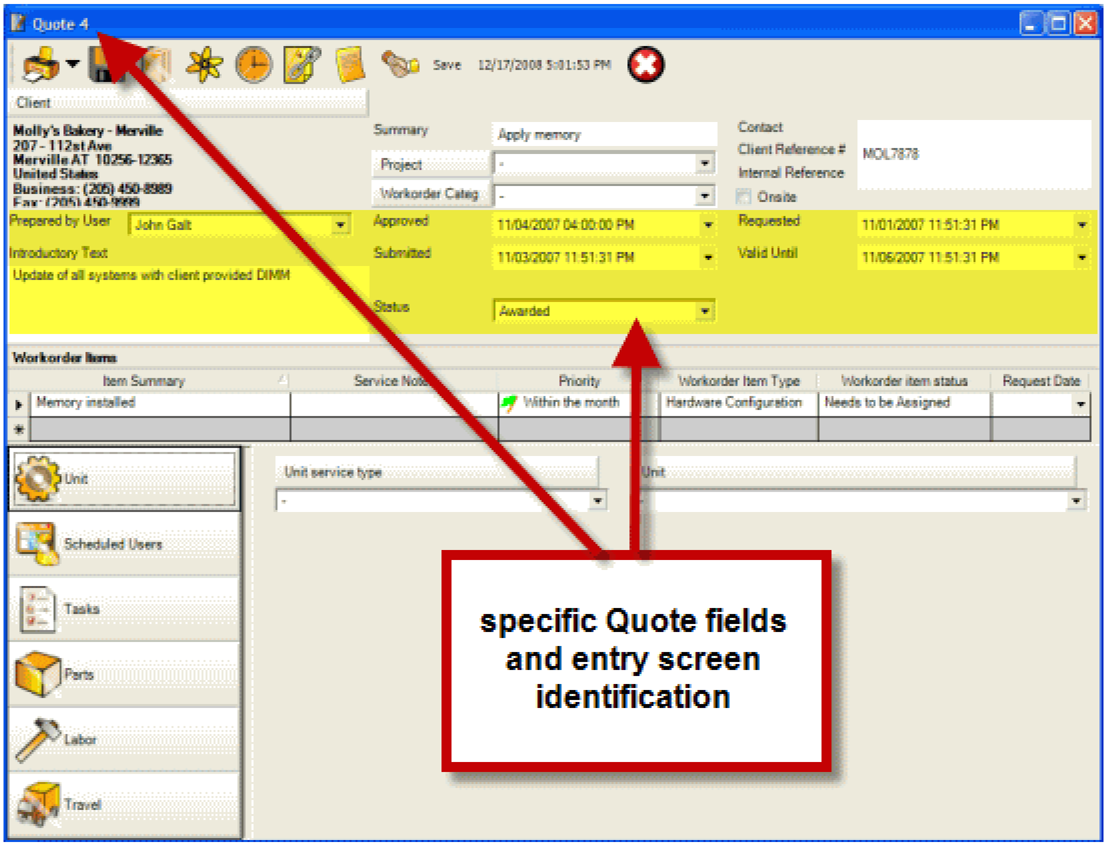
Just log in as the AyaNova Administrator, open up any service workorder entry screen, select the menu option **Customize...**, and toggle those fields and field labels to not show!

See the section Display / non-display of fields in the order entry screen for an example of disabling fields from showing in the service workorder entry screen.



5.4 Quotes

5.4.1 What do I use a quote for?



A quote itemizes costs and provides details on possible service for a client (and possible units of that client).

For example, your customers may wish to receive a quote for the services they may receive so that they can approve it before the service is actually provided.

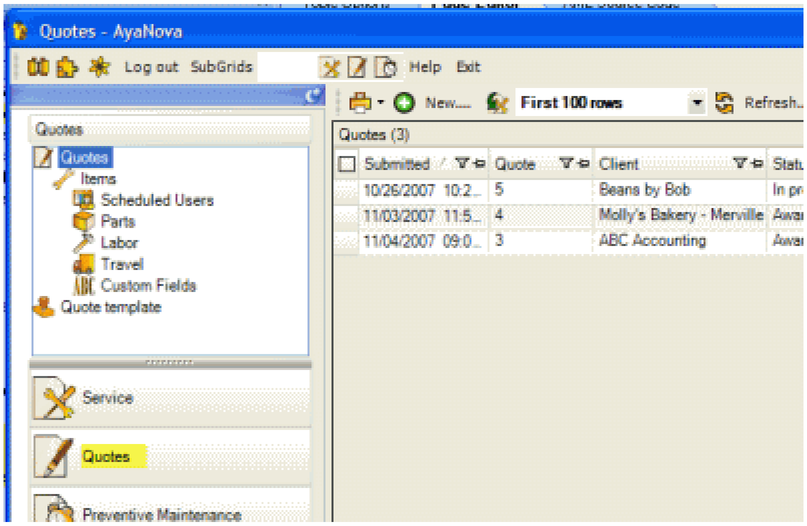
Use AyaNova Quotes to:

- Create quotes in AyaNova for work that may be performed and parts that may be used
- Track creation of the quote, submission to the client of the quote and acceptance of the quote
- Generate a workorder from the quote without have to re-enter everything
- Maintain a history of your quotes as well as the actual service performed.

A quote can be used to generate a service work order via the Quote grid.

For this reason, you will note that the same fields and workorder items appear in a quote as in a service workorder as well as same type of sub-grids underneath when the Quotes grid is expanded on the navigation pane.

5.4.2 Quotes grid



The Quotes grid displays information about the quote as a whole – such as the client, quote number, project assigned to, overall summary, overall category, prepared by, requested date, submitted date, approved date, valid until date and quote status.

The Quotes grid is useful for **quickly viewing** which quotes are in progress, completed, invoiced, or closed. For example, the sales manager may view the screen to quickly filter which quotes are waiting on response from a client for acceptance.

The Quotes grid is also used so you can **view and/or edit** a Quote by selecting the Quote number from this grid.

And you can also **create a new Quote** from the Quotes grid or **generate a service workorder from the selected Quote** in this grid

See also:
Setting what columns display in a grid
Accessing data displayed in grids
Adding, editing and deleting data for display in a grid
Jump buttons
How do I generate a service workorder from a quote?

Security Group internal object: Object.WorkorderQuote

Forbidden : User of that security group can not see the Quote navigation pane grids at all

Read Only : User can view the Quote navigation pane grids but can not create new quote

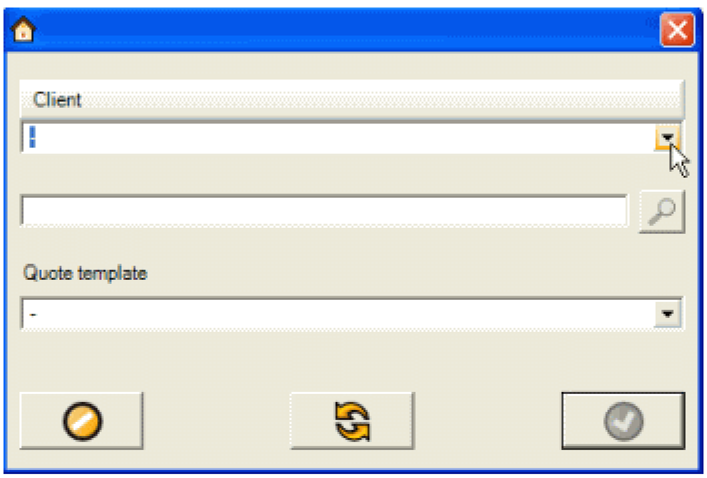
Read/Write or Read/Write/Delete : User can view the Quote navigation pane grids and create new

5.4.3 Create a new Quote

A new quote can be created in three different ways:

1. Use the Accelerator Key combination
2. Select the New... menu option in the Quote grid
3. Right-click on the client's name in any grid and select Quote

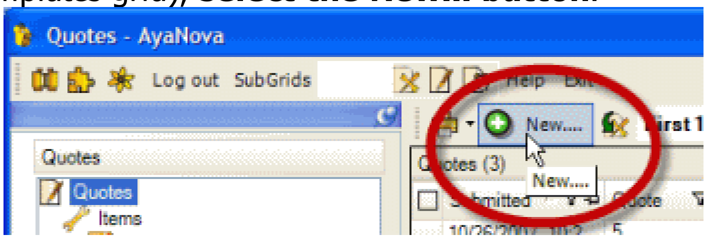
1. From any main grid, **press the Accelerator Key combination ALT-q** using your keyboard which will bring up the client and template selection window.



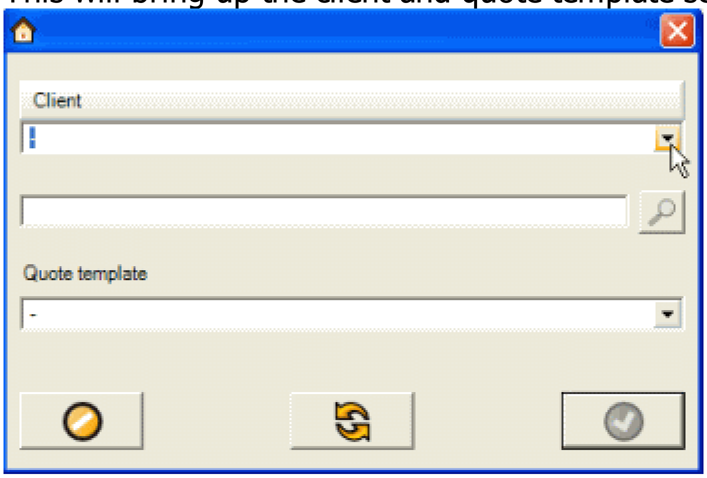
Select the client (and template if desired). Select  and a new Quote entry screen for this client will open

See also:
Accelerator Keys

2. Viewing any of the Quote navigation pane grids (except for the Quote Templates grid), **select the New... button**.

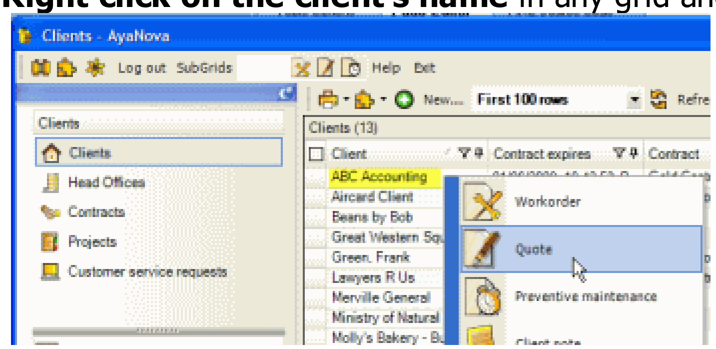


This will bring up the client and quote template selection window

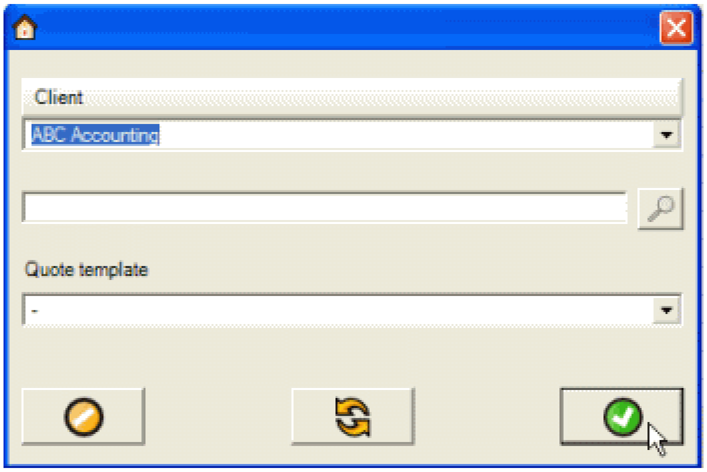


A client is required to be selected. A Quote template is not. Click on the  OK button when you have selected your client (and quote if applicable)

3. **Right click on the client's name** in any grid and select Quote



This will bring up the client and quote template selection window with the client pre-selected.



Select a quote template if desired and click on the  OK button and the quote entry screen will open.

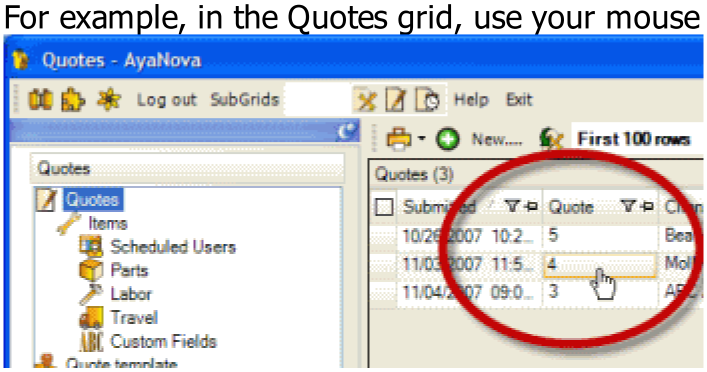
5.4.4 View an existing Quote

An existing quote can be viewed and edited by opening that quote's entry screen and editing as needed.

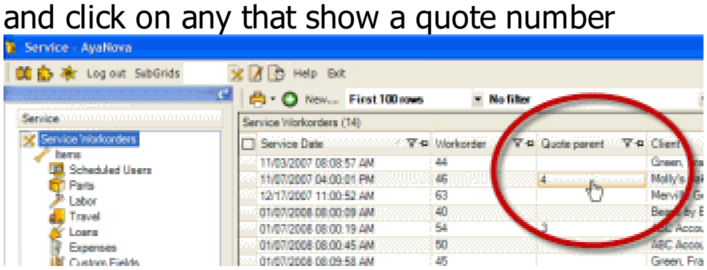
Open an existing quote in three different ways:

1. From any grid in AyaNova that shows a link to a quote number.

For example, in the Quotes grid, use your mouse to click on a **Quote** number

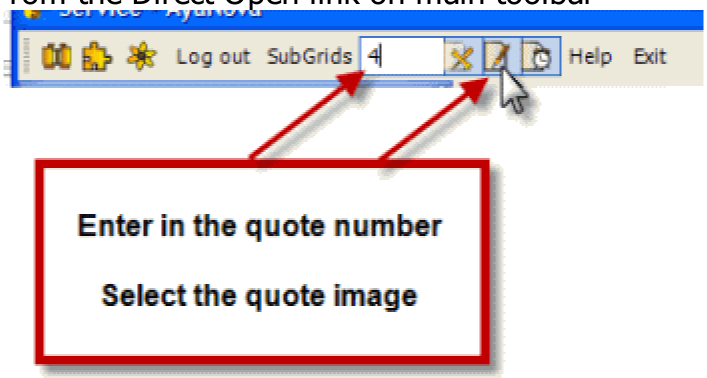


For example, in the Service Workorders grid, view the column **Quote Parent**, and click on any that show a quote number



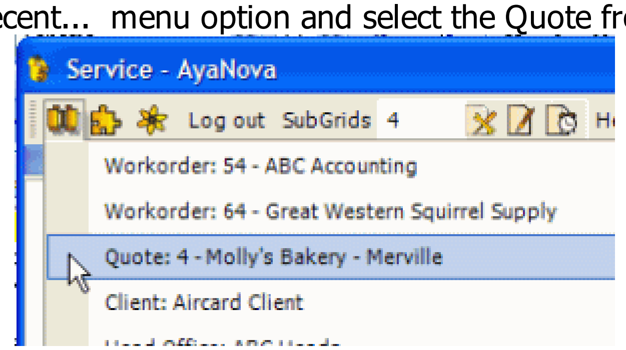
See also:
[Adding, editing and deleting data for display in a main grid]

2. From the Direct Open link on main toolbar



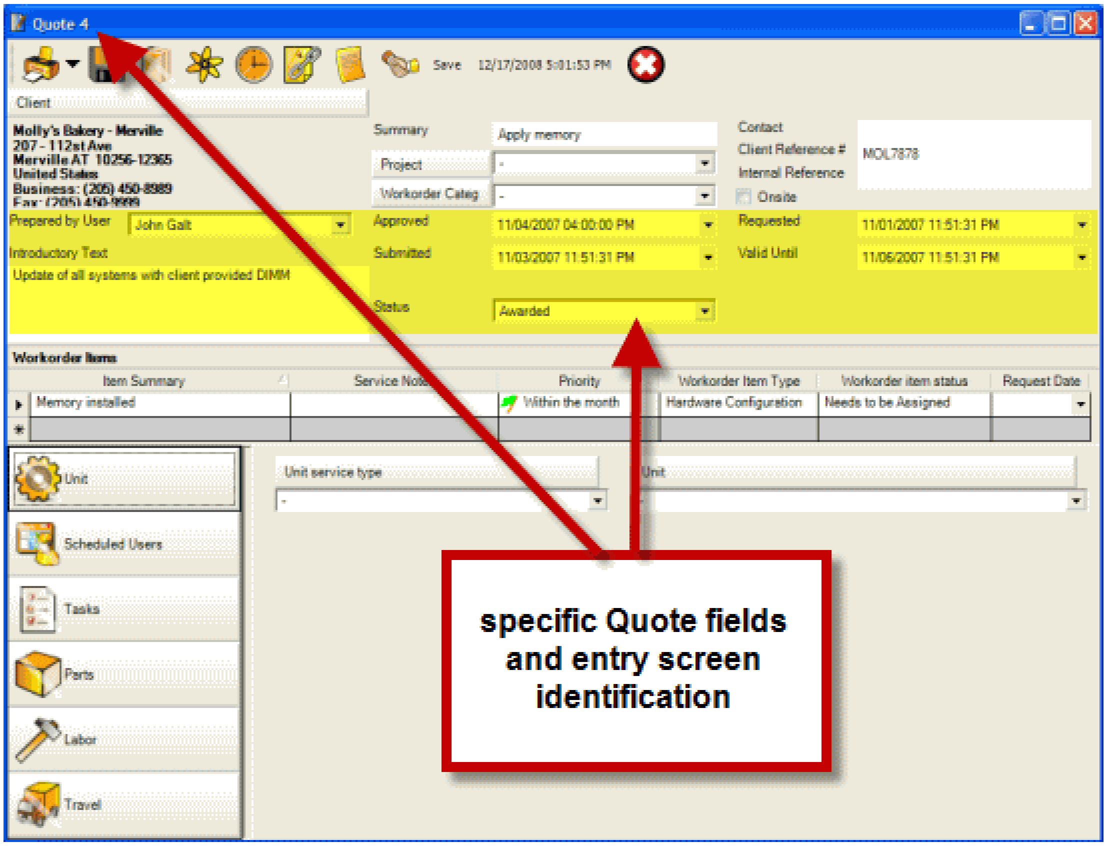
See also:
[Main AyaNova Menu Bar]

3. If you have just recently been editing the Quote, then drop down the  Recent... menu option and select the Quote from there



See also:
[Main AyaNova Menu Bar]

5.4.5 Quotes entry screen fields



The Quote entry screen has the majority of the same fields as a Service Workorder so that the relevant data can be copied to a new service workorder without having to retype it back in when you generate a service workorder from a quote.

Do refer to the AyaNova Help file section on the service workorder for details on aspects of the order entry screen other than the specifics related to Quotes.

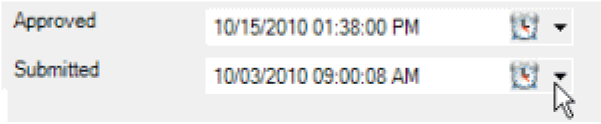
See also:
Service Workorder entry screen
Order entry screen security settings
Parts selected in a Quote
How do I generate a service workorder from a quote?

Also see the section on toggling off fields or their labels from displaying.

Fields of a Quote entry screen that are different from the Service Workorder:

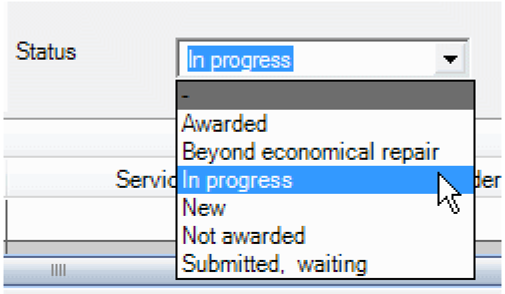
Prepared By User - Drop down and select the user that this quote was prepared by. This is useful for reporting and grid filtering purposes

Introductory text - This could be text for your self or for the client.



Approved - This is a date selection field from which you can identify the date that this quote was approved by the client.

Submitted - This is a date selection field from which you can identify the date that this quote was submitted to the client.

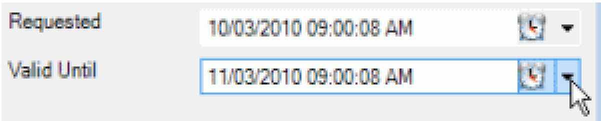


Status - Identify the status of the quote via this field by selecting one of the six English locale options - Awarded, Beyond economical repair, In Progress, New, Not Awarded or Submitted waiting.

As with all text in AyaNova, these statuses are examples only that are set in the sample English locale.

You can certainly localize and relabel the text of these statuses to whatever text works best for you. Do review the section on Localized Text Designer.

You would be editing the keys such as WorkorderQuoteStatusTypes.Label.Awarded, WorkorderQuoteStatusTypes.Label.New, WorkorderQuoteStatusTypes.Label.NotAwarded etc etc.



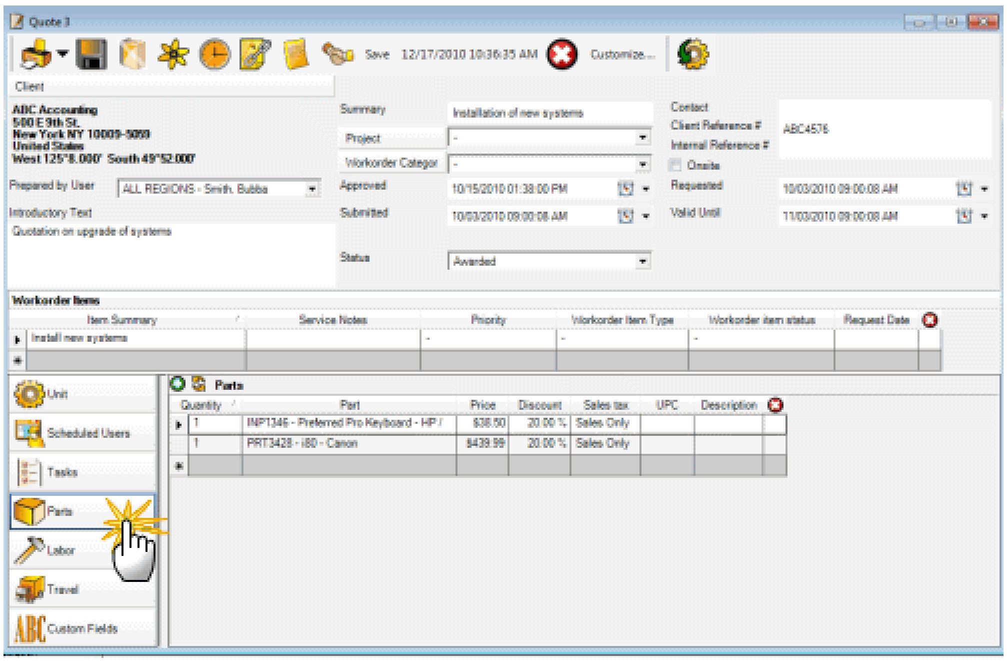
Requested - This is a date selection field from which you can identify the date that this quote was requested for by the client.

Valid Until - This is a date selection field from which you can identify the date that this quote is valid till.

NOTE: Follow Ups made in a Quote are not transferable to the Service Workorder created from the Quote

Note that a Follow Up in a Quote is for that quote itself. If you create a service workorder from the quote, the Follow Up is NOT transferred to the new service workorder.

5.4.6 Parts selected in a Quote do not affect On Hand amounts



Parts selected in a Quote

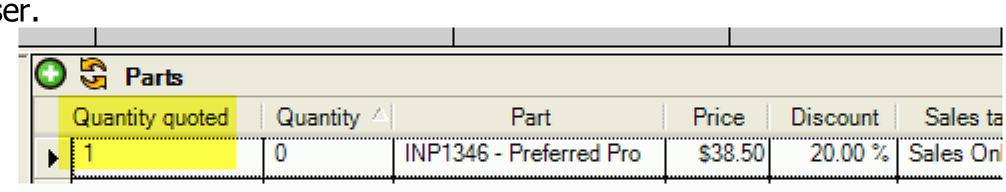
Parts entered in a quote **do not affect inventory**, only a service work order can remove inventory.

- When a quote is converted to a service workorder, the quantity of parts in a quote are not entered in the Quantity column within the Parts subgrid in a service workorder.
- Instead the quantity is entered in the **Quantity Quoted** column within the parts subgrid in a service workorder only as a reminder of the amount that should be used as per the quote.

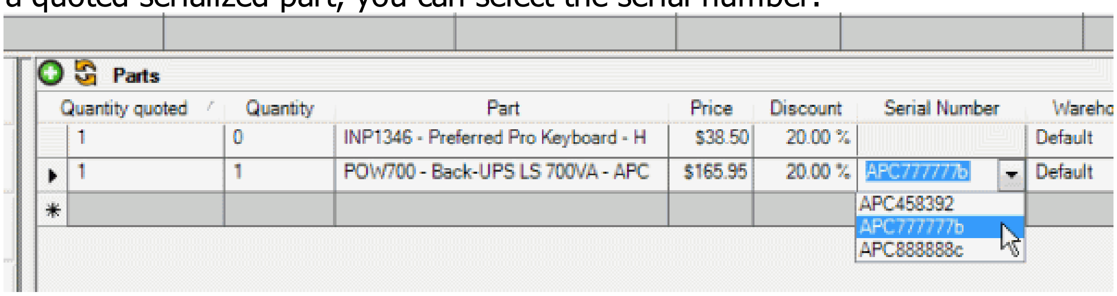
AyaNova can not pre-enter the quantity in a service workorder as user intervention may be required because:

- a part may or may not have a serial number
- the quantity may or may not be in stock

The screenshot below is from the Parts section of a service workorder that was created by a quote. The quantity quoted is indicated in the Parts sub-screen's **Quantity Quoted** column, but the **Quantity** has not yet been entered by the user.



And to maintain history of Quantity Quoted, when you enter in the Quantity of 1 for a quoted serialized part, you can select the serial number.



5.4.7 Quote order entry screen security

The following is the structure of a Quote entry screen's rights

Object.WorkorderQuote = parent
    Object.WorkorderItem = child
        Object.WorkorderItemUnit =grandchild
        Object.WorkorderItemScheduledUser = grandchild
        Object.WorkorderItemTasks = grandchild
        Object.WorkorderItemLabor = grandchild
        Object.WorkorderItemParts = grandchild
        Object.WorkorderItemTravel = grandchild
        Object.WorkorderItemOutsideService = grandchild
        Object.WorkorderItemMiscExpenses = grandchild
        Object.WorkorderItemLoan = grandchild
        Object.WorkorderItemCustom = grandchild

- **Note** that all objects under the parent apply to all three: service workorders, quotes **and** PM's entry screens.

For example, the Scheduled Users subsection will NOT show in **any** service workorder entry screen, quote entry screen **or** PM entry screen for users of that security group **if** you set Object.WorkorderItemScheduledUser to Forbidden in that security group.

This is because what you set for Object.WorkorderItemScheduledUser is applied to all three - service workorders, quotes and PM's.

- Note how the WorkorderItem is a "child" of the Workorder; and the WorkorderItemLabor is a child of the WorkorderItem and a "grandchild" of the Workorder
- If the object is a “child” of another object, the “child” will only ever have at maximum the rights of the “parent”
- Only access rights set for a “child” less or equal to the rights of the “parent” will take effect
- Access rights set for a “child” that are greater than the rights of the “parent” will not take effect.

- A "grandchild" will only be given the maximum rights set of the "child" regardless what you set in the security group. And the "child" will only be given the maximum rights set of the "parent" regardless what you set in the security group.

Example 1:
If you have set Read Only access to the Quote root object (Object.WorkorderQuote) for a security group, even if you set Read/Write access to any of the child objects – Read / Write access will be ignored as the Quote root object access right takes precedence. Users of the security group where you set this will only be able to view a quote and its items and subsections (labor, parts, etc) but not edit.

Example 2:
If you want users of the security group to be able to view and edit all aspects of the quote except only view the Scheduled Users subsection, you would set all the related objects to Read/Write, but set Object.WorkorderItemScheduledUser to Read Only

Example 3:
If you want users of a specific security group to not even see the Tasks subsection, you would set all the workorder related objects to Read/Write but set Object.WorkorderItemTask to Forbidden.

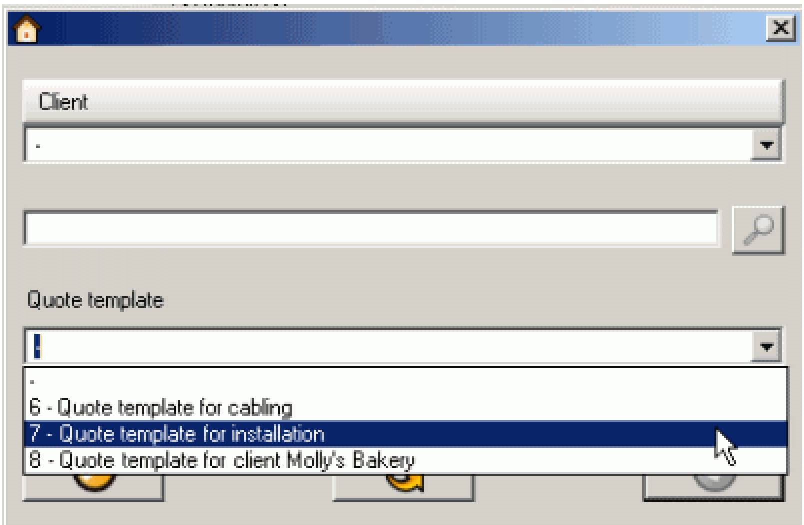
Object Name in Security Group screen	What this object refers to	What to set to give users of this security group minimum ability to edit and create a service workorder
Object.WorkorderQuote	quote entry screen **NOTE: access given to this affects all Object.WorkorderItem type objects**	Read/Write
Object.WorkorderItem	Workorder item section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemUnit	Unit section of a service workorder, quote or PM	Read/Write
Object.WorkorderItemLabor	Labor section of a service workorder, quote and preventive maintenance	Read/Write
		Read/Write
Object.WorkorderItemPart	Parts section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemScheduledUser	Scheduled Users section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemTask	Tasks section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemTravel	Travel section of a service workorder, quote and preventive maintenance	Read/Write
The Objects listed below must be set to **minimum Read-Only** for the users of the Security Group to be able to view in a quote		
Object.Client	To be able to select a client	

Object.Contract	To be able to select a client with a contract	
Object.ContractRate	To be able to select a client with a contract	
Object.Task	To be able to select the Task jump button	
Object.TaskGroup	To be able to select the Task jump button	
Object.TaskGroupTask	To be able to select the Task jump button	
Object.Unit	To be able to select a unit	
Object.UnitModel	To be able to select a unit	
Object.Priority	To be able to view the Priorities subgrid	
Object.Project	To be able to view the Project jump button	
Object.Report	To be able to print	
Object.WorkorderCategory	To be able to view via the Workorder Category subgrid	
Object.WorkorderStatus	To be able to view the Workorder Statuses subgrid	
Object.WorkorderItemType	To be able to view the Workorder Item Types subgrid	
Object.ScheduleMarker	To be able to view Follow Ups	
Object.ServiceBank	To be able to view client's banked service	
Object.UnitMeterReading	To be able to view unit's meter reading	
Object.Part	To be able to create a new part from within a workorder	

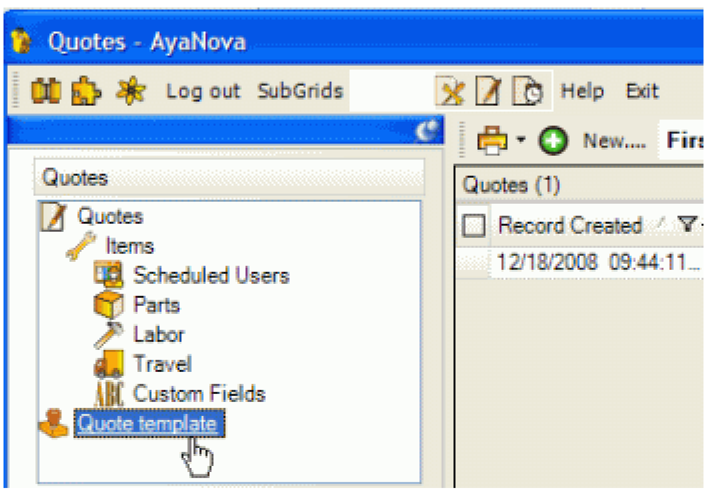
5.4.8 Quote Templates

Quote templates allow you to pre-enter or pre-select common information for a new quote entry screen. Quote templates are a great time saver.

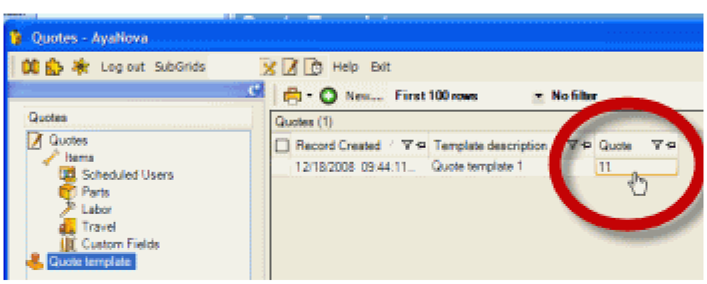
Then when you create a new Quote, you can easily just select the template with its pre-entered information from the list of templates to save you entry time.



View, edit and create quote templates via the Quote Templates grid via the Quotes navigation pane

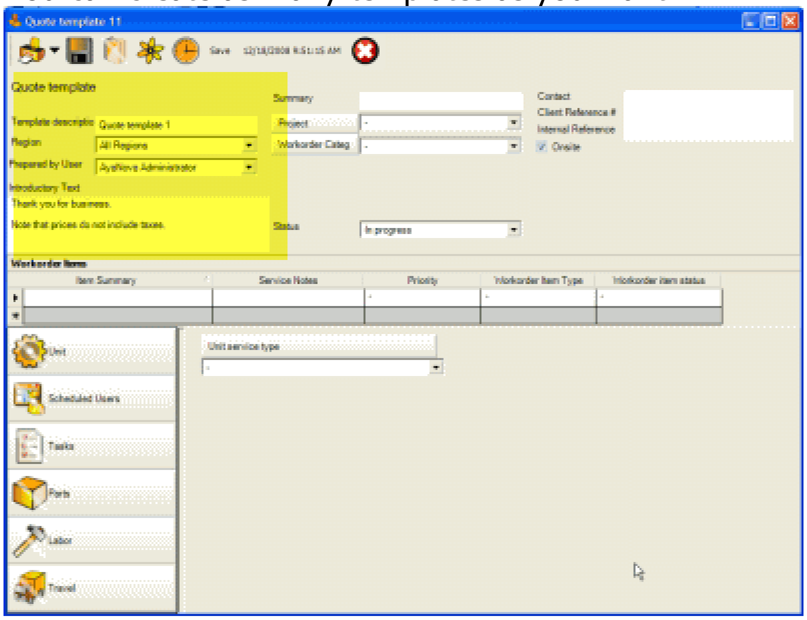


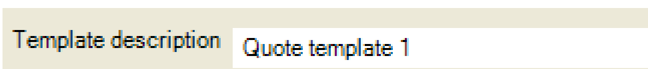
You can edit or view the details on an existing Quote template by clicking its number under the Quote column in the Quote Template grid **<u>or</u>** by selecting its Template Description



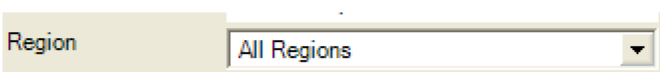
Create a new Quote Template by selecting the New...  menu option in the Quote template grid

You can create as many templates as you want





- Enter a template description to make it easy for you to differentiate it from other templates so that you can select the right template for a quote. If you create specific templates for different work to be performed, suggestion is to name it with that type of work i.e. Onsite Network Service Quote, Hot water heater replacement, etc.



- If you want all users of all regions to be able to access and select this quote, select the All Regions. If you want only users of a specific region (or those set to All Regions) to be able to select this quote, select that specific region.

Also see: Regions

- Enter and select those details that you want this template to enter in any new quote created from it - such as the Introductory Text, Workorder Category, etc.

- You will note that client, unit and any date related fields are not available because a template could be for any client, unit or date in the future.

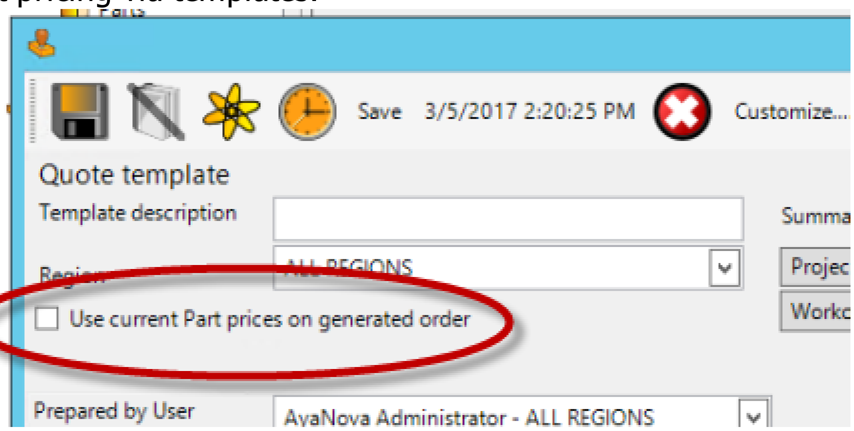
- Quote Template Number 

 is automatically +1 of the last quote.

- If you select a rate that a client is not capable of having (prevented by contract, or template has a contract rate selected), the record is not transferred to the quote . i.e. a non-contract rate is selected in the quote template for Scheduled Users. Create a new quote using this template for a contracted client that is restricted to a specific rate, will see that the Scheduled User record is not made in new quote at all.

- Selecting Parts in a quote template:
  - o Selecting a part in a quote template does not affect inventory.
  - o Inventory is only affected when parts are used in a service workorder

- Part pricing via templates:



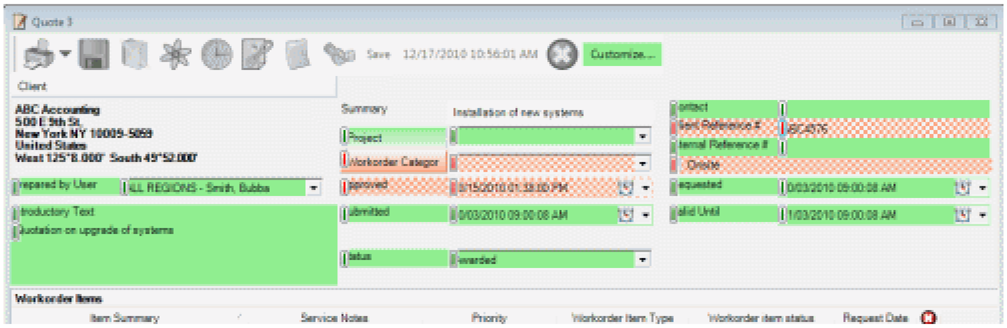
  - When "Use current Part prices on generated order" is unchecked: The part price that will be used with the generated quote will be the price stated on this template.
  - When "Use current Part prices on generated order" is checkmarked: The part price that will be used with the generated quote will be the Retail price stated in the Part record itself
    - o this is very useful that when your part prices change, your templates will use the latest price regardless what is stated in the template.

5.4.9 Customize what fields display in Quote entry screen

You can remove fields from showing in the Quote header portion if not needed.

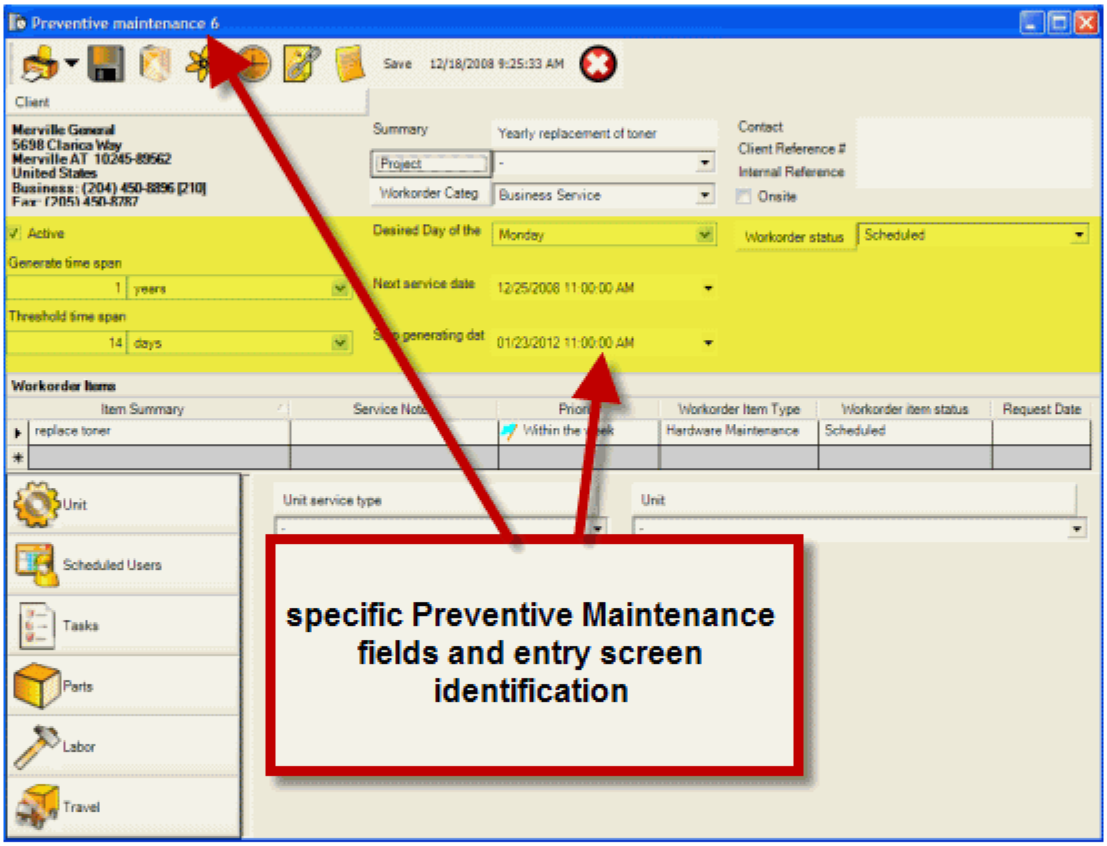
Just log in as the AyaNova Administrator, open up any Quote entry screen, select the menu option **Customize...**, and toggle those fields and field labels to not show!

See the section Display / non-display of fields in the order entry screen for an example of disabling fields from showing in the service workorder entry screen.


Quote 3
Save 12/17/2010 10:56:01 AM
Customize...
Client
ABC Accounting
500 E 9th St.
New York NY 10009-5059
United States
Summary
Installation of new systems
Project
Workorder Category
Workorder Items
Item Summary
Service Notes
Priority
Workorder Item Type
Workorder item status
Request Date

5.5 Preventive Maintenance

5.5.1 What do I use a Preventive Maintenance order for?



Let's take the example that you want to schedule service every six months for a client.

> Rather than manually creating a new service workorder for every six month period from now until the end of time, or rather than having to remind yourself to schedule that every six months and some times accidentally forgetting and losing out on that revenue, or the non-service resulting in a catastrophe - **just create a single Preventive Maintenance order and let AyaNova automatically generate the service workorders from it as needed**!

The primary goal of preventive (a.k.a. "preventative") maintenance is to prevent the failure of equipment before it actually occurs.

With AyaNova, you create a Preventive Maintenance order once, and then use it to automatically or manually generate service work orders from it.

Think of the Preventive Maintenance order as a "template" for your service workorder that has the additional bonus of automatically generating service workorders from it on specific dates that you have told it to do.

You create one Preventive Maintenance order, and from that PM generate the reoccurring service workorders where the work is actually scheduled and where details about the service performed are entered.

See for more details:
How do I manually generate a service workorder from a Preventive Maintenance order?
How do I automatically generate a service workorder from a Preventive Maintenance order?

While the term preventive maintenance is used, technically speaking you can use AyaNova's Preventive Maintenance feature for any type of recurring service workorder.

By pre-planning service, you make sure that:

- Provide service that prevents issues rather than being called in to perform service after an issue has occurred. Result is happy customers.
- Your customers are serviced without them having to call you and remind you. Result is happy customers.
- A steady booking of service and revenue rather than being swamped at once with emergencies.

For example, you might provide photocopier service for rental machines. By using the PM feature of AyaNova, you can automatically have AyaNova create service workorders on a regular basis (i.e. every six months) identifying what service to perform, to identify meter usage, etc.

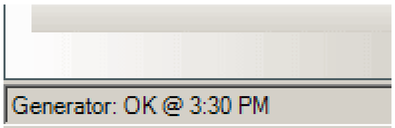
You will note that the same fields and workorder items appear in service work order, the quote and the preventive maintenance order entry screens. The service work order, the quote and the preventive maintenance order use portions of the same screens/fields for ease of transfer between the three.

5.5.2 Generator and Preventive Maintenance

The AyaNova Generator program generates service work orders **from** preventive maintenance orders automatically based on the fields set in the PM order.

A. Generator when stand-alone default installation:

If you took the stand-alone default installation when you installed AyaNova, you don't have to configure anything to run the internal Generator.



If you have any issues with a PM not generating:

1. Recheck the required fields of the Preventive Maintenance - Active, Next Service Date, Threshold Time Span and Generate Time Span
2. Make sure you are logged in as a user that is **not** the AyaNova Administrator
3. Make sure you are logged in as a user that has full rights to preventive maintenance and service workorder objects (so that they can be created and updated)
4. Confirm that the Generator is running successfully and shows as such in the bottom left-hand corner when logged in
5. Check the Service Workorder grid sorting by the P.M. Parent column as the workorder may actually have been generated
6. Confirm that client is Active - as PM's will not generate for an inactive client.

B. Generator Service when AyaNova is networked:

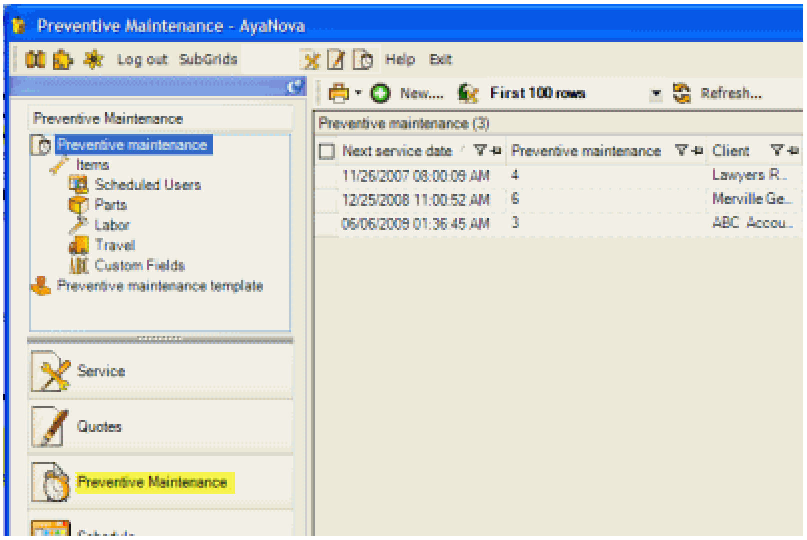
Whereas if you have configured AyaNova for network use, than you must install the Generator service.

Follow the Network Generator installation steps to install the Generator Service so that your Preventive Maintenance orders can generate service workorders.

If you have any issues with a PM not generating:

1. Recheck the required fields of the Preventive Maintenance - Active, Next Service Date, Threshold Time Span and Generate Time Span
2. Confirm that the Generator service is running successfully as per the network Generator service
3. Check the Service Workorder grid sorting by the P.M. Parent column as the workorder may actually have been generated
4. Confirm that client is Active - as PM's will not generate for an inactive client.

5.5.3 Preventive Maintenance grid



The Preventive Maintenance grid displays information about preventive maintenance orders as a whole – such as the client, pm number, and project assigned to, overall summary, overall category, next service date, stop generating date, generate span and threshold span.

The Preventive Maintenance grid is useful for quickly viewing which preventive maintenance orders have been made for which clients, as well as when the Next Service Date for a preventive maintenance order is, or viewing of other fields from the preventive maintenance header.

The Preventive Maintenance grid is also used so you can **View / Create / Update or Delete** a PM order by selecting the PM number from this grid.

And you can also **manually generate a service workorder from the selected PM** from this grid

See also for more details:

[Setting what columns display in a grid](#)
[Accessing data displayed in grids](#)
[Adding, editing and deleting data for display in a grid](#)
[Jump buttons](#)
[How do I manually generate a service workorder from a preventive maintenance order?](#)

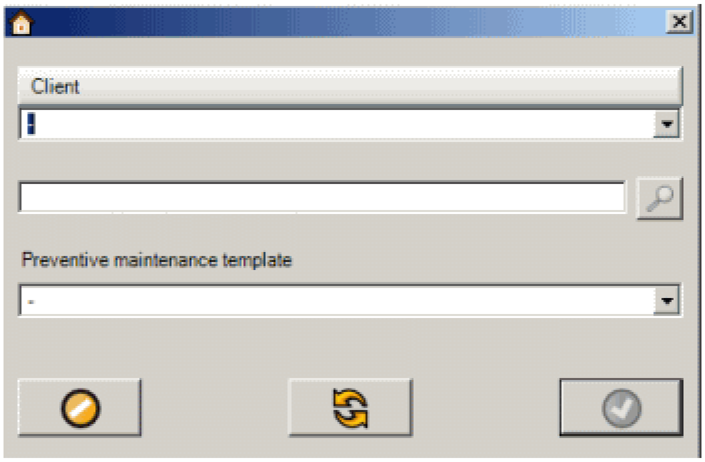
Security Group internal object: Object.WorkorderPreventiveMaintenance
Forbidden : User of that security group can not see the Preventive Maintenance navigation pane grids at all
Read Only : User can view the Preventive Maintenance navigation pane grids but can not create new PM's
Read/Write or Read/Write/Delete : User can view the Preventive Maintenance navigation pane grids and create new

5.5.4 Create a new Preventive Maintenance order

A new preventive maintenance order can be created in four different ways:

1. **Use the Accelerator Key combination**
2. **Select the New... menu option in the PM grid**
3. **Right-click on the client's name in any grid and select Preventive Maintenance**
4. **Right-click on the unit's name in any grid and select Preventive Maintenance**

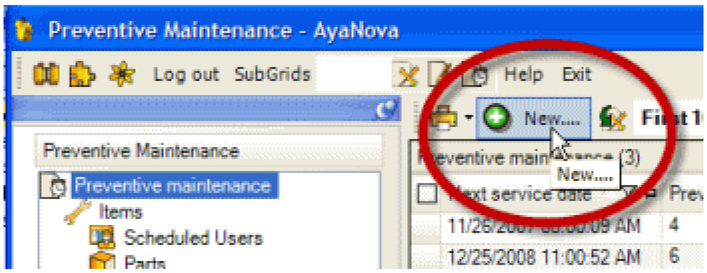
1. From any main grid, press the **Accelerator Key combination ALT-m** using your keyboard which will bring up the client and template selection window.



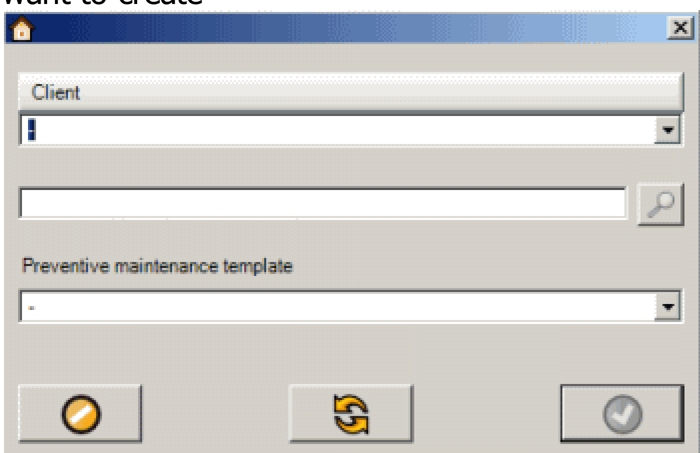
Select the client (and template if desired). Select  and a new PM entry screen for this client will open

See also for more details:
Accelerator Keys

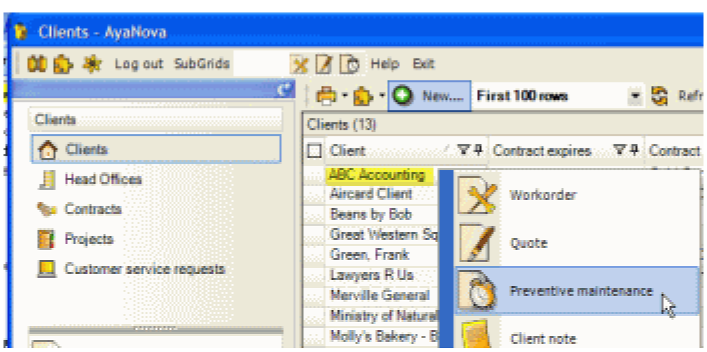
2. Viewing any of the Preventive Maintenance navigation pane grids (except for the Preventive Maintenance Templates grid), **select the New... button**.



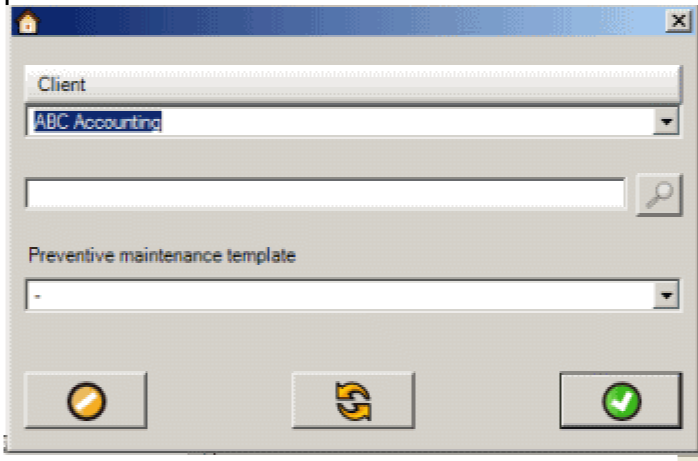
This will bring up the client and PM template selection window for the PM you want to create



3. **Right click on the client's name** in any grid and select Preventive Maintenance

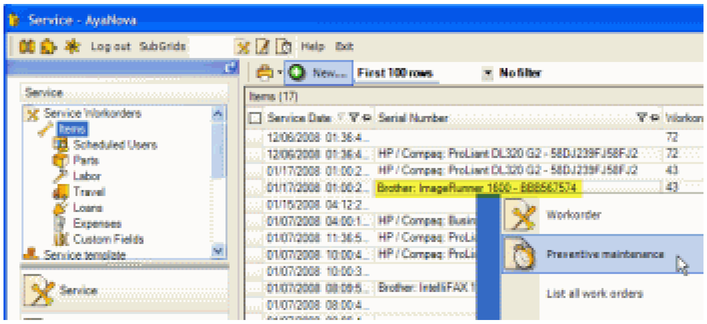


This will bring up the client and PM template selection window with the client pre-selected.

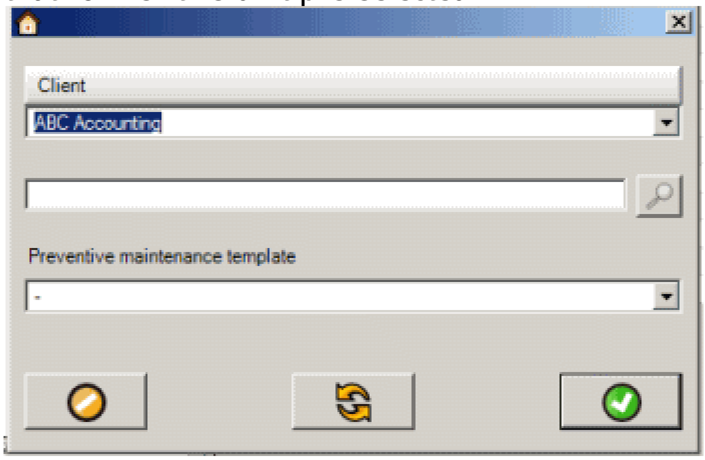


Select a PM template if desired and click on the  OK button and the PM entry screen will open.

4. **Right click on a unit's serial number** in any grid and select Preventive Maintenance



This will bring up the client and PM template selection window with the client that "owns" this unit pre-selected.



Select a PM template if desired and click on the  OK button and the PM entry screen will open.

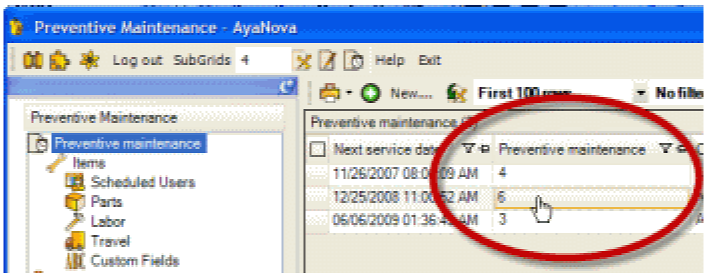
5.5.5 View an existing Preventive Maintenance order

An existing preventive maintenance order can be viewed and edited by opening that PM's entry screen and editing as needed

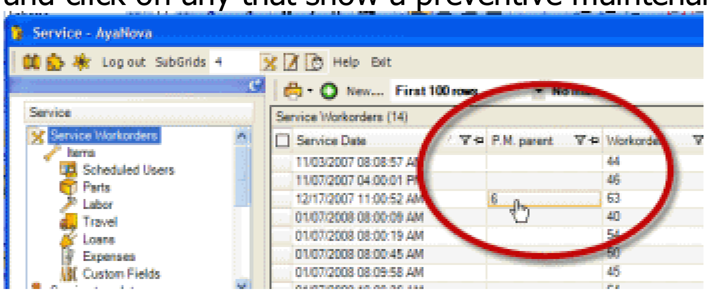
Open an existing preventive maintenance order in three different ways:

1. From any grid in AyaNova that shows a link to a preventive maintenance number.

   For example, in the Preventive Maintenance grid, use your mouse to click on a PM number

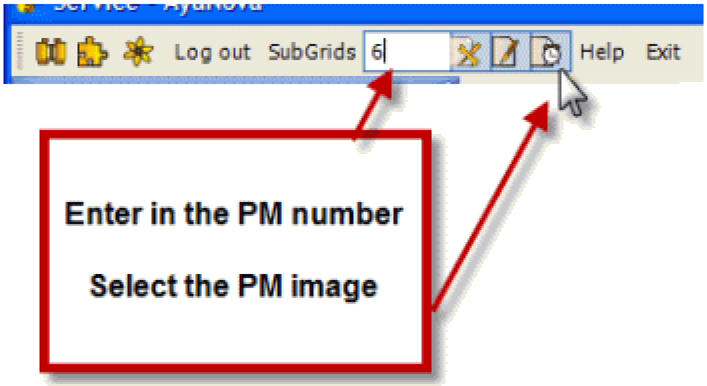


   Another example, in the Service Workorders grid, view the column P.M. Parent, and click on any that show a preventive maintenance number



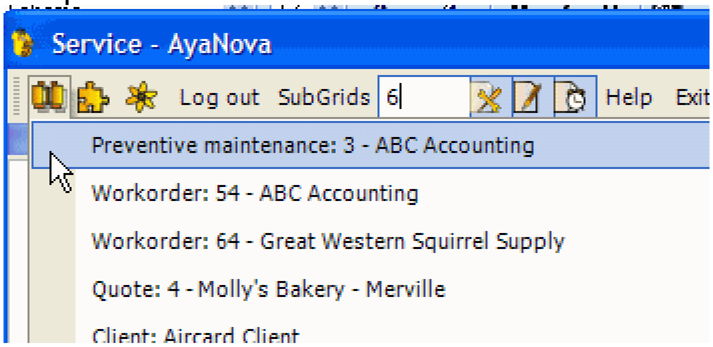
   See also:
   Adding, editing and deleting data for display in a main grid

2. From the Direct Open link on main toolbar



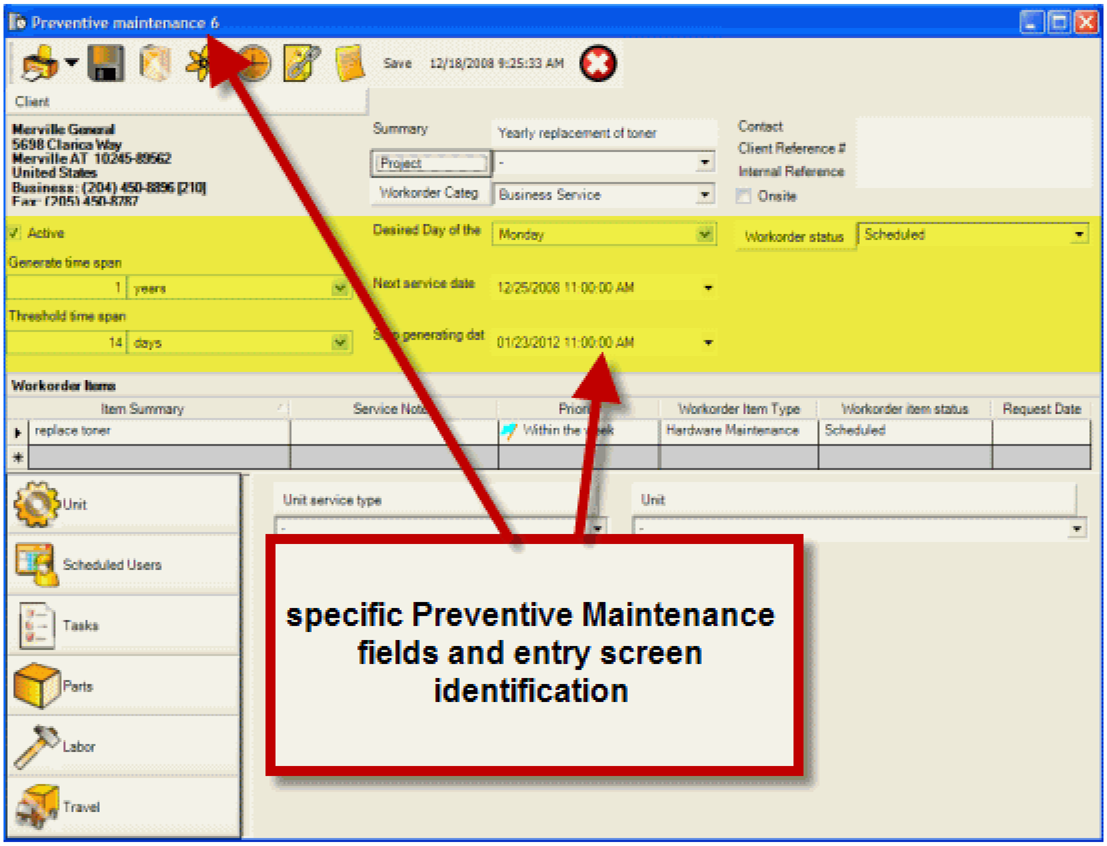
See also:
Main AyaNova Menu Bar

3. If you have just recently been editing the PM, then drop down the  Recent... menu option and select the PM from there



See also:
Main AyaNova Menu Bar

5.5.6 Preventive Maintenance entry screen fields



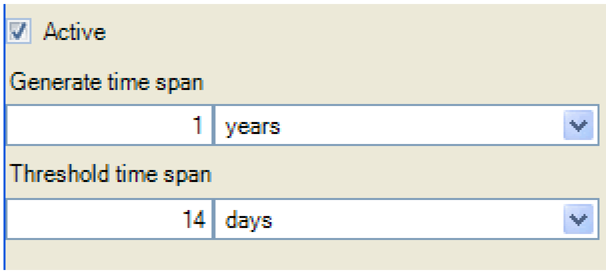
The preventive maintenance entry screen has the majority of the same fields as a service workorder so that the relevant data can be copied to a new service workorder automatically when the relevant date for conversion has been reached if generating automatically or when generating a service workorder from the PM manually.

Do refer to the AyaNova Help file section on the service workorder for details on aspects of the order entry screen other than the specifics related to Preventive Maintenance.

See also:
Service Workorder entry screen
Order entry screen security settings
Parts selected in a PM
How do I manually generate a service workorder from a Preventive Maintenance order?
How do I automatically generate a service workorder from a Preventive Maintenance order?

Also see the section on toggling off fields or their labels from displaying.

Fields of a Preventive Maintenance entry screen that are different from the Service Workorder:



Active - This is required to be check-marked if you wish the preventive maintenance to auto convert to a new service workorder.

Generate Time Span - This is a required field and is where you dictate how often the service date is repeated.

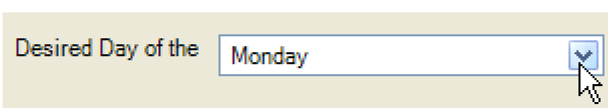
You can enter in any whole numerical amount, and have a selection of either by hours, by days, by months or by years.

For example, if you wished to have this preventive maintenance item repeated every month, you would enter in the number 1 and select months

Threshold Time Span - This is a required field and is where you dictate how far in advance of the service date you wish the workorder to be generated.

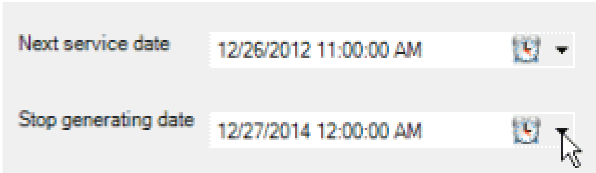
You can enter in any whole numerical amount, and have a selection of either by minutes, by hours, by days, by months or by years.

For example, if you wished to have this preventive maintenance create a new service workorder 7 days in advance of the Service Date, you would enter in the number 7 and select days.



Desired Day of the Week - This is not a required field. If you wish the next Service Date to fall on a specific day of the week, select that day of the week here.

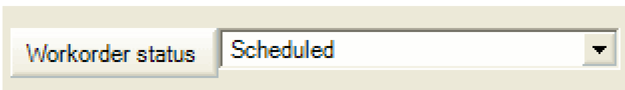
For example, if the preventive maintenance is set to generate every 1 months, and the initial service date is Monday December 12th, 2008, and you wish every subsequent service to fall on the first Monday on or after the 12th, the next Service Date would be Monday January 16th, 2008 if Monday was selected as the Desired Day of the Week as the 12th of January falls on a Thursday, and the next Monday is the 16th.



Next Service Date - <u>This is a required field</u> and indicates the date against which the other fields refer to.

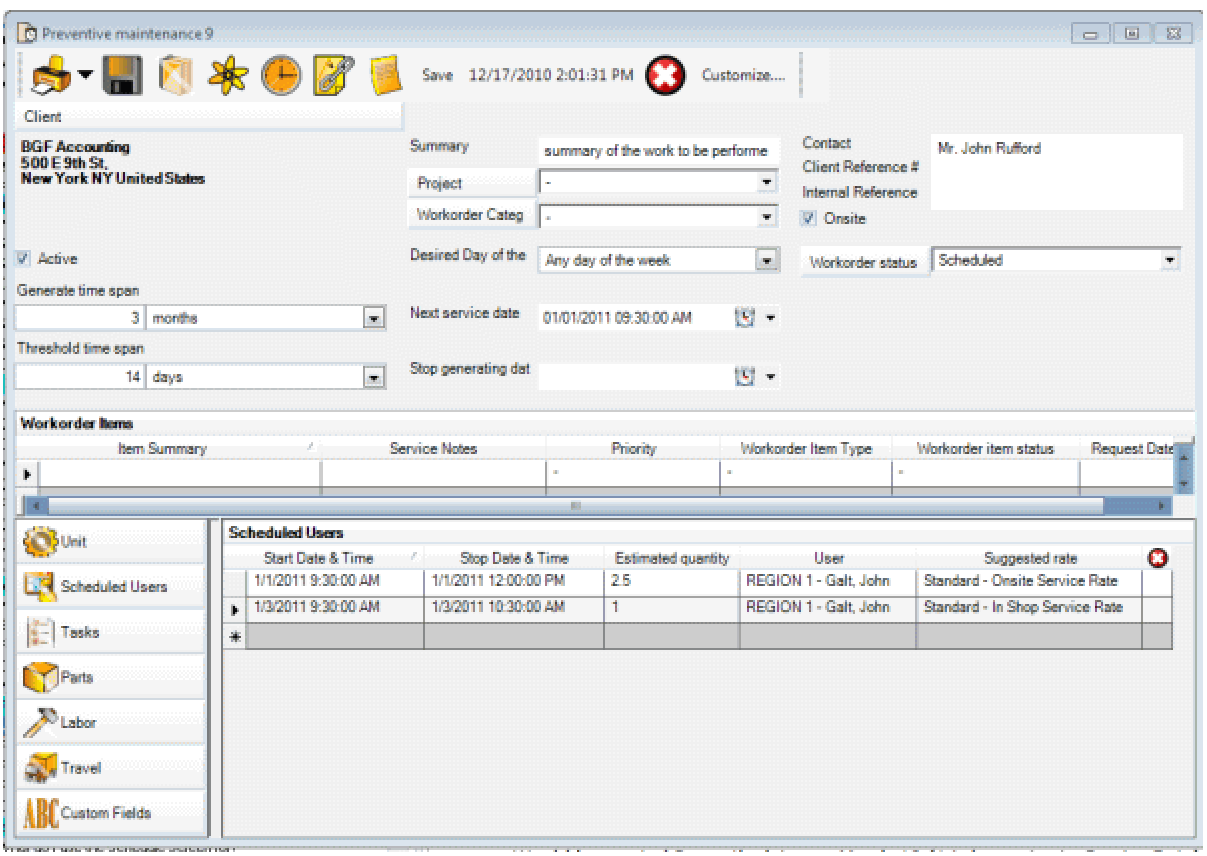
Stop Generating Date - This is not a required field. This field identifies the time when no further workorders would be generated past this date.

This is useful if you wish a preventive maintenance to only occur for a certain time span.



Workorder Status - This is not a required field. Select any Workorder Status you have created appropriate for the Service Workorder that will be generated. This is the status that the service workorder as a whole will be set to when it is created.

5.5.7 Next Service Date field importance

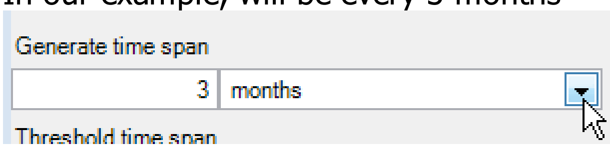


The importance of the Service Date field

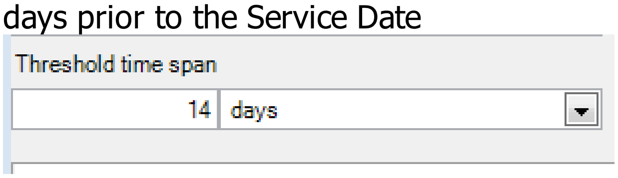
Lets say you want the following:

- a service workorder created 14 days prior to the first scheduled user's service start date and time,
- plus you would need to scheduled a follow-up call two days after the first scheduled start date on the same workorder item
- and you want this repeated every 3 months
- with the first scheduled service to be January 1

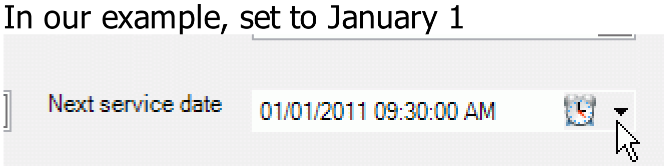
1. Set the re-occurrence in your PM by setting the **Generate Time Span**
In our example, will be every 3 months



2. Set the number of days prior to the service date to auto-create the workorder in the **Threshold Time Span**
In our example, we will enter 14 as we want the service workorder created 14 days prior to the Service Date

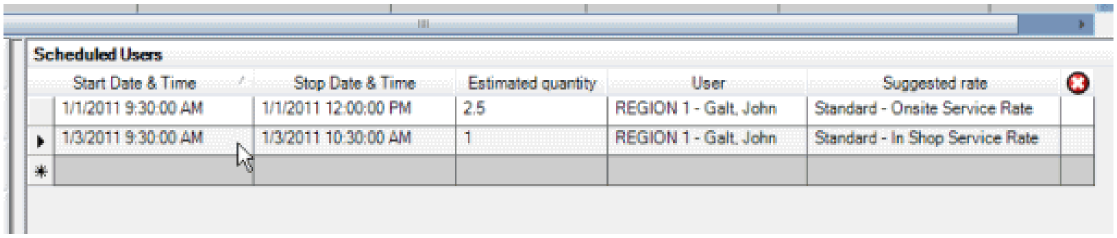


3. Set the first Service Date you want the service workorder to be in the **Next Service Date** field
You would usually set this as the first scheduled service start date or date relative to the Scheduled Users
In our example, set to January 1



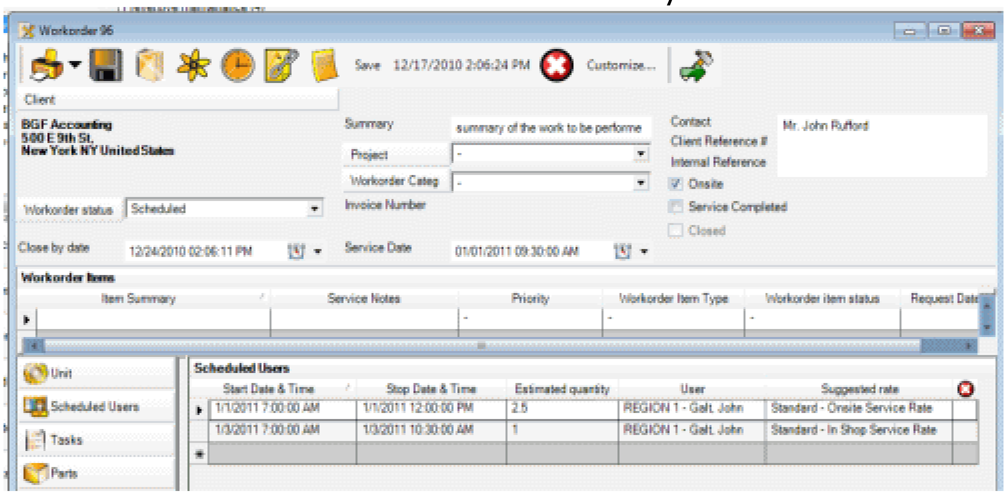
4. Enter in the Work Details and other fields in the workorder item.

5. Enter Scheduled Users
   - select the first scheduled user, select the first start date and time which would be January 1, select the first stop date and time
   - select the second scheduled user, select the second start date and time which would be January 3, 2008, select the second stop date and time - this would be that follow up call that is two days after the initial service.

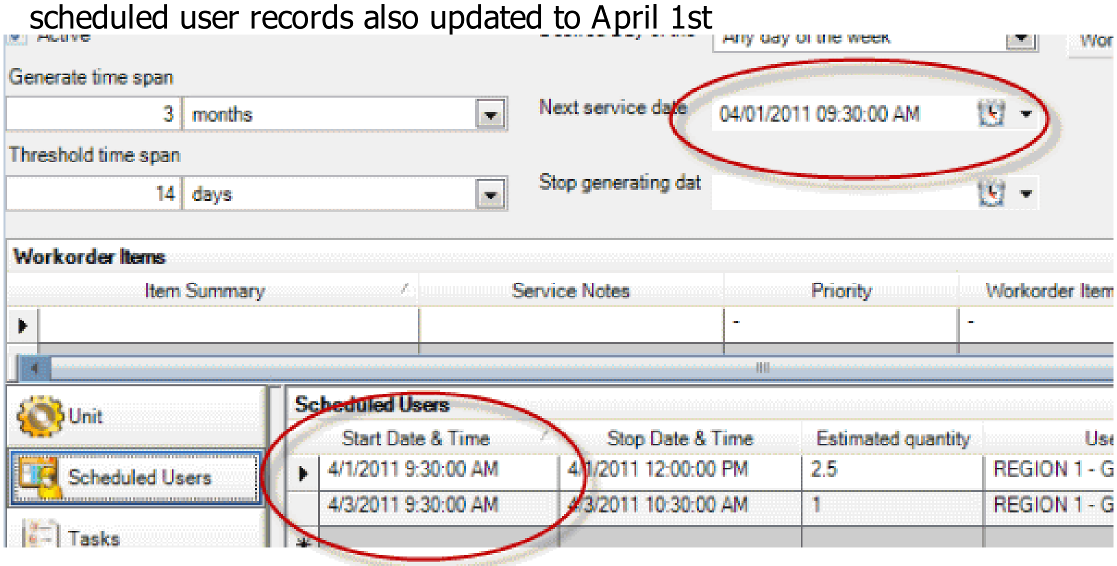


When the first auto-created service workorder is generated:

- The service workorder would be created on December 17 (14 days prior to Service date)
- There would be two scheduled user records - once for Jan 1
- On another scheduled user record for January 3



- AND the PM will be updated with the Next Service Date of April 1, with the scheduled user records also updated to April 1st



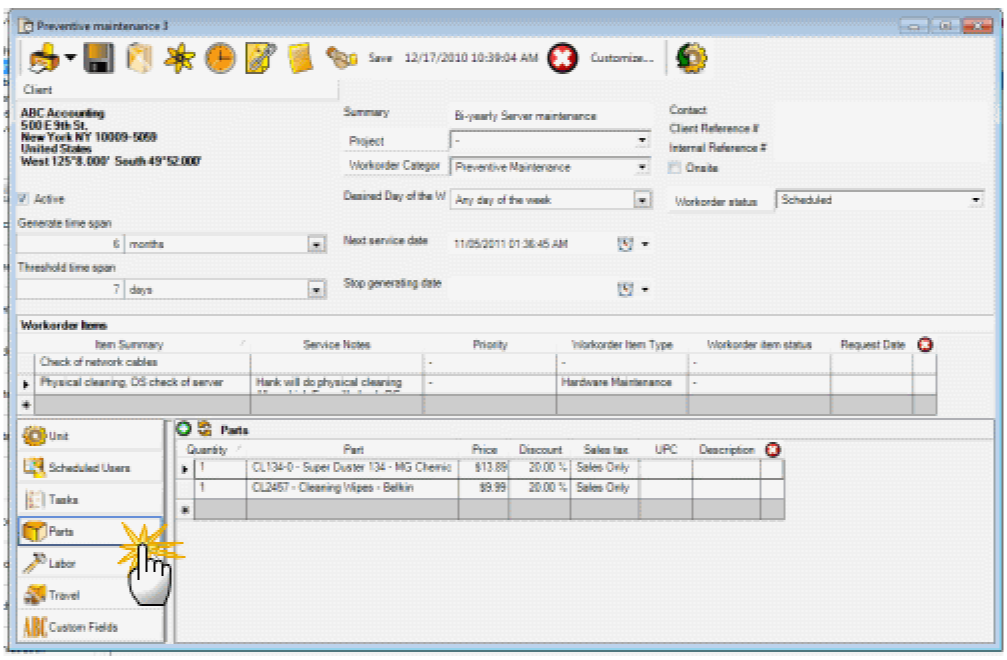
And than the next auto-created service workorder is generated:

- Would be created on March 18 (14 days prior to Service Date)
- The first scheduled user would be scheduled for April 1
- The second would be scheduled for April 3

And so on - with the PM's Next Service Date and its scheduled user records being updated every time a new workorder is generated.

As you see, the Scheduled start and stop dates are **relative to the Service Date selected – for example, if you selected a Service Date of July 1, 2011, and then created Scheduled users items with a start date of July 15, 2011 – when the workorders are created in the future, the scheduled start dates **will always be two weeks ahead** of the Service Date that changes every time another pm item is created.

5.5.8 Parts selected in a PM do note affect On Hand amounts



Parts entered in a preventive maintenance order **do not affect inventory**

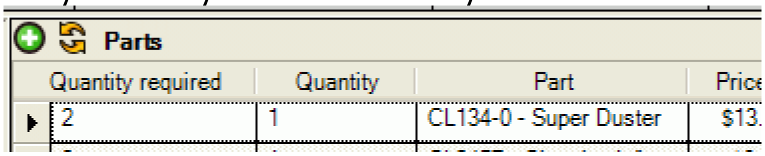
- When a preventive maintenance order is converted to a service workorder, the quantity of parts in a PM are not entered in the Quantity column within the Parts subgrid in a service workorder.

- Parts via a PM are entered in a column within the parts subgrid **Quantity Required** in a service workorder only as a reminder of the amount that should be used as per the preventive maintenance.

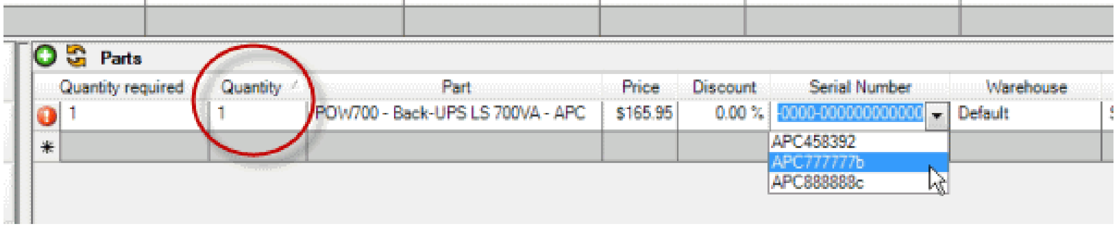
AyaNova can not pre-enter this quantity in a service workorder as user intervention may be required because:

- a part may or may not have a serial number
- the quantity may or may not be in stock

In the screenshot below, this service workorder was created by a preventive maintenance. The Quantity Required is indicated in the Parts sub-screen, but the Quantity has not yet been entered by the user.



And to maintain history of Quantity Required, when you enter in the Quantity of 1 for a serialized part in a generated workorder, you can select the serial number



5.5.9 PM order entry screen security

The following is the structure of a PM entry screen's rights

Object.WorkorderPreventiveMaintenance = parent
 Object.WorkorderItem = child
  Object.WorkorderItemUnit =grandchild
  Object.WorkorderItemScheduledUser = grandchild
  Object.WorkorderItemTasks = grandchild
  Object.WorkorderItemLabor = grandchild
  Object.WorkorderItemParts = grandchild
  Object.WorkorderItemTravel = grandchild
  Object.WorkorderItemOutsideService = grandchild
  Object.WorkorderItemMiscExpenses = grandchild
  Object.WorkorderItemLoan = grandchild
  Object.WorkorderItemCustom = grandchild

- **Note** that all objects under the parent apply to all three: service workorders, quotes **and** PM's entry screens.

For example, the Scheduled Users subsection will NOT show in **any** service workorder entry screen, quote entry screen **or** PM entry screen for users of that security group **if** you set Object.WorkorderItemScheduledUser to Forbidden in that security group.

This is because what you set for Object.WorkorderItemScheduledUser is applied to all three - service workorders, quotes and PM's.

- Note how the WorkorderItem is a "child" of the Workorder; and the WorkorderItemLabor is a child of the WorkorderItem and a "grandchild" of the Workorder
- If the object is a “child” of another object, the “child” will only ever have at maximum the rights of the “parent”
- Only access rights set for a “child” less or equal to the rights of the “parent” will take effect
- Access rights set for a “child” that are greater than the rights of the “parent” will not take effect.

- A "grandchild" will only be given the maximum rights set of the "child" regardless what you set in the security group. And the "child" will only be given the maximum rights set of the "parent" regardless what you set in the security group.

Example 1:
If you have set Read Only access to the PM root object (Object.WorkorderPreventiveMaintenance) for a security group, even if you set Read/Write access to any of the child objects – Read / Write access will be ignored as the Quote root object access right takes precedence. Users of the security group where you set this will only be able to view a quote and its items and subsections (labor, parts, etc) but not edit.

Example 2:
If you want users of the security group to be able to view and edit all aspects of the PM except only view the Scheduled Users subsection, you would set all the related objects to Read/Write, but set Object.WorkorderItemScheduledUser to Read Only

Example 3:
If you want users of a specific security group to not even see the Tasks subsection in a PM, you would set all the workorder related objects to Read/Write but set Object.WorkorderItemTask to Forbidden.

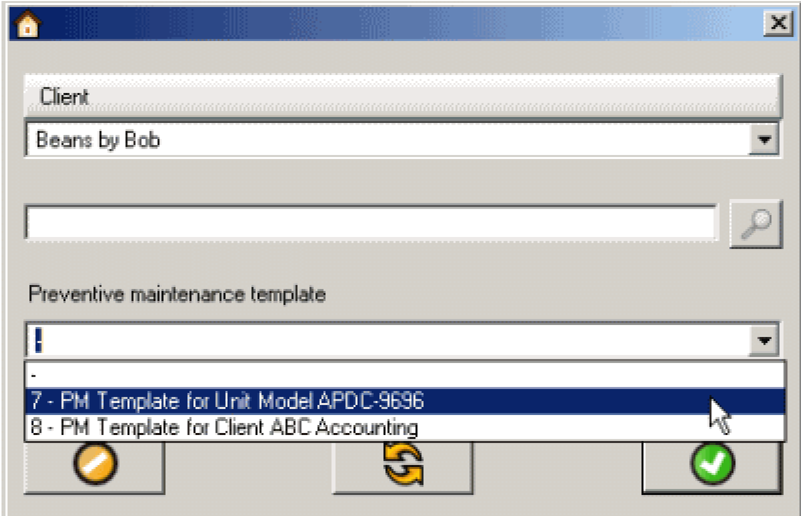
Object Name in Security Group screen	What this object refers to	What to set to give users of this security group minimum ability to edit and create a service workorder
Object.WorkorderPreventiveMaintenance	PM entry screen **NOTE: access given to this affects all Object.WorkorderItem type objects**	Read/Write
Object.WorkorderItem	Workorder item section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemUnit	Unit section of a service workorder, quote or PM	Read/Write
Object.WorkorderItemLabor	Labor section of a service workorder, quote and preventive maintenance	Read/Write
		Read/Write
Object.WorkorderItemPart	Parts section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemScheduledUser	Scheduled Users section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemTask	Tasks section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemTravel	Travel section of a service workorder, quote and preventive maintenance	Read/Write
The Objects listed below must be set to **minimum Read-Only** for the users of the Security Group to be able to view in a PM		
Object.Client	To be able to select a client	

Object.Contract	To be able to select a client with a contract	
Object.ContractRate	To be able to select a client with a contract	
Object.Task	To be able to select the Task jump button	
Object.TaskGroup	To be able to select the Task jump button	
Object.TaskGroupTask	To be able to select the Task jump button	
Object.Unit	To be able to select a unit	
Object.UnitModel	To be able to select a unit	
Object.Priority	To be able to view the Priorities subgrid	
Object.Project	To be able to view the Project jump button	
Object.Report	To be able to print	
Object.WorkorderCategory	To be able to view via the Workorder Category subgrid	
Object.WorkorderStatus	To be able to view the Workorder Statuses subgrid	
Object.WorkorderItemType	To be able to view the Workorder Item Types subgrid	
Object.ScheduleMarker	To be able to view Follow Ups	
Object.ServiceBank	To be able to view client's banked service	
Object.UnitMeterReading	To be able to view unit's meter reading	
Object.Part	To be able to create a new part from within a workorder	

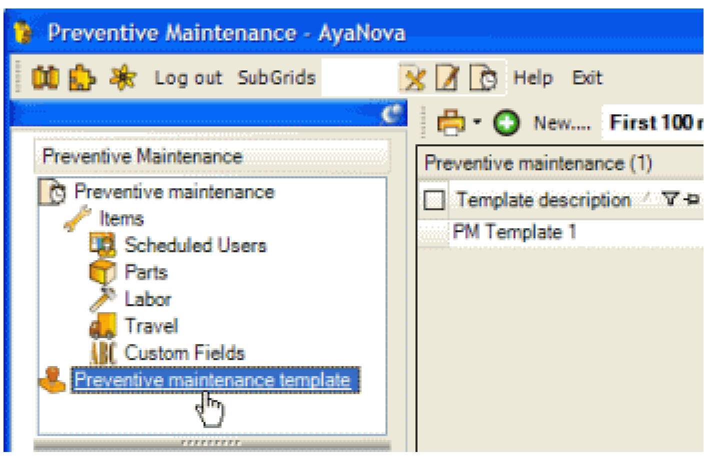
5.5.10 Preventive Maintenance Templates

Preventive maintenance templates allow you to pre-enter or pre-select common information for a new preventive maintenance entry screen. Preventive maintenance templates are a great time saver.

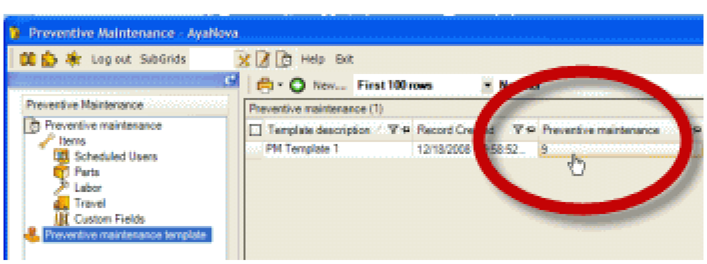
Then when you create a new Preventive Maintenance order, you can easily just select the template with its pre-entered information from the list of templates to save you entry time.



View, edit and create preventive maintenance templates via the Preventive Maintenance Templates grid via the Preventive Maintenance navigation pane

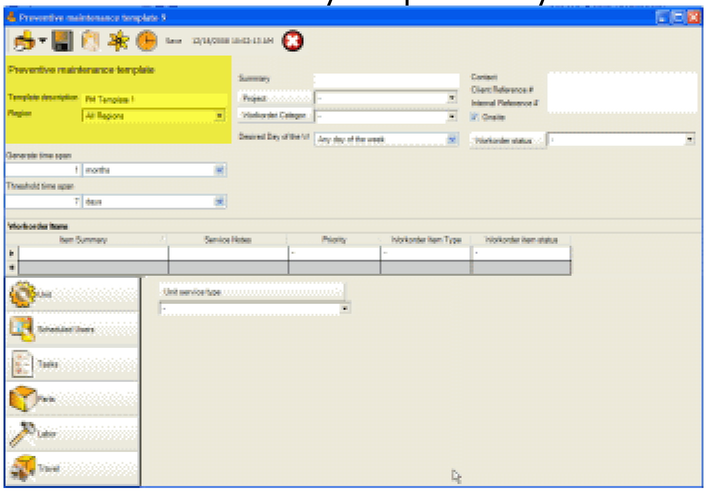


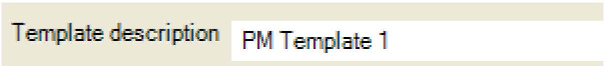
You can edit or view the details on an existing Preventive maintenance template by clicking its number under the Preventive maintenance column **or** by selecting its Template Description



Create a new Preventive maintenance template by selecting the  New... menu option.

You can create as many templates as you want

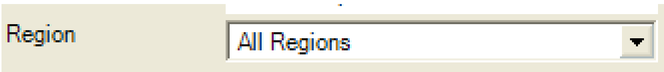




- Enter a template description to make it easy for you to differentiate it from other templates so that you can select the right template for a preventive maintenance. If you create specific templates for different work to be performed, suggestion is to name it with that type of work i.e. Onsite Network Service PM Template etc.

- Enter and select those details that you want this template to enter in any new quote created from it - such as the Generator Time Span, Workorder Category, etc.

- You will note that client does not show, nor does unit, nor does any date related fields - because a template could be for any client, any unit or any date in the future.



- If you want all users of all regions to be able to access and select this quote, select the All Regions. If you want only users of a specific region (or those set to All Regions) to be able to select this quote, select that specific region.

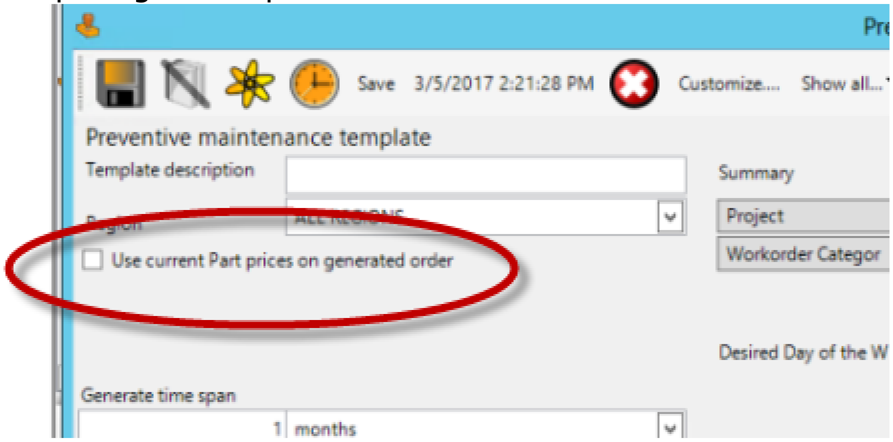
Also see: [Regions]

- Preventive Maintenance Template Number is automatically +1 of the last quote.

- If select a rate that a client is not capable of having (prevented by contract, or template has a contract rate selected), the record is not transferred to the PM. i.e. a non-contract rate is selected in the PM template for Scheduled Users. Create a new PM using this template for a contracted client that is restricted to a specific rate, will see that the Scheduled User record is not made in new PM at all

- Selecting Parts in a PM template:
  - Selecting a part in a PM template does not affect inventory.
  - Inventory is only affected when parts are used in a service workorder

- Part pricing via templates:



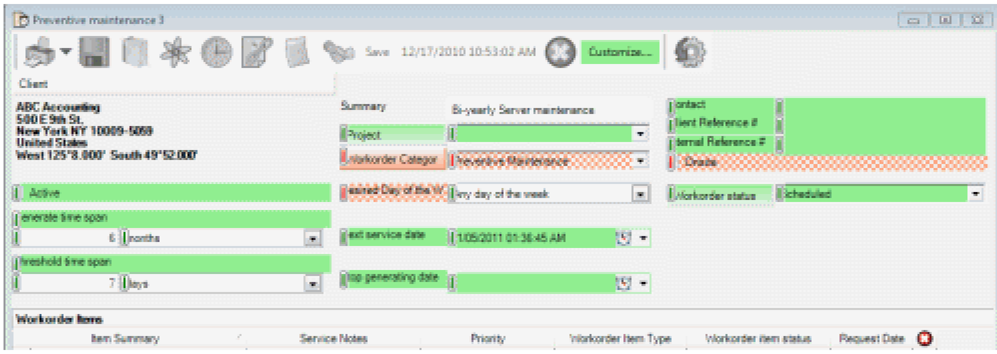
  - When "Use current Part prices on generated order" is unchecked: The part price that will be used with the generated PM will be the price stated on this template.
  - When "Use current Part prices on generated order" is checkmarked: The part price that will be used with the generated PM will be the Retail price stated in the Part record itself
    - this is very useful that when your part prices change, your templates will use the latest price regardless what is stated in the template.

5.5.11 Customize what fields display in PM entry screen

You can remove fields from showing in the Preventive Maintenance header portion if not needed.

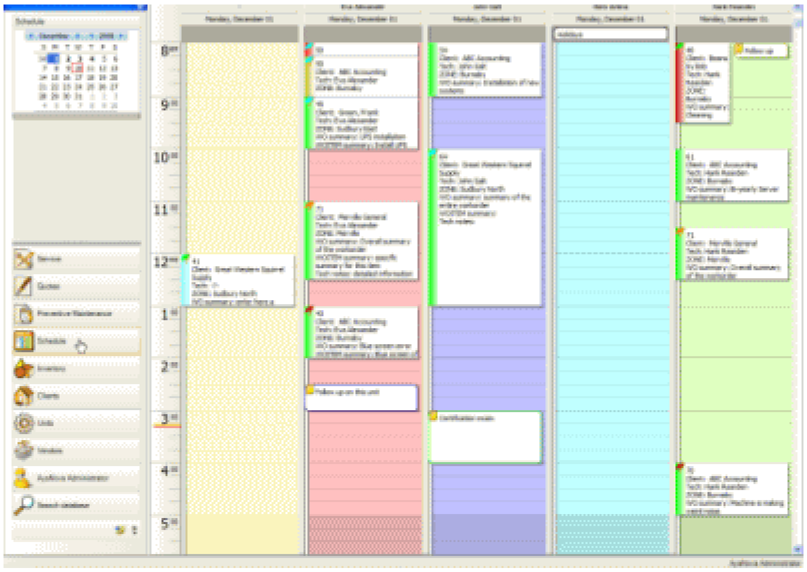
Just log in as the AyaNova Administrator, open up any PM entry screen, select the menu option **Customize...**, and toggle those fields and field labels to not show!

See the section Display / non-display of fields in the order entry screen for an example of disabling fields from showing in the service workorder entry screen.


Preventive maintenance 3
Save
12/17/2010 10:53:02 AM
Customize...
Client
ABC Accounting
500 E 9th St.
New York NY 10009-5059
United States
Summary
Bi-yearly Server maintenance
Project
Active
Workorder Items
Item Summary
Service Notes
Priority
Request Date

5.6 Schedule screen

5.6.1 What do I use the Schedule Screen for?



The Schedule screen is the calendar and scheduling component of AyaNova.

With the Schedule screen you can:

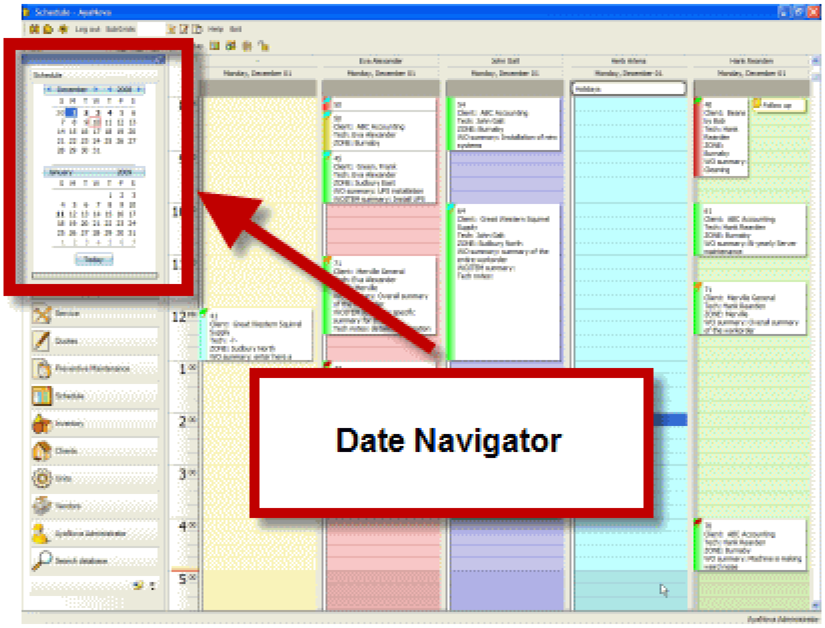
- Visually manage scheduled workorder items within a time period.
- Use your mouse to drag and move a scheduled workorder item to another time period or even another schedulable user
- Add to existing workorder items from the Schedule screen
- View schedule for single scheduled user or for multiple scheduled users
- Quickly create new work orders directly from the Schedule screen.
- View any time range such as day, week, work week or monthly by selecting in the Date Navigator
- Create and view Schedule Markers
- Create Scheduled Users Groups
- Print out dispatch orders for scheduled users
- Print graphical views of the Schedule screen for one or more schedulable users.
- View a day in horizontal view time line

The Schedule screen displays workorder items assigned to schedulable users. As a service work order can have multiple workorder items, and each workorder item can have multiple scheduled users, although the display will state the overall workorder number, it is in relation to a particular workorder item **within** that service workorder.

The Schedule Screen is a great tool for dispatchers to determine who is already scheduled and schedule accordingly, and for schedulable users to view their schedules.

Security Group internal object: Object.ScheduleForm
Forbidden : User of that security group can not view the Schedule screen at all *Read Only or Read/Write or Read/Write/Delete* : User can view the Schedule screen. Ability to create schedule markers and workorder items, and edit existing depends on the security group setting for those objects.

5.6.2 Schedule Screen Date Navigator



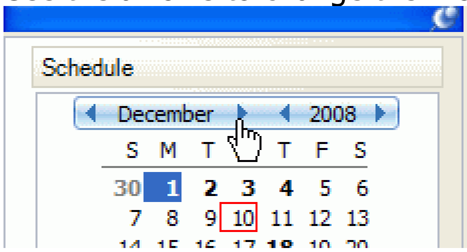
The Schedule screen date navigator is the mini calendar on the left in the Schedule screen that lets you quickly navigate to a date in the large calendar on the right. When you click a number in the date navigator, that date is displayed in the main Schedule calendar screen on the right.

The date navigator can also help orient you as to which days of the month you're viewing, the current day, and which days currently have workorder items and schedule markers.

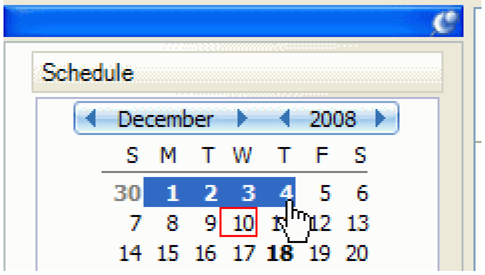
Dates are **bolded** for that month if there are one or more scheduled items on that day for any user being viewed.

Some tips on use:

Use the arrows to change the month and/or the year

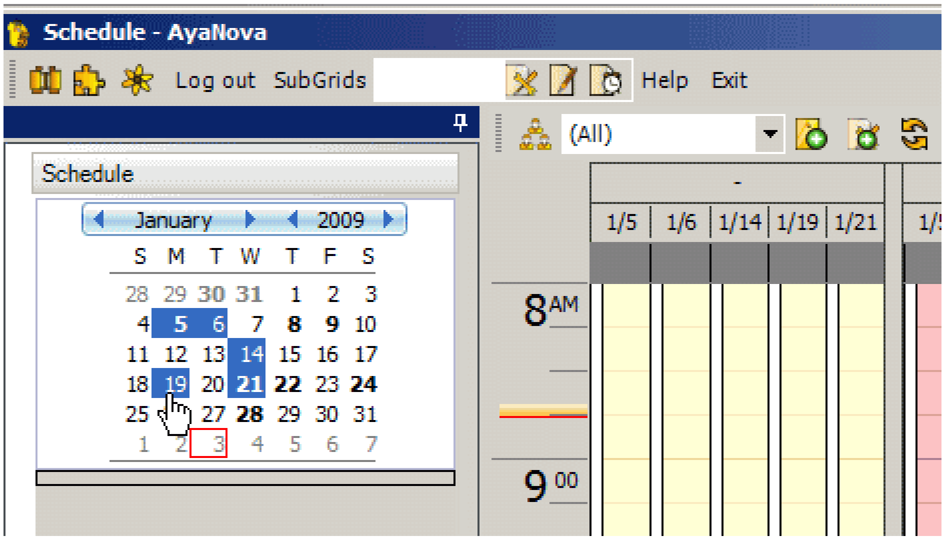


Use your mouse to select adjacent days or weeks or a whole month by clicking and dragging your mouse over the dates you want to display.

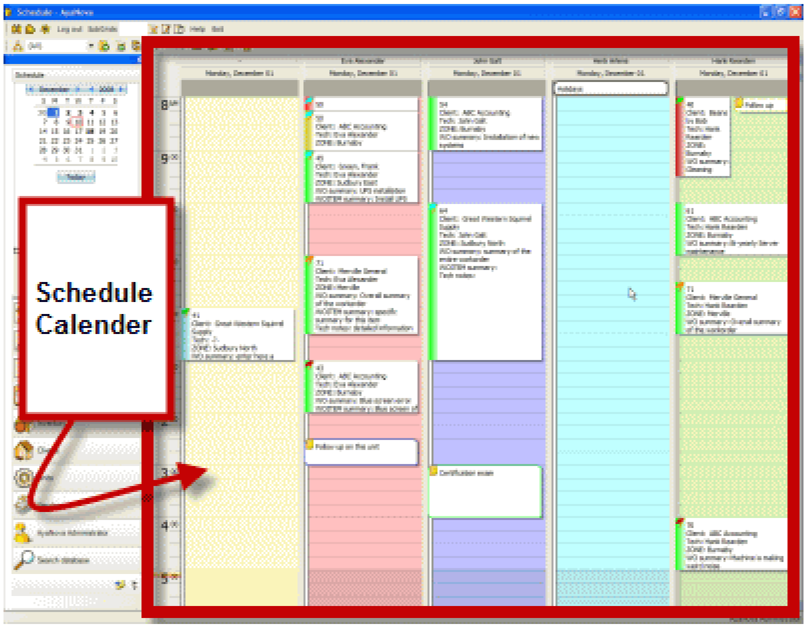


When you select a time span the scheduled items calendar to the right will **automatically** adjust to encompass the span selected by changing it's view type as appropriate. For example if you click and drag to encompass a week you will get a 7 day view, if you click a single day you will get a day view, if you click and drag to select a whole month you will get a month oriented view.

Use your mouse and **CTRL** key to display nonadjacent days - click on the first date, now hold the CTRL key on your keyboard and click on other dates. For example suppose you need to reschedule an appointment and you need to compare days with nonadjacent dates for a scheduled user. Or, maybe you want to schedule something on a Tuesday, but you want to find a Tuesday in a week that's not so busy.



5.6.3 Schedule Calendar

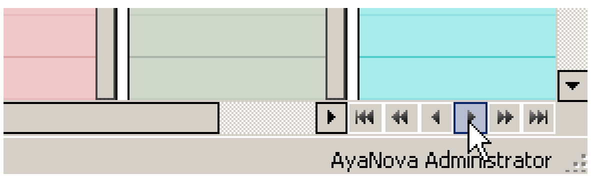


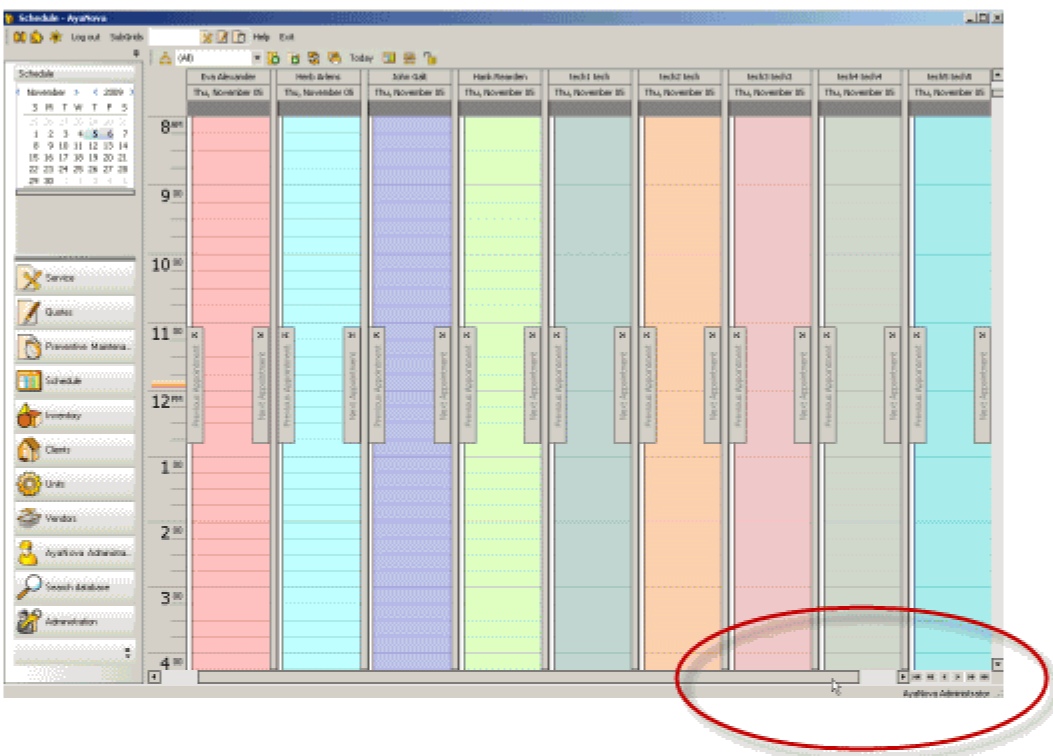
This is the main calendar in the Schedule screen from which you can view information.

- The Schedule screen can display two different items for schedulable users - [Schedule Markers](), [Follow Ups]() and [scheduled Workorder Items]()
- You can place your mouse over the item on the Schedule calendar to [pop up a tip window providing more information on the scheduled workorder item]().
- You can edit what displays and does not display in this popup window by editing the [Workorder Item Summary Template tag settings in the Administration Global Settings]().

- Schedulable users are displayed by default in alphabetical order by their Last Name. Whether the name includes their first name, last name, initials and/or region depends on what you have set for the User Display Format in your [Global Settings]
- When viewing (All) users or a Schedulable User Group, the special unassigned column is always the first column showing where items would be if not assigned to a specific user (i.e. a time and date is set, but not the user).
- The back color for each schedulable user is set in that user's [User entry screen] "Schedule Back Color" field

If you are have active 9 or more schedulable users, and are viewing them all in the Schedule screen, you will note that the scroll bar at the bottom of the calendar becomes active - so that the width of each schedulable users column on the calendar is still viewable.





5.6.4 View saved on exit

When you exit out of AyaNova, the following you were viewing in the Schedule screen will be saved for your AyaNova username.

Day(s) viewing - If the user is viewing a single day and that day is today then it will open next time to whatever day is current when it's opened.

On the other hand if a user is viewing more than one day or a day other than today then it will open next time on that same date window.

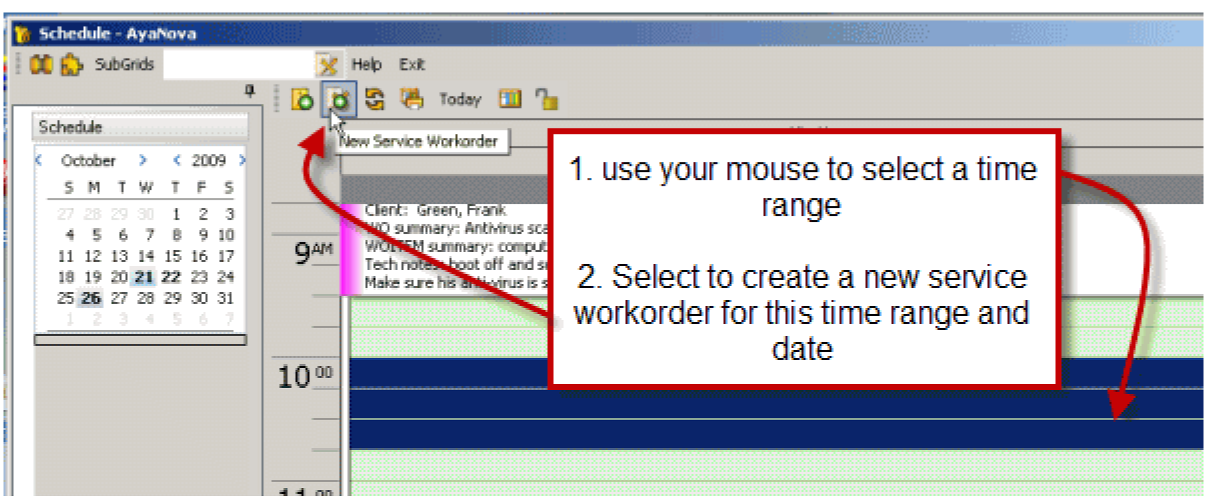
If viewing random dates (dates not consecutive) by having used the CTRL key and mouse to select, the saved view will be the entire range from earliest to the latest random date.

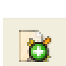
Time Line or Regular view - If you were viewing the Schedule screen using the TimeLine menu option when you exited out of AyaNova, the Time Line will be displaying for the day you were previously viewing.

Schedulable User Group selected - the Schedulable User Group last selected on exit will be the Schedulable User Group showing when you next log in.

Do note this is one reason why it is recommended that each person logging into AyaNova have their own AyaNova username, so that only your settings are saved on exit and not overwritten by another that is logged in as the same username.

5.6.5 Menu - New Service Workorder

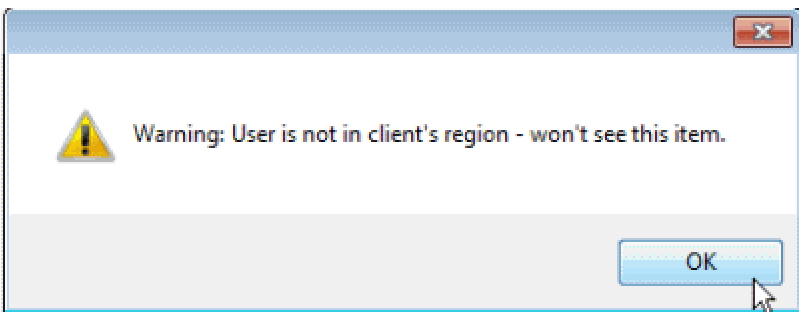


 New Service Workorder

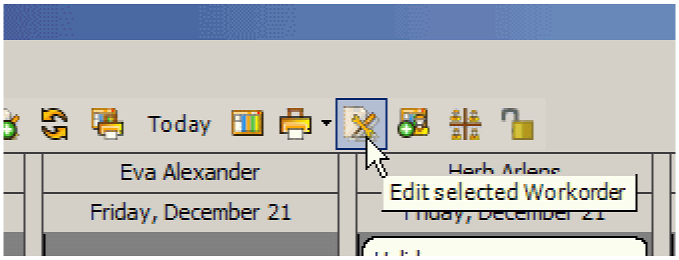
Select a time range for a specific schedulable user, and select this menu option to create a Scheduled users record in the workorder item for the specific user for that specific date and time range.

NOTE: If you do not select a specific schedulable user from the calendar (for example, you were in a month view for all users or for a group of users), the Scheduled User in the new workorder item will default to the last selected scheduled user.

If the schedulable user selected is a member of a different region than the client, a warning message will pop letting you know that user when logged in won't be able to see the service workorder because this client is a member of a different region. Also review the Regions section of this Help docs



5.6.6 Menu - Edit selected workorder item



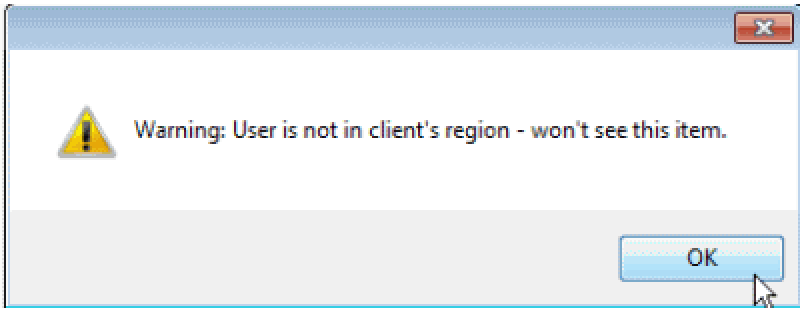
 **Edit selected workorder item**

Selecting this Schedule screen menu option will open the last selected workorder item.

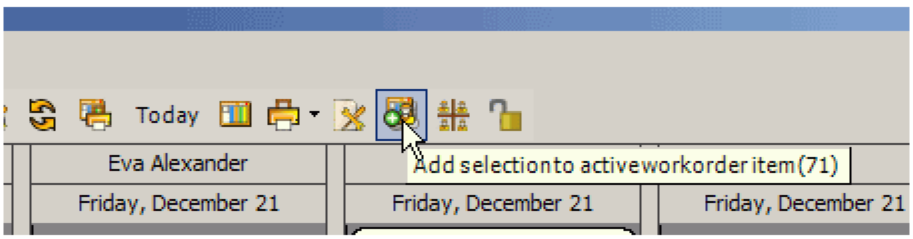
Alternatively, you can double-click on the workorder item in the screen to open it.

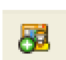
NOTE: This menu option will **not** appear unless an existing Workorder Item for a schedulable user is selected on the screen

If the schedulable user selected is a member of a different region than the client, a warning message will pop letting you know that user when logged in won't be able to see the service workorder because this client is a member of a different region. Also review the Regions section of this Help docs



5.6.7 Menu - Add selection to active workorder item



 **Add selection to active workorder item (XX)**

Selecting this menu option in the Schedule screen toolbar will cause the just prior selection to be associated with the active workorder item.

This is useful if you are scheduling multiple schedulable users to the same workorder item.

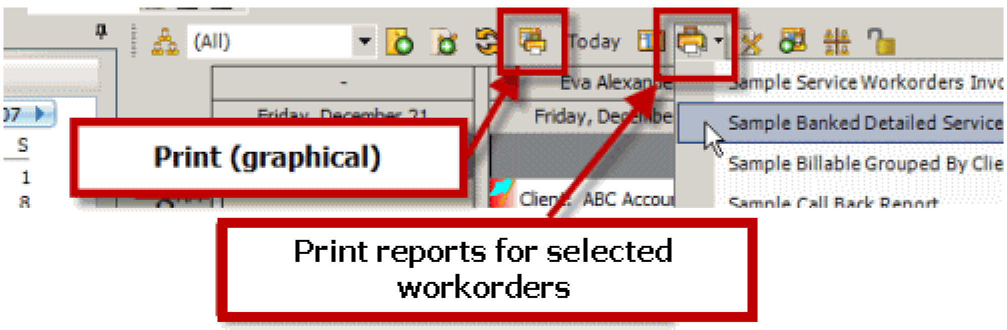
For example:
- a workorder item was previously clicked on in the Schedule screen
- now you select a new date range for a different schedulable user
- then you select the Add Selection to Active Workorder Item (xx) menu option (*where xx is the workorder number of the previously selected workorder*)
- this would schedule that different schedulable user to that same workorder item

NOTE:
- This menu option will **only** show if you have **already** clicked on a workorder item in the Schedule screen.

- If you have not selected a time range, and you click on this menu option, AyaNova will assume you wish to duplicate the same time frame for the same user for the same workorder item.
- If have selected multiple workorder items (using CTRL key and mouse as done when printing multiple workorder items from the Schedule screen), this menu option **only** adds the selection to the last selected workorder item.

5.6.8 Menu - Printing from Schedule

The Schedule screen has **two** printing options:



 **Print**

Select this menu option to print out a graphical view of the Schedule screen. It will first bring up the Page Setup window where you select the Style (day, week, etc), Start Date and End Date, the time range, and if a specific resource.

See also:
[Graphical printout from the Schedule Screen](#)
[How do I print out a graphical day view of the Schedule?](#)

 **Print selected workorders**

Select this menu option to display a list of the Service Workorder report templates.
Select workorder item(s) then the Print Workorder menu option, and it will list same report templates as those selectable from Print in the Service Workorders grid and entry screen.

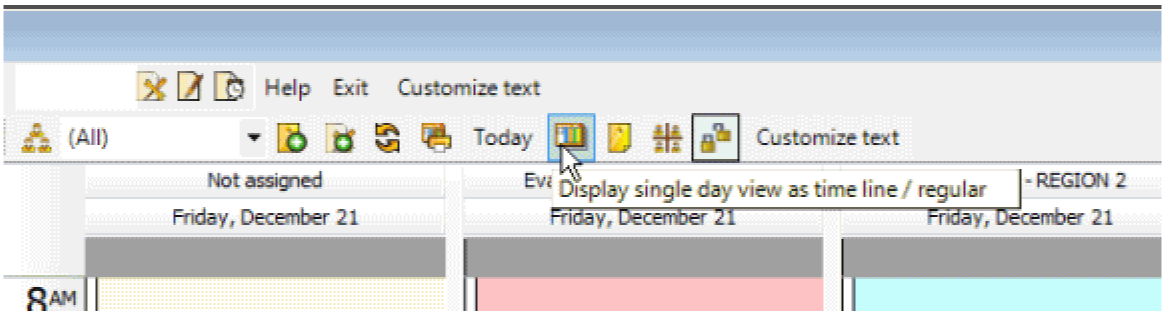
This makes it even easier for the tech to view their schedule, select the workorder items they need, and print them out to go perform the service.

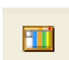
NOTE: this menu option only displays if you have selected one or more workorder items in the Schedule screen.

To select a specific workorder item, use your mouse to click on it. To select multiple workorder items, select the first workorder item and then hold the CTRL key down while you use your mouse to select the others.

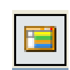
See also:
[Printing reports from the Schedule Screen](#)
[How do I print out dispatches for myself from the Schedule screen?](#)

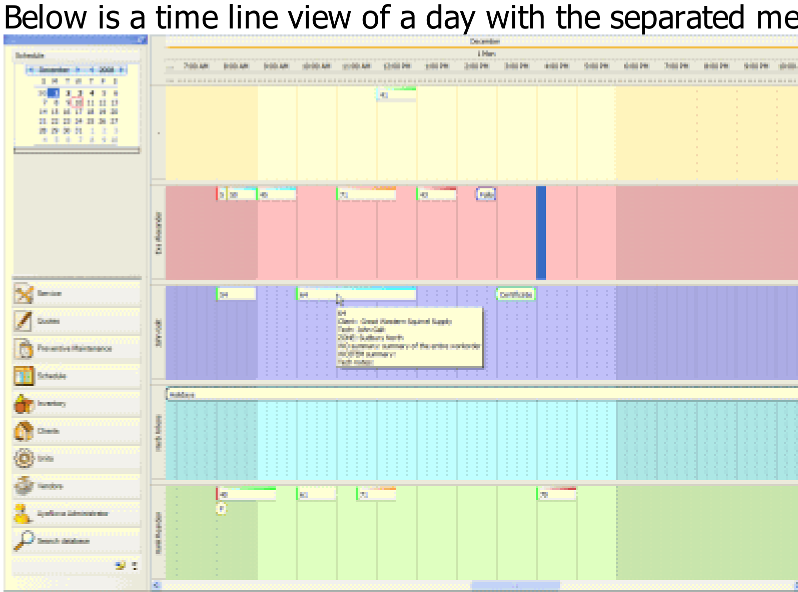
5.6.9 Menu - Display single day view as time line / regular



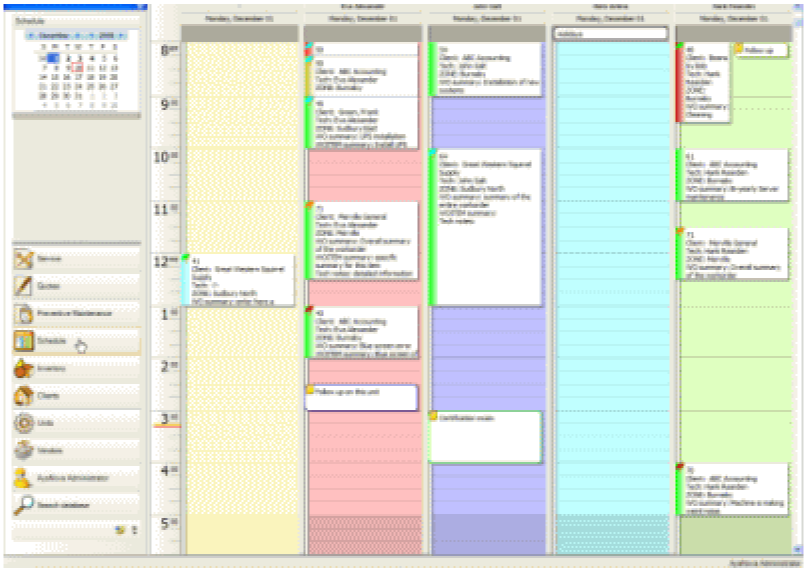
 **Display single day view as time line / regular**

This menu option in the Schedule screen allows you to set display items in a single day view the common style layout (vertical), or display in a time line (horizontal)

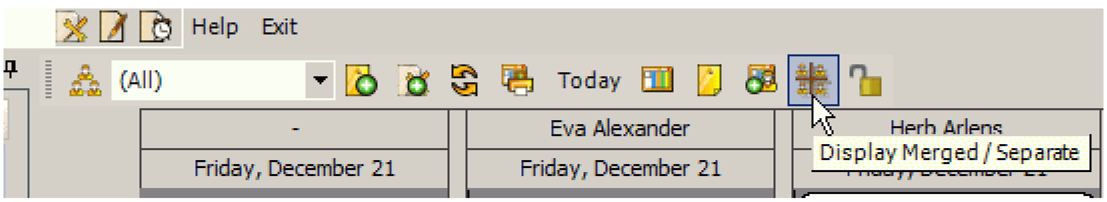
Below is a time line view of a day with the separated menu option 



Below is a common view of a day with the separated menu option 



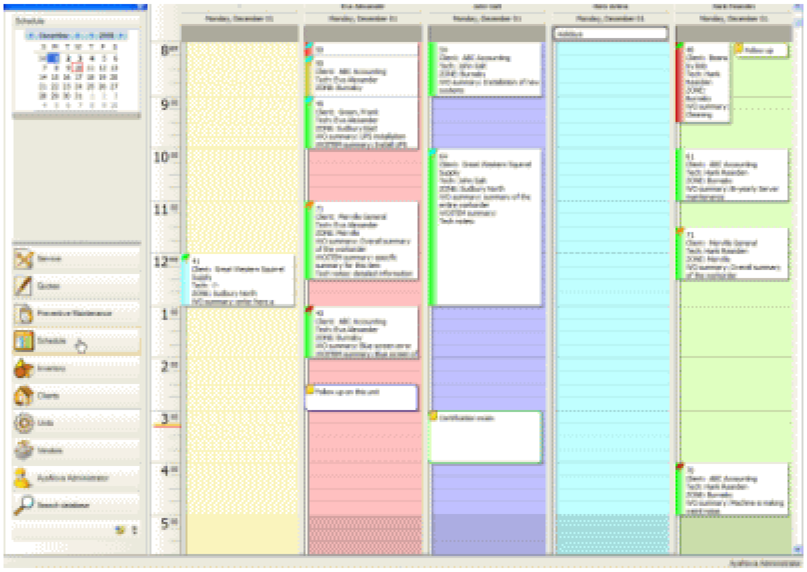
5.6.10 Menu - Display Merged / Separate

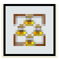


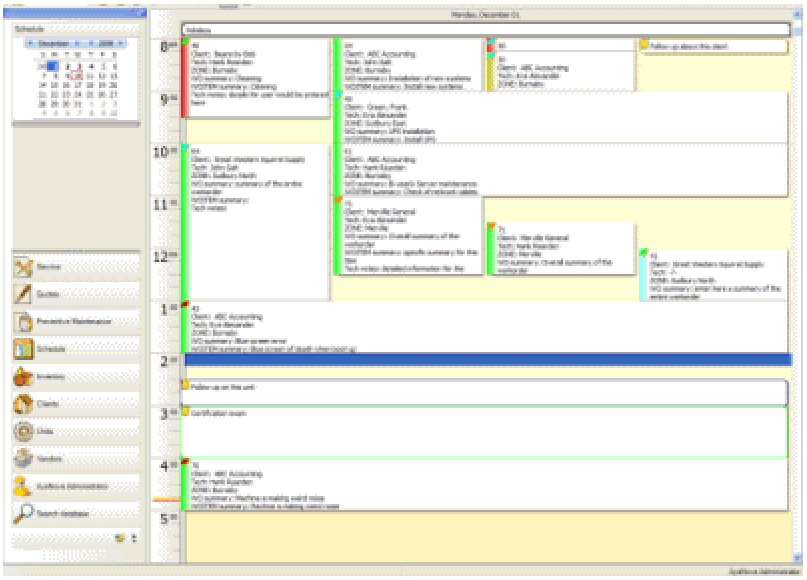
Display Merged/Separate

This menu option in the Schedule screen allows you to set display items in a merged Schedule screen view, or in a separated screen view (each user separate from the other).

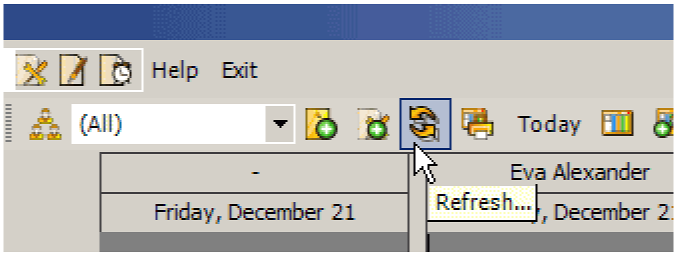
Below is a Separate view  - where each schedulable user of the selected Schedulable User Group is separated from the other. For example, in the screenshot below, there are four schedulable users plus the Unassigned column for the date selected.



Below is a Merged view  - where the workorder items of all schedulable users' of the Schedulable User Group selected show together. For example, in the screenshot below, all workorder items for all four techs plus unassigned show all merged for the day.



5.6.11 Menu - Refresh



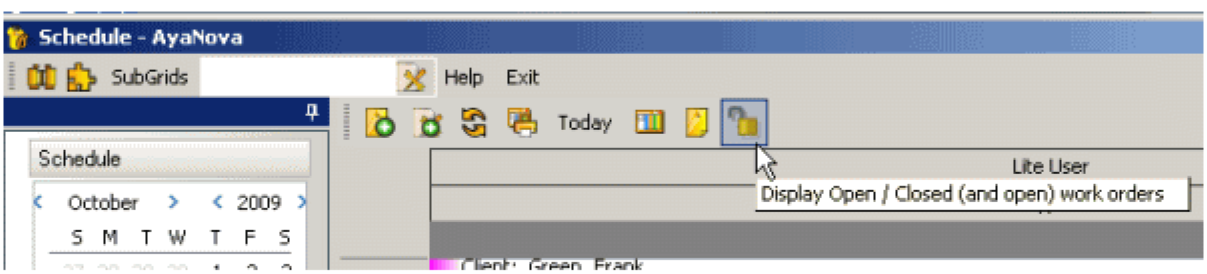
 Refresh...

This is to refresh the Schedule screen immediately in the event other networked AyaNova users have entered new information since the last time automatically refreshed (schedule refreshes automatically approximately every 5 minutes)

NOTE: You can be notified of new service workorder items that are scheduled for you by subscribing to that notification. You can be notified by AyaNova Pop-up, AyaNova Memo, external email or external SMS (pager)

See also:
Notifications

5.6.12 Menu - Show Open and Closed or Open Only



Display Open / Closed (and open) work orders

The Schedule screen will display only open workorders, or open and Closed workorders depending on what was last viewed on exit.

For example, if you click on the menu option so that it shows  as this means you are viewing only workorders that have not been checkmarked Closed.

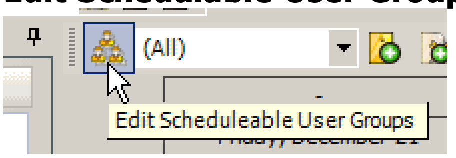
And when you exit out of AyaNova, it will remember that you were last viewing only open workorders, and will again display only open workorders.

 When this menu option is showing, both Open and Closed workorder items will show on the Schedule screen

 When this menu option is showing, only Open workorder items will show on the Schedule screen. By default, only the Open workorder items will show.

5.6.13 Menu - Scheduleable User Groups

Edit Schedulable User Groups



This menu option in the Schedule screen opens up the Schedulable User Groups edit screen whereby you can create a new schedulable user group; edit a selected schedulable user group; or delete a schedulable group.

Note that the order that schedulable users display in the calendar is by default alphabetically by the user's Last Name.

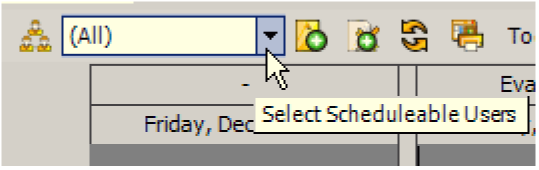
Schedulable User Groups are very useful as you can then view only certain schedulable users in the Schedule screen based on certain requirements, whether it be by Region, and/or Dispatch Zone, and/or Skill, and/or Certification and/or whatever basis you wish.

See Also:
How do I create a Schedulable User Group?
How do I edit a Schedulable User Group?
How do I delete a Schedulable User Group?

NOTE: If using Regions, do note that users can only view data that is assigned to the same region as theirs. So if you created a workorder and assigned a schedulable user to that workorder, but that client is of one region and the schedulable user is of another, be aware that the schedulable user will not see that scheduled workorder when they log into AyaNova.
It is highly recommended that if using Regions, that you create Schedulable User Groups based on users of each region, so that it is very easy to see at a glance which techs can be scheduled for a client of that region.

See Also:
Regions

Select Schedulable Users

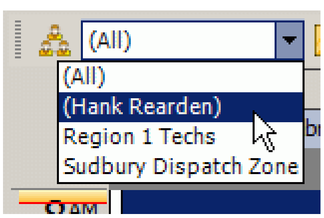


Clicking on the drop down arrow of this field displays:

- the (All) option.
    - Selecting (All) will display a Schedule screen for all items (workorder items, Schedule Markers, Follow Ups) within that time period for **all** active schedulable users plus unassigned scheduled workorder items.

- The available Schedulable User Groups that have been created so far.
    - If select a specific Schedulable User Group, only the items pertaining to those users in that group will display on the Schedule screen.
    - This is useful to reduce or expand the amount of information displaying.
    - For example, if you are a dispatcher for everyone in the organization, you may wish all schedulable users items to display.
    - Or perhaps a client from a particular dispatch zone requests service, you could select to show a Schedulable User Group that only shows users that are assigned to that dispatch zone and assign accordingly.

- If the user logged in is of type "Schedulable User", then will show that schedulable user's name
    - For example, the tech Hank logs in and quickly only wants to see their scheduled items. The Schedule screen will include a Schedulable User Group called Hank's name, and he can quickly select it to see just his scheduled items



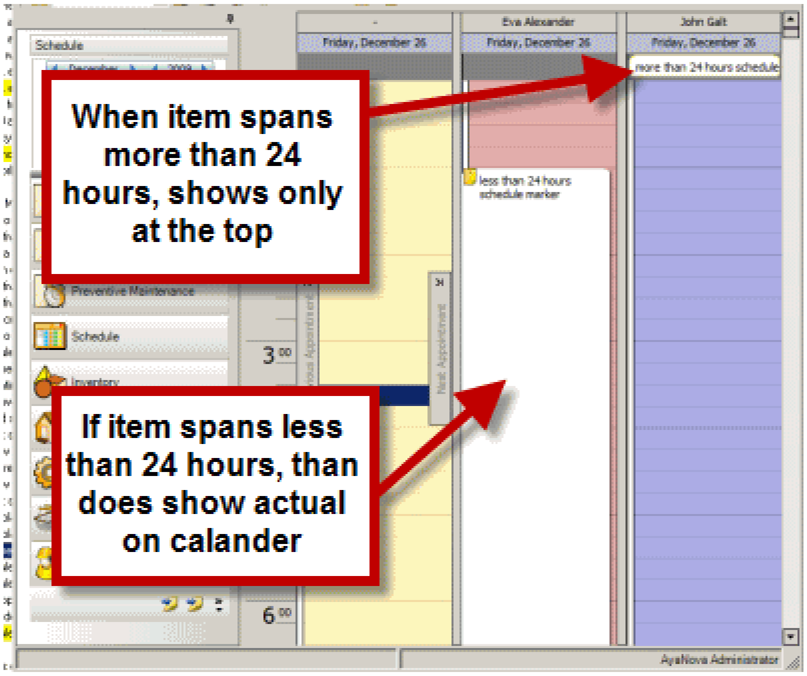
Security Group internal object: Object.ScheduleableUserGroup
NOTE: Both Object.SchedulableUserGroup and SchedulableUserGroupUser **must** be set to the same.

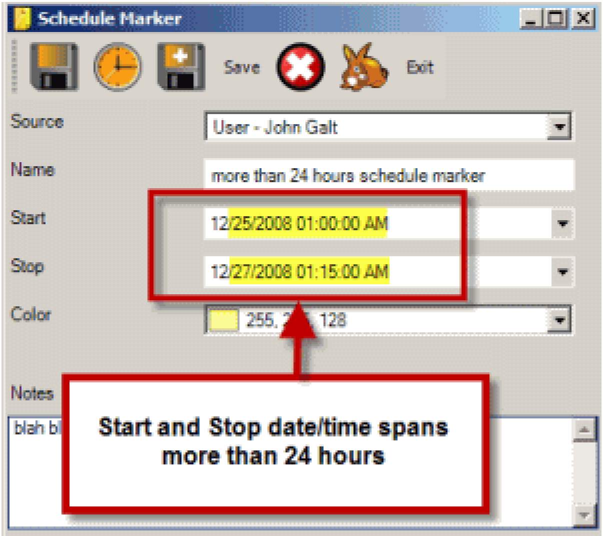
Forbidden : User of that security group can not open an existing Scheduleable User Group entry screen nor edit it. They can select existing Schedulable User Groups to show those users in the Schedule Screen *Read Only* : User can view an existing Scheduleable User Group entry screen but can not create or edit *Read/Write* : User can view an existing Scheduleable User Group entry screen as well as create and edit *Read/Write/Delete* : User can view existing Scheduleable User Group entry screen, and create, edit and delete
Security Group internal object: Object.ScheduleableUserGroupUser
Forbidden : User of that security group can not open an existing Scheduleable User Group entry screen nor edit it. They can select existing Schedulable User Groups to show those users in the Schedule Screen *Read Only* : User can view an existing Scheduleable User Group entry screen but can not create or edit *Read/Write* : User can view an existing Scheduleable User Group entry screen as well as create and edit *Read/Write/Delete* : User can view existing Scheduleable User Group entry screen, and create, edit and delete

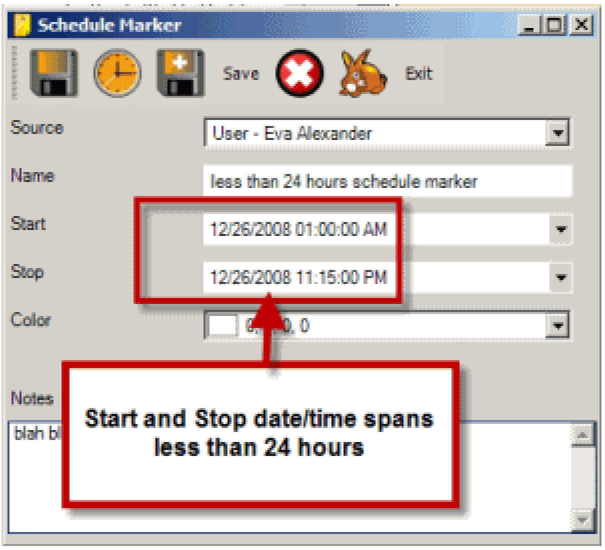
5.6.14 Scheduled item that spans a full day

When a scheduled item (whether it be a service workorder item or a Schedule Marker) **spans 24 hours or more**, it will only display on the Schedule screen just at the top, denoting at a glance that it spans the entire day without overlapping everything.

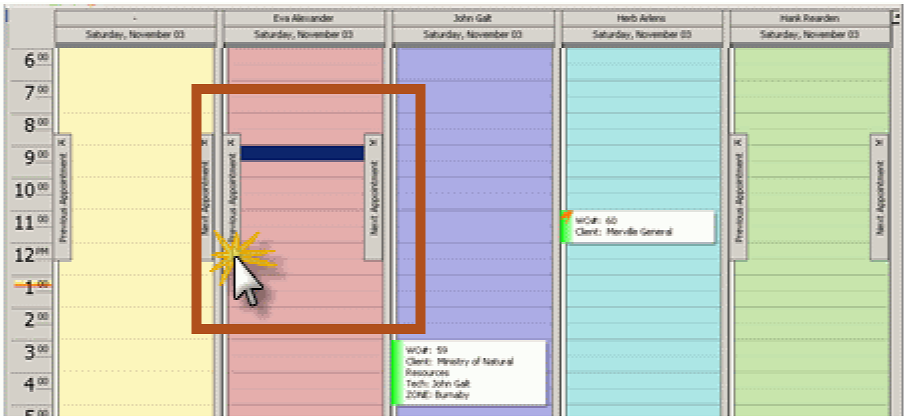
When a scheduled item (whether Schedule Marker or Service Workorder Item) spans less than 24 hours, the time range shows on the Schedule screen in correspondence to the time range on the left.


When item spans more than 24 hours, shows only at the top
If item spans less than 24 hours, than does show actual on calander
more than 24 hours schedule
less than 24 hours schedule marker
Eva Alexander
John Galt
Friday, December 26
Preventive Maintenance
Schedule
Inventory
AyaNova Administrator


Schedule Marker
Save
Exit
Source
User - John Galt
Name
more than 24 hours schedule marker
Start
12/25/2008 01:00:00 AM
Stop
12/27/2008 01:15:00 AM
Color
Notes
Start and Stop date/time spans more than 24 hours

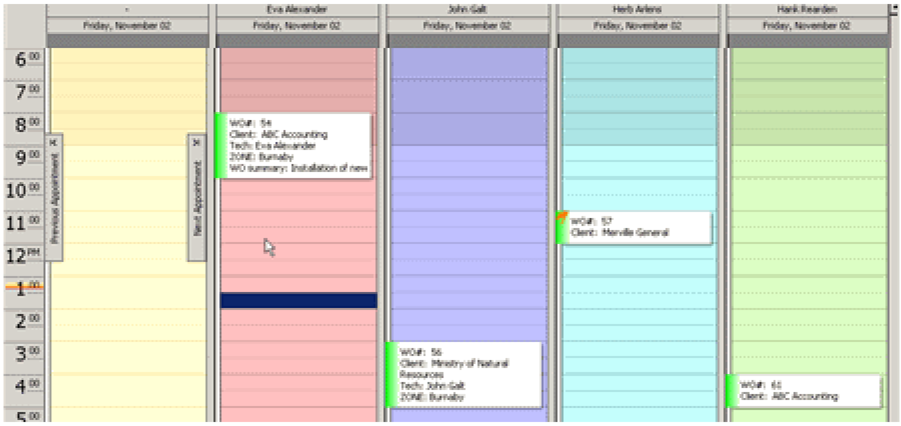


5.6.15 Next Appointment / Previous Appointment



In the screenshot above, in separated view, Eva has two helpful features showing - the Previous Appointment and the Next Appointment.

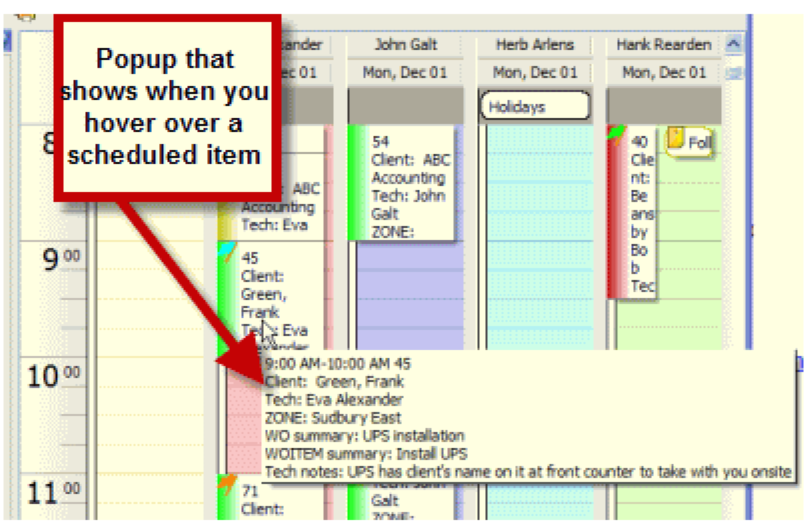
If you clicked on the Previous Appointment, the Schedule screen will "jump" to that date showing you what is scheduled for Eva on that date (as well as for other schedulable users)



This feature allows you to quickly see when the next appointment or previous appointment for that schedulable user was or is.

> **NOTE**: Next Appointment and Previous Appointment only displays if there are no scheduled workorder items and no Schedule Markers for that schedulable user for the date you are actually viewing.
>
> **NOTE**: Previous Appointment and Next Appointment displays based on if the Next or Previous is within the calendar month showing on Date Navigator or within 7 days on either side of the visible calendar month.
>
> For example, if the calendar is showing the month of October 2008 and you are presently displaying October 15 2008 on the Schedule calendar, and the technician Eva has no workorder items or schedule markers on that day, but that technician does have a Schedule Marker for September 27th and a workorder item booked for November 4th, that tech will show both Next and Previous available for selection. But if that technician Eva's previously booked item is September 14, the Previous Appointment feature will not show as it is outside the November window plus outside of the 7 days on either side of November.

5.6.16 Workorder Item Summary Display popup



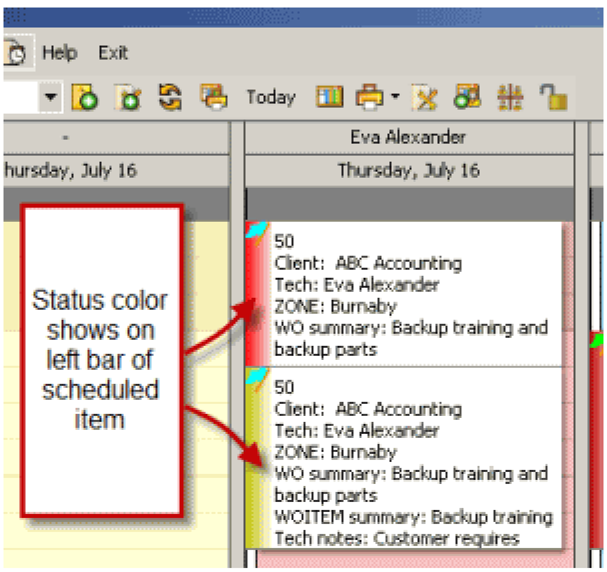
Hover your mouse cursor over a scheduled workorder item on the calendar, and AyaNova will "pop-up" a summary of what the workorder item is about.

What displays in this popup is dependant on what you have set in your Global Settings for the Workorder Item Summary Template

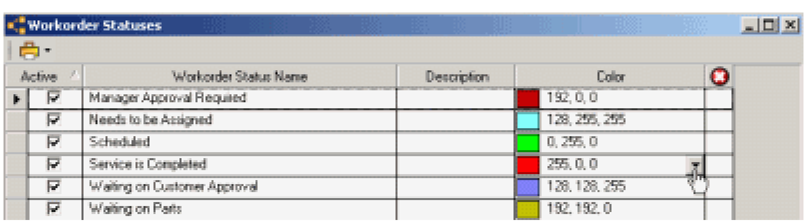
See Also:
How do I edit what pops up on the Schedule Screen?

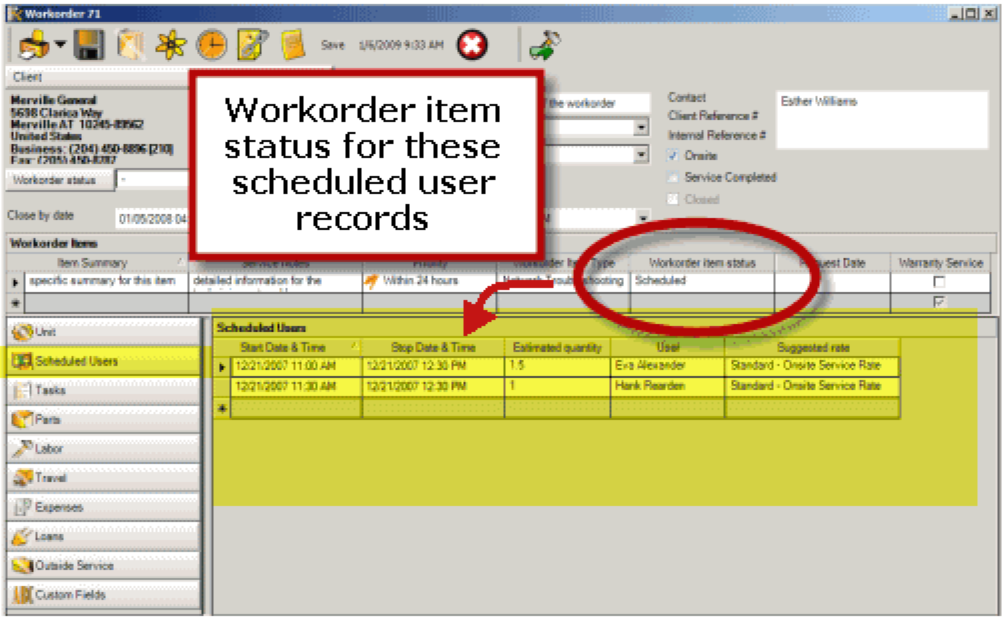
5.6.17 Status of scheduled item

The colored bar on the left side of a scheduled workorder item equates to the Workorder Item Status color of the Workorder Item Status selected for that scheduled user's workorder Item.



See also Workorder Statuses





5.6.18 Schedule Markers / Follow Ups

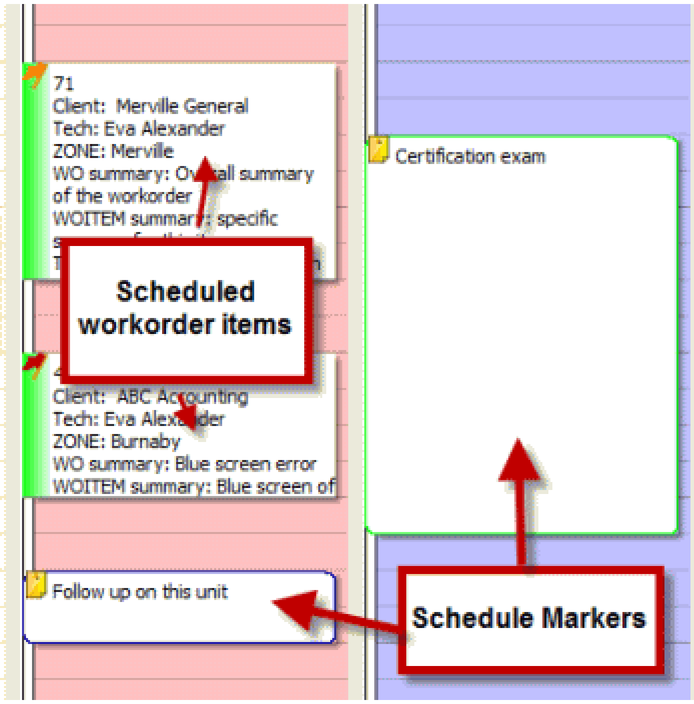
Use Schedule Markers to identify and remind about events that are not service workorder items - i.e. holidays, dental appointment, exam testing etc.

A Schedule Marker can be assigned to a specific scheduleable user, to all scheduleable users of a specific Region, to all scheduleable users of a specific Dispatch Zone, or Globally to all scheduleable users.

A Follow Up is a Schedule Marker with the additional feature of providing a jump button to open the specific workorder (or quote or preventive maintenance order, client, head office, contract, or unit) that the Follow Up is referring to.

Follow Ups are NOT created from the Schedule screen, instead are created from the menu option for a specific record (i.e. for a specific workorder or quote, PM, client or unit).
See tutorial How do I Create and view Follow Up in a workorder

Schedule Markers/Follow Ups have the Schedule Marker image in the upper left hand corner if your screen view is large enough, and display with slightly rounded edges when viewing the Schedule screen, whereas workorder items are square.

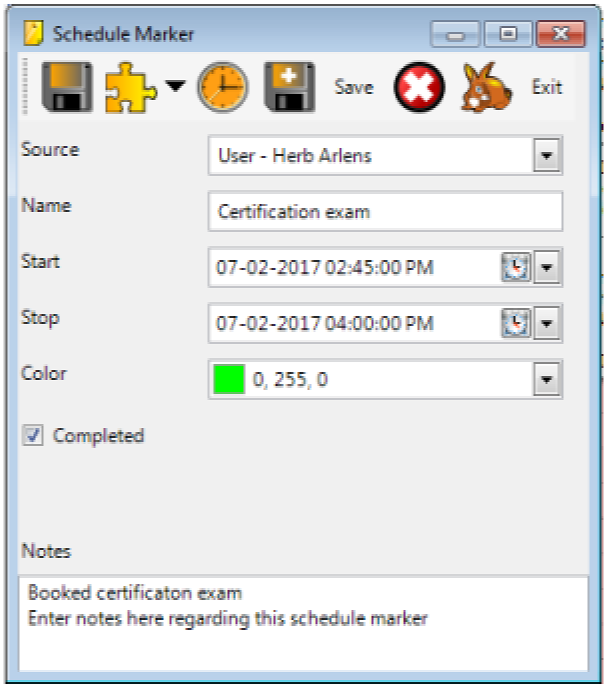


Examples of use:

- create a schedule marker for a user that is in training and not available for service.
- create a schedule marker to identify an afternoon that a schedulable user is not available due to a dentist appointment.
- create a schedule marker to remind a scheduleable user of an upcoming event

You can quickly create a Schedule Marker by selecting a time frame and selecting the New Schedule Marker button on the toolbar which will auto enter the date and time frame still allowing you to select for whom the Schedule Marker is for.

NOTE: Follow Ups are NOT created from the Schedule screen.
Follow Ups are instead are created from the menu option for a specific record (i.e. for a specific workorder or quote, PM, client or unit).
See tutorial How do I Create and view Follow Up in a workorder



Source

A Schedule Marker can be created for:

- a single scheduleable user
- for users of a specific Region
- for users of a specific Dispatch Zone
- for all scheduleable users (Global)

Do note that a Schedule Marker whose Source is for a number of users (i.e. Global) if deleted or set to Completed by one user will be deleted or set to Completed for all.

Schedule Marker Name

This is where you enter a summary or "name" of what this schedule marker is for. This will display on the calendar if your view is large enough.

Start Date & Time

This is where you select the start date and time of the schedule marker unless you had pre-selected on the Schedule screen's specific day.

Stop Date & Time

This is where you select the stop date and time of the schedule marker unless you had pre-selected on the Schedule screen's specific day.

Color

This is where you select what color you want the schedule marker to display as in the Schedule screen. You can leave this blank for none.

Completed *New feature as of AyaNova 7.5*

This is where you can select whether the Schedule Marker has been completed or not.
We suggest to use the Schedule Marker grid to filter on this column to display schedule markers that are not yet completed and need to be reassigned to a future date

NOTE: When your database is automatically updated with 7.5, all Schedule Markers with a start date of before the date/time you perform the update are set to Completed.

Notes
This is where you can enter additional information pertaining to the schedule marker.

See also:
New Schedule Marker
How do I duplicate a Schedule Marker?
Main Workorder entry screen menu options - Follow Up

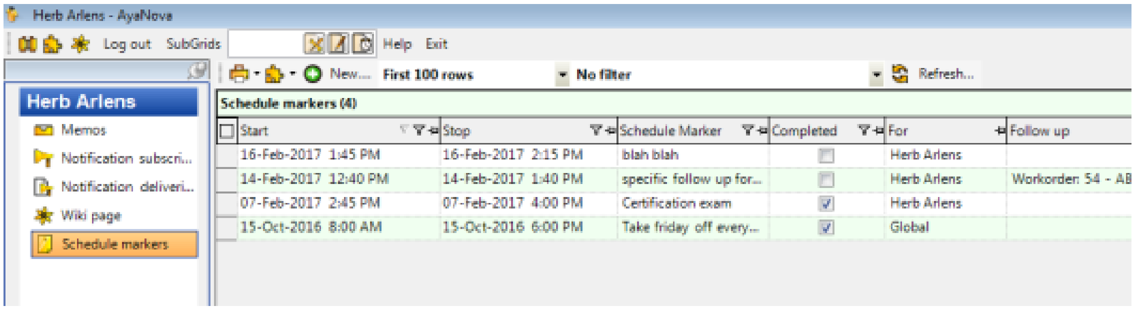
Security Group internal object: Object.ScheduleMarker
Forbidden : User of that security group can not open an existing Schedule Marker nor create new (applies also to Follow Ups)
Read Only : User can view an existing Schedule Marker but can not create or edit (applies also to Follow Ups)
Read/Write : User can view an existing Schedule Marker as well as create and edit (applies also to Follow Ups)
Read/Write/Delete : User can view existing Schedule Markers, and create, edit and delete (applies also to Follow Ups)

5.6.19 Schedule Marker grids

AyaNova 7.5 now includes two Schedule Markers grids:

- **User's Schedule Marker grid**
- **Administration Schedule Marker grid**

User's Schedule Marker grid



For this grid to display:
1. The user logged in must be User Type of Scheduleable User
2. This user must be a member of a security group with Read Only or higher rights set to Object.ScheduleMarker

This grid will display schedule marker records that have a Source selected of:
- o this specific logged in scheduleable user
- o a Dispatch Zone that this scheduleable user is assigned to
- o a Region that this scheduleable user is assigned to
- o Global

Suggested use:

With this User's Schedule Marker grid, the logged in scheduleable user can filter and sort by Start date/time, Stop date/time, Schedule Marker and/or the Completed column.

Two examples of use:

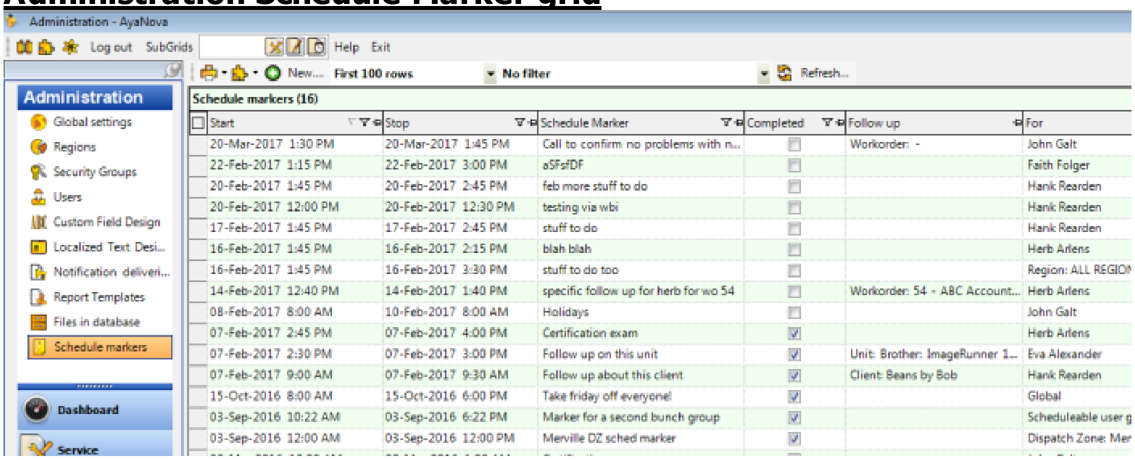
Herb wants to review Schedule Markers assigned last month.
1. Herb filters on the Start date/time column, selecting [Month - Previous]
2. The filtered grid will now display only schedule markers/follow ups that have a start date/time of last month.

Herb wants to confirm he hasn't missed a Schedule Marker previously assigned.
1. Herb filters on the Completed column, selecting [False]
2. The filtered grid will now display all schedule markers/follow ups that have not been checkmarked Completed.

Also refer to the Dashboard which displays quick access to upcoming Schedule Markers.
And the graphical Schedule Screen which displays Schedule Markers assigned for the dates being viewed.

NOTE: The "For" column and the "Follow Up" column are not sortable and not filterable. The data in these two columns are dynamically filled after the query has been processed as they can represent multiple types of objects, and as such because are dynamic, are not sortable nor filterable.

Administration Schedule Marker grid



For this grid to display:
1. The user logged in must have User Type of Administrator User
2. This user must be a member of a security group with Read Only or higher rights set to Object.ScheduleMarker

This grid will display all Schedule Markers regardless of the Source selected.

Suggested use:

The logged in administrator user can filter and sort by Start date/time, Stop date/time, Schedule Marker and/or the Completed column.

Two examples of use:

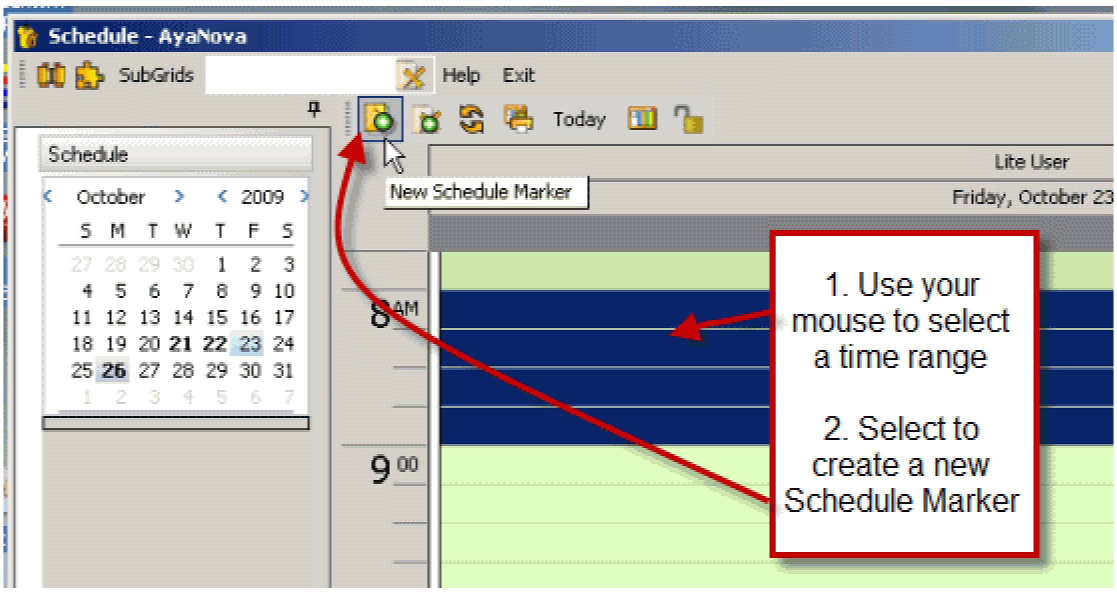
Manager wants to review Schedule Markers assigned last month.
1. Manager filters on the Start date/time column, selecting [Month - Previous]
2. The filtered grid will now display only schedule markers/follow ups that have a start date/time of last month so can see at a glance which are Completed, see what schedule markers were assigned last month, etc.

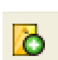
Manager wants to confirm Schedule Marker previously assigned have been completed.
1. Manager filters on the Completed column, selecting [False]
2. The filtered grid will now display all schedule markers/follow ups that have not been checkmarked Completed.

Also refer to the Dashboard which displays quick access to upcoming Schedule Markers.
And the graphical Schedule Screen which displays Schedule Markers assigned for the dates being viewed.

NOTE: The "For" column and the "Follow Up" column are not sortable and not filterable. The data in these two columns are dynamically filled after the query has been processed as they can represent multiple types of objects, and as such because are dynamic, are not sortable nor filterable.

5.6.20 Menu - New Schedule Marker

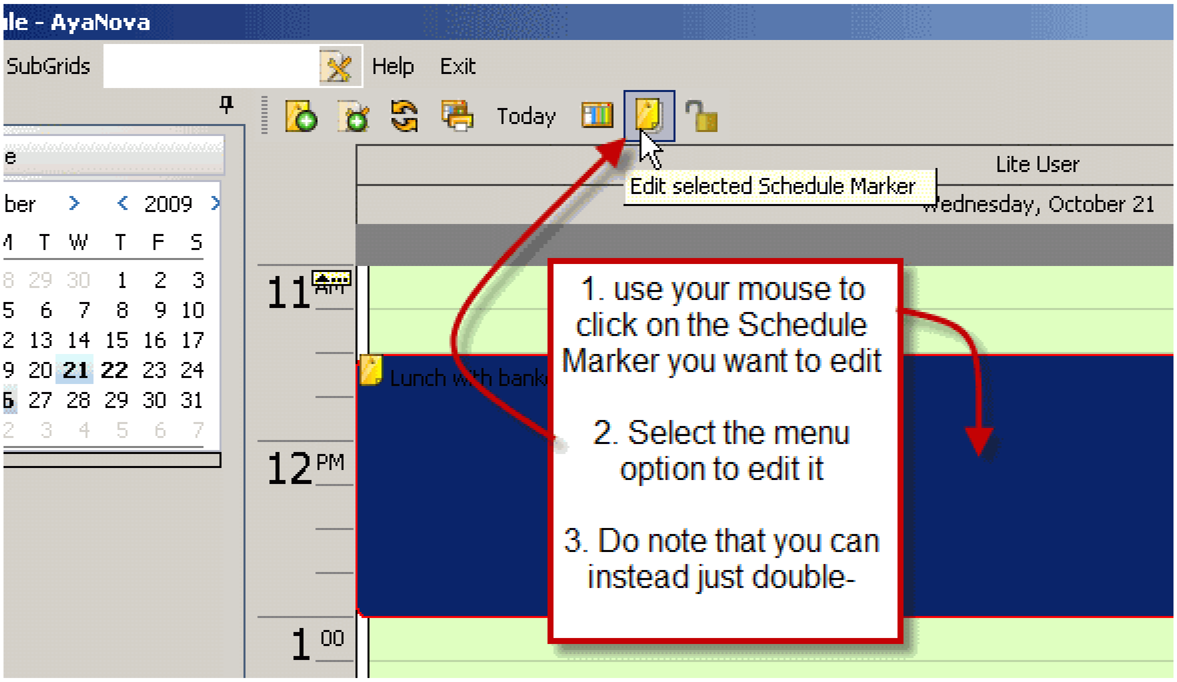


 New Schedule Marker

1. Select the date and time frame for a schedulable user within the calendar itself
2. Now select the New Schedule Marker toolbar option
3. This will open a new Schedule Marker which will have the date pre-entered, the user pre-entered, and the selected start and stop time set as well.

See also:
Schedule Markers

5.6.21 Menu - Edit selected Schedule Marker



 Edit selected Schedule Marker

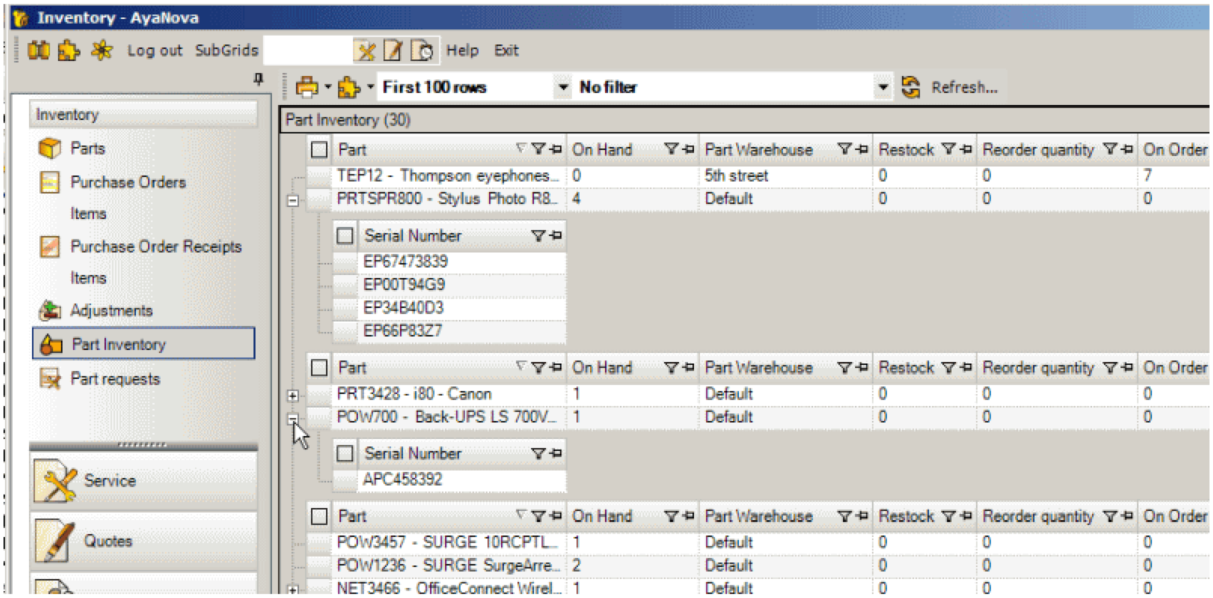
Selecting this Schedule screen menu option will open the last selected schedule marker

You can of course, just double-click on the Schedule Marker to open it.

NOTE: This menu option will not appear unless an existing Schedule Marker for a schedulable user is selected on the screen

5.7 Inventory

5.7.1 Benefits of inventory



Good inventory control is essential to properly running a business.

AyaNova makes inventory control easy for you to track, print out reports and always be aware of your stock levels.

The benefits of utilizing Inventory features of AyaNova are:

- Track whether parts are used in service, to be ordered, or on order via purchase order.
- Able to maintain an accurate count of inventory – too much in stock ties up collateral, too little results in customers waiting and service unable to be performed and possibly lost sales
- Able to assign inventory and track inventory flow with multiple warehouses
- Able to request parts to be ordered via workorders

Even if you do not use the full Inventory feature of AyaNova, Parts would still be created so they can be selected within a quote, preventive maintenance item or within a service work order, identifying the quantity used or to be used and price.

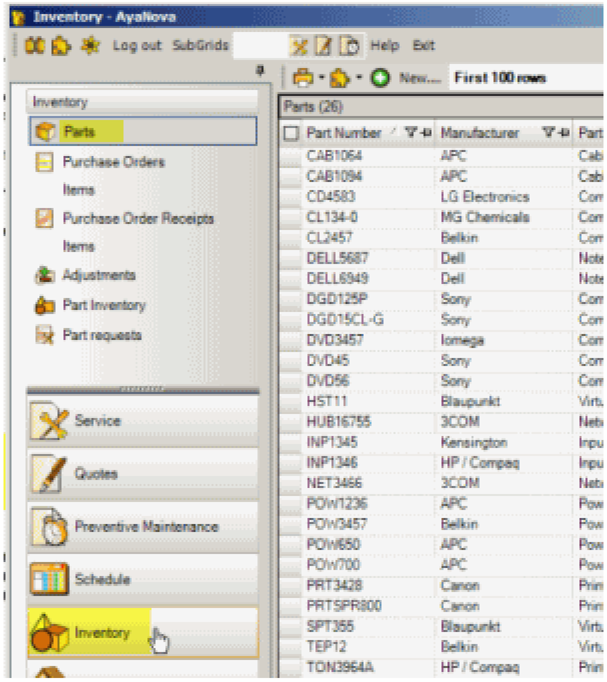
Whether entered by the dispatcher to inform the scheduled user what parts need to be taken onsite, or by the scheduled user after service has been performed to ensure the parts get billed to the client, entering Parts is recommended.

See also:

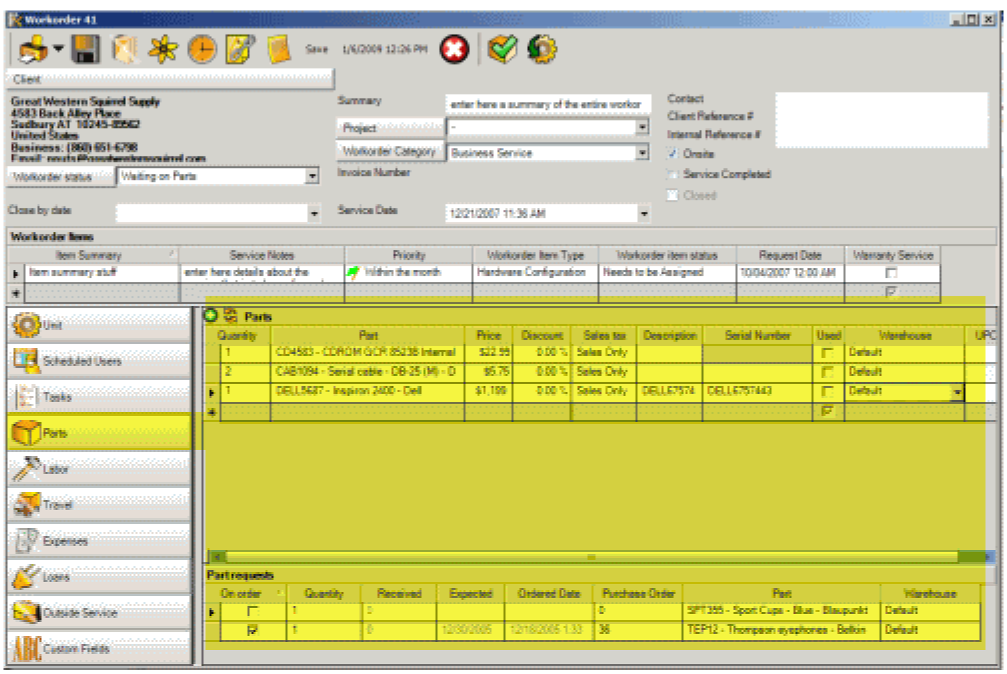
[How do I turn off inventory?](#)
[How do I enter opening inventory?](#)
[How do I create a Purchase Order based on Part Requests?](#)
[How do I Receive a Purchase Order?](#)
[How do I create a Purchase Order based on Restock Level for Parts for that Vendor?](#)

5.7.2 Parts

5.7.2.1 What are Parts for?



View of the Part grid in the Inventory navigation pane.



View of the work order entry screen Parts subsection where parts are selected.

A "Part" is a description of an item that you want to type in once, so that you can easily select it within a workorder or a quote or a preventive maintenance.

NOTE: A Part is **not** the quantity in stock or on order. Part is information about the part in general - its number, name, vendor, price, cost etc.

With AyaNova, there is a choice whether to use full inventory of parts or whether to only maintain a list of parts for selection in the areas above by setting the Use Inventory setting in Global Settings. The trial version has this enabled by default.

Actual inventory (quantity on hand, etc) and status about parts are entered via:

- Part Adjustment (enter your starting inventory, or adjust inventory)
- Part request in a service workorder
- Purchase Order
- Purchase Order Receipt

NOTE: The information on a Part must be entered first **before** you can enter inventory information such as quantity and location, or create purchase orders, receive or make inventory adjustments.

NOTE: It is recommended to not import or enter parts unless you actually will use the part. The parts list is loaded whenever a workorder is opened, so if you have for example 30,000 parts do note that large number will affect how long it will take to view a workorder entry screen

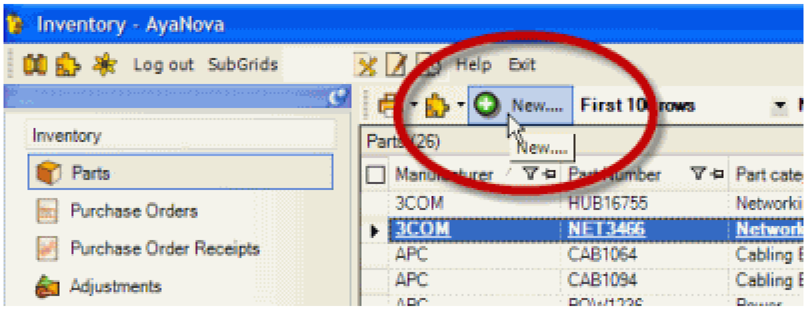
See also:

Parts grid
Part Inventory menu option in the Part entry screen
Part entry screen
ImportExport.csv utility

5.7.2.2 Parts grid

Parts are created by using the 

New... menu option on the Parts grid



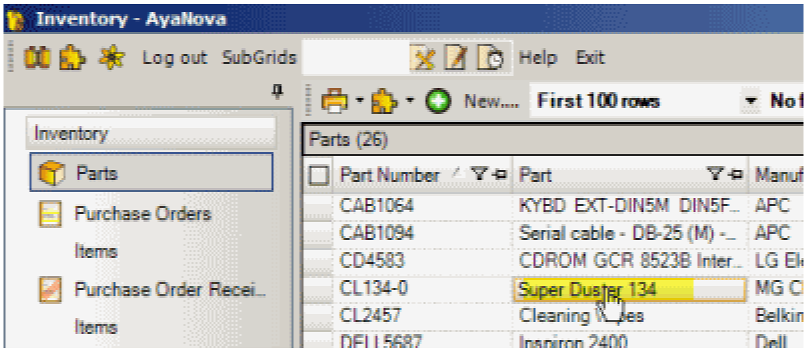
Or create a new part by selecting the Accelerator Keys combination ALT-p when viewing any main grid.

Or create a part while within a service workorder on the fly

Or import parts using the ImportExport.csv utility

Or import parts from your QuickBooks or Peachtree accounting program using the accounting optional add-on QBI or PTI. Please refer to the Help files for the optional add-on you are using.

View an existing Part by selecting the Part Number or Part Name in the part grid



The Parts grid displays columns regarding the part itself, and records for each part entered.

This grid does **not** display other columns referring to inventory of the part, nor what workorders selected in, etc. This grid only displays columns from the Part entry screen

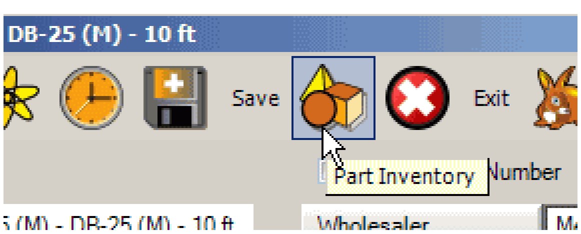
Note that you can also localize labels to display whatever text you want - see also: Localize field labels

And you can set what columns you want to display in the grid - see also: Setting what columns display in a grid

Security Group internal object: Object.Part
Forbidden : User of that security group can not access the Parts grid nor entry screen *Read Only* : User can view the Parts grid and entry screen but can not create or edit *Read/Write* : User can view the Parts grid and create and edit *Read/Write/Delete* : User can view the Parts grid, and create, edit and delete

Part	Displays the Part name	Select to open the part entry screen
Part Number	Displays the Part number	Select to open the part entry screen
Part Category		Select to open the Part Categories subgrid
Manufacturer		Select to open the Vendor's entry screen
Wholesaler		Select to open the Vendor's entry screen
Alternative Wholesaler		Select to open the Vendor's entry screen
Unit of Measure		Select to open the Unit of Measure subgrid
Part Assembly		Select to open the Part Assemblies subgrid
UPC		
Manufacturer Number		
Wholesaler Number		
Alternative Wholesaler Number		
Cost		
Retail		
Track Serial Number		
Active		
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Custom 8		
Custom 9		
Custom 0		

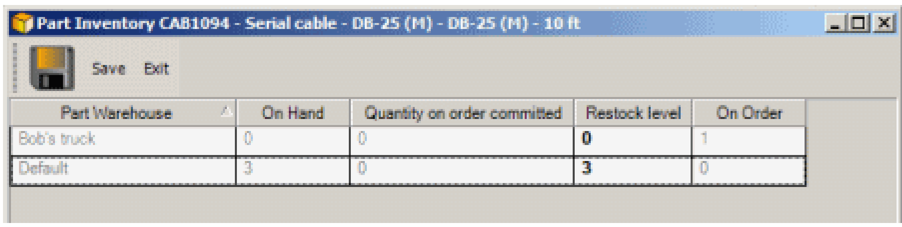
5.7.2.3 Part Inventory menu option



 **In the Part entry screen is the Part Inventory menu option:**

- Once a newly created part has been saved, this menu option becomes available.

NOTE: **Only** once an amount has been added to inventory for a specific warehouse, can you set the Restock Level in the part's entry screen.



Restock Level is the only edited part of this menu option. In the Part Inventory sub-grid for a specific part, you will note that all columns are grayed out and not editable except for the Restock Level column.

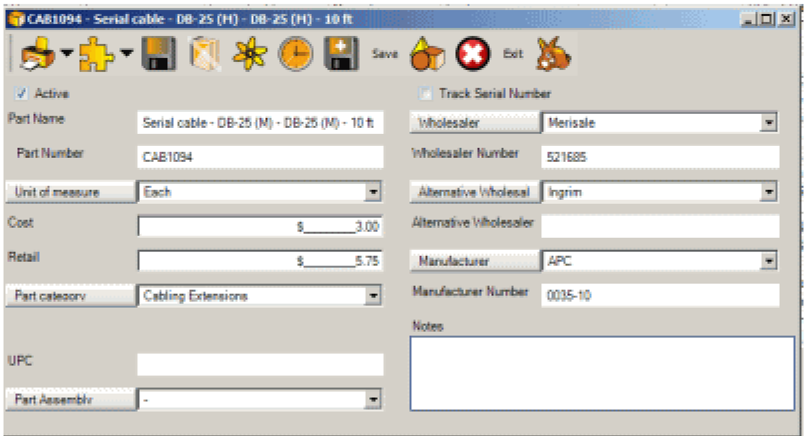
You would enter a Restock Level to denote for your purchaser how many should always be on hand. In this way, when the purchaser views the Restock List from within a PO for a specific vendor, it will automatically advise them of the minimum amount of each part provided by that vendor that should be ordered, to bring the stock level up to minimum. This ensures that you have critical parts on hand at all times.

On Hand amount is obtained from Purchase Order Receipts, and from Inventory Adjustments. You may use Inventory Adjustments to enter your beginning inventory level.

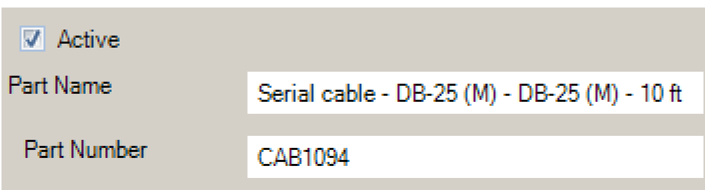
Quantity on Order Committed is obtained from parts requested for workorders.

On Order is obtained from Purchase Orders that are ordered but not yet received.

5.7.2.4 Part entry screen



Part entry screen fields:



Active

If checked, this part will appear in the Parts grid screen, and be listed in Parts drop down selection lists such as in Service Workorder, Purchase Orders etc

If unchecked, this part will only appear in the Parts grid screen and would not be available for selection elsewhere

If you no longer want a part to be available for selection, un-check the Active field and save.

If the part was mistakenly created and no inventory has been set for it, no PO's made for it, no selection in any other AyaNova object - then you can delete it via the Delete  menu option.

Part Name

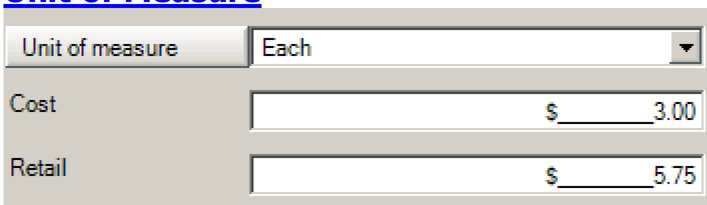
A short description of the part displayed for selection from drop down lists, handy when part numbers are not easily descriptive. Keep it short and in a format that the customer and AyaNova users can understand.

Part Number

This is a required field.

Usually the number used in your point of sale or accounting software. If you plan to integrate AyaNova with accounting software in future, or you presently integrate by entering invoices manually, you should be careful to enter part numbers exactly in the same format used in your accounting or point of sale software.

Unit of Measure



Identify the measure of the part - i.e. "each", "box", "case", "dozen", "gallon", "feet", "meter" etc

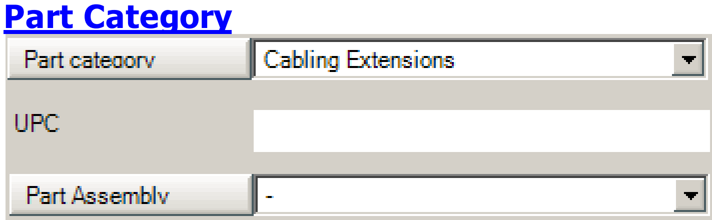
Cost

The currency amount you enter here will be available to the Service Workorders, Quotes and PM's where this part is selected.

Retail

The currency amount you enter here will show as the retail price in Service Workorders, Quotes and PM's where this part is selected. Do note that you can edit the amount in a service workorder, quote or PM if needed.

Part Category



A way of grouping parts together for filtering or reporting on.

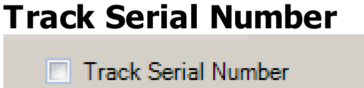
UPC

Entering the UPC code here will allow ease of use elsewhere in AyaNova. For example, if users are entering Parts in a Service Work order, they can select the UPC field and scan in the part using a bar code scanner which will automatically select the appropriate part. This adds up to saved time and less mistakes in entry.

Part Assembly

A way of grouping parts together for filtering or reporting on.

Track Serial Number



This only affects if the Inventory module is in use (Use Inventory is set to True in Global Settings). If selected, every one of this Part that is in Inventory requires a unique serial number.

Tracking serial numbers is vital for warranties, recalls and service.

If check marked, when receiving this part via Purchase Order Receipts, it will automatically provide a serial number field to enter in the serial number for the number of received parts.

If check marked, when entering an Inventory Adjustment, it will automatically provide a serial number field to enter the serial numbers for parts being added to inventory, or a drop down selection serial number field to select existing serial numbers to remove from inventory.

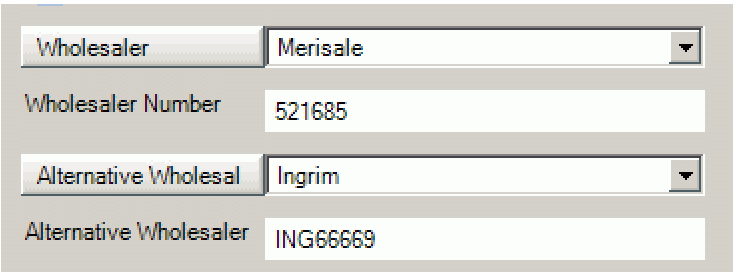
If parts have serial numbers, when selecting a part used in service in a workorder item, the Serial Number field will display as selectable to select the actual serial numbers that are in inventory – preventing accidental incorrect entries in the workorder item.

Do note that you cannot change the checkmark on this field if this part has ever been entered into inventory with serial numbers.

NOTE:

- you can **not** set Track Serial Number field to True if there are parts already in inventory
- You first must remove the parts from inventory using a Inventory Adjustment
- Then you can change the Track Serial field in the part to True (checkmark)
- Now add the parts into inventory using a new Inventory Adjustment and as Track Serial is now selected, you will be asked for the serial number for each individual part quantity

Wholesaler



From whom you purchase the Part from. This may also be referred to as a distributor and as with all text you see in AyaNova you can change the localized text from Wholesaler to Distributor easily if necessary.

For a part to be ordered via a purchase order for that vendor, it **must** have that vendor selected as either the Wholesaler or the Alternative Wholesaler.

Setting this also allows you to take advantage of the Restock By Vendor feature in a purchase order where by setting the wholesaler for the part, you can obtain a list of all parts that are below the Minimum Stock Level and easily order without having to do a manual inventory count of what is needed to be ordered.

The drop down lists all available Vendors set as Wholesalers that a Part could potentially be associated with.

If the Wholesaler is not in the drop down list and no Wholesaler has been selected, then with the drop down selection list blank, click on the Wholesaler button to open up a new Vendor entry screen so that you can enter the Vendor details, save, close and then select it from this list.

Or if the Wholesaler is selected from the drop down list, you can open up the Vendor entry screen displaying that Vendor information by clicking on the Wholesaler button.

Setting the wholesaler allows you to use the time saving list of items that need to be reordered based on wholesaler and minimum stock level via the purchase order. This allows you to maintain optimum stock levels and keep your techs and customers happy.

Wholesaler Number

Number used by the Wholesaler in reference to this part. Provided here as may be different than your part number, allowing you to easily order by the Wholesaler number from within a Purchase Order

Alternative Wholesaler

Second distributor that part may be purchased from.

For a part to be ordered via a purchase order for that vendor, it must have that vendor selected as either the Wholesaler or the Alternative Wholesaler.

The drop down lists all available Vendors set as Wholesalers that a Part could potentially be associated with.

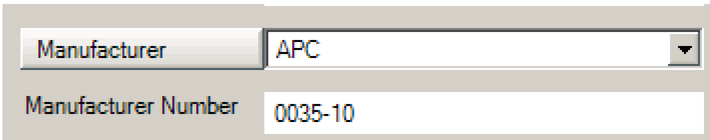
If the Wholesaler is not in the drop down list and no Wholesaler has been selected, then with the drop down selection list blank, click on the Wholesaler ID button to open up a new Vendor entry screen so that you can enter the Vendor details, save, close and then select it from this list.

Or if the Wholesaler is selected from the drop down list, you can open up the Vendor entry screen displaying that Vendor information by clicking on the Wholesaler ID button.

Alternative Wholesaler Number

Number used by the Alternative Wholesaler.

Manufacturer



This would be who makes the part. This is another way of grouping parts.

The drop down lists all available Vendors set as Manufacturer that a Part could potentially be associated with.

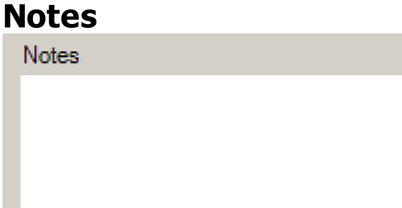
If the Manufacturer is not in the drop down list and no Manufacturer has been selected, then with the drop down selection list blank, click on the Manufacturer button to open up a new Vendor entry screen so that you can enter the Vendor details, save, close and then select it from this list.

Or if the Manufacturer is selected from the drop down list, you can open up the Vendor entry screen displaying that Vendor information by clicking on the Manufacturer button.

Manufacturer Number

This is the number used by the Manufacturer and is another way of identifying the part.

Notes



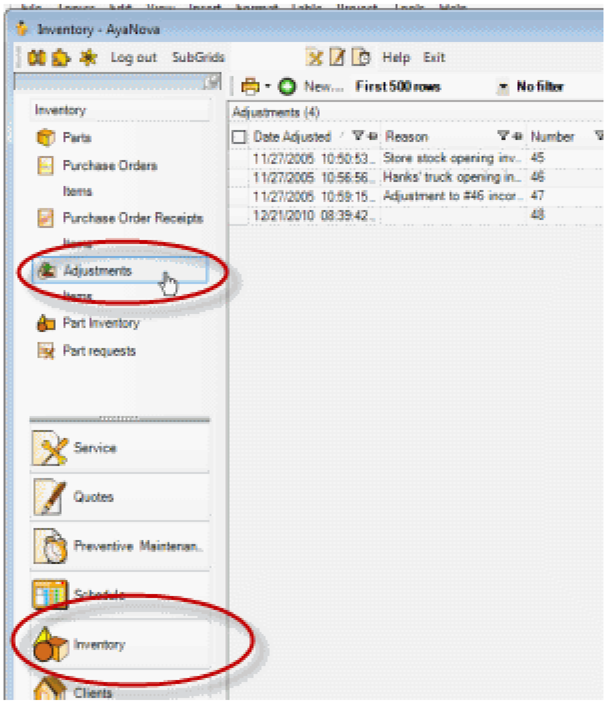
This is where you can enter additional notes about this part if needed.

See also:

[Custom Field Designer]
[Common entry screen menu options]
[Localize field labels]

5.7.3 Adjustments

5.7.3.1 Inventory Adjustments



Follow along with the tutorial [How do I enter opening inventory?]() to walk through how to create a part adjustment.

Also see [Adjustments Items grid]()

Why use Inventory adjustments:

Opening Inventory Adjustments

It is quite possible that you have been using another inventory program prior to AyaNova, or in conjunction with an older version of AyaNova and now you want to use the AyaNova Inventory features.

As the Purchase Order Receipt screen is only used to receive against open Purchase Orders, if you already have inventory in physical stock, you need some way of initially entering that quantity of stock into AyaNova.

Inventory – quantity on hand – is entered after Parts themselves have been entered. You need to be able to select the part, and then state the quantity and location – two separate things.

Quantity Adjustments due to spoilage, damage, theft, samples, etc.

These adjustments are made when stock in the warehouse is taken out of the warehouse for a known reason. Stock quantity adjustments are the most common adjustments made.

Quantity Adjustments due to a Receiving Error
The adjustments are made when it is discovered after the post that the quantity entered on the computer as received does not match the actual quantity received.

Quantity Adjustments due to Work Order Service Error
The adjustments are made when a Part was incorrectly set to Used on a completed work order which removes the part quantity from inventory. As you can not return a Part to inventory from a completed work order, you must use the Inventory Adjustment to return the part to inventory.

Quantity Adjustments due to transfers between Warehouses
The adjustments are made to transfer Parts from one warehouse to another, thus allowing accurate location of the Parts.

Generally speaking, there should never be a reason to use Inventory Adjustments to affect inventory other than when first setting up AyaNova opening inventory except in special circumstances.

Using the Purchase Order and Purchase Order Receipts features of Inventory and Parts in Service Work orders will allow you to maintain an accurate and up to date inventory of what is in stock, what is on order, and what is reserved.

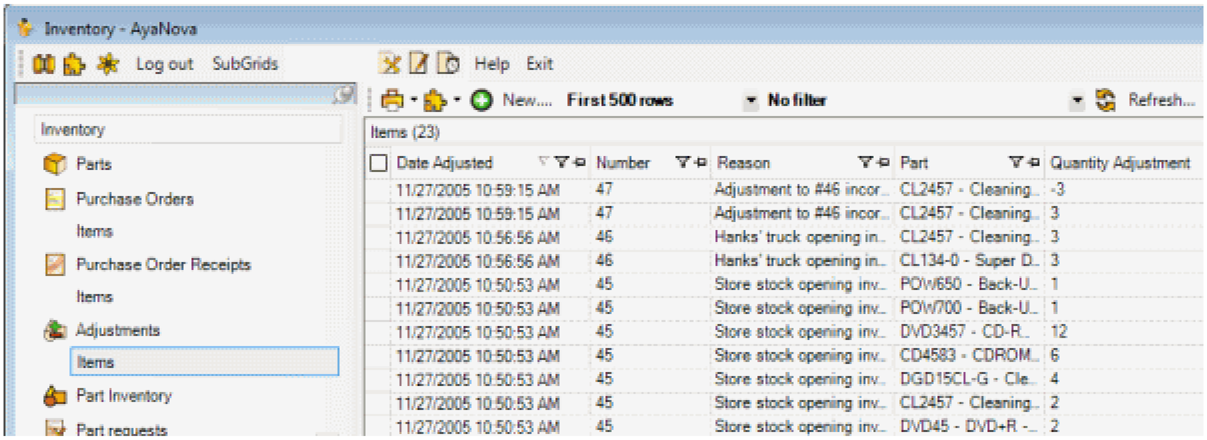
Often an employee will cause shrinkage unintentionally due to a lack of knowledge of particular business procedures. It is suggested that the service manager or owner reviews all Inventory related features in this manual, and then perhaps condense it for their staff – identifying the rules to follow. Maintaining an up-to-date, step-by-step of all policies and procedures is an easy remedy for this.

Because the above uses of Inventory Adjustments could be used incorrectly or fraudulently, keeping a history of changes is very important. For this reason, inventory adjustments cannot be deleted or edited once saved. If you made a mistake entering an inventory adjustment, create a new inventory adjustment to adjust that. This maintains a history of what has been adjusted and by whom.

Security Group internal object: Object.PartInventoryAdjustment
Forbidden : User of that security group can not access the Adjustments grid nor entry screen *Read Only* : User can view the Adjustments grid and entry screen but can not

create new *Read/Write or Read/Write/Delete* : User can view the Adjustments grid and create new

5.7.3.2 Adjustment Items grid



The Adjustments Items grid displays each individual record of each part adjustment.

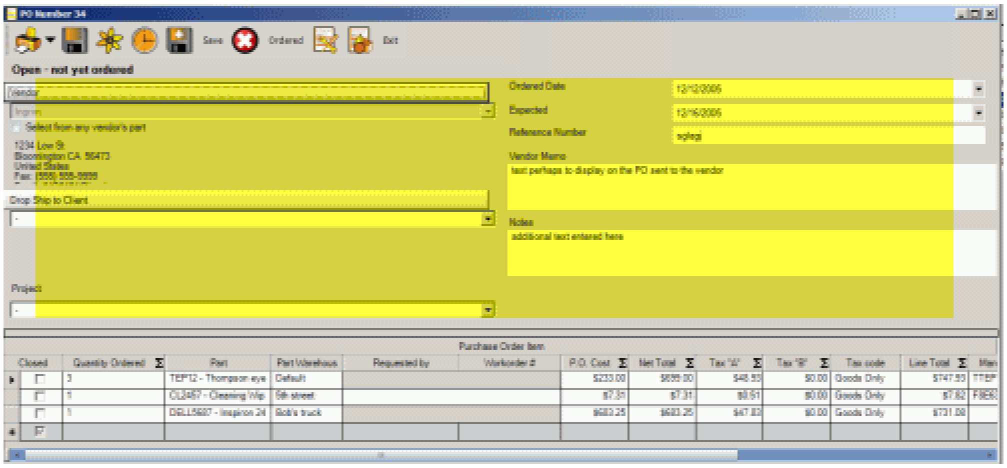
This grid provides you with the ability to easily see at a glance what parts were entered by an adjustment, when, what quantity, and by whom.

You can filter to display specific records, as well as print reports from this grid.

> For example, you might want to have a report of all part adjustments for a specific part. Just filter on the Part column to show that specific part only, and select your report template.

5.7.4 Purchase Orders

5.7.4.1 What are Purchase Orders for?



Purchase Orders are used to:

- identify the quantity of parts and the the price for those parts that you want ordered for inventory
- to restock the Restock Level for parts
- and to fulfill Part Requests for workorders.

Entering the quantity of items in a Purchase Order provides benefits:

- the workorder where parts were requested will display the PO # and the Ordered Date and the Expected Date so that the schedulable user can schedule himself accordingly until the parts arrive.

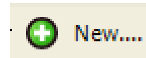
- you can easily receive the parts ordered into inventory using a Purchase Order Receipt without having to type and select again what was ordered.

Purchase Orders can be generated based on inventory counts, on work order requests, or manually.

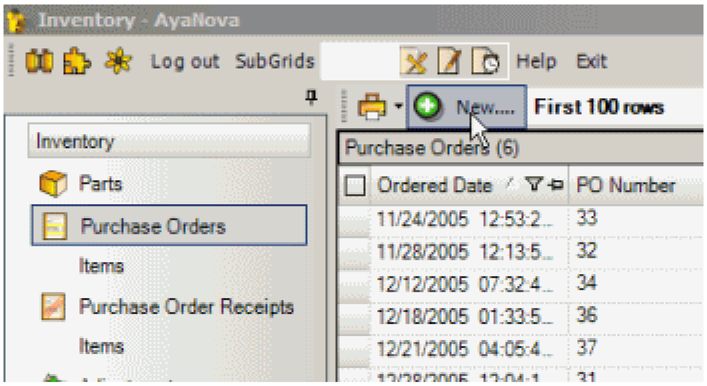
Purchase Orders are accessed via the Purchases Orders grid and the Parts Requests grid

See also:
[Purchase Orders grid]
[Part Requests]
[How do I create a Purchase Order based on Part Requests?]
[How do I create a Purchase Order based on Restock Level for Parts for that Vendor?]

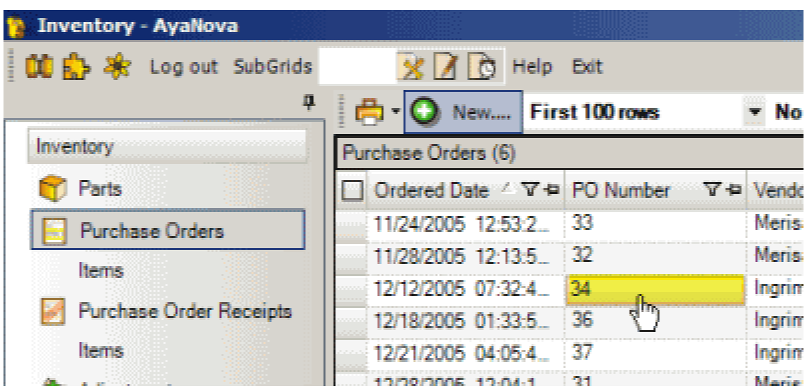
5.7.4.2 Purchase Orders grid

Purchase Orders are created via the Purchase Order grid's New... 

menu option in the Inventory navigation pane



View an existing Purchase Order by selecting the purchase order number under the Purchase Order Number column for the PO you wish to view



The Purchase Order grid displays columns regarding the purchase order as a whole – such as the PO Number, the Purchase Order Status and the Ordered Date.

This grid does **not** display other columns referring to the actual parts ordered as a Purchase Order could be for multiple Parts. Instead view the Purchase Orders (items) grid.

Note that you can also localize labels to display whatever you want - see also: Localize field labels

And you can set what columns you want to display in the grid - see also: Setting what columns display in a grid

Security Group internal object: Object.PurchaseOrder

Forbidden : User of that security group can not access the Purchase Order grid nor entry screen

Read Only : User can view the Purchase Order grid and entry screen but can not edit

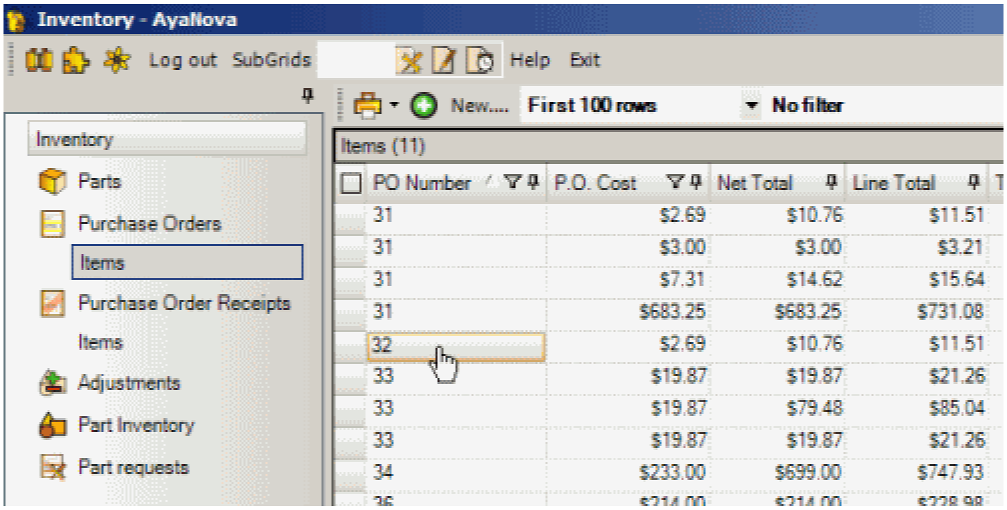
Read/Write : User can view the Purchase Order grid, and create and edit existing

Read/Write/Delete : User can view the Purchase Order grid, and create and edit and delete existing (if not yet ordered)

PO Number	Displays the PO Number	Select to open the PO's entry screen
Vendor	Displays the Vendor who the PO is ordered from	Select to open the Vendor's entry screen
Reference Number	Displays the Reference Number entered in this PO	
Purchase Order Status	Displays the present Purchase Order Status	
Ordered Date	Displays the Ordered Date	
Expected	Displays the Expected Date	
Project	Displays the selected Project this PO is for	Select to open the Project's entry screen
Drop Ship To Client	Displays the client selected for this PO as a whole	Select to open the Client's entry screen
Record Created	Displays the date this PO was first created	
Record Created By	Displays who first created this PO	
Record Last Modified	Displays the date this PO was last modified	
Record Last Modified By	Displays who last edited this PO	
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Custom 8		
Custom 9		
Custom 0		

5.7.4.3 Purchase Orders Items

The Purchase Orders Items grid displays columns regarding the purchase order **and** its purchase order items, so that you can filter and sort as needed to obtain reports.



Examples of use:

- Perform a filter on a part to see all PO's where it was ordered in from.
- Perform a filter a project to view all parts ordered for it.

The grid **does** display columns referring to the actual parts ordered as a Purchase Order could be for multiple Parts.

The Purchase Order Items grid does NOT display custom fields, nor are custom fields of a PO available for reporting

Note that you can also localize labels to display whatever you want - see also: Localize field labels

And you can set what columns you want to display in the grid - see also: Setting what columns display in a grid

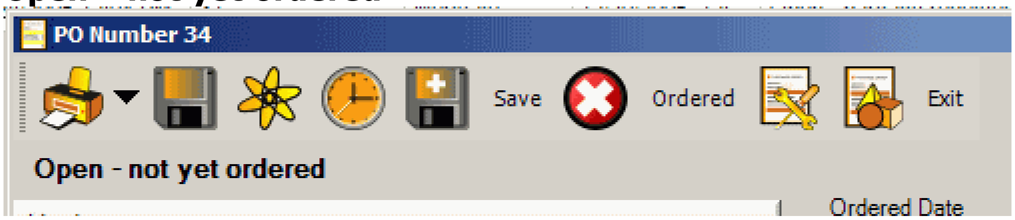
PO Number	Displays the PO Number	Select to open the PO's entry screen
Vendor	Displays the Vendor who the PO is ordered from	Select to open the Vendor's entry screen
Reference Number	Displays the Reference Number entered in this PO	
Purchase Order Status	Displays the present Purchase Order Status	
Ordered Date	Displays the Date when actually placed the PO	
Expected	Displays the Date when this PO is expected to be received	
Project	Displays the selected Project this PO is for	Select to open the Project's entry screen
Drop Ship To Client	Displays the client selected for this PO as a whole	Select to open the Client's entry screen
Record Created	Displays the date this PO was actually first created	
Record Last Modified	Displays the date this PO was last modified	
Part	Displays the part name - from the part's entry screen	Select to open the Part's entry screen
Part Number	Displays the part number - from the part's entry screen	Select to open the Part's entry

NOTE: Your Regional Settings for Time should include seconds so that you can select specific date/time when filtering on such columns as the Service Date in a workorder, the Labor's Service Start Date & Time, a PO's Ordered Date, a PO Receipt's Received Date, etc

- Certain date fields are automatically pre-entered for you when you perform something.
- For example - when you create a new service workorder, the Service Date defaults to today's date and time (including seconds); or when you place a PO on order, the Ordered Date is automatically taken from today's date and time (including seconds); or when you receive parts from a PO, the Received Date is automatically taken from today's data and time (including seconds)
- Because the date and time are stored internally in the database including seconds, for you to be able to select a specific date/time to filter by, you must be showing the seconds so that the filter results include the specific record date.
- Otherwise, if you do not have seconds displaying, your filter results may show nothing.

5.7.4.4 Statuses of a Purchase Order

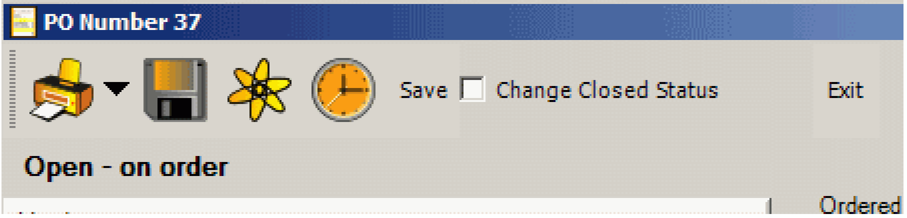
Open – not yet ordered



This is the status of a new purchase order or a purchase order that you have not set Ordered.

Fields are still editable at this status (unless the P.O. Item was made from a part request as can not edit as that could break the link between the part request and the PO).

Open – on order

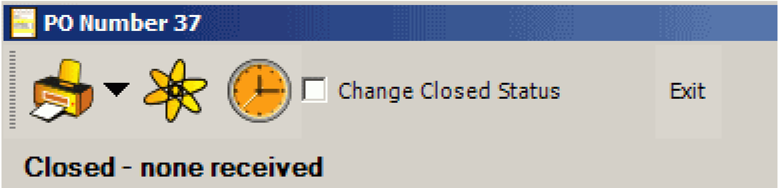


A Purchase Order that is open and has been ordered - as you can still edit some of the PO header fields.

Note that the items ordered are not editable.

If you place a checkmark in Change Closed Status, this will set the PO to a Closed status; removing it from the list of selectable PO's to receive against via a Purchase Order Receipt and removing any non-received items at this point.

Closed – none received



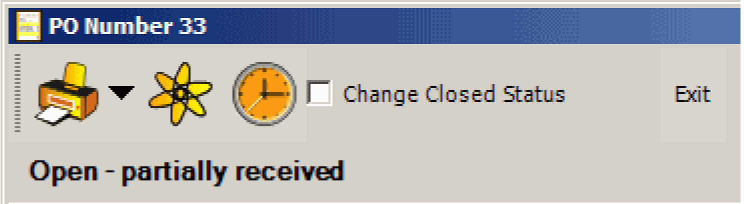
This status will show if the Purchase Order has been manually closed with no items received into stock - the Change Closed Status was checked and then the PO was saved. This may occur in such a situation as a Purchase Order was placed; then it was determined you no longer wanted the items and canceled the Purchase Order.

Do note that although you can revert back to *Open - On Order* by checking the Changed Closed Status, note the following:

NOTE: If PO is set to "Closed - none received" without receiving any of the ordered items:

- The PO Items of the PO are removed in their entirety once the form is exited out of, as 0 received.
  - example: if 4 were on order, and then manually set the PO to "Closed - none received", the entire PO Item record will be removed from the PO once have saved and exited out of the PO form.
- The On Order quantity for a part showing in Part Inventory grid will be updated as no longer on order
- Any Part Requests ordered that were have a Quantity of Received will revert back to not on order (i.e. in the workorder's Part requests subsection, will no longer show On Order so that you can delete if needed)

Open – partially received



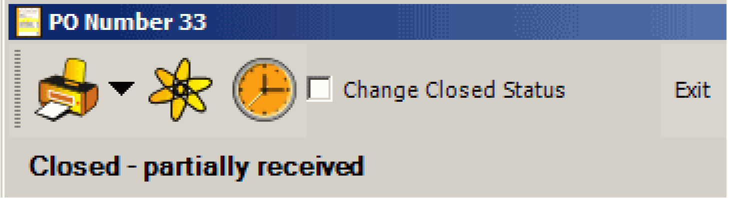
A Purchase Order that is open and partially received via PO Receipt

Partially received is when not all parts and quantity ordered via a PO have been received.

Such a PO will still be selectable to receive against as not all ordered items have been received.

If place a checkmark in Change Closed Status, you will instigate manual closing of this PO changing its status to Closed - partially received.

Closed – partially received



A Purchase Order that is closed and partially received by checking the *Changed Closed Status* and saving.

Possible reason is only part of PO items have arrived. Vendor has stated do not have items in stock. Therefore you have manually closed the PO because you will no longer be receiving against it.

You can revert back to *Open - partially received* by checking the Changed and saving, but do note the following below.

NOTE: If PO is manually set to "Closed - partially received" with receiving only part of the quantity of the ordered items

- The PO Items quantity ordered are automatically edited to that actually received
  - example: if 4 were on order, received 3, and then manually set the PO to "Closed - partially received", the Qty Ordered in the PO will be automatically edited to 3 instead of 4
  - example: if a part request for 4 was made, a PO created from this part request for quantity of 4 ordered, received 3, and then manually set the PO to "Closed - partially received", the Qty Ordered in the PO will be automatically edited to 3 instead of 4 AND the workorder where the part request was made will automatically be edited to a Quantity ordered of 3
- PO Items that have 0 received are removed in their entirety from the PO (i.e. if 0 received for any parts, those ordered parts will be automatically removed from the PO Items list)
- The On Order quantity for a part showing in Part Inventory grid will be updated

Closed – fully received

A Purchase Order that is closed

All items have been received via Purchase Order Receipts.

Note once fully received no additional editing at all, including re-opening. And the Change Closed Status menu option is no longer available.

5.7.4.5 Purchase Order menu options

A Purchase Order entry screen's menu options display based on whether the PO has been ordered, been partially received or closed.

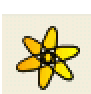
Closed or **Partially Received**

If the Purchase Order has been closed or partially received you will note that there is no Save related menu options as the PO can not be further edited except for the Project.

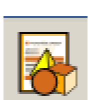
Not yet ordered or **Open - on order**

If the PO is not yet ordered or on order, you can still edit some of the Purchase Order's header fields (i.e. memo, Reference #, Expected Date, etc) so the Save related menu options show.

PO menu options:


Wiki

Refer to the [Wiki section](#) for more details.

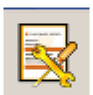

Restock List

First select the vendor in the PO itself.
Then clicking on this menu option will display a grid identifying all parts that are requested to be ordered via workorder items for that specific selected vendor set as the wholesaler in the part entry screen (or set as the alternative wholesaler).

This menu option will display blank information if a vendor has not yet been selected in the PO
This menu option will display blank information if the vendor selected is not the wholesaler or alternative wholesaler of the part to be restocked.

This menu option will not show if a Drop Ship to Client is selected.

See also:
How do I create a Purchase Order based on Restock Level for Parts for that Vendor?

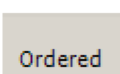

Part Requests List
First select the vendor in the PO itself.
Then clicking on this menu option will display a grid identifying all parts that are below the minimum stock level for that specific selected vendor as the wholesaler in the part entry screen (or alternative wholesaler). Refer to further in this section.

This menu option will display blank information if a vendor has not yet been selected in the PO
This menu option will display blank information if the vendor selected is not the wholesaler or alternative wholesaler of the part to be restocked.

This menu option will not show if a Drop Ship to Client is selected

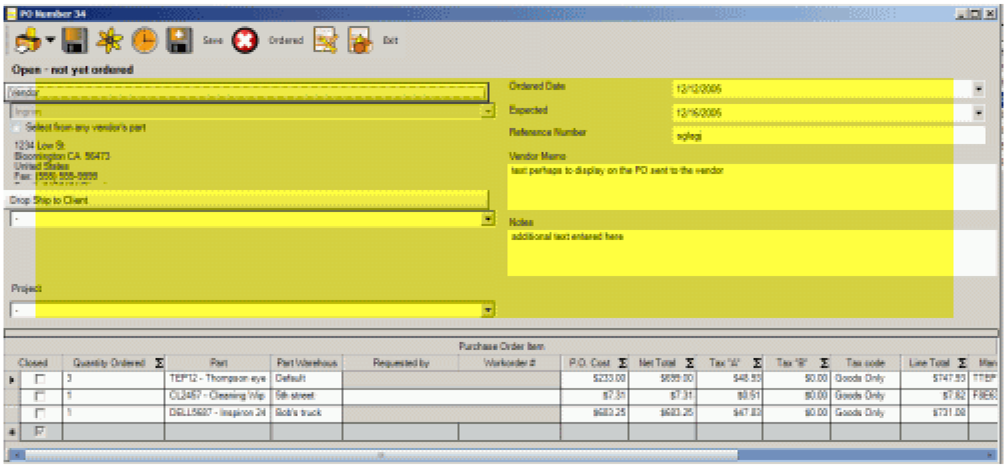
Only Part Requests from workorders that have not yet been closed AND have not yet been ordered in an existing PO will display for selection.

See also:
How do I create a Purchase Order based on Part Requests?

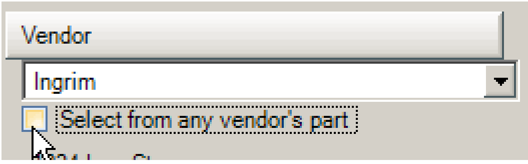


Ordered
Select to indicate that the Purchase Order has been ordered. Once selected, it can not be de-selected.

5.7.4.6 Purchase order entry screen



Vendor



When a Purchase Order is first created, you can select which Vendor the Purchase Order is for via the Vendor drop down selection list.

This is a required field.

If you have thousands of parts, and certain vendors provide certain parts, this narrows your selection of parts down.

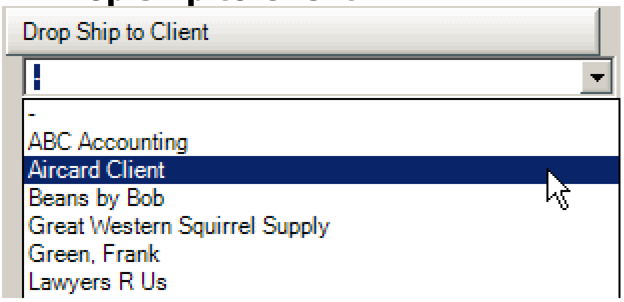
If instead you order the same parts from many different vendors then checkmark the Select from any vendor's parts to display all parts for selection.

If the Vendor is not in the list for selection, then with no vendor selected, click on the Vendor button which will open a new Vendor entry screen so that you can enter the details on the fly, save, close and return to the Purchase Order to select that Vendor.

> ***NOTE*** : Once a Vendor has been selected, and at least one part have been selected within the Purchase Order Items grid, the Vendor selection becomes grayed out to indicate that you can not change the Vendor once parts have been selected.

Select from any vendor's part
If you checkmark this field, then all parts regardless of who is set as the Wholesaler or Alternative Wholesaler in the part's entry screen will display for selection in this PO

Drop Ship to Client



This may be used to indicate that you wish the PO shipped directly to the client.

If the client is not in list for selection, then with no client selected, click on the Drop Ship to Client button which will open a new Client entry screen so that you can enter the details on the fly, save, close and return to the Purchase Order to select that Client.

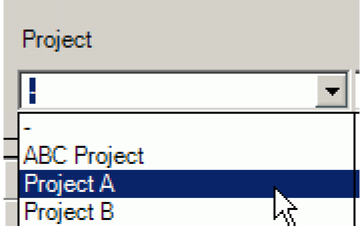
The selected Client address and contact information will display in the box below it, as well you can click on the Drop Ship To Client button to open up the Client entry screen for that client to view additional information.

Do note that when you select a Drop Ship to Client that the Part Request List and Restock List menu options will not show because you would not want to accidentally drop ship your restock items or part requests for other clients to one client.

If you need to select an item from the Part Request List menu option and Drop Ship it to a client – make sure you select the item from the Part Request List menu before selecting the Drop Ship to Client

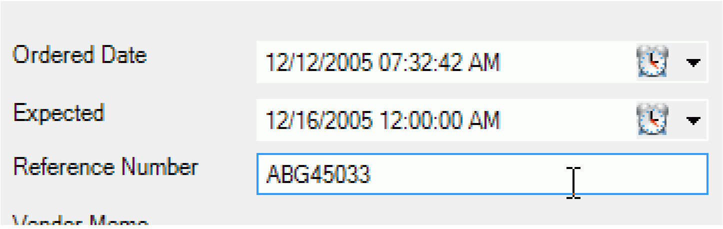
NOTE: If you are logged in as a user with a specific Region set, only those clients of the same region will display.

Project



If all parts ordered are for a specific project, you might want to select the project for identification here.

Ordered Date



As you may create the Purchase Order one day, but not order it till another, this allows you to select the actual date it was ordered. This is a required field.

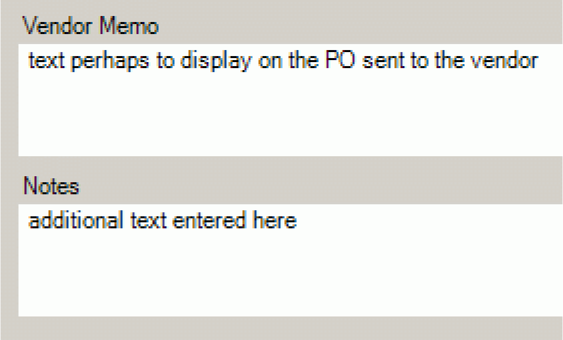
Once the PO is placed on order, this field is no longer editable.

Expected
This is the date you expect the ordered items to arrive at. Identifying this date allows for quick sorting on the Purchase Order grid screen of what ordered items are expected to arrive that day, as well within a Work order Item Parts the user can view the expected date once the part has been ordered.

This field is available for editing when the PO status is **Open - not yet ordered** or **Open - on order**. Once the status of the PO is changed to any other status, this field is no longer editable.

Reference Number
Suggested use is a PO reference number given to you from the vendor.

This field is available for editing when the PO status is **Open - not yet ordered** or **Open - on order**. Once the status of the PO is changed to any other status, this field is no longer editable.



Vendor Memo
Suggested use is information that you may wish on a PO sent to the vendor

This field is available for editing when the PO status is **Open - not yet ordered** or **Open - on order**. Once the status of the PO is changed to any other status, this field is no longer editable.

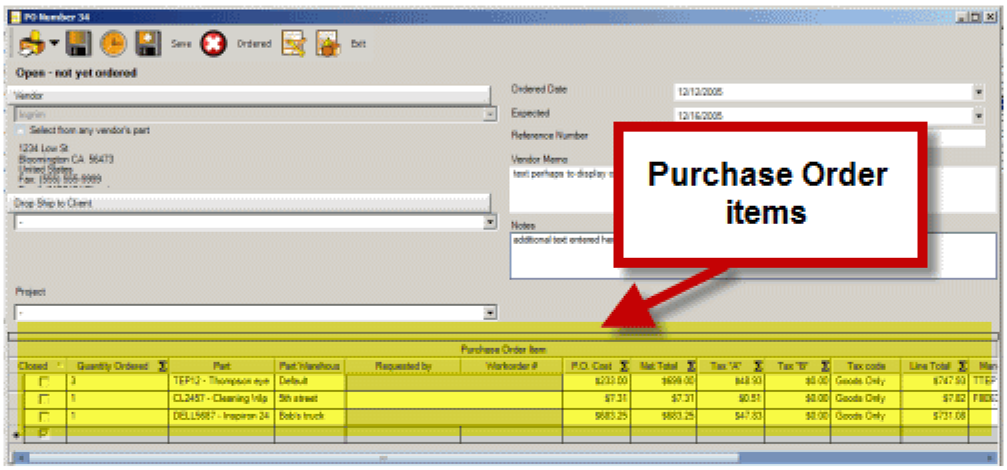
Notes
Suggested use may be for information for you regarding this PO

This field is available for editing when the PO status is **Open - not yet ordered** or **Open - on order**. Once the status of the PO is changed to any other status, this field is no longer editable.

See also:
[Custom Field Designer]
[Localize field labels]

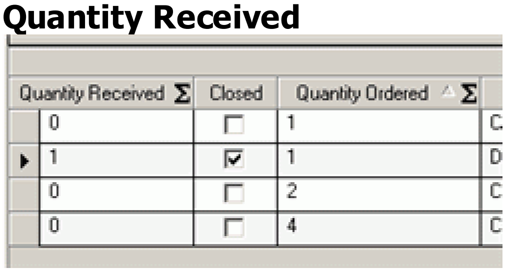
5.7.4.7 Purchase order entry screen items

Each Purchase Order could have one or more part records - identifying quantity ordered, for what warehouse, what tax rate, price, workorder requested from and more.



If you do not wish certain columns to display in the Items grid, just right-click on the column heading to bring up a list of all displaying columns and uncheck it.

Quantity Received



Only displays if any items have been received via Purchase Order Receipts. Quantity Received can not be manually edited as derived automatically by the database.

Quantity Ordered
Indicate how many of the part is to be ordered.
This number must be a positive number. Entering of a negative number will be automatically changed to a positive number.

Closed

Indicates if this items order is fulfilled.

Part

Quant	Part	Part Warehous	F
1	CAB1094 - Serial cable - DB-25 (M) - DB-25 (M) - 10 f	Bob's truck	
1	DELL5687 - Inspiron 2400 - Dell	Default	
2	CL2457 - Cleaning Wipes - Belkin	Hank's Truck	
4	CL134-0 - Super Duster 134 - MG Chemicals	Default	

This is a drop down selection of the part to be ordered.

If the part is not in the list it may be because:

- The selected vendor in the PO is not selected as a wholesaler for that part
- The selected vendor in the PO is not selected as an alternative wholesaler for that part
- The part is not yet entered in AyaNova.
- You have not check-marked **Select from any vendor's part field**

When a vendor is selected, only those parts associated with the vendor as a Wholesaler or as an Alternative Wholesaler display for selection, unless you have check-marked the Select from any vendor's part field under the vendor selection field at the top.

Part Warehouse
If the part is to be ordered to replenish a specific warehouse, select the warehouse here. When receiving, the inventory of this warehouse will be automatically updated.

Note: If ordering for multiple warehouses on the same purchase order, then each row should be the quantity ordered for that specific warehouse. You cannot receive against multiple warehouses in a single Receipt unless the Purchase Order items have been separated initially into quantities for each warehouse

P.O. Cost

Purchase Order Item						
P.O. Cost	Net Total	Tax "A"	Tax "B"	Tax code	Line Total	M
€3.00	€3.00	€0.21	€0.00	Goods Only	€3.21	C
€683.25	€683.25	€47.83	€0.00	Goods Only	€731.08	
€7.31	€14.62	€1.02	€0.00	Goods Only	€15.64	F
€2.69	€10.76	€0.75	€0.00	Goods Only	€11.51	M

This cost is initially taken from the entered cost field in the Part entry screen.

If your vendor gives you a different cost amount when you order, enter that amount here so it can be confirmed when the part is received.

Net Total
Quantity Ordered multiplied by the Part Cost.
Net Total can not be edited as derived automatically by the database.

Tax Code
The actual tax code selected affects what displays in Tax "A" and Tax "B". The default tax code as set up in Global Settings will automatically be selected here for purchases, but you can select a different tax code here as long as the PO has not been ordered yet.

Tax “A”, Tax “B”
The Tax “A” and Tax “B” are themselves not editable as it gets the information from the Tax Code itself.
Only the Tax Code can be changed from the default set – you can not manually change the tax $ amounts as derived automatically by the database.

Line Total
Quantity ordered multiplied by the Part Cost plus taxes.

Line Total can not be edited as derived automatically by the database.

Requested by, Workorder #

Requested by	Workorder #
AyaNova Administrator	41

This column will display who requested the part and via what service workorder if the part was entered in the PO via the Part Requests List.

This is automatic and cannot be edited or entered manually as tied to the actual service workorder.

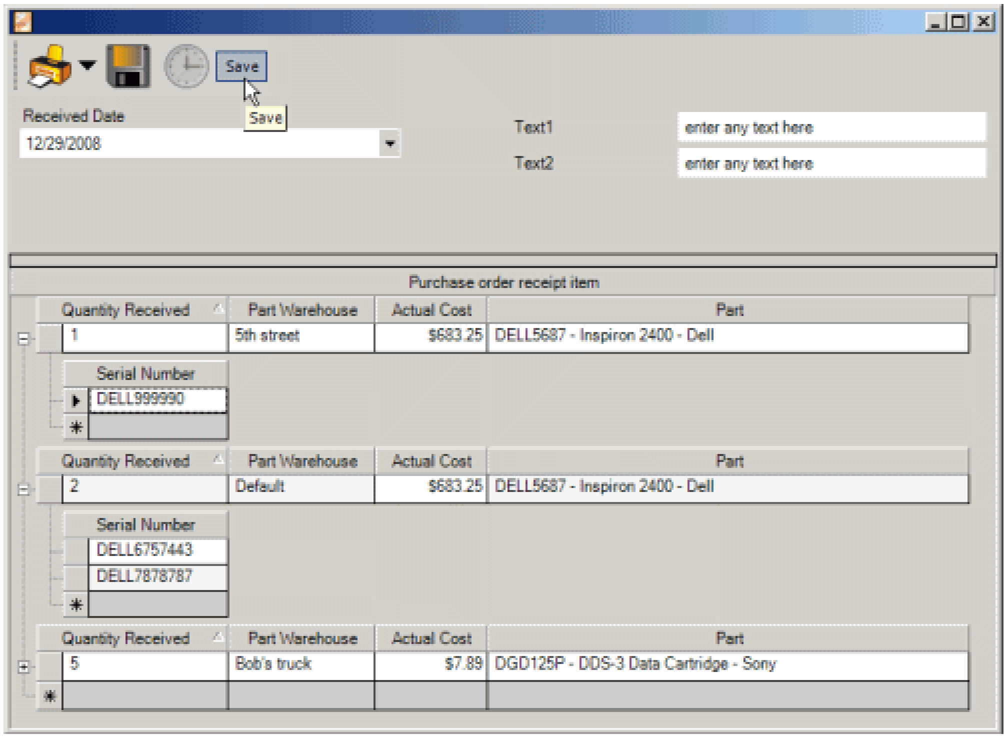
Manufacturer Number, Wholesaler Number, Alternative Wholesaler

Manufacturer Number	Wholesaler Number	Alternative Wholesaler
0035-10	521685	
F8E633	503264	
MG134	152475	

These columns display based on what is entered in that specific part's entry screen.

5.7.5 Purchase Order Receipts

5.7.5.1 What are Purchase Order Receipts for?



Purchase Order Receipts are used to receive inventory ordered via Purchase Orders.

Parts received via Receipts automatically update the Purchase Order, as well as automatically update inventory.

You can receive against multiple Purchase Orders at one time.

You can receive against a Purchase Order multiple times until all Parts are received.

NOTE: A Receipt can never be edited once it has been saved. An existing saved Receipt can only be viewed. If a Receipt is incorrect, use the Inventory Adjustment as needed.

See also:
How do I Receive a Purchase Order?

5.7.5.2 Purchase Order Receipts grid

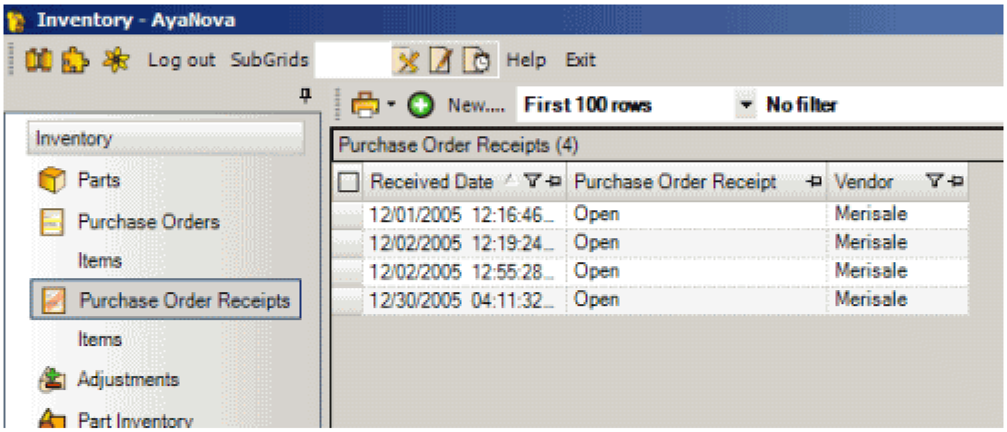
Purchase Order Receipts grid

The Receipt Orders grid displays only three columns – the Received Date column, the Vendor column and an Open column to open that purchase order receipt.

The grid does not display other columns as a Receipt could be for multiple Purchase Orders and Parts. You can filter based on the Vendor, or based on the Received date.

Purchase Order Receipts are created via the Purchase Order Receipts grid's New... 

menu option in the Inventory navigation pane



Note that you can also localize labels to display whatever you want - see also: Localize field labels

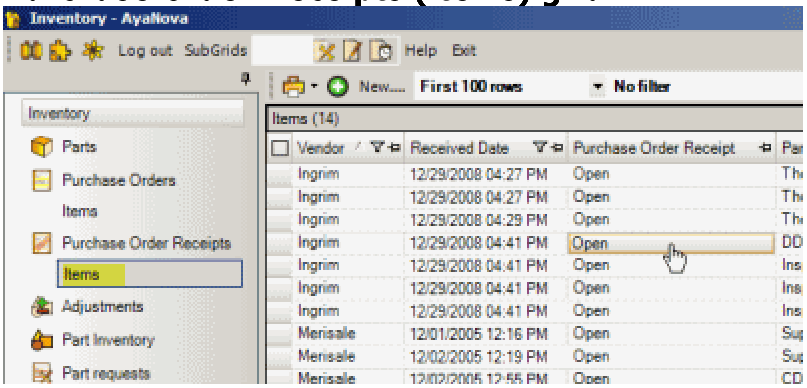
And you can set what columns you want to display in the grid - see also: Setting what columns display in a grid

Security Group internal object: Object.PurchaseOrder
Forbidden : User of that security group can not access the Purchase Order Receipts grid and entry screen *Read Only* : User can view the Purchase Order Receipts grid and entry screen but can not create new *Read/Write or Read/Write/Delete* : User can access the Purchase Order Receipts grid, view and create new

Vendor	Identifies the vendor the PO Receipt was made for	Select to open that Vendor's entry screen
Received Date	Displays the date the PO Receipt was received	
Purchase Order Receipt		Select to open PO Receipt entry screen

5.7.5.3 Purchase Order Receipts Items grid

Purchase Order Receipts (items) grid



The Receipt Orders Items grid displays actual data from the items in a PO Receipt

Examples of use:

- Perform a filter on the Serial Number for a specific serial number so that you can identify the vendor it was received from and when
- Perform a filter on Part Number to list all receiving of a certain part so that you can run a report on it.
- Perform a filter on the PO Number column to display parts received from a specific PO

And you can set what columns you want to display in the grid - see also: Setting what columns display in a grid

Vendor	Identifies the vendor the PO Receipt was made for	Select to open that Vendor's entry screen
Received Date	Displays the date the PO Receipt was received	
Purchase Order Receipt		Select to open PO Receipt entry screen
Text1	Displays the text entered in this field from the PO Receipt entry screen	
Text2	Displays the text entered in this field from the PO Receipt entry screen	
PO Number	Displays the PO # that the part record was ordered from	Select to open the Purchase Order entry screen
Workorder	If the part was requested via a workorder, displays the workorder #	Select to open the Workorder entry screen
Part	Displays the part name - from the part's entry screen	Select to open the Part's entry screen
Part Number	Displays the part number - from the part's entry screen	Select to open the Part's entry screen
Part Warehouse	Displays the part warehouse this part is ordered for in this PO	Select to open the Part Warehouses subgrid
Quantity Ordered	Displays the quantity of this part that was ordered in this record	
Quantity Received	Displays the quantity of this part that has been received for this specific record	
Serial Number	Displays the serial number for the part if serialized	
Actual Cost	Displays the cost entered in the PO Receipt for this part	
Retail	Displays the retail price set in the Part entry screen	
Active	From the part's entry screen	
Part Category	From the part's entry screen	
Part Assembly	From the part's entry screen	

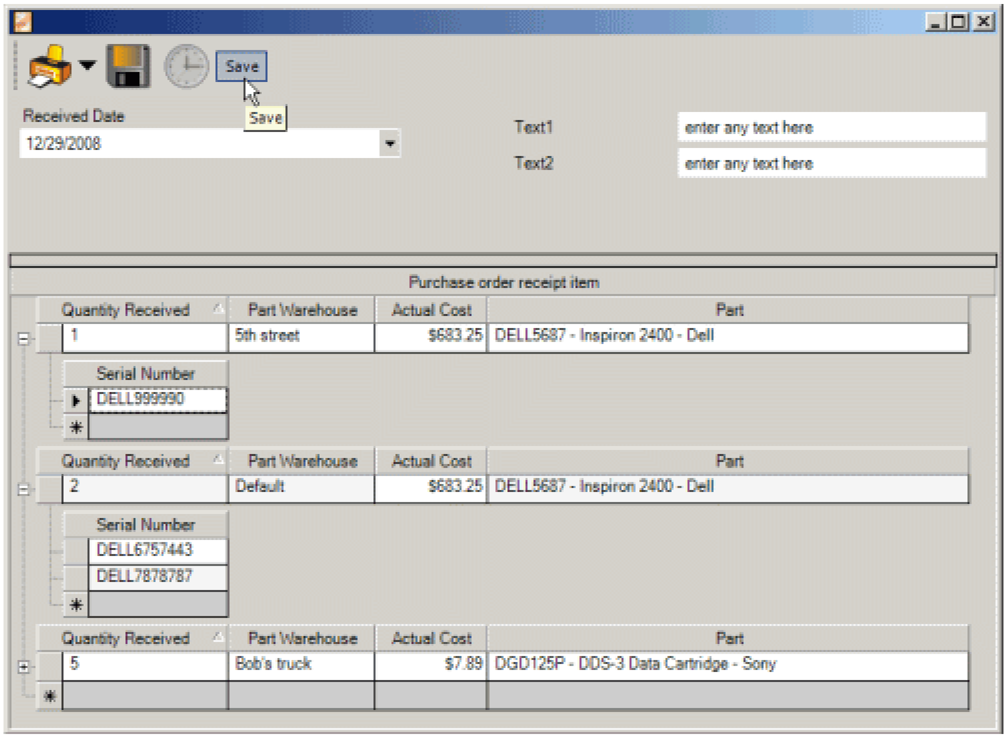
NOTE: Your Regional Settings for Time should include seconds so that you can select specific date/time when filtering on such columns as the Service Date in a workorder, the Labor's Service Start Date & Time, a PO's Ordered Date, a PO Receipt's Received Date, etc

- Certain date fields are automatically pre-entered for you when you perform something.
- For example - when you create a new service workorder, the Service Date defaults to today's date and time (including seconds); or when you place a PO on order, the Ordered Date is automatically taken from today's date and

time (including seconds); or when you receive parts from a PO, the Received Date is automatically taken from today's data and time (including seconds)

- Because the date and time are stored internally in the database including seconds, for you to be able to select a specific date/time to filter by, you must be showing the seconds so that the filter results include the specific record date.
- Otherwise, if you do not have seconds displaying, your filter results may show nothing.

5.7.5.4 Purchase Order Receipts entry screen



Purchase Order Receipt entry screen

Note that the Receipt entry screen items subgrid automatically populates with the quantity ordered. If the actual quantity ordered was incorrect or actual parts received are not complete, you would edit the Quantity received before saving and closing.

A Receipt can not be edited once it has been saved and closed.

If you have received incorrectly, an Inventory Adjustment will need to be made.

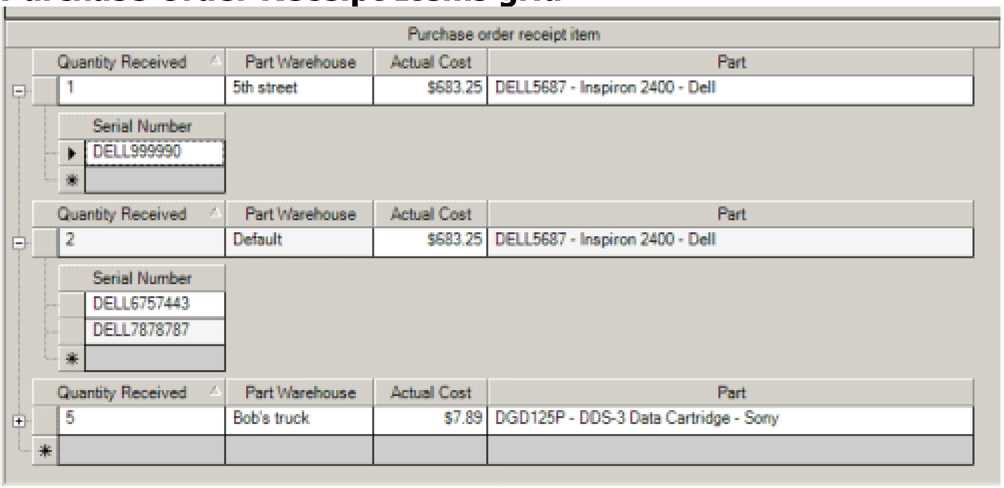
Received Date
This is the date the items were received. This is selectable as receiving could have occurred the previous day etc. The date defaults to today's date.

Text1
Enter any text here desired

Text2
Entered any text here desired

> Note that you can also localize labels to display whatever you want - see also: [Localize field labels](#)

Purchase Order Receipt Items grid



Additional items can not be added to the Receipt Items grid unless they come from a Purchase Order. If you are receiving items that were not via a Purchase Order in AyaNova, use the Inventory Adjustment screen.

Part
This is the Part that was selected on the Purchase Order.

Quantity Received
This defaults to the outstanding Quantity amount that was ordered that has not yet been received. It is editable until the Receipt is saved. This updates the Quantity Received column as displayed in an associated Purchase Order.

> **Serial Number**
> If the part is serialized (Track Serial Number has been check-marked in the Part's entry screen) then when you receive, you can enter the serial number received here.
>
> If the part **is not** set to Track Serial, the Serial Number field will be grayed to indicate no entry of a serial number.

If the part **is** set to Track Serial, the Serial Number fields for the quantity of that part received will display as editable so you can enter in the serial numbers.

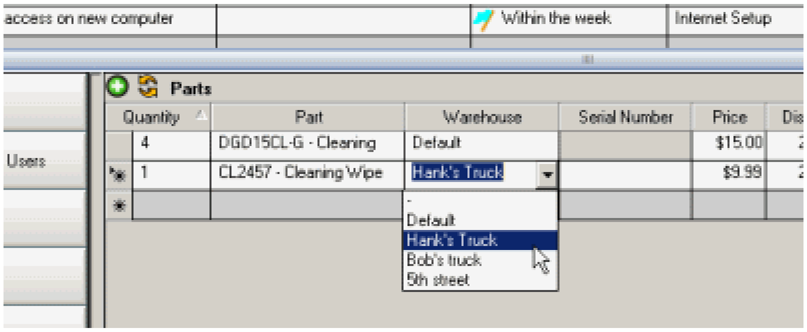
Part Warehouse
This is the warehouse selected in the Purchase Order. Note that you cannot change the warehouse as it is automatically obtained from the Purchase Order.

Actual Cost
This would be what the vendor actually charged for this part. It will default to what was entered in the Purchase Order, but is editable if needed to reflect what was actually charged.

The part's Cost field in its part entry screen is NOT updated with this Cost from the PO Receipt. If the price is different than what is in the part entry screen, you must manually edit.

See also:
How do I received a Purchase Order?
Notification Subscriptions - Workorder item part request – parts received

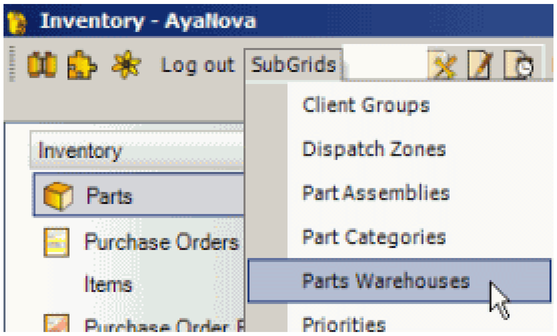
5.7.6 Part Warehouses

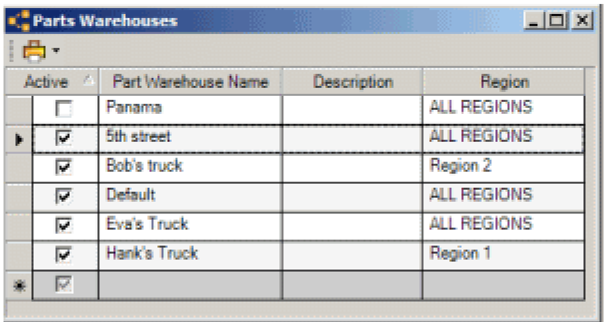


Warehouses can be actual buildings where stock is kept, or could even be each scheduled users "stash" of parts on hand so that inventory out of the store is tracked. How you use part warehouses is up to you.

Specifying exactly where parts are located, is useful to maintain accurate stock counts if you have multiple locations where stock is located

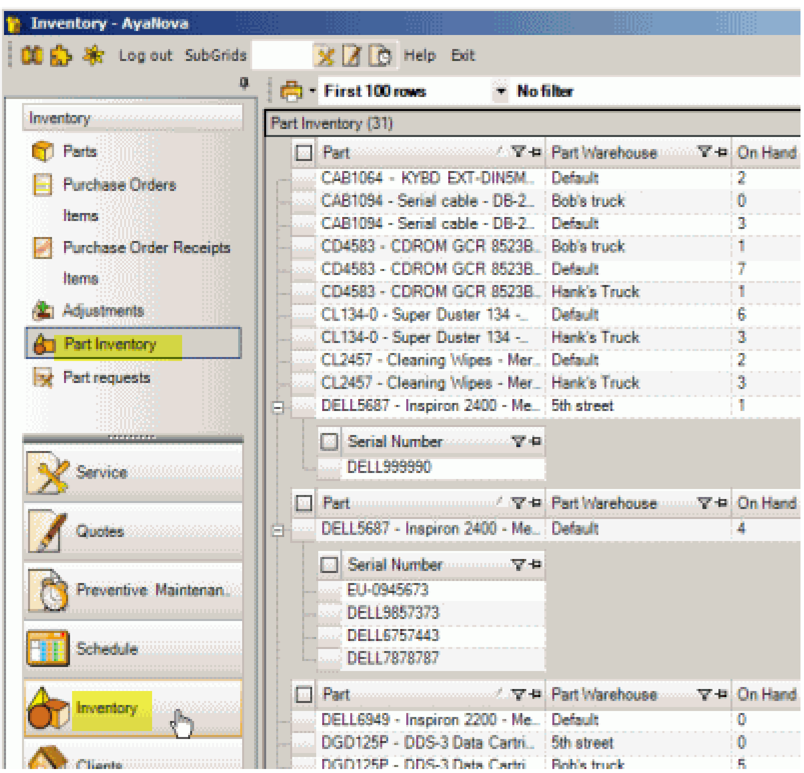
The part warehouse grid is accessed from the SubGrids menu bar from the top of your desktop AyaNova program





See more about [Part Warehouses]

5.7.7 Part Inventory Grid



The Part Inventory grid displays what the actual inventory of the parts entered into AyaNova is

NOTE: Only parts that have more than 0 On Hand Amount, or more than 0 On Order amount, or more than 0 in the Restock Level will display in this grid.

This grid format makes it very easy to filter, group and sort for ease of selection and for reporting. The grid will display parts in each warehouse based on your last view of this grid.

For example, if you filtered to only show parts in a specific warehouse, it would only show those parts that do so. If you do not wish certain columns to display in the grid, just right-click on the column heading to bring up a list of all displaying columns and uncheck it.

Another example of use: Filter on the Reorder Quantity field for all >0, so that only parts that have a re-order amount of more than 0 show, and you can see at a glance what wholesaler's you need to order from, and/or print off.

Note that you can also localize labels to display whatever you want - see also: Localize field labels

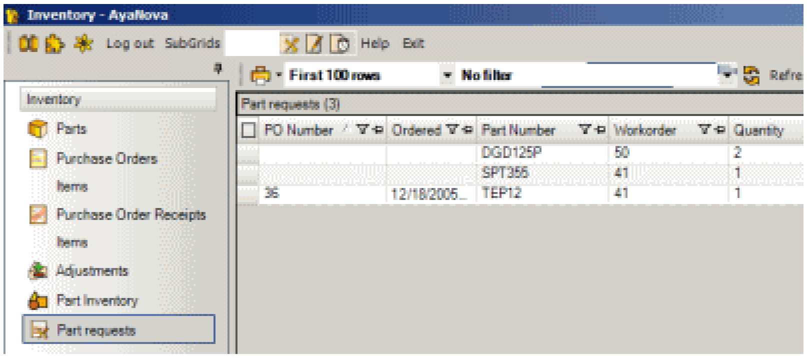
Security Group internal object: Object.PartByWarehouseInventory
Forbidden : User of that security group can not access the Part Inventory grid *Read Only or Read/Write or Read/Write/Delete* : User can view the Part Inventory grid

Part Inventory grid field columns:

Part Warehouse	Displays the warehouse name where this relevant quantity for this part is	Select to open Part Warehouses subgrid
Active	Displays whether this part is Active or not - if displays for selection in workorders, quotes and PM's	
Part	Displays part based on Global Setting's "part Display Format"	Select to open Part entry screen
On Hand	Displays quantity on hand of this part in this warehouse	
Reorder Quantity	Displays quantity for this part for this warehouse to order to bring On Hand up to Restock Level	
On Order	Displays quantity of this part for this warehouse that is on order	
Restock Level	Displays restock level quantity of this part for this warehouse	
Part Assembly		Select to open the Part Assembly subgrid
Part Category		Select to open the Part Category subgrid
Cost	Displays the individual cost price for this part - useful for reporting	
Retail	Displays the individual retail price for this part - useful for reporting	
Region	From the Part Warehouse	
Wholesaler		Select to open that vendor
Alternative Wholesaler		Select to open that vendor

See also:
Filtering a grid
Moving and sorting columns in a grid
Setting what columns display in a grid

5.7.8 Part Requests



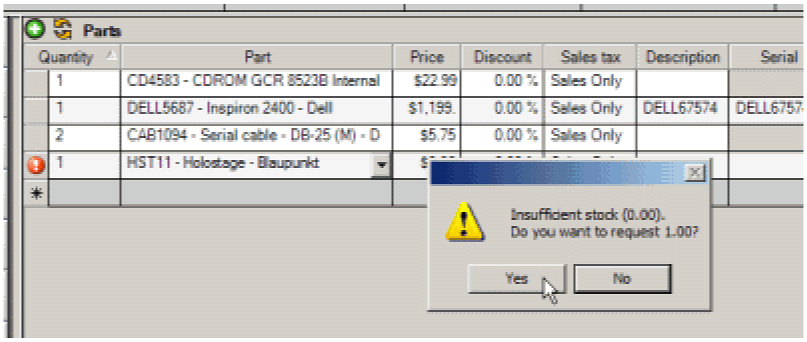
The Part Requests grid screen displays parts that have been requested via service workorders, showing whether ordered or not, so that you can see at a glance if a Purchase Order is needed to be placed for part requests.

For example: at the beginning of each day (if you normally order once a day) filter the Part Requests grid by those that do not have a PO number. If any records show, you will then know to create a PO for that wholesaler and order the requested parts

Part Requests will also display within the Purchase Order via the Part Requests List menu option so you can easily select what you do want to order from part requests. If you do not wish certain columns to display in the grid, just right-click on the column heading to bring up a list of all displaying columns and uncheck it.

Note that you can also localize labels to display whatever you want - see also: Localize field labels

The Part Requests that show in this grid are from parts you have requested via a service workorder. See Part Requests subgrid of the service workorder for more details.



Part Requests grid field columns

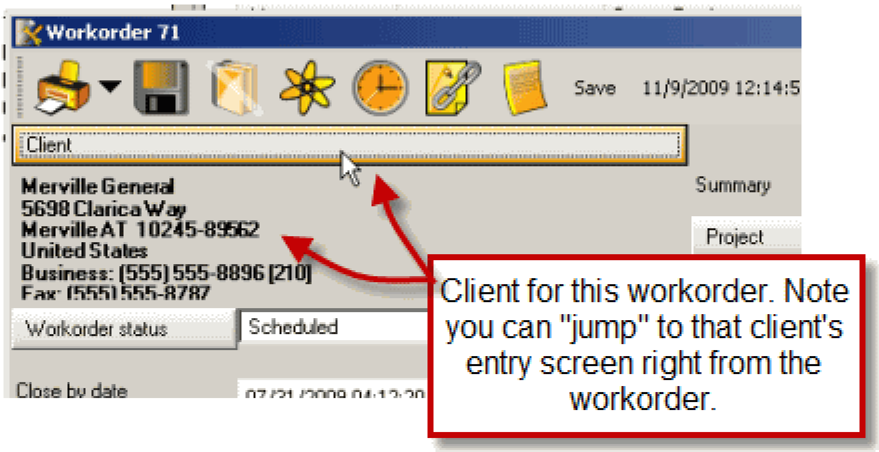
Part Warehouse	Displays warehouse name	Select to open Warehouses subgrid
Part Name	Displays part name	Select to open Part entry screen
Part Number	Displays part number	Select to open Part entry screen
Manufacturer		
Manufacturer Number		
Workorder	Service workorder number	Select to open the service workorder where this part was requested from
Closed	Indicates if the workorder is itself closed or not	
Record created	Date part was requested	
Wholesaler	Wholesaler for this part	Select to open vendor entry screen

Wholesaler Number		
PO Number	Number of PO this part was ordered on	
Ordered From	Wholesaler actually ordered from	Select to open vendor entry screen
Ordered Date	Date PO was ordered	
Expected	Date PO is expected to be received	
Quantity	Quantity requested via the workorder	

See also:
Filtering a grid
Moving and sorting columns in a grid
Setting what columns display in a grid

5.8 Clients

5.8.1 What do I use a Client for?



Clients are who you are performing service for.

A workorder, quote and/or PM can be created for a Client. And in the workorder (or quote or PM) you can further identify "Units" that are "owned" by the client that are serviced.

A client may be a company, a client may be an individual, a client may even be a bus. What you use "Client" as in AyaNova would depend on whom or who service is performed for in your service industry.

Examples:

Property management service - each "Client" equates to an apartment. And areas of the apartment (living room, kitchen, etc) and/or equipment in the condo such as dishwasher, bathtub, etc is identified as a "Unit". And "Head Office" equates to the entire building or owner of that building for billing purposes. This way when you create a service workorder for the apartment (i.e. Client) and also can identify the specific equipment or room (i.e. Unit in the apartment) that requires service and maintain service history on it.

Computer service - each "Client" equates to a customer that you provide computer service to. And each computer equipment owned by that client is identified as a "Unit".

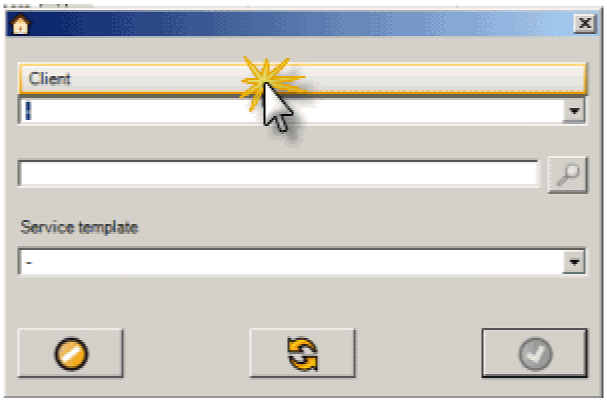
3 ways to create a client

1. Via the New... 

menu option in the Client grid

2. Via the Client jump button within another entry's screen

For example: in the Client selection window when creating a new workorder, click on the Client jump button with no client selected, and a new client entry screen will display for you to enter a new client.



See also: Jump Buttons

3. Import via the importexport.csv utility

Client's information is entered once via the Client entry screen. When a service work order, quote, or preventive maintenance item is needed for a client, you only have to select the client from the drop down selection list without having to re-entry information.

A history of all service workorders, quotes, preventive maintenance and units that are associated with a single client is therefore maintained.

As you can change who the Head Office is for a client, this can be useful for maintaining service history even if the client or unit changes.

Example:

A office building uses AyaNova to manage internal computer service. The department Accounting is a "Head Office". Bob who is an accountant is a "Client" (a "client") that has its head office as Accounting. Bob's printer is a "Unit" with Bob selected as the "Client" in its unit entry screen.
When service is performed for Bob's printer, the printer is selected as the unit in the workorder for Bob.
And if down the road, the printer is moved to Mary's office in the Loans department (Loans is another "Head Office" and Mary is another "Client"), in that unit's entry screen for that printer, the client is easily changed to Mary.

This way, when look up previous service history on that printer (Unit), will still be able to see all workorders where that unit was selected, even when it was "owned" by Bob.

AyaNova can be localized to display field label text in any language - for example, you may want what is labeled as "Clients" to be labeled as "Apartment" or "Employee" etc - whatever makes the easiest use for your type of service

See also for more details:
Localized Text Designer

5.8.2 Clients grid

The Clients grid screen lists clients in grid format. This grid format makes it very easy to filter, group and sort for ease of selection, as well as access the client entry information.

Performance hint: If a company has for example 10000 clients in their AyaNova database, and the user removes the service bank totals columns for incidents, hours and currency from displaying in the Client grid, the performance returning the list of clients will be improved. This is irrelevant if you have a small number of clients.

Performance hint: If a company has for example 10000 clients in their AyaNova database, and you do use Banked Service - just make sure none of these banked service related columns are the first four columns in the grid for sorting, and the performance returning the list of clients will be improved. This is irrelevant if you have a small number of clients.

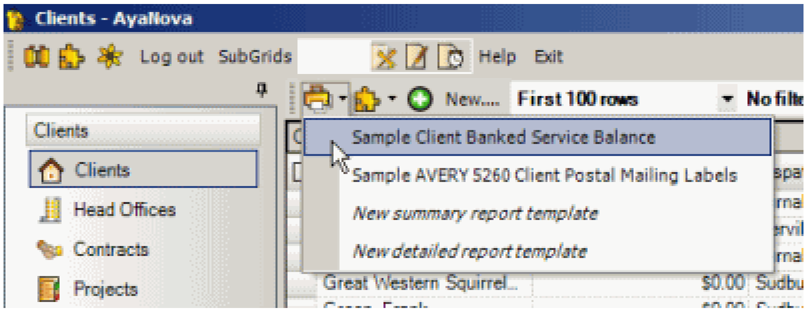
Security Group internal object: Object.Client
Forbidden : User of that security group can not access the Clients grid and entry screen *Read Only* : User can view the Clients grid and entry screen but can not edit it *Read/Write* : User can access the Clients grid, view, create and edit *Read/Write/Delete* : User can access the Clients grid, view, create and edit and delete

From the Clients grid you can:

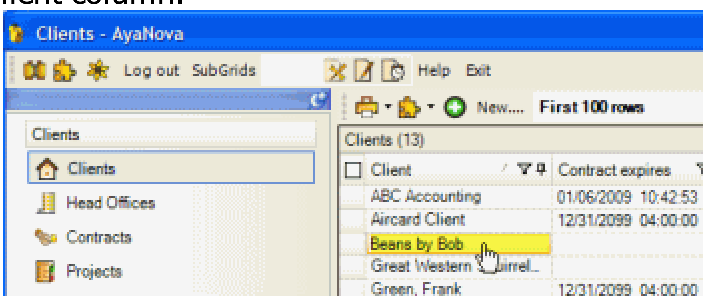
- Create a new client via the New... 

menu option

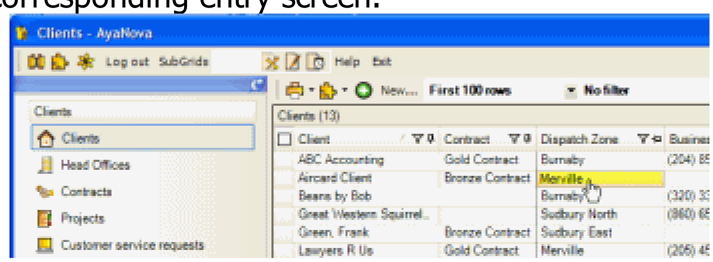
- Print reports on client data that is available from its entry screen and the Clients grid



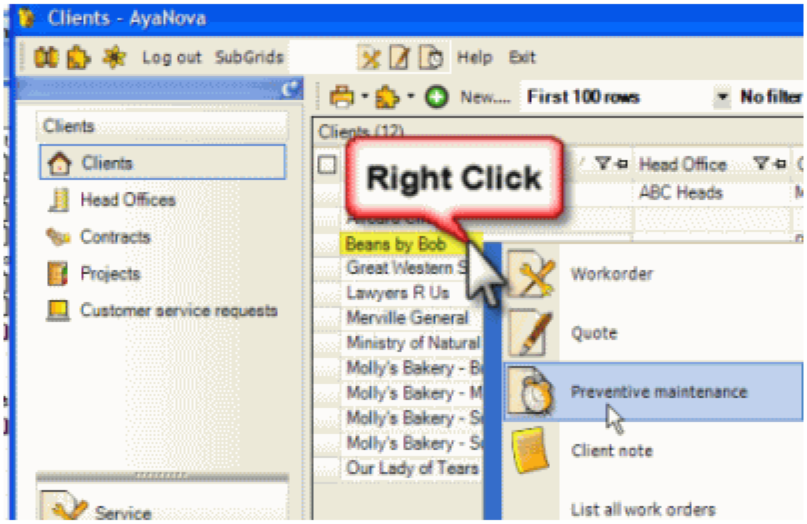
- Open up a Client entry screen of a client by clicking on the client listed in the Client column.



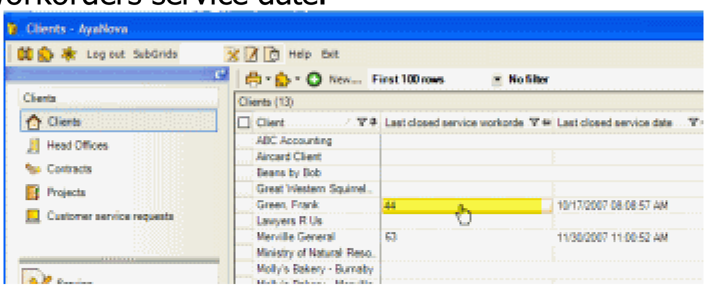
- Open up other entry screens such as its Head Office, Dispatch Zones, Contract, Client Groups etc by clicking on the field under the columns to open up the corresponding entry screen.



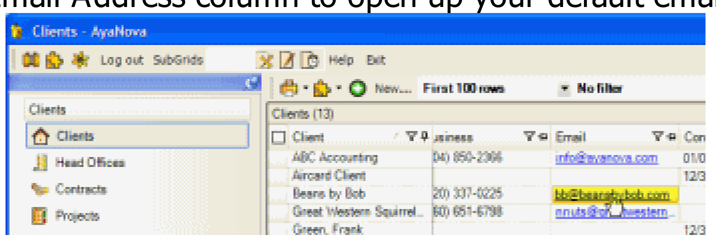
- Create a new work order, quote or PM item for that client by right-clicking on the client name under the Client column; or [list all workorders](#) for this client; or create an [AyaNovaLink](#) to this client on your desktop or in a Wiki page



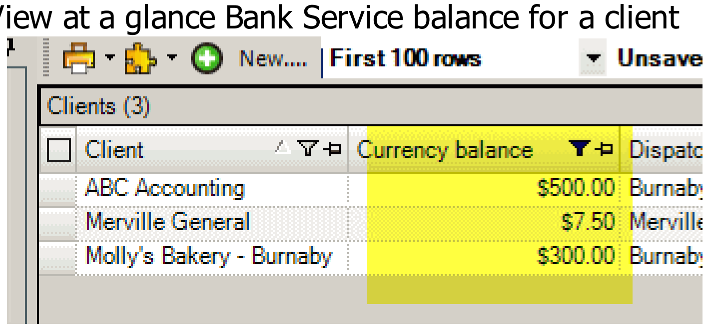
- Quickly view the last closed workorder for each client and that closed workorders service date.



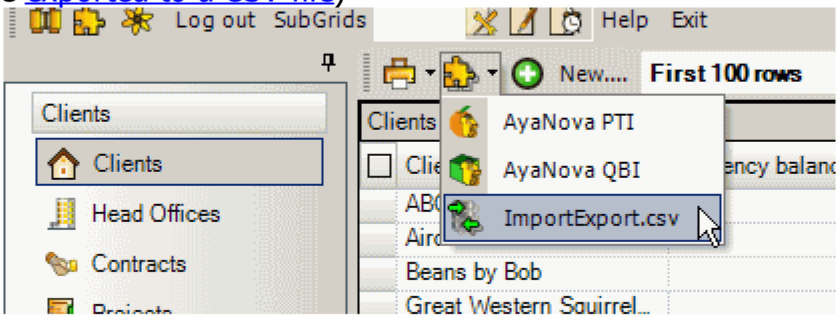
- Send an external email to a client by selecting the email address under the Email Address column to open up your default email program.



- Open the web site of the client by clicking on the website address to automatically open up your web browser to that URL
- View at a glance Bank Service balance for a client

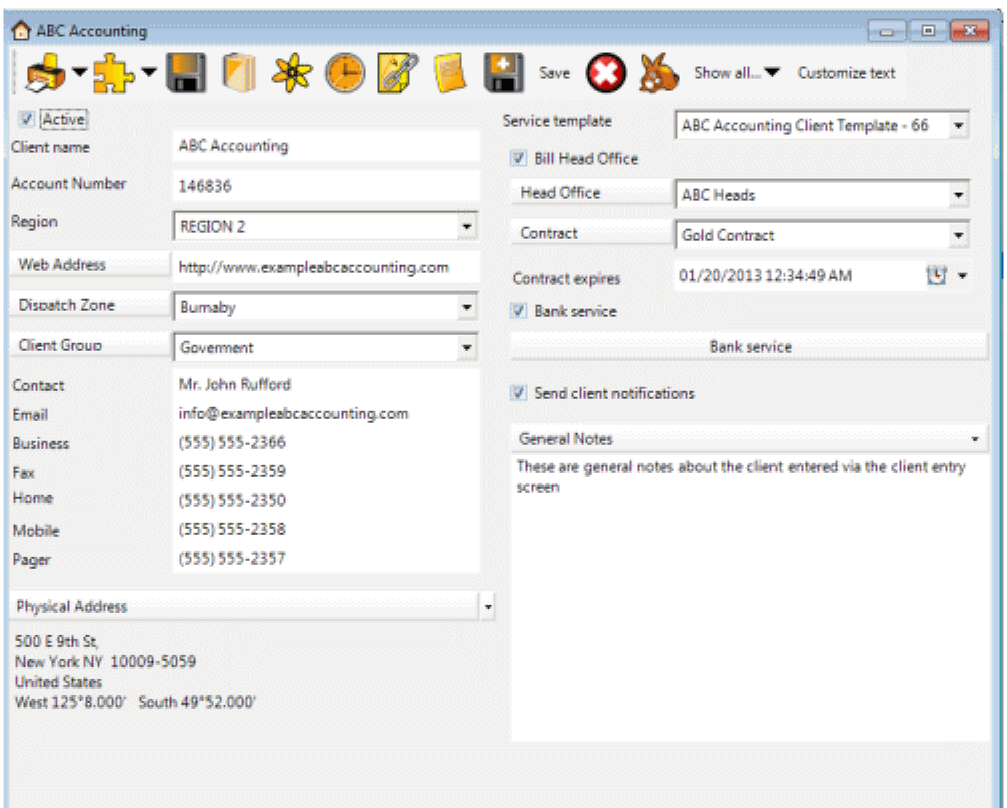


- Run either of the optional accounting programs QBI or PTI
- Export the selected client records to a CSV file (or don't select any, and all will be exported to a CSV file)



See also:
[Filtering a grid]
[Moving and sorting columns in a grid]
[Setting what columns display in a grid]
[How do I quickly find workorders for a client or a unit?]

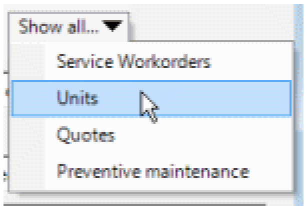
5.8.3 Clients entry screen



Additional client entry screen menu options

Client Note

This opens up the Client Note grid screen where you can enter notes pertaining to that client selected within this workorder. Client Notes are accessible from the client entry screen's menu options as well as from any workorder for that client for entry and viewing only - there is no print ability for Client Notes.



Show all...

This menu option provides quick access to all units of this client, all service workorders for this client, all quotes, and all PM's for this client

Customize text...

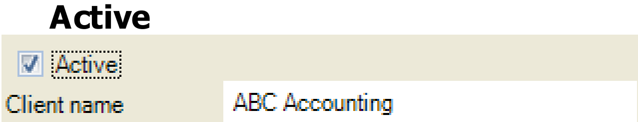
This menu option ONLY shows when logged in as the AyaNova Administrator.

Use the Customize text... menu option to localize labels of this entry screen on the fly or if accessed from the main menu bar, displays the labels of the main grids and main menu bar for quickly editing.

See also for more details:
Common entry screen menu options

Fields of the client entry screen

Active



If unchecked, client will appear only in Client grid screen, and not be listed in Client drop down selection lists any new service work orders, preventive maintenance, quotes or as a unit owner.
If this de-activated Client has any Preventive Maintenance workorders they will also be set to inactive.

Client Name

This is a text field where you enter the name you want to give the client. This field is used to fill any list in AyaNova where you need to select a client and be identified in any Client column.

If the client is not a company, then typically you would type the last name followed by a comma, a space and then the first name like this: Smith, Joe.

Client names should be unique so that they can easily be selected from drop-down selection lists without having to open the Client entry screen to determine which client name is the one you want.

Unique names are not required but are recommended so they are easy to select from the Clients drop down list.

If you have branches of the same company with the same name to enter, we recommend you append to their name something descriptive so you can tell them apart when selecting them for work orders.

For example you could append the company name with the street name or city name or country or branch number if the client numbers their branches. For example: “First national bank #102”, “First national bank #343” etc.

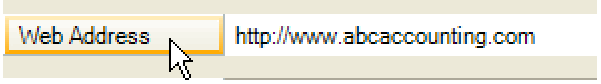
Because it’s necessary to select a client very often in AyaNova you should enter client names here in a way that takes full advantage of the client list selection auto-select shortcut feature. This feature allows you to type the first few characters of a client’s name to select them so the first part of the name should be the most distinctive.

Account Number
The account number for your client may be obtained from your accounting software, and is another way of identifying your client in reports or via the Clients grid. This is a text field only and not tied to any particular accounting feature.

Region
If you select the default region, then this Client is available for all users that have access to Clients. Otherwise select a specific region for this client to restrict access to it and its workorders etc.

Also see: Regions

Website



If you click on the Website button to the left, it will open up your computers default web browser to that entered URL address. Entering the client’s web address also allows you to easily select it from the Client grid if this is a need in your service.

Dispatch Zone
By assigning a client to a dispatch zone, along with AyaNova scheduled users assigned to dispatch zones, you can quickly view scheduled users via the Schedule screen that service this zone and be able to assign more efficiently.

Assigning clients to dispatch zones also is useful for sorting and filtering clients within the various grids.

Clicking on the Dispatch Zone button opens the Dispatch Zones grid. This is useful so that you can quickly and easily add additional Dispatch Zones to select from, or edit existing as needed and as you have rights to.

Client Group
Assigning clients to client groups is useful for sorting and filtering clients within the various grids.

Clicking on the Client Group button opens the Client Groups grid. This is useful so that you can quickly and easily add additional Client Groups to select from, or edit existing as needed and as you have rights to.

Contact
Suggestion is to enter the first and last name of the main contact for this client in this field.

When a new workorder is created for this client, as a helpful function, the contents of this field is transferred to the Contact field in the workorder.

Email
Enter in the main contacts email address here in proper email format if you plan on using the Client Notification feature and/or so that it may be used in a workorder report template.

This can then be used in conjunction with a detailed workorder report templates script to automatically "suck" this email address out and place it in the To: field when emailing a single report template for a workorder.

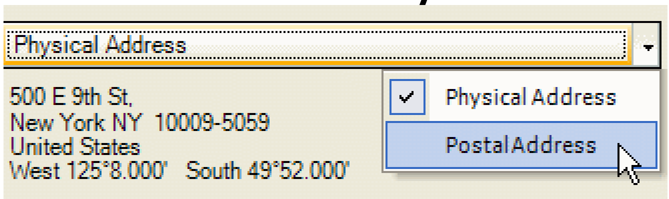
Refer to the AyaNova Support Forum https://forum.ayanova.com section Printing & Report Templates for additional sample report templates including those related for use with the client's email address.

Business, Fax, Home, Mobile, Pager
Enter appropriate phone numbers where indicated. These fields will be available in a detailed workorder report template.

Service Template

If you select a specific service template here, when you create a new workorder for this client, it will default to selecting that service template

Postal Address and Physical Address



The Postal Address is the address where the client receives mail. The Physical Address is where they receive deliveries or where service is performed; where they are physically.

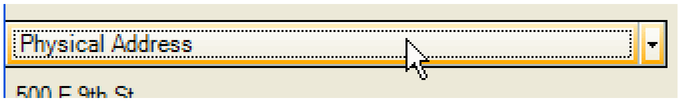
You can switch between these two addresses by clicking on the drop down arrow to display, and then clicking on either the Postal Address or Physical Address.

If presently viewing the Physical Address, the label Physical Address will have a checkmark beside it and be labeled in the button.

If presently viewing the Postal Address, the label Postal Address will have a checkmark beside it, and be labeled in the button.

The Physical Address defaults to showing as AyaNova is mostly concerned with where service is performed, and the physical address displays in the Clients grid, and within Service workorders, quotes and PM’s.

To edit the type of address, click on the button to bring up the Address entry screen.



Address screen menu options:

If viewing the Physical Address – the menu option will be **Copy to the postal address**. If viewing the Postal Address – this would be **Copy to the physical address** menu option. Makes it easier then having to enter twice, especially if the mailing address is exactly the same as the physical address where service is performed.

Once you have entered data, click once on the  OK button to accept the entered information and close the screen.

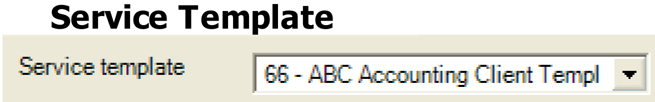
Select the  Record History button to display history regarding the user that created or last modified this record. Do note that only history of saved information is displayed. If you have not yet closed the screen which saves it, you as a user and the date will not yet display.

 This opens your default Internet browser to MapQuest where the entered address is automatically entered so you can view on a map. Extended mapping capabilities are on the To Do list for future releases of AyaNova

Note that if it was a Postal Address that was opened, that the Latitude and Longitude fields are grayed out. This is because Latitude and Longitude are physical attributes and only are available to display when the Physical Address button is selected. Use of Latitude and Longitude are on the To Do list for future features of AyaNova integrating with other mapping software.

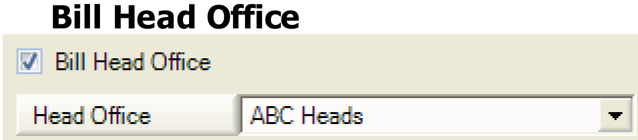
Enter Latitude and Longitude fields using the apostrophe key on your keyboard. For example, if South 49°52.000' you would type in 49’52.000 and then tab off.

Service Template



If you want a service workorder template always preselected for this client, select here

Bill Head Office



If you check mark this field, you can use this in conjunction with a script in a Detailed style report template to determine whether to display the Head Office’s postal address on a report for a service workorder, or the client’s address. This is useful if the head office is sent the completed workorder for payment, whereas a dispatch report would have the clients physical address as that is where service would be performed.

Refer to the AyaNova Support Forum https://forum.ayanova.com section Printing & Report Templates for additional sample report templates including those related for use with Bill Head Office.

Head Office
Assigning a client to a specific Head Office is for reporting purposes and/or filtering purposes only and is not required.

If the Head Office is not in the drop down list and no Head Office has been selected as the image above, then with the drop down selection list blank, click on the Head Office button to open up a new head office entry screen so that you can enter the Head Office details, save, close and then select it from this list.

Or if the Head Office is selected from the drop down list, you can open up the Head Office entry screen displaying that head office information by clicking on the Head Office button

Contract

Selecting a contract will automatically apply that contract's settings on rates to be used and part discounts to service workorders where this client is selected. You can also see right away in a service workorder that this client has a contract as the Contract icon  will display in the toolbar menu of the service workorder.

For example, if have selected a contract that restricts specific rates to be used, only those rates will be available for selection in a service workorder.

Or for example, if have selected a contract that applies a discount to parts, when parts are selected within a workorder item, this discount will automatically be entered.

You can quickly view the specifics of a contract by selecting it from the drop-down selection list, and then clicking on the Contract button to open the Contract entry screen.

If the contract desired is not in the drop down list and no contract has been selected as the image above, then with the drop down selection list blank, click on the Contract button to open up a new Contract entry screen so that you can enter the Contract details, save, close and then select it from this list. Refer to the section on Contracts further in this manual.

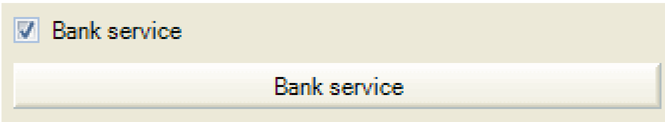
Contract Expires
If the contract has expired, it will not show the Contract icon within a service workorder and the Contract settings will not be enforced.

If there is no contract expiry date, it will not show the Contract icon within a service workorder and the Contract settings will not be enforced.

Entering the contract expiry date is useful to:

- Filter the Clients grid by Contract expiry Date to view at a glance which contracts are coming up on expiry.
- Run a report of contract expiry dates so that you can see at a glance which will expire soon and make sure to renew them
- So you can be automatically notified before the expiry date to remind your client to renew

Bank Service

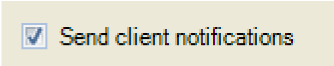


If checked, this displays the Bank Service button to open the Banking grid for this client

Banked service allows you to manually enter in prepaid amounts, and to automatically apply against the balance from service workorders.

See also for more details:
Banked Service

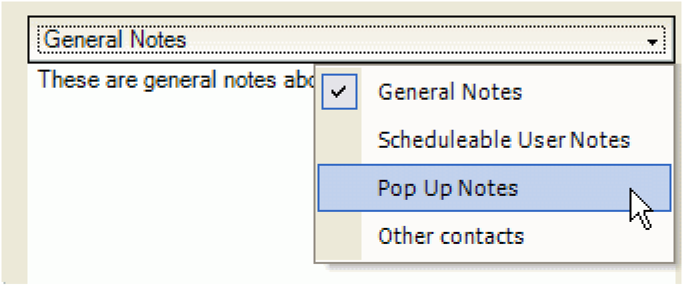
Send Client Notifications



If check-marked, then if the Region this client is a member of has Client notifications set up, then this client will receive those set up when that event occurs.

See also for more details:
Regions - Client Notifications

General Notes



These might be general information about the client that you wish to maintain with the client record.

Note that if you are viewing the General Notes the label General Notes will display on the button, as well as the drop down will show a checkmark next to General Notes.

Schedulable User Notes
If you have standing instructions for scheduled users that perform service for this client, you may wish to enter them here rather than re-entering in every service workorder for this client.

The Scheduled User Notes will display along with the client name, address and contact information in the service workorder entry screen and is selectable within Detailed format report templates.

Note that if you are viewing the Schedulable User Notes the label Schedulable User Notes will display on the button, as well as the drop down will show a checkmark next to Schedulable User Notes.

Popup Notes
Popup notes automatically "popup" whenever a service workorder for this client is opened whether a new service workorder, or viewing an existing service workorder.

A example of use would be the accounting department wants to indicate to dispatch when taking any service requests to remind the client about outstanding payments. As the popup will popup when the dispatch creates a new service workorder, this reminds the dispatch right then to talk with the client about this.

Other Contacts
Enter additional contacts information in this text box.

See also:
[Head Offices]
[Units]
[Custom Field Designer]

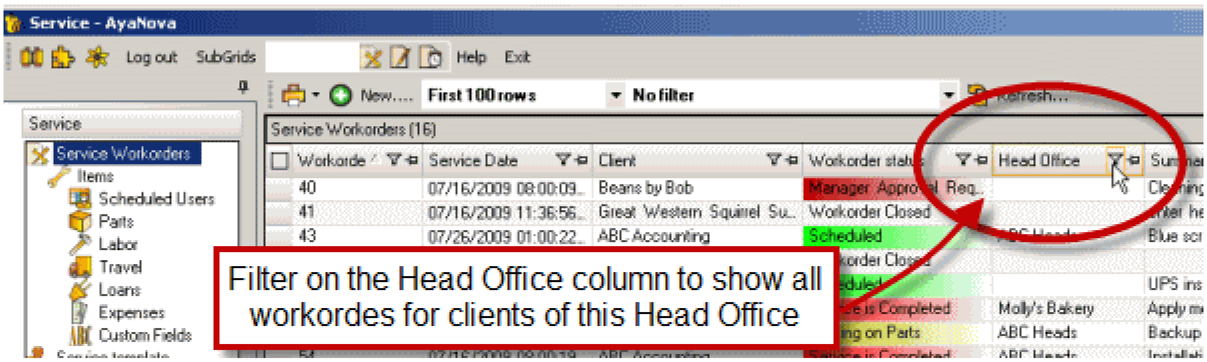
Fields from the Client entry screen that are available in a detailed service workorder report template

- Account Number
- Postal Address, City, StateProv, Country, PostalCode
- Physical Address, City, StateProv, Country, PostalCode, Latitude, Longitude
- Client Name

- Client Group
- Client Contact
- Dispatch Zone
- Email, Business, Fax, Home, Mobile, Pager
- Other Contacts
- Region
- Schedulable User Notes

5.9 Head Offices

5.9.1 What do I use Head Offices for?



Head Offices are used to group clients together for viewing and reporting and common functionality purposes.

For example, filter the Service Workorder grid by the Head Office to list all workorders for clients that have that same Head Office so you can produce a report for those specific workorders.

NOTE: Head Offices can **not** be selected as the client for whom service is being performed for in service workorders, quotes, PM's.

A Head Office may be the actual head office for a number of your customers, or Head Offices may represent different departments of your organization, or it could represent something else.

Examples:

Property management service - a "Head Office" equates to the entire building or owner of that building for billing purposes. And each "Client" equates to an apartment. And areas of the apartment (living room, kitchen, etc) and/or equipment in the condo such as dishwasher, bathtub, etc is identified as a "Unit". This way when you create a service workorder for the apartment (i.e. Client) you can have the actual billable information sent to the owner of the apartment building (i.e. Head Office)

Internal computer service for a loans company - a "Head Office" equates to a specific department of the company such as Accounting, Front, etc. And each "Client" equates to a specific person of this company. And each equipment used by a person such as computer, monitor, printer etc is identified as a "Unit". This way you can filter on the department (i.e. Head Office) to obtain reports for each department.

As you can change who the Head Office is for a client, this can be useful for maintaining service history even if the client or unit changes.

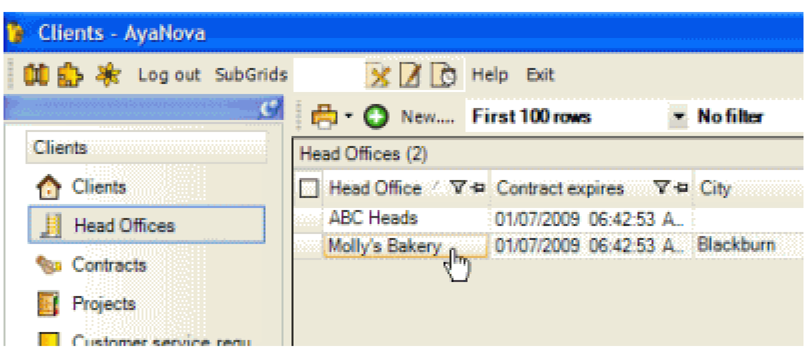
Example:

A office building uses AyaNova to manage internal computer service. The department Accounting is a "Head Office". Bob who is an accountant is a "Client" (a "client") that has its head office as Accounting. Bob's printer is a "Unit" with Bob selected as the "Client" in its unit entry screen.
When service is performed for Bob's printer, the printer is selected as the unit in the workorder for Bob.
And if down the road, the printer is moved to Mary's office in the Loans department (Loans is another "Head Office" and Mary is another "Client"), in that unit's entry screen for that printer, the client is easily changed to Mary. This way, when look up previous service history on that printer (Unit), will still be able to see all workorders where that unit was selected, even when it was "owned" by Bob.

AyaNova can be localized to display field label text in any language - for example, you may want what is labeled as "Head Offices" to be labeled as "Department" or "Building" etc - whatever makes sense for your type of service

See also for more details:
Localized Text Designer

5.9.2 Head Office grid



From the Head Offices grid you can:

- Create a new Head Office via the  New... menu option
- Open up a Head Office entry screen of a head office. Click on the head office listed in the Head Office column.

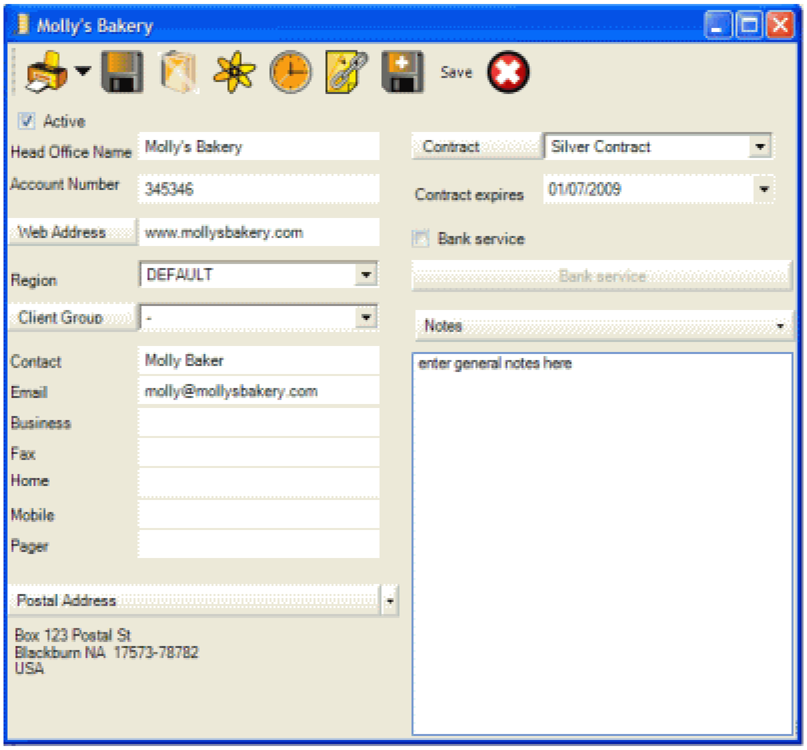
- Open up other entry screens such as a Contract, and the Client Groups subgrid by clicking on the field under the columns to open up the corresponding entry screen
- Send an external email to a head office by selecting the email address under the Email Address column to open up your default email program.
- Open the web site of the head office by clicking on the website address to automatically open up your web browser to that URL

Do note that all users regardless of the region they are specified to will continue to see all head offices listed in the Head Office grid because commonly it is the client that is regionalized, whereas the Head Office is available to all.

See Also: Regions

Security Group internal object: Object.HeadOffice
Forbidden : User of that security group can not access the Head Offices grid and entry screen *Read Only* : User can view the Head Offices grid and entry screen but can not edit *Read/Write* : User can access the Head Offices grid, view, create and edit *Read/Write/Delete* : User can access the Head Offices grid, view, create and edit and delete

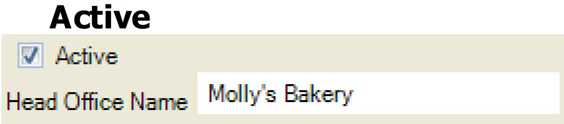
5.9.3 Head Office entry screen



See Also:
[Common entry screen menu options]

Fields of the Head Office entry screen:

Active



If unchecked, Head Office will appear only in head office grid screen, and not be listed in head office drop down selection lists.

Head Office Name

This is where you enter the head office company or name if it's not a company. This field is used to fill any list in AyaNova where you need to select a head office and be identified in any head office column.

If the head office is not a company, then typically you would type the last name followed by a comma, a space and then the first name like this: Smith, Joe.

As with client's names and any object name, the head office name should be unique so it is identifiable via the drop down selection lists.

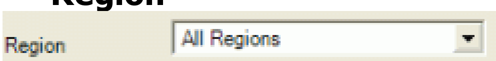
Account Number

The account number for your head office may be obtained from your accounting software, and is another way of identifying your head office in reports or via the head offices grid. This is a text field only and not tied to any particular accounting feature.

Web Address

If you click on the Web Address jump button, it will open up your computers default web browser to that entered URL address. Entering the head office's web address also allows you to easily select it from the head office grid if this is a need in your service.

Region



This drop down lists the available regions for selection.

By default a new Head Office will have the default region selected which means all users that are set for any region can view.

Do note that all users regardless of the region they are specified to will continue to see all head offices listed in the Head Office grid because commonly it is the client that is regionalized, whereas the Head Office is available to all.

See Also: [Regions]

Client Group

Assigning head offices to client groups is useful for sorting and filtering head offices within the grid.

Clicking on the Client Group button opens the Client Groups grid. This is useful so that you can quickly and easily add additional Client Groups to select from, or edit existing as needed and as you have rights to.

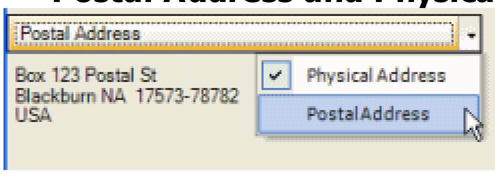
As with all fields other than the Head Office name, this is an optional field. You do not have to enter anything if you do not want to use this.

Contact
Suggestion is to enter the first and last name of the main contact for this head office in this field

Email
Enter in the main contacts email address here

Business, Fax, Home, Mobile, Pager
Enter appropriate phone numbers where indicated. These fields are not preformatted for specific telephone numbers - enter how you want to.

Postal Address and Physical Address



The Postal Address is the address where the head office receives mail. The Physical Address would be where they receive deliveries or where they are physically.

You can switch between these two addresses by clicking on the drop down arrow to display, and then clicking on either the Postal Address or Physical Address.

The Head Office's Postal Address is available via detailed report templates for service workorders. This is useful so that you can have the Head Office's address display on a report that is to be sent to the head office.

Contract

Selecting a contract assigns that contract settings to this head office, which in turn assigns it to all clients that have this head office selected within their Client entry screen.

Selecting a contract will automatically apply that contract's settings on rates to be used and part discounts to service workorders where clients that have this head office selected.

This cuts down having to select the same contract for every client that has this same head office.

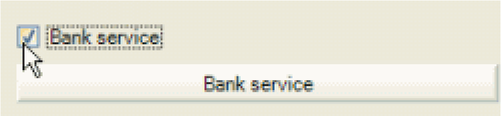
You can quickly see the specifications of the contract by selecting the contract from the drop down selection list, and then clicking on the Contract button to open that contract.

If the contract desired is not in the drop down list and no contract has been selected as the image above, then with the drop down selection list blank, click on the Contract button to open up a new Contract entry screen so that you can enter the Contract details, save, close and then select it from this list.

Contract Expires
If the contract has expired, it will not show the Contract icon within a service workorder and contract specifics would not apply.

Entering the contract expire date is also useful because it you could run a report of contract expiry dates so that you can see at a glance which will expire soon and renew them.

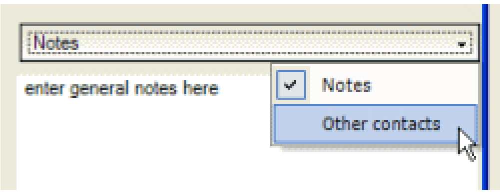
Bank Service



If checked, this displays the Bank Service button to open the Banking grid.

Banked service allows you to manually enter in prepaid amounts, and to automatically apply against the balance from service workorders.

Notes



These are notes about this head office for viewing when on the head office record screen only. They are not intended to be used elsewhere in the program.

Other Contacts
Enter additional contacts information in this text box.

Fields from the Head Office entry screen that are available in a detailed service workorder report template

- Head Office name
- Head Office Postal Address
- Head Office Postal City
- Head Office Postal Country
- Head Office Postal PostalCode
- Head Office Postal StateProv

5.10 Banked Service

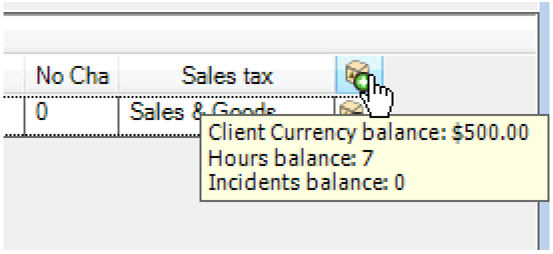


Image above from Labor subsection of a service workorder showing this client has Banked Service available.

If you have customers that prepay you for service, use the Banked Service feature to track what has been pre-paid and what has been applied against from service workorders for this client (or unit or head office)

See also:
[How do I enter a manual Banked Service?](#)
[How do I apply Labor against Banked Service automatically via a Service Workorder?](#)

- **Each head office, or client, or unit can have its own Banked Service.**

  If a unit has Bank Service activated, that takes precedence over the Bank Service for the client, which takes precedence over the Bank Service for the head office.

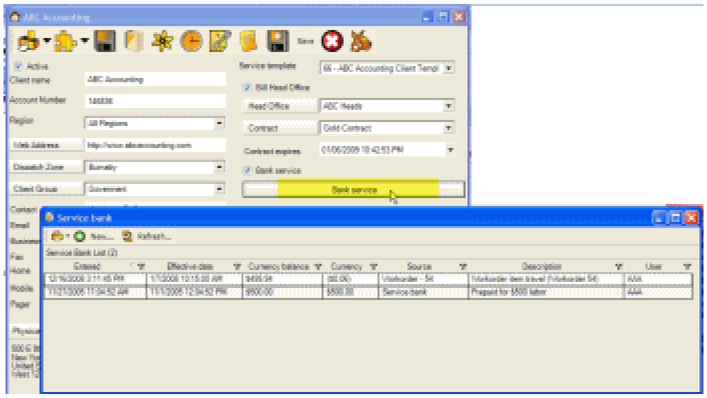
  For example, within a workorder, if the head office of the selected client has Bank Service enabled, you will be able to apply Labor (whether as hours, money amount or incidents) against that head office's Bank Service.

  But if a client also has Bank Service enabled, its Bank Service will be used instead of any set up for the Head Office.

  And again, if a specific unit of that client has itself been set up with Bank Service, when that unit is selected in a workorder item, any entered Labor within that workorder item would be applied against that unit's specific Bank Service.

  If a unit has its own Bank Service, that takes precedence over the Bank Service for the client, which takes precedence over the Bank Service for the head office.

- **The Banked grid is accessible from** within a head office entry screen for that specific head office, or within a client entry screen for that specific client or within a unit's entry screen for that specific unit by clicking on the Bank Service jump button.



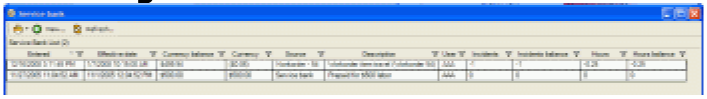
Screenshot above is from selecting the Bank Service from within a client's entry screen.

Grid entries can be entered manually within the grid itself; or grid entries can be automatically entered via a workorder items labor entry.

See also:
Labor - Banked

Once a row is entered and saved, it is not editable. If an incorrect amount is entered manually or applied incorrect via a work order, you will need to create manually an adjustment by entering a “minus” amount in a new entry.

Banked grid columns



Although the grid is filterable just as with other grids within AyaNova, it is recommended that you leave the Entered Date as the first column and display it so that you are always looking at the last entry first.

Note that the Banked grid can display columns for banked hours, banked incidents (labor items) as well as banked money. It is recommended that you make a standard decision on what means you bank service for all of your clients, and set the other columns to not display so there is no confusion.

For example, if you use Banked Hours only (as your client pre-pays for an hour of service instead of a currency amount), then it is suggested to edit the grid to not display the Banked Currency and Banked Incidents related columns.

Whereas if you use Banked Currency (client pre-pays a total labor amount) then it is suggested to edit the grid to not display the Banked Hours and Banked Incidents related columns.

If columns are displaying that you do not use, right-click on the column headings of the grid to bring up the list of columns. Uncheck the columns that you do not wish to show.
See also:
Setting what columns display in a grid

Entered
This is the creation date and time of the entry.

Hours
Positive or negative number of hours applied to previous total hours of Hours Balance

Hours Balance
Balance left on amount of hours pre-paid for determined by the entered date

Currency
Positive or negative number of money amount applied to previous total amount of Currency Balance

Currency Balance
Balance left on amount of money pre-paid determined by the entered date

Incidents
Positive or negative number of incidents applied to previous total amount of Incidents Balance.

Do note that each labor item within a workorder item in a single workorder is considered one incident if utilizing the automatic Bank Service feature in a workorder item Labor.

Incidents Balance
Balance left on number of incidents determined by the entered date

User
This is the user who either entered in the banked information manually or via the Labor item in a workorder.

Source
This column will show the text “Service Banked” to indicate a manual entry if entered from this screen.

If entered automatically via a workorder it will show the service workorder number.

Effective Date
Do note that this field is for informational and reporting purposes only – we localized it to the text Effective Date but you might use it for what ever date you may need it for.

Description
This field is where you might enter the reason for the entry. For example, you might enter "Client pre-paid for 30 hours" etc.

When row information comes from a work order, it will automatically enter "Workorder item labor" as the text.

If an adjusting entry because the labor item was deleted from the service workorder, it will display as (-Workorder item labor) to denote it is an adjusting entry.

Bank Service and Taxes

If the client has pre-paid for hours or incidents or a currency amount, it is assumed that you, the service company, have already taken into consideration the taxes.

For example, if a client prepays for 5 service hours at $50 a hour, and taxes on labor is 7%, the client would pre-pay $267.50 which is from ((5 hours x $50 per hour)x 0.07 tax rate)

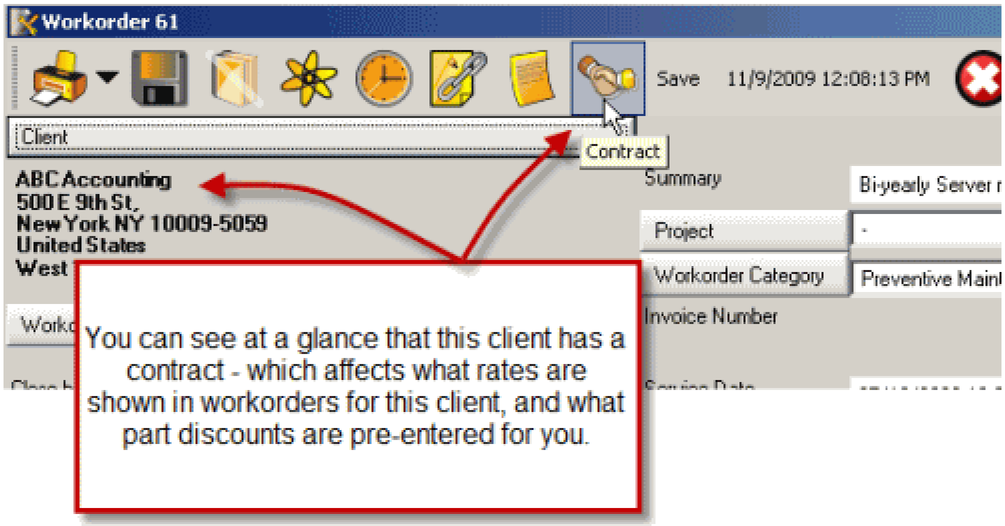
Another example, a clients wants to prepay $200 for banked currency. The service company would charge $200 + any applicable labor taxes, and enter the $200 in the Banked Service as pre-payment.

Printing Banked Service information

The Banked Service grid provides a number of sample report templates for printing data from that Banked Service grid for that client (or that head office, or that unit - whatever object you opened that Banked Service grid for)

Also note that the Labor grid and the Travel grid in the Service navigation pane can show the Effective Date column which identifies the date the banked service was applied. This column is useful to filter to show which labor (or travel) records have (or have not) been applied against banked service and when they were applied.

5.11 Contracts



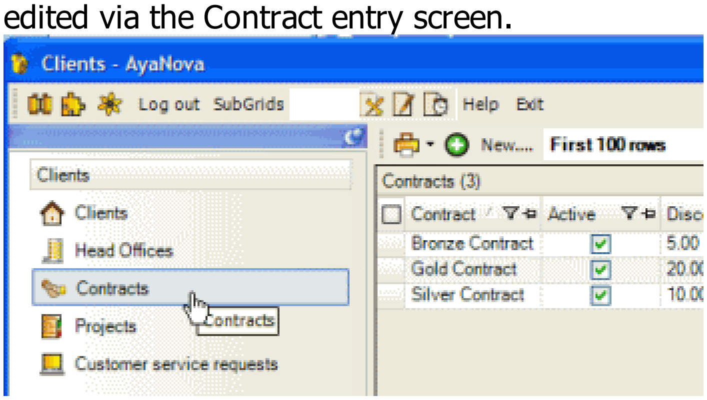
In your service you may have customers that receive special service rates, and travel rates, as well as a special discount on parts.

Rather than having to try to remember when billing out labor, travel, and parts, you can assign these contracts to the head office or to individual clients; and the workorders where these clients are selected will automatically remind you by either allowing these special contract rates in selection lists, or restricting to only the special contract rates in selection lists, and automatically entering the discount to be set to parts when used in service.

Contracts can be selected for head offices and for clients.

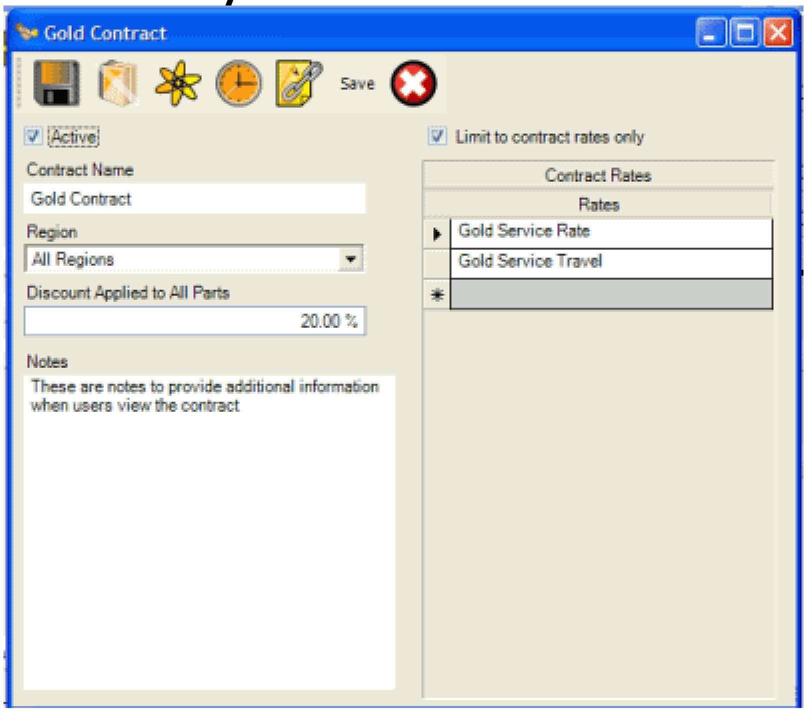
NOTE: If you are looking to enter pre-paid amounts and apply against these, refer to Bank Service. Banked service can be selected for head offices, for clients, and for client's units (customer equipment).

Contracts are listed in the Contracts grid list, and individual contracts are created and edited via the Contract entry screen.



Security Group internal object: Object.Contract
Forbidden : User of that security group can not access the Contracts grid nor entry screen *Read Only* : User can view the Contracts grid but can not edit via the entry screen *Read/Write* : User can access the Contracts grid, view, create and edit *Read/Write/Delete* : User can access the Contracts grid, view, create and edit and delete
Security Group internal object: Object.ContractRate
Forbidden : User of that security group can not access the Contract entry screen *Read Only* : User can view Contract Rates within the Contract entry screen but can not edit it *Read/Write or Read/Write/Delete* : User can view and edit the Contract Rates within the Contract entry screen

Contract entry field



Active
This indicates if the contract is in force or not. Contracts in force will appear so within workorders with the discount automatically displaying on selected parts, and rates set displaying in drop down selection lists in the workorder. This overrides Contract Expires set in the head office or client entry screen.

Contract Name
This text field is where you would identify the name of the contract that will display for selection.

Region
This drop down lists the available regions for selection.

By default a new Contract will have the default region selected which means all users that are set for any region can view. If you want to restrict users from viewing this contract to those of a specific region, then select a specific region.

See Also: Regions

Discount Applied to all Parts on any Work order
Enter in a discount that a Client will receive that will be applied to all parts selected within a workorder.

If a discount is not to be applied to all parts, then within a workorder item you will need to specific the discount at the time of part entry.

You will be able to edit this discount or remove it in the workorder item parts.

Notes
This text field is where any additional information pertaining to this contract would be entered.

Limit to Contract Rates Only
Check this box if you want only the rates selected in the Contract Rates grid to be available in drop down lists for selection within workorders for a client of head office / client that has this contract selected.

If Limit to Contract Rates Only is selected, you must have at minimum one of each contract type rates selected – one contract service rate, and one contract travel rate - otherwise when you go to select a rate in a service workorder, nothing will display for selection.

NOTE: Only rates that have been check-marked as "Contract" within the Rates subgrid can be selected in the Contract Rates grid

If you want rates for this client to include specific contract rates set in the Contract Rates grid; and also want to be able to select all “regular” rates, then do not check this box.

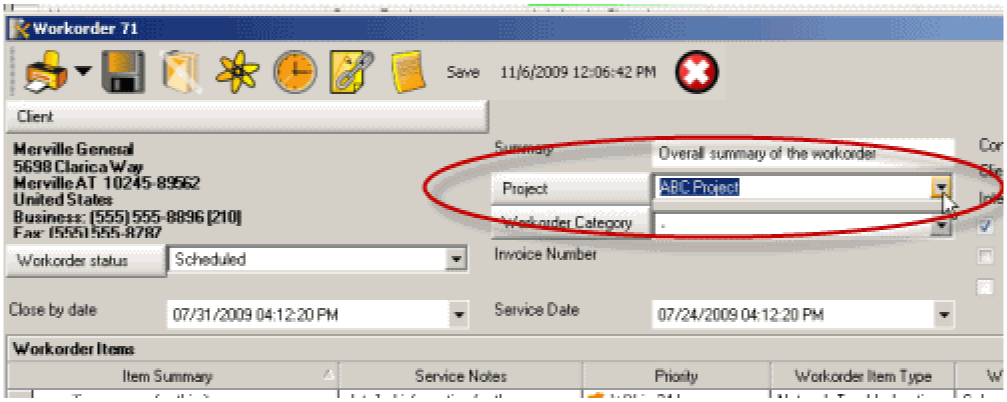
See also:
Rates

Contract Rates grid
Rates that have been set as Contract within the Rates subgrid will display for selection here.

You can have as many different rates specified here as needed.

Rates selected in this Contract Rates grid in the Contract entry screen will display in drop down selection lists for the client of the head office / client that has this contract selected in their entry screen and a valid Contract Expiry date.

5.12 Projects



Projects in AyaNova are used to group service workorders, quotes, Preventive Maintenance and/or Purchase Orders together for management reporting purposes and as an additional method of categorizing orders for filtering.

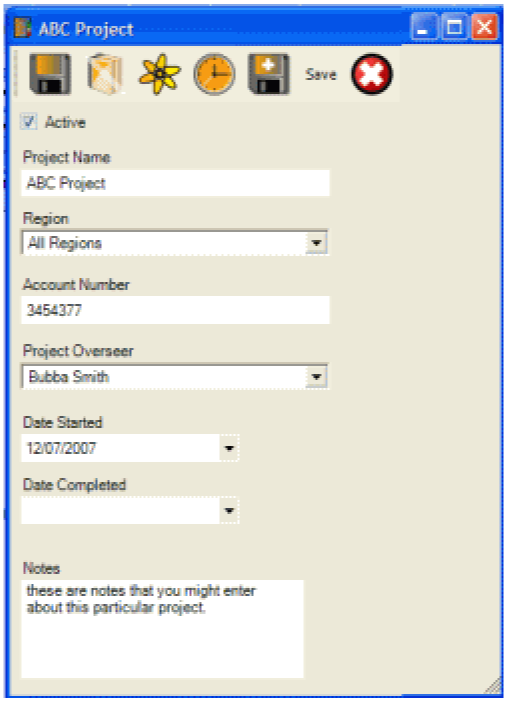
From time to time a service organization may take on a set project that will involve multiple service calls to complete.
It is useful to know exactly how many work orders went into a project, the total labor hours, parts etc to see if the amount bid or quoted for a project was realistic.It's also important to keep track of the total expenses for a project as it progresses to ensure the work is within the amount quoted. Finally, it may be useful to be able to show the client a summarized or detailed account of all work that went into a project.

The Project grid displays the projects that have been created within AyaNova based on the filters and sorting selected in the Projects grid. The grid displays information about each project – project name, account number, project overseer, date started and completed and active status.

The Projects grid does not display what service workorders have this project selected – you would refer to the Service workorders grid, and filter and sort by Projects to see this.

Security Group internal object: Object.Project
Forbidden : User of that security group can not access the Projects grid nor entry screen *Read Only* : User can view the Projects grid and entry screen but can not edit it *Read/Write* : User can access the Projects grid, view, create and edit

Read/Write/Delete : User can access the Projects grid, view, create and edit and delete



The Project entry screen

Active

Active projects will display in drop down selection within workorders, quotes, and preventive maintenance.

If the project has been selected within a service workorder, quote, or pm, you will not be able to delete the project.

If you do not wish a project to display (for example once the project is over) for selection in the Project drop down selection list in service workorders, quotes, or pm's, make the project inactive. Setting a project inactive hides it from new selection but retains all it's history.

Project Name

This is a text field where you would enter the name of the project that appears on printed reports and in selection lists in AyaNova. It is recommended to keep it short and descriptive.

Note that if you change this name after using it, it affects all existing records that use this project as the name is *linked* to those other objects, not stored in them. Make new projects, don't re-use old ones.

Account Number
This text field is for informational and reporting purposes and grid filtering only at this time.

Region
This drop down lists the available regions for selection.

By default a new Project will have the default region selected which means all users that are set for any region can view. If you want to restrict users from viewing this project to those of a specific region, then select a specific region.

See Also: Regions

Project Overseer ID
The AyaNova user responsible for overseeing the project. This drop down selection field is for informational purposes and grid filtering only at this time.

Date Started
This date selection field is for informational purposes and grid filtering only at this time.

Date Completed
This date selection field is for informational purposes and grid filtering only at this time.

Notes
Enter in this text field descriptive notes regarding this project.

5.13 Customer Service Requests

5.13.1 What do I use Customer Service Requests for?

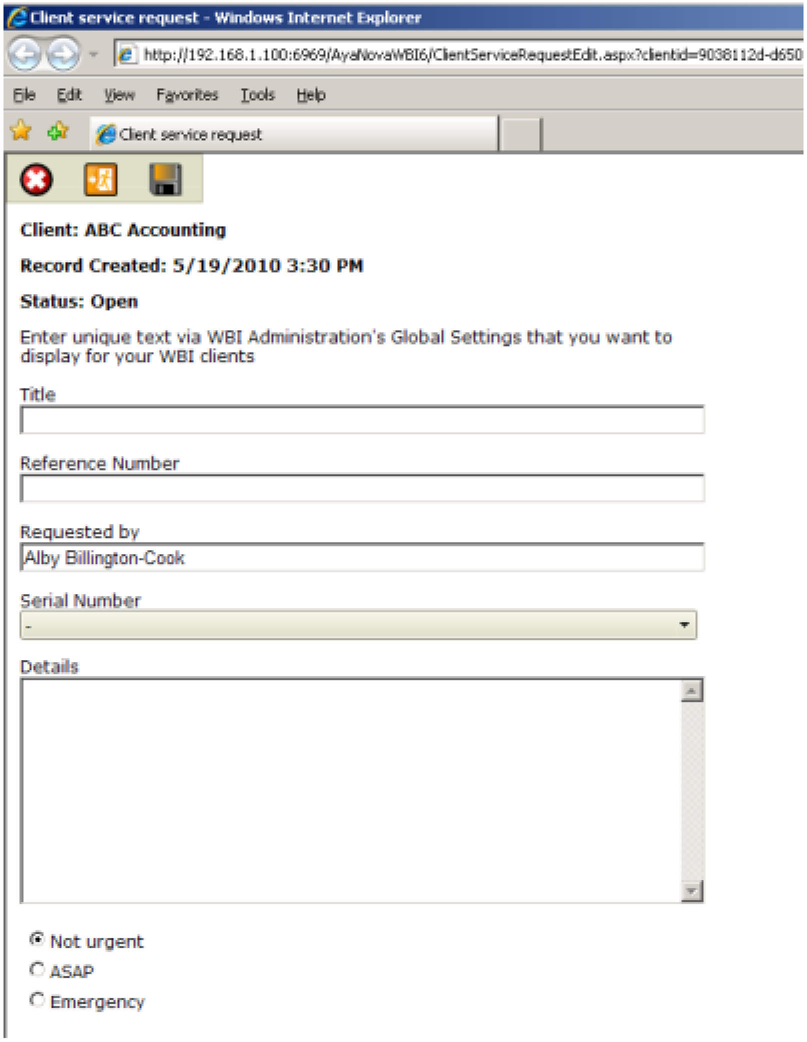


Image above is from the Service request form that a client can fill out online using a web browser to request service from you.

Customer Service Requests are requests for service made by "clients" via the Client WBI optional add-on.

> "Clients" could be customers of your service company, clients could be properties if you are a property management company, clients could be offices in your building that you schedule service for, etc. See also the section on Clients.
>
> The Client WBI optional add-on allows you to offer your clients the ability to request service via the web without having to call or email without knowing for sure if anything is being done; as they can visually see via their Client WBI screen when CSR's have been accepted or rejected, and what service workorder the request is now tied to once accepted.

You can also be automatically notified when a client requests service so no delay in responding.

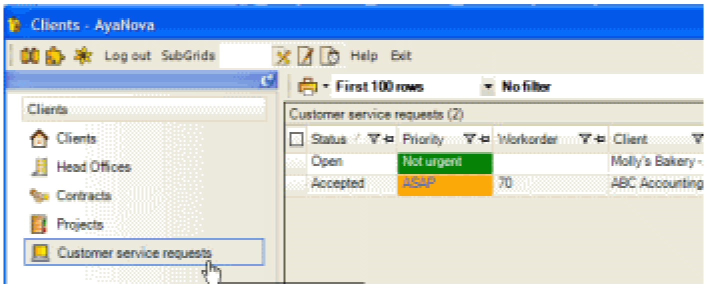
Do check out details about the optional add-on WBI and other remote access options on our website at http://www.ayanova.com

5.13.2 Customer Service Requests grid

The Customer Service Requests grid in AyaNova is where you can view requests for service made directly by clients using the optional add-on WBI (web browser interface)

In addition to supporting roving technicians on the road, WBI is also an excellent way to provide modern service capabilities to your customers, refer to the our web site http://www.ayanova.com for details on WBI and other remote access options.

The Customer Service Requests grid in the AyaNova program is also where you can accept a request (and thereby auto-generate a service workorder from it), or reject a request.



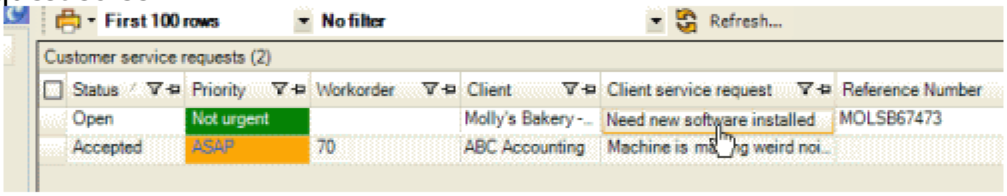
Security Group internal object: Object.ClientServiceRequest
Forbidden : User of that security group can not access the Client Service Request grid nor CSR entry screens *Read Only* : User can view the Client Service Request grid but can not accept or reject if also has rights to Service Workorders *Read/Write or Read/Write/Delete* : User can access the Vendors grid, view, accept and reject if also has rights to Service Workorders

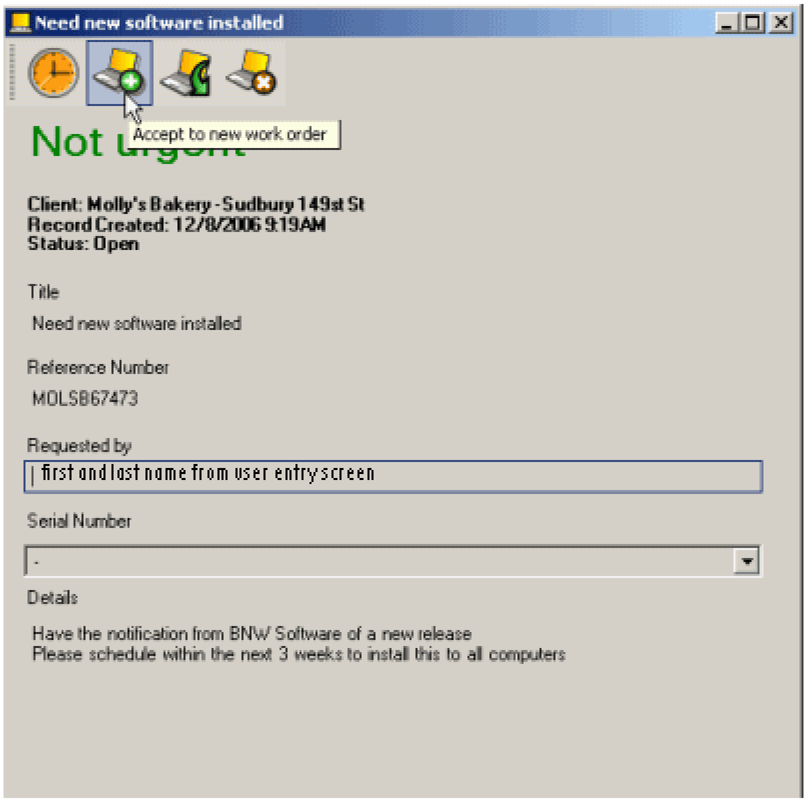
Columns of the Customer Service Request grid

Status	displays whether request is open, accepted or rejected or if workorder the CSR was created from is Closed	
Workorder	Displays workorder # request accepted to	Select to open Service Workorder entry screen
Priority	Priority set by customer	
Record Created	Date when customer created service request	
Client	Name of client service request is for	
Reference Number	Number assigned by customer for their internal use	
Head Office	Name of head office for the client if applicable	
Client Service Request	Brief description of service requested	Select to open the Customer Service Request
Record Created By	Client user's initial's that created the service request	
Serial Number	Unit selected by client to be serviced if applicable	

5.13.3 Viewing a Customer Service Request

1. Click on the Customer Service Request to open and view the Customer Service Request screen.





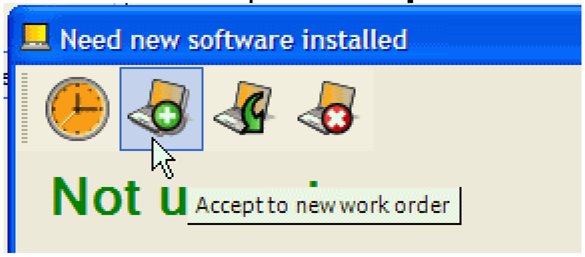
2. Only the client logged in via WBI can edit a customer service request.

Refer to the WBI Help documentation on WBI Client Configuration for configuring one or more user accounts for a client to be able to log in via WBI and request service.

- This configuration dictates what the first and last name of the user is that will be automatically entered into the Requested By: field for the client

5.13.4 Accepting a Customer Service Request to a New Service Workorder

1. Select the menu option **Accept to new work order**



2. A new service workorder for this client will open

1 Whatever text entered in the **Title** will be copied to the **Workorder Summary field** and the **Workorder Item Summary** field of the workorder

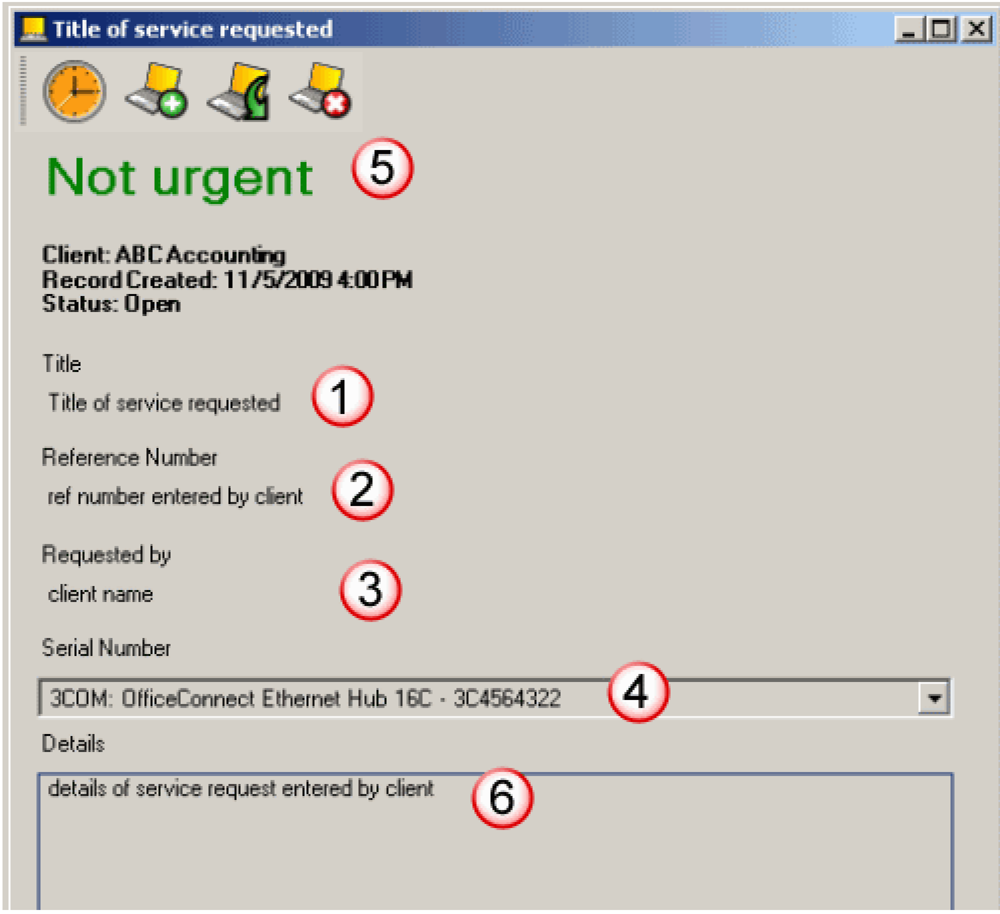
2 Text from the **Reference Number** field will be copied to the **Client Reference #** field and the first line of the **Service Notes** field

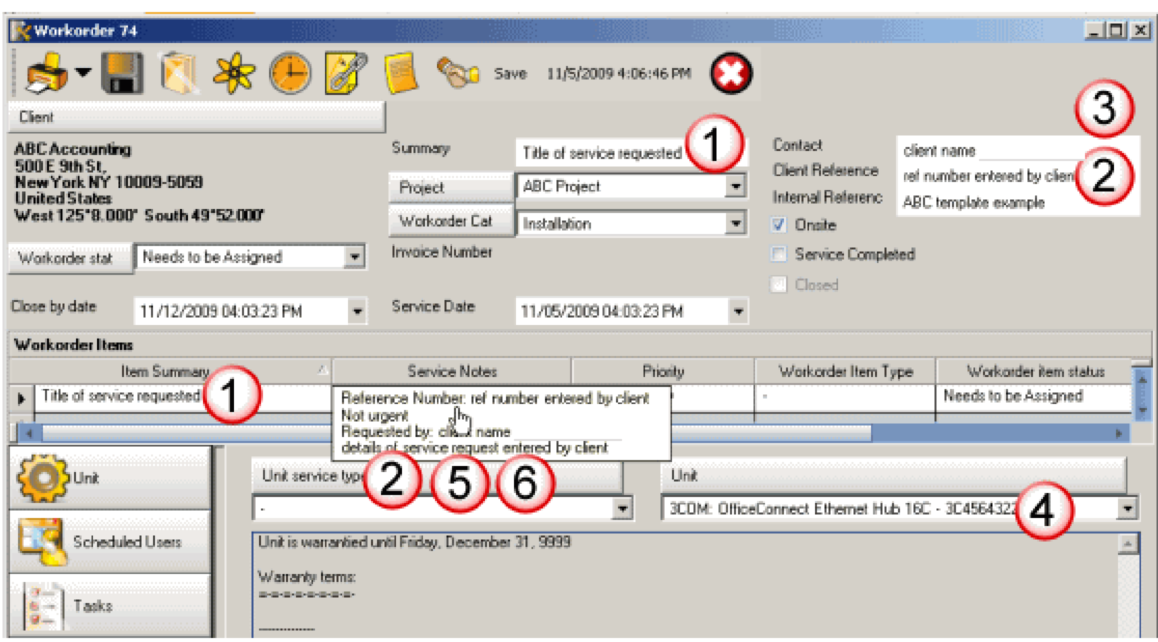
3 Text in the **Requested By** field will be copied to the **Contact** field in the workorder

4 If client selected a unit, it will be selected in the **Unit** sub-screen in the service workorder

5 The urgency selected by the client will be copied to the second line of the **Service Notes** field

6 The text from the **Details** field will be copied to third line of the **Service Notes** field





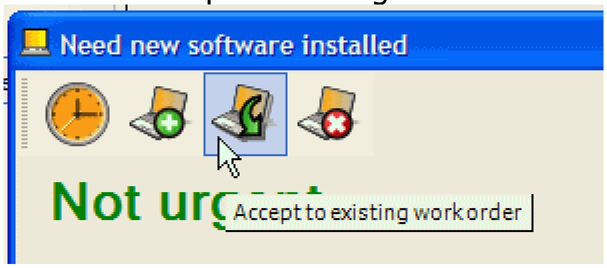
- You will also note that the workorder number for this workorder is already present – the workorder is created and saved automatically.

- Once a workorder has been created from a service request, the client can no longer delete the CSR request as linked to the service workorder.
- If a client has a default Service Workorder Template set in their client entry screen, all other template entered data will be transferred to the new service workorder for this CSR except for the fields Workorder Summary, Workorder Item Summary, Client Reference # and Service Notes as text from these is taken from the CSR.
- And if the client is a member of a region that is using the Client Notification feature, they could automatically be sent an email letting them know their service request has been accepted.

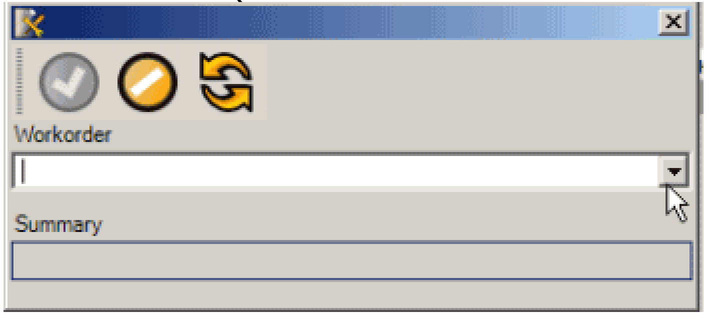
See also:
Client Notifications

5.13.5 Accepting a Customer Service Request to an Existing Service Workorder

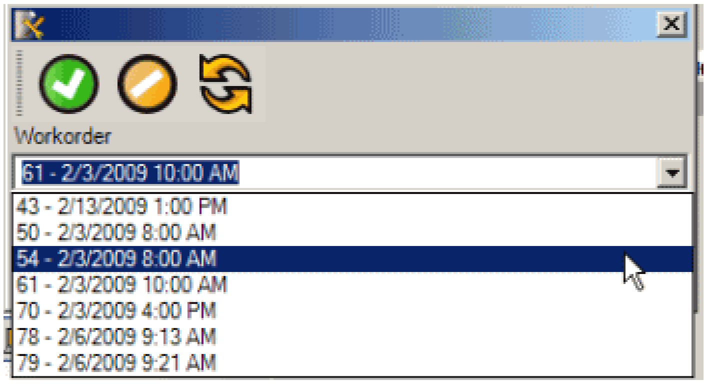
1. Select the Accept to existing workorder menu option



2. The Service Workorder Selection list will display for this client listing all open service workorders (workorders not check-marked Service is Completed nor Closed)



3. Select the service workorder you would like to add this service request to, and click on the OK



4. That service workorder will now open with the service request added as a new workorder item

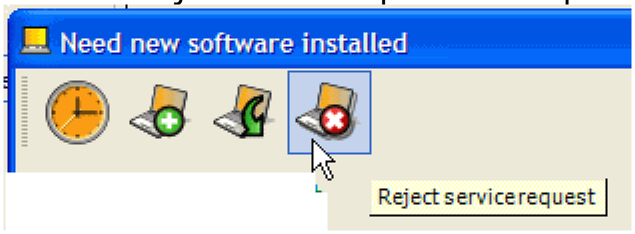
- Text from the **Title** will be copied to the **Workorder Item Summary** field for this workorder item
- Text from the **Reference Number** field will be copied to the first line of the **Service Notes** field for this workorder item
- The urgency selected by the client will be copied to the second line of the **Service Notes** field for this workorder item
- The text from the **Details** field will be copied to third line of the **Service Notes** field for this workorder item
- If client selected a unit, it will be selected in the **Unit** sub-screen in the service workorder for this workorder item
- Once a workorder has been created from a service request, the client can no longer delete the CSR request as linked to the service workorder.

- And if the client is a member of a region that is using the Client Notification feature, they could automatically be sent an email letting them know their service request has been accepted.

See also:
Client Notifications

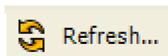
5.13.6 Rejecting a Customer Service Request

1. Select the Reject service request menu option



2. Customer service request screen will close, bringing you back to the Customer service request grid.

- And if the client is a member of a region that is using the Client Notification feature, they could automatically be sent an email letting them know their service request has been rejected.
  See also:
  Client Notifications

3. Click Refresh 

on the Customer Service Requests grid to view updated status

4. A rejected (declined) customer service request can be accepted a later time

5. Only a client via WBI login can delete a declined service request

Refer to the WBI Online Help which provides detailed information on configuring clients for access via WBI.

5.13.7 Deleting a Customer Service Request

1. **Only** the client logged in via WBI can delete a service request

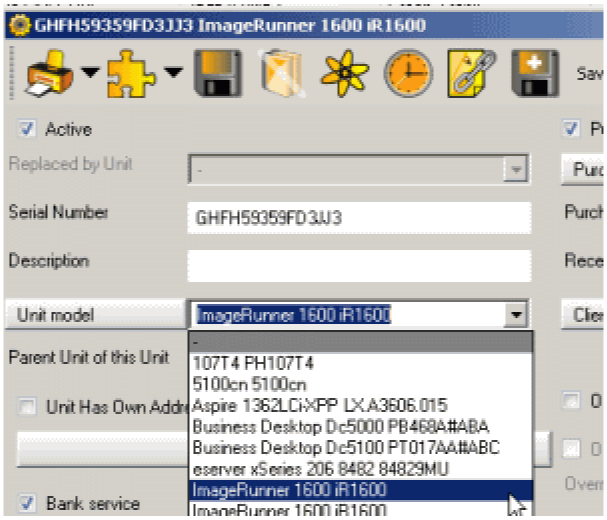
2. And **only** if the service request has not yet been accepted

3. And **only** if the client has the delete rights given to their security group they belong to. Refer to the WBI Help section on configuring security group rights for a WBI client

To delete a customer service request:

1. log in as the client via WBI
2. select CSR to view it
3. and select the Delete menu option

5.14 Unit Models

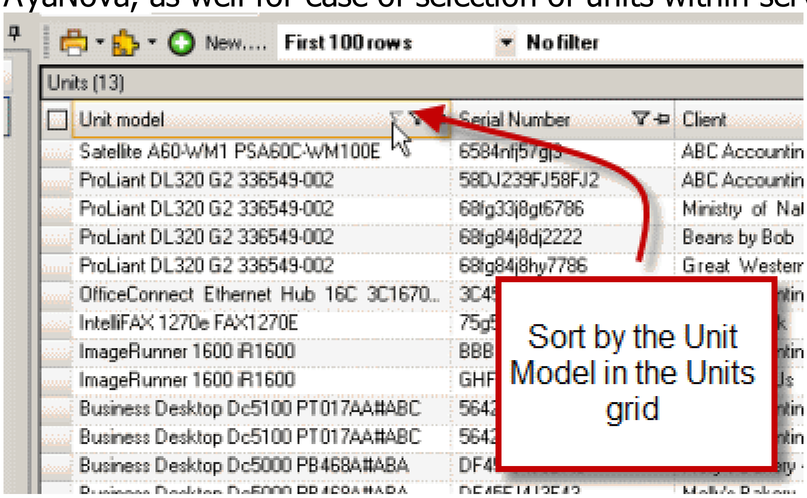


Unit Models are a way of identifying common information of Units.

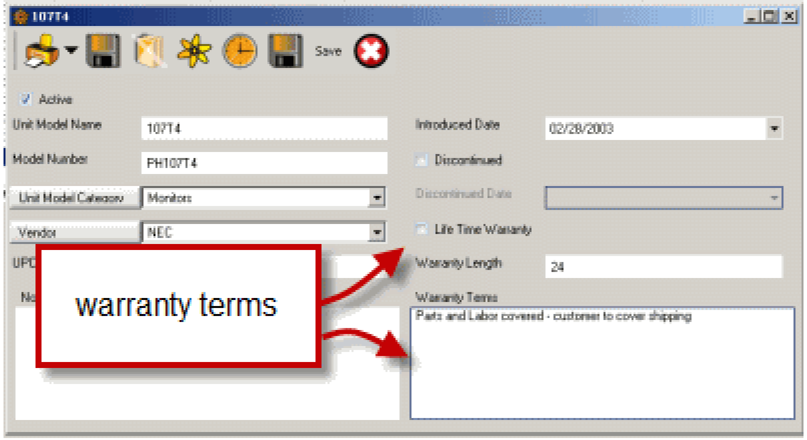
Unit Model information is entered once so that it can be selected for Units so there is no need for double entry.

The Wiki for a unit model is also an excellent place to keep service information for all units of that model.

Selecting a specific Unit Model in a unit entry screen is useful if you wish to filter Units by Unit Models to view what Units of a particular Unit Model is entered into AyaNova, as well for ease of selection of units within service workorders.



Selecting a specific Unit Model in a unit entry screen also allows you to enter warranty information once in the Unit Model entry screen, and have it applied automatically to the unit.



Security Group internal object: Object.UnitModel

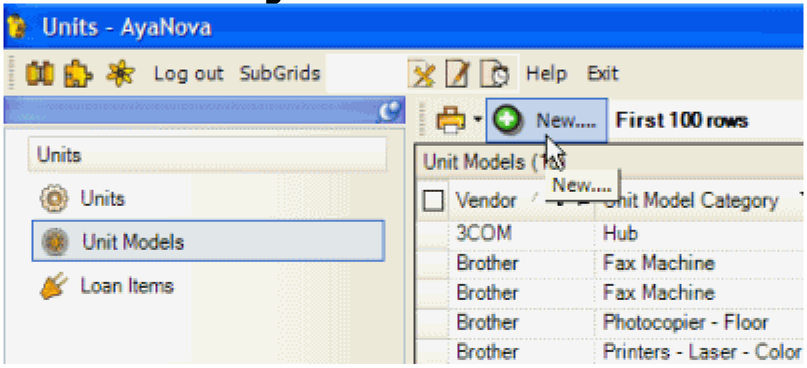
Forbidden : User of that security group can not access the Unit Models grid nor entry screen

Read Only : User can view the Unit Models grid and entry screen but can not edit

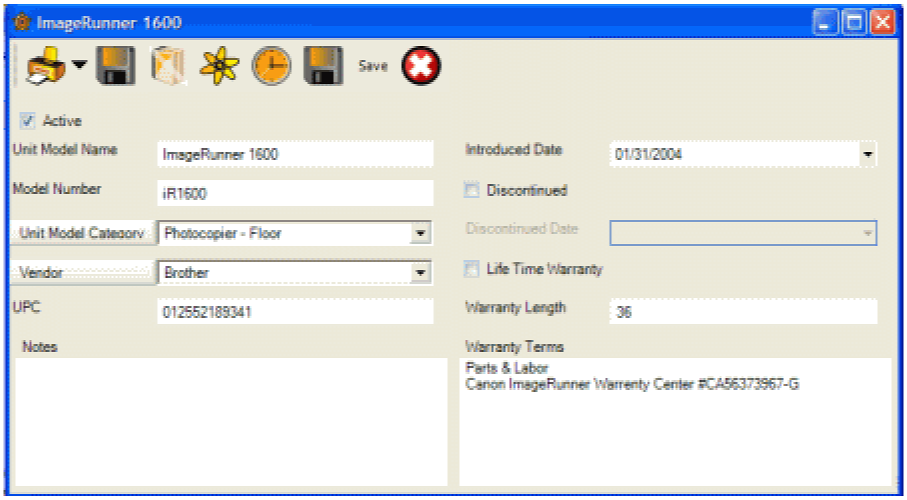
Read/Write : User can access the Unit Models grid, view, create and edit

Read/Write/Delete : User can access the Unit Models grid, view, create and edit and delete

Create a new Unit Model by selecting the New... menu option at the top of the Unit Models grid



Unit Model entry screen



Active
If unchecked, Unit Model will appear only in Unit Model grid screen, and not be listed in Unit Model drop down selection. For example, you had Units entered that were of this Unit Model previously, but no longer wish this Unit Model to be available for selection so you would set this Unit Model to inactive.

Unit Model Name
Enter the description or name of the model, usually the manufacturers "official" description to make it easier to find when entering new units. If in doubt opt for whatever is labeled on the equipment itself as this will likely be all that is known about equipment being worked upon.

This field is used to fill any drop down selection list in AyaNova where you need to select a Unit Model.

Although unit model names do not need to be unique, entering different names allows you to easily select the correct model from drop down selection lists.

Model Number
Usually the manufacturers supplied model number. You can type any characters in this box.

Unit Model Category
Use this to categorize the equipment by type. This is used only for management reporting. I.E. service revenue by type of equipment.

Clicking on the Unit Model Category button opens the Unit Model Category grid. This is useful so that you can quickly and easily add additional unit model categories to select from, or edit existing as needed and as you have rights to.

Vendor

It is important that a vendor be selected as the manufacturer name is used as part of the descriptive name of a Unit in many different areas of the program. In addition when you create this link your staff can easily and quickly look up the manufacturer record for phone numbers etc.

If a Vendor is not in the drop down selection, you can quickly add one on the fly by not selecting any vendor, and clicking on the Vendor button to the right of the drop down selection list to open up a new and empty Vendor entry screen. Enter the details of the vendor, save and the vendor will now appear in the drop down selection list.

Or if you need to edit a vendor, select it from the drop down list, and then click on the Vendor button to the right to open the Vendor entry screen with this unit's information.

UPC
Another way of identifying a unit model

Warranty Length
Used not only for information purposes but in conjunction with the service work order, when a unit of this model is selected for service on a work order, the program will check to see if it's under warranty still based on this information and the purchase date on the units screen and display this information on the service work order so you can easily see at a glance when entering without the need to open up the individual Unit entry screen.

Warranty Length is in months. For example, if the warranty period for this unit model is 3 years, enter in 36 (12 months X 3 years = 36 months).

Life Time Warranty
Indicates that the warranty does not expire and has no set warranty length.

See also:
[Service Workorder - Unit]

Warranty Terms
This is where you would enter any information necessary to process a warranty as well as any special terms of the warranty such as parts only or labor only etc.

Introduced Date
The date this type of unit model was first introduced to the market. Also for informational purposes, this can be useful if the warranty of a product is in question, if the client can't remember when they bought it, you can tell from here if there is any possibility of it being under warranty still.

Discontinued

Used for informational purposes, staff can quickly see if a product is still current or discontinued. This can also be useful if the warranty of a product is in question, if the client can't remember when they bought it, you can tell from here if there is any possibility of it being under warranty still.

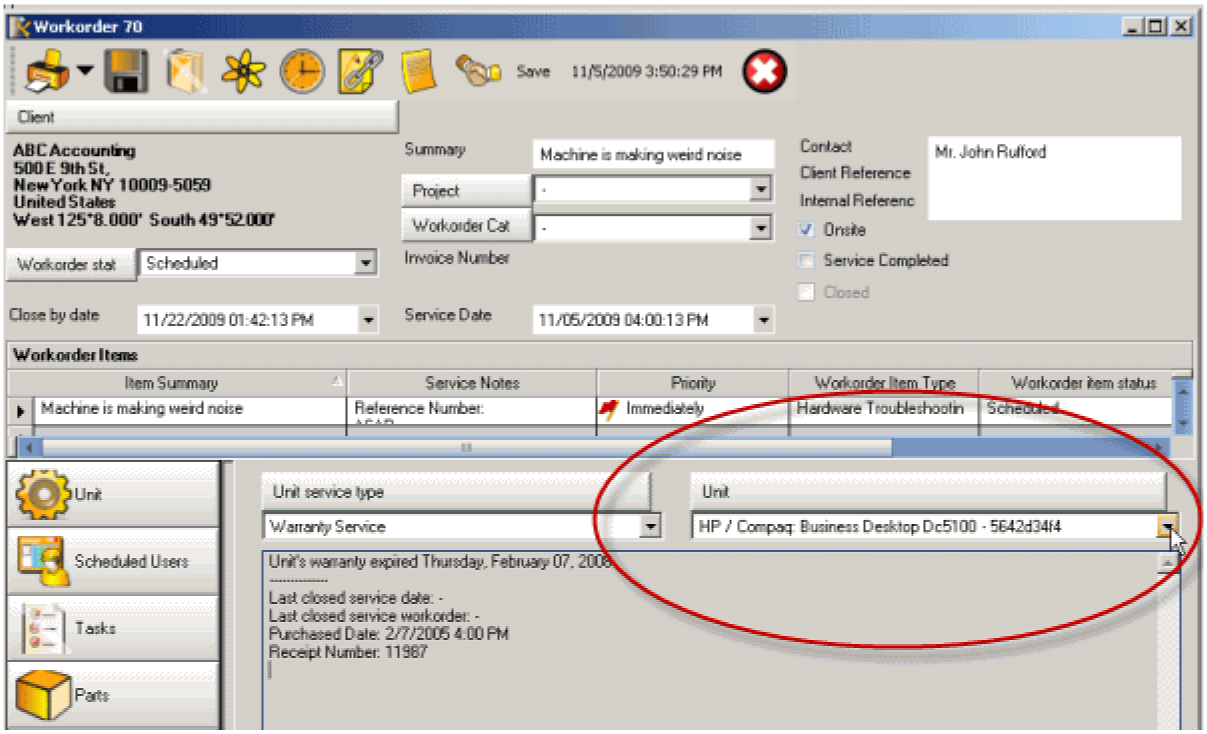
If check marked entered, the Discontinued Date field becomes available.

Discontinued Date
Also for informational purposes, this can be useful if the warranty of a product is in question, if the client can't remember when they bought it, you can tell from here if there is any possibility of it being under warranty still.

Notes
As with all notes fields in AyaNova, use this area to enter anything you wish others to see when viewing this item on this screen.

5.15 Units

5.15.1 What do I use a Unit for?



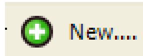
Units would be any thing owned by a client that you may wish to schedule and track service history for.

Examples:

Computer service - each computer is a "Unit". Identify each computer owned by a client that you perform service on by its serial number and enter other pertinent information. This way, in the workorder you can select the specific computer you provided service for - to maintain a history of service that was performed on it as well as document what costs have been incurred (parts, labor, etc) directly because of it.

Property management service for apartments - each "unit" equates to rooms of the apartment (living room, kitchen, etc) and/or equipment in the condo such as dishwasher, bathtub, etc. Each "client" equates to the apartment itself. And "Head Office" equates to the entire building or owner of that building for billing purposes. This way when creating a service workorder for a specific apartment, you can identify the specific "unit" (i.e. specific equipment or room in the apartment) that requires service and maintain service history on it.

3 ways to create a Unit

1. Via the New...  menu option in the Unit's grid

2. Via the Unit jump button in another's entry screen

   See also: Jump Buttons

3. Import via the importexport.csv utility

A Unit’s information is entered once. When a service work order, quote or preventive maintenance item is needed for a Unit, you only have to select the already entered Unit. There is no need for double entry.

As you can change who the Head Office is for a client, this can be useful for maintaining service history even if the client or unit changes.

Example:

A office building uses AyaNova to manage internal computer service. The department Accounting is a "Head Office". Bob who is an accountant is a "Client" (a "client") that has its head office as Accounting. Bob's printer is a "Unit" with Bob selected as the "Client" in its unit entry screen.
When service is performed for Bob's printer, the printer is selected as the unit in the workorder for Bob.
And if down the road, the printer is moved to Mary's office in the Loans department (Loans is another "Head Office" and Mary is another "Client"), in that unit's entry screen for that printer, the client is easily changed to Mary. This way, when look up previous service history on that printer (Unit), will still be able to see all workorders where that unit was selected, even when it was "owned" by Bob.

AyaNova can be localized to display field label text in any language - for example, you may want what is labeled as "Units" to be labeled as "Equipment" or "Room" etc - whatever makes the easiest use for your type of service

See also for more details:
Localized Text Designer

5.15.2 Units grid

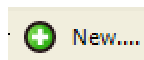
The Units grid screen lists units in grid format. This grid format makes it very easy to filter, group and sort for ease of selection, as well as access the unit entry information.

Performance hint: If a company has for example 10000 units in their AyaNova database, and you do not use Meter Readings, remove the meter reading columns from displaying in the Units grid, the performance returning the list of units will be improved. This is irrelevant if you have a small number of units.

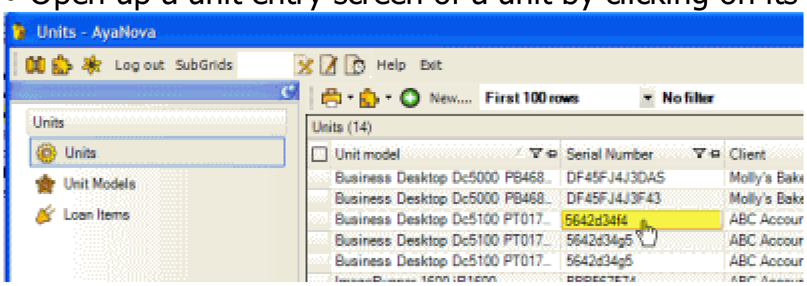
Performance hint: If a company has for example 10000 units in their AyaNova database, and you do not use Banked Service - remove the service banked related columns from displaying in the Units grid and the performance returning the list of units will be improved. This is irrelevant if you have a small number of units.

Performance hint: If a company has for example 10000 units in their AyaNova database, and you do use Banked Service or Meter Readings - just make sure none of these columns are the first four columns in the grid for sorting, and the performance returning the list of units will be improved. This is irrelevant if you have a small number of units.

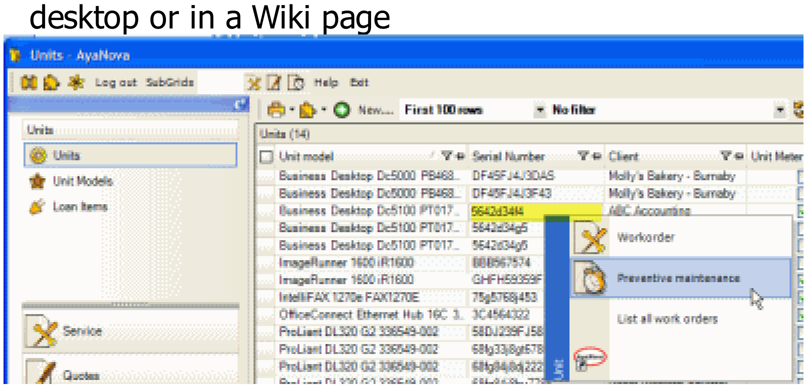
From the Units grid you can:

- Create a new Unit from the New...  menu option

- Open up a unit entry screen of a unit by clicking on its serial number



- Create a new work order or PM item for that unit, or bring up a list of all workorders where that unit has been selected in by right-clicking on the unit Serial Number column, or create an AyaNovaLink to this object on your desktop or in a Wiki page



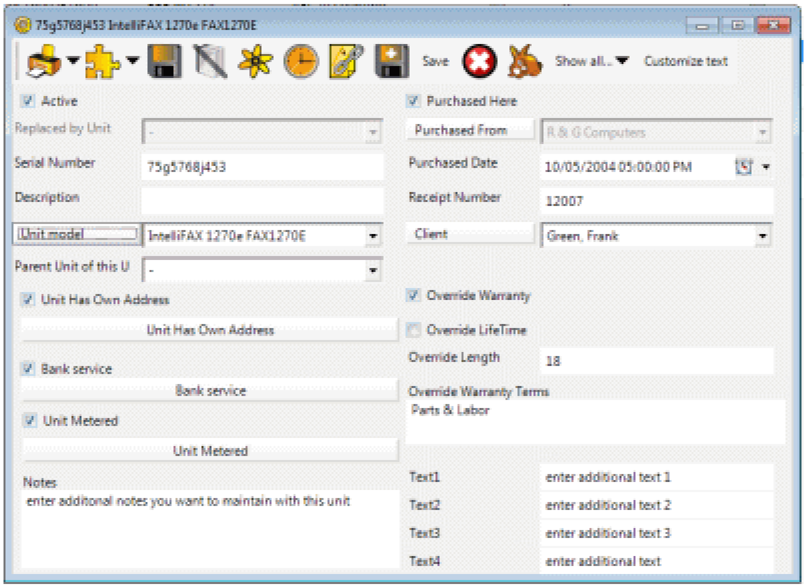
- See at a glance the number of the last closed workorder for that unit and that closed workorders service date.
- View at a glance Bank Service balance for a unit, or its last Closed Service Workorder
- Print reports related to the information that shows in this Units grid

• Export the selected unit records to a CSV file (or don't select any, and all will be exported to a CSV file)

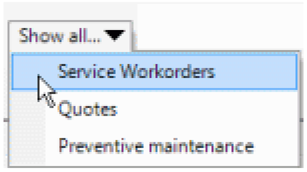
See also:
Filtering a grid
Moving and sorting columns in a grid
Setting what columns display in a grid
How do I quickly find workorders for a client or a unit?

Security Group internal object: Object.Unit
Forbidden : User of that security group can not access the Units grid nor entry screen *Read Only* : User can view the Units grid and view the entry screen but can not edit *Read/Write* : User can access the Units grid, view, create and edit *Read/Write/Delete* : User can access the Units grid, view, create and edit and delete

5.15.3 Unit entry screen



Additional menu options of the unit entry screen



Show all...
This menu option provides quick access to all service workorders, all quotes, and all PM's for this unit

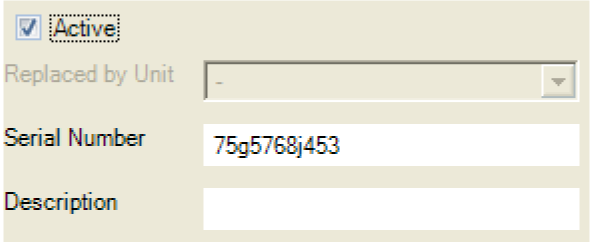
Customize text...
This menu option ONLY shows when logged in as the AyaNova Administrator.

Use the Customize text... menu option to localize labels of this entry screen on the fly or if accessed from the main menu bar, displays the labels of the main grids and main menu bar for quickly editing.

See also for more details:
Common entry screen menu options

Fields of the unit entry screen

Active



If checked, Unit will appear in Unit grid screen, and be listed in Unit drop down selection lists for any new service work orders, preventive maintenance, or quotes for the client that “owns” the unit.

If unchecked, Unit will only appear in Unit grid screen and would not be available for selection in new service workorders, quotes or pm’s.

Replaced By Unit
This appears if Active is unchecked. This field is only for informational purposes and is intended to be used to connect to a unit that has replaced this inactive unit.

Serial Number
As you could have many units entered into the AyaNova database with the same Unit Model and manufacturer, the serial number is what identifies each unit individually.

A serial number can be any combination of letters / symbols or numbers that you can type on your keyboard.

If a unit that you want to track does not have a serial number you will have to make one up for it. Some of our clients who manufacture their own equipment will assign serial numbers to units and either etch or tag the unit in some way to mark it with the serial number.

Sometimes a unit that does not have a serial number is part of another unit that does have a serial number.

For example a wheel on a bicycle may not have a serial number, but the bicycle does. In this case when you create a unit record for that bicycles front wheel, you might want to enter the serial number like this “123abc-front wheel” Where 123abc is the serial number of the main unit, in this case a bicycle.

The reason to put the serial number first is to make it faster to select from a unit selection list. Since all drop down lists in AyaNova will automatically scroll down to the relevant area based on the first few letters that you type. Putting the serial number first will cause all units that start with the same serial number to be grouped together making selection easier. (i.e. There are many different “front wheels” but only one that starts with that particular serial number)

How a unit is displayed in drop down lists for selection in preventive maintenance, quotes and service work order items is determined by the Administrative Global Settings for Unit Name Display. For example, you may find it easier to display units by the Unit model first, then by serial number. Others may find it easier to display the units by their serial number and then by unit model number, then by Unit Model manufacturer.

See also:
Global Settings

Description
Use this field to enter an extended description of a unit if it has not been assigned a model number.

This field’s purpose is to provide a human understandable description of a unit so that it’s easily identified on printed reports and various areas of the program.

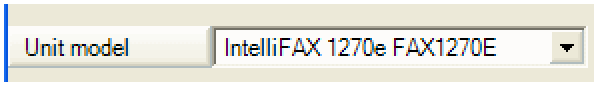
If you were to not select a model and also not provide a description the only identification of a unit would be its serial number.

Normally you would always assign a unit model instead of using this field because you only have to enter a unit model record once and can then select it quickly and easily.

If you use this description field instead you would need to retype a full description for every unit you enter.

It is recommended that this field only be used in cases where a unit is unique and there is only one of them that will ever be entered in AyaNova. Otherwise you will be doing a lot of double entry.

Model



The purpose of models is to keep important service related information that applies to all units of the same model together and to save the amount of entry required for each unit as well as track warranty information.

To take advantage of many time saving features throughout AyaNova you should always assign a unit to a model. This makes it easier to select from drop down selection lists, as well as filtering in the Unit List grid, as well as displaying on reports.

If you are entering a unit and discover there is no model entry for it, you can quickly add one on the fly by not selecting any unit model, and clicking on the Model button to the right of the drop down selection list to open up a new and empty Unit Model entry screen. Enter the details of the unit model, save and the model will now appear in the drop down selection list.

Or if you need to edit a model, select it from the drop down list, and then click on the Model button to the right to open the Unit Model entry screen with this unit models information.

Remember that you only need to enter a model record once, after that it can be quickly selected when entering a unit with two clicks and the information is then useful throughout the program and on reports.

If a unit has a unit model selected, as well as the Purchased Date entered, you will be able to take advantage of the warranty information that will appear within a workorder when the unit is selected for service.

See also:
[Unit Models](#)

Parent Unit of this Unit

Used to group units into a master and sub unit relationship. If a unit is part of another unit select the other unit from this list.

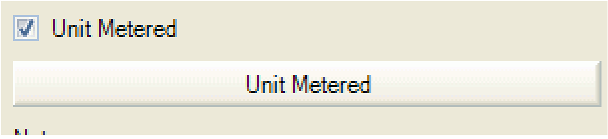
You can filter the Unit grid by the Parent Unit of this Unit to display all units that are in essence sub-units of a master unit – the Parent Unit.

Do note that this is for informational purposes only. Setting this does not allow selection of the parent unit in a workorder to affect sub-units.

Unit has own address checkmark
If selected, Unit has own address button becomes available

Unit has own address button
If Unit is located at a different address then the Client here is where you would enter in the Units address.

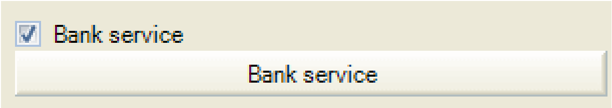
Metered



If checked this indicates that the unit will have meter readings tracked and displays the Metered button to open the Meter Reading grid.

See also: Unit Meter Reading

Bank Service

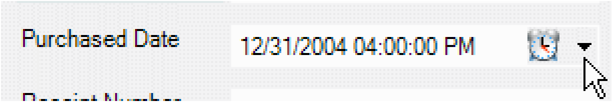


If checked this indicates that the unit will have banked pre-paid service applied to it and displays the Uses Banking button to open the Banking grid.

See also:
Banked Service

Notes
As with all notes fields in AyaNova, use this area to enter anything you wish others to see when viewing this item on this screen.

Purchased Here



If the Unit was sold by your organization, click on the Purchased Here checkbox.

This field in combination with the purchase date and sales receipt number give you all the information you need to quickly get a copy of a sales receipt for warranty processing purposes.

For example: if you want to get a copy of the receipt and all fields are filled out correctly, you can go to the unit entry screen, select the unit, note the receipt number and purchase date and then click on the Purchased from hyperlink to view the phone and contact information of the organization that sold the unit to contact them and get a copy of the invoice / receipt.

Purchased From
Used to indicate where the unit was purchased.

If the Vendor is not listed in the drop down selection box, without any Vendor selected, click on the Purchased From button to open up a new Vendor entry screen to add.

Purchased Date
Date of when this unit was purchased.

This is used to determine warranty time left based on warranty information within the Unit Model.

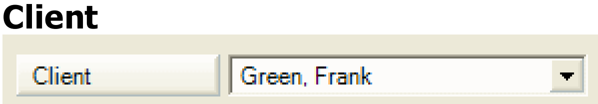
And this information is then displayed within the workorder item when you select the unit so you can see at a glance at the time of workorder creation whether the unit falls under warranty or not.

If a unit has a unit model selected, as well as the Purchased Date entered, you will be able to take advantage of the warranty information as laid out in the Unit Model that will appear within a workorder when the unit is selected for service.

Refer also to the section on the service workorder item Unit sub-screen.

Receipt Number
This field is provided for warranty related purposes. Sometimes you need to provide a copy of a sales receipt when processing a warranty claim. It could be your own sales receipt or another company's if the unit was purchased elsewhere.

Client

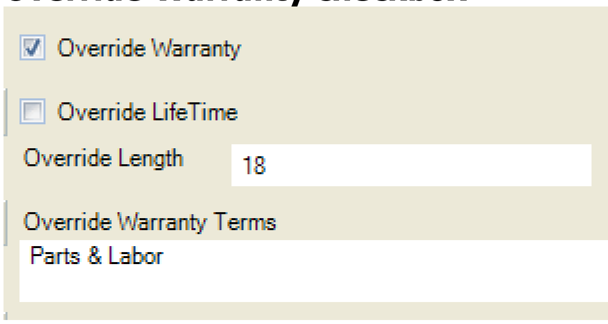


Select the client that owns this unit of equipment. The button above this drop down selection list will take you to the Client entry screen on the fly if you discover that the client has not been entered yet in AyaNova or to the Client entry for the selected Client.

If a client transfers equipment to another of your clients you can change the owner by changing the selection in this box.

If the unit is owned by yourself, and you want to be able to maintain equipment service history, it is recommended to create a client that is your company, and assign units to that client.

Override Warranty checkbox



If Override Warranty **is not** check-marked, the warranty terms of the Unit Model are used in conjunction with the Purchased Date of this unit.

If Override Warranty **is** check-marked, this means that the Unit Model's warranty terms are ignored. Instead the specific Override warranty settings of this unit's entry screen are used.

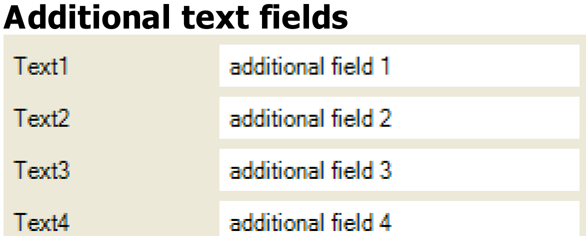
Override Life Time
Indicates that the warranty does not expire and has no set warranty length.

Override Length
Used not only for information purposes but in conjunction with the service work order, when this unit is selected for service on a work order, the program will check to see if it’s under warranty still based on this information and the purchase date on the units screen and display this information on the service work order so you can easily see at a glance when entering without the need to open up the individual Unit entry screen.

Warranty Length is in months. For example, if the warranty period for this unit model is 3 years, enter in 36 (12 months X 3 years = 36 months).

Override Warranty Terms
This is where you would enter any information necessary to process a warranty as well as any special terms of the warranty such as parts only or labor only etc.

Additional text fields



These fields are so that you can enter additional information about this unit if desired. Use the Localized Text Designer to edit the label for each field if desired.

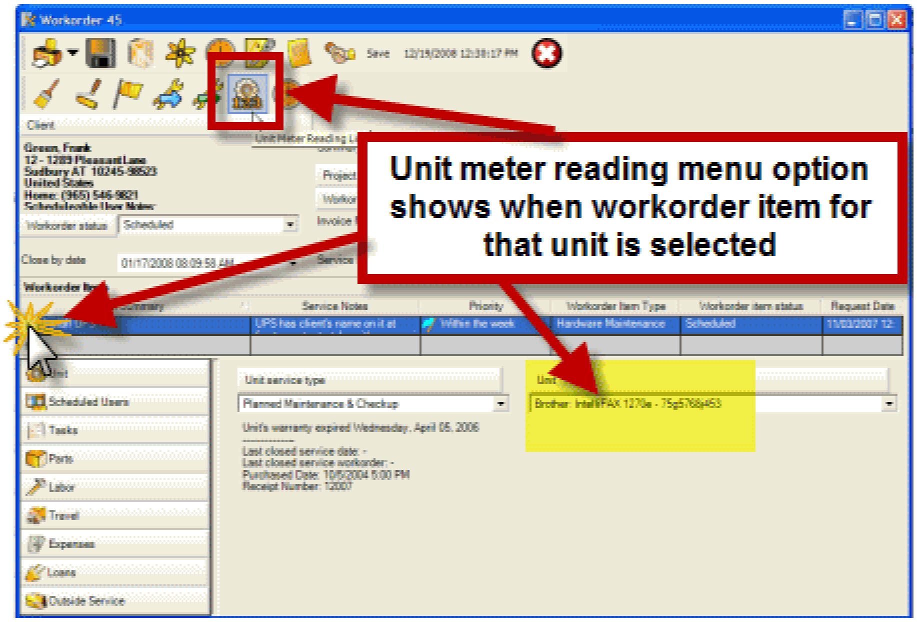
These four fields are available via a detailed report template for a service workorder.

See also:
Localized Text Designer
Service Workorders - Unit
Custom Field Designer

Fields from the Unit entry screen that are available in a detailed service workorder report template

- LT_Unit_Label_Serial (this is a composite of the Unit serial and other fields you have identified in the Unit display name in Global Settings
- LT_Unit_Label_Text1
- LT_Unit_Label_Text2
- LT_Unit_Label_Text3
- LT_Unit_Label_Text4
- LT_O_UnitModel
- LT_Unit_Label_PurchasedDate
- LT_UnitMeterReading_Label_Meter

5.15.4 Unit Meter Reading



The Unit Meter reading allows you to maintain a history of meter readings for a unit. A meter reading generally comes from a device or readout attached to equipment that indicates it's duty cycle such as hours or miles or counts. This can be useful if you charge based on meter readings, or be able to recommended additional products and services to the client based on its meter readings.

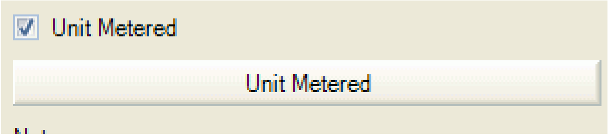
See also:
[How do I enter a manual Unit Meter Reading?]
[How do I enter a Unit Meter Reading via a Service Workorder?]

Security Group internal object: Object.UnitMeterReading
Forbidden : User of that security group can not access the Unit Meter Reading subgrid at all *Read Only* : User can access the Unit Meter Reading subgrid and view it but can not edit it *Read/Write* : User can access the Unit Meter Reading subgrid, view and edit *Read/Write/Delete* : User can access the Unit Meter Reading subgrid, view and edit and delete

You can access a unit's meter reading:

1. From within the Unit entry screen
2. From within the service workorder for that unit

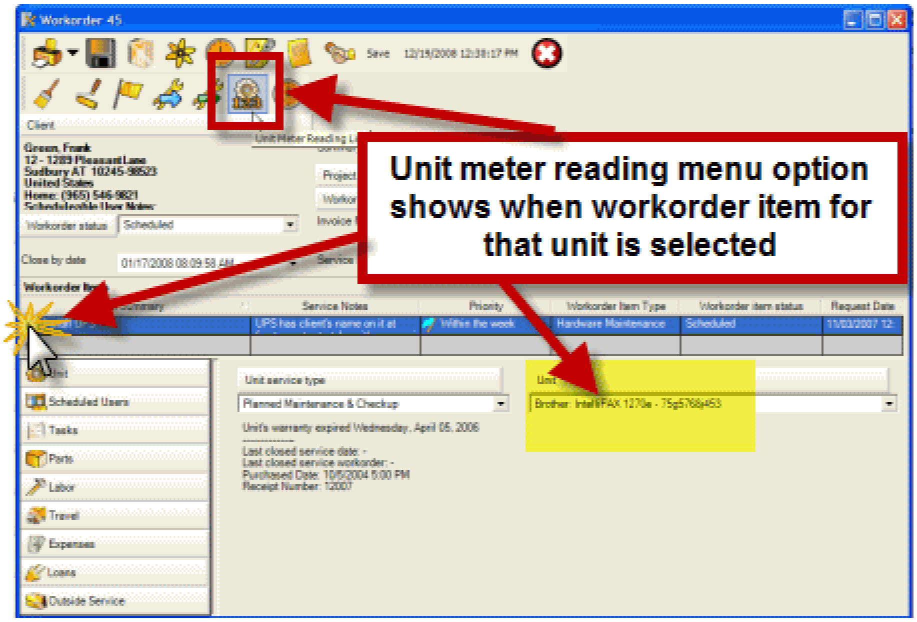
1. **Within the Unit entry screen**, if the checkbox for Metered is checked, the Metered button will be made available.



Click on the Metered button to open the Meter Reading grid for that unit

NOTE: Meter readings entered manually this way **will not** display a workorder number

2. **Within a workorder for that unit**, select the workorder item where the unit is selected in Units, to display additional toolbar options

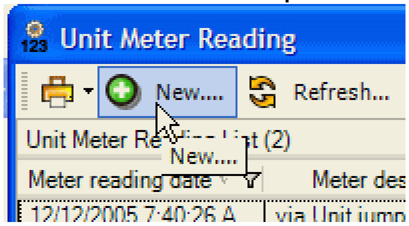


NOTE: Meter Readings enter via the workorder item menu option **will** display this workorder number

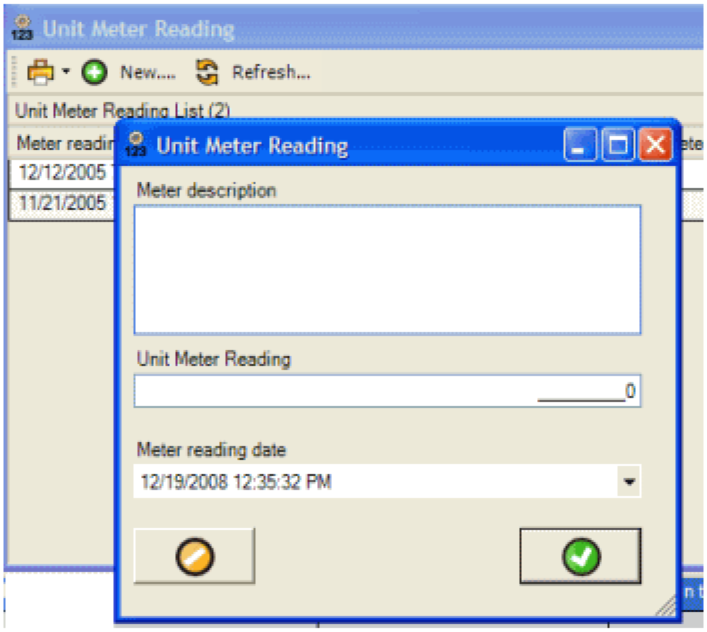
NOTE: Meter Readings entered via the workorder item menu option will display that specific meter reading in the Unit Meter Reading column in the Items grid, and is available in the detailed report template dataset for Service Workorders and Items, and in a summary report template dataset for Items

Once a row is entered and saved, it is not editable. If an incorrect amount is entered manually or applied incorrect via a work order, you will need to manually create an adjustment.

- Select the menu option New... to enter in a new Meter Reading



Fields of the Unit Meter Reading entry screen:

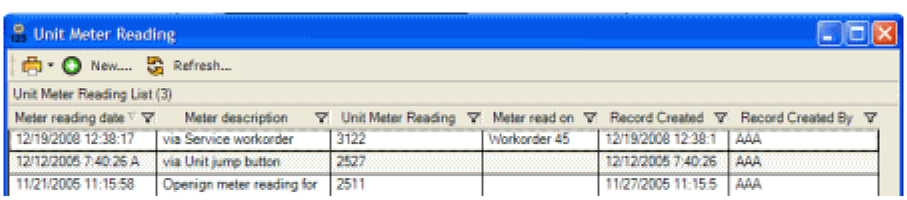


Description
Enter within this text field the description of why entering manually or other information pertaining to this meter reading.

Meter Reading
Enter within this numeric field the actual meter reading

Date of Reading
Select from this date field the date and time of the actual meter reading

Unit Metered Reading grid columns



Workorder Item
This column displays the service workorder number if the entry was made from within a Service Workorder.

Date of Reading
This column displays the entered date of the reading. This is not necessarily the same date when the data was actually entered, but was determined by the user entering the data.

Description

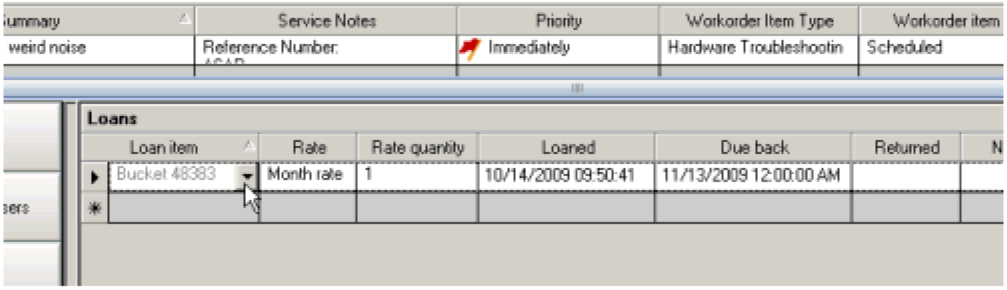
This column displays any descriptive information entered about the meter reading.

Meter Reading
This column displays the numeric value for the meter reading.

Entered Date
This column displays the date the entry was actually made. This is automatically determined by the computer's date and time.

User
This column displays the user who entered the data. This is automatically determined by the user who entered the data and is not editable

5.16 Loan Items



Loan Items in AyaNova are intended for tracking equipment that you might loan out or rent to clients. For example you might rent or loan equipment to a client while their equipment is being repaired.

Loan Items are selected within a service workorder item.

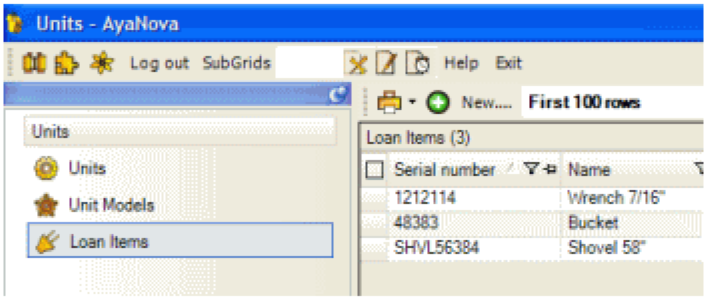
See also:
Service Workorder - Loans

If you do not wish a loan item to display for selection in the workorder item Loans, make the loan item inactive.

It is recommended that if a loan item or any object is no longer needed, that you make it inactive by de-selecting the "Active" checkbox rather than deleting it. In this way you will still have history on the object, but it can no longer be selected in drop down selection lists.

Security Group internal object: Object.LoanItem
Forbidden : User of that security group can not access the Loan Items grid nor entry screen *Read Only* : User can view the Loan Items grid and entry screen but can not edit *Read/Write* : User can access the Loan Items grid, view, create and edit *Read/Write/Delete* : User can access the Loan Items grid, view, create and edit and delete

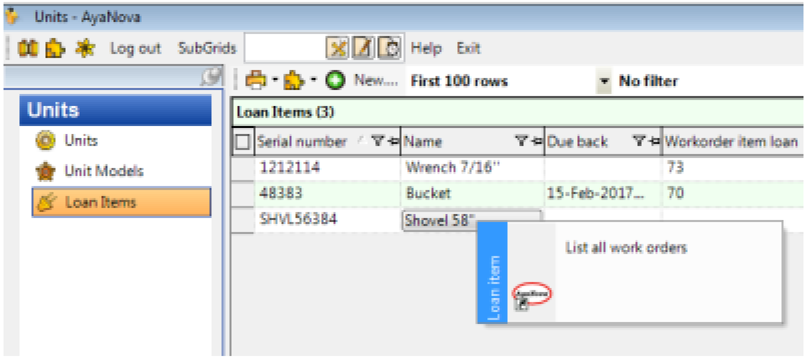
Loan Items grid



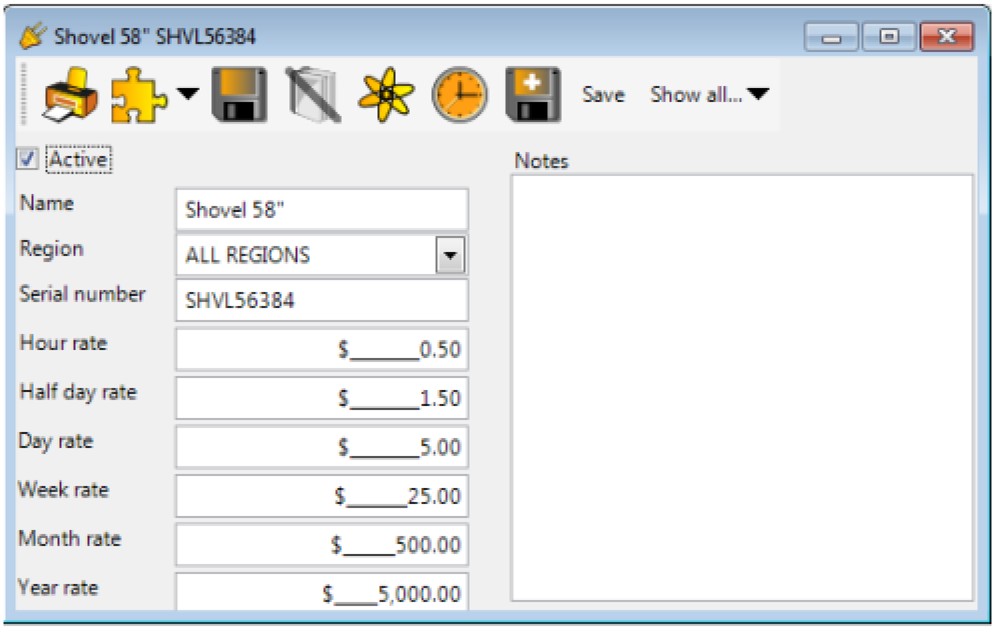
The Loan Items grid displays information about each loan item – loan item serial number and name, if active, workorder number of last loan, client presently loaned to, and when due back if not already.

This grid is useful so you can filter and sort to display information on all loan items, not just those that are presently loaned out.

Quickly list all service workorders that a loan item was loaned out in by right-clicking on the loan item's Name in the grid, and select List all workorders. AyaNova will automatically filter the Loan Items grid in the Service navigation pane to list all workorders where this loan item was previously and existing loaned out.



The Loan Item entry screen



Active
Active loan items that are not presently loaned out will display in drop down selection within workorders, quotes, preventive maintenance.

Name
This is a text field where you would enter the name of the loan item that appears drop down selection fields in a service workorder. It is recommended to keep it short and descriptive. This is a required field.

> NOTE: if you change this name after using it, it affects all work orders that use that have that loan item selected since all records in AyaNova are *linked* not duplicated.

Serial Number
Additional identification field you might use for this loan item

Region
If you select the default region, then this Loan item is available for all users that have access to Loans. Otherwise select a specific region for this loan item to restrict access to it and selection of it in workorders.

Also see: Regions

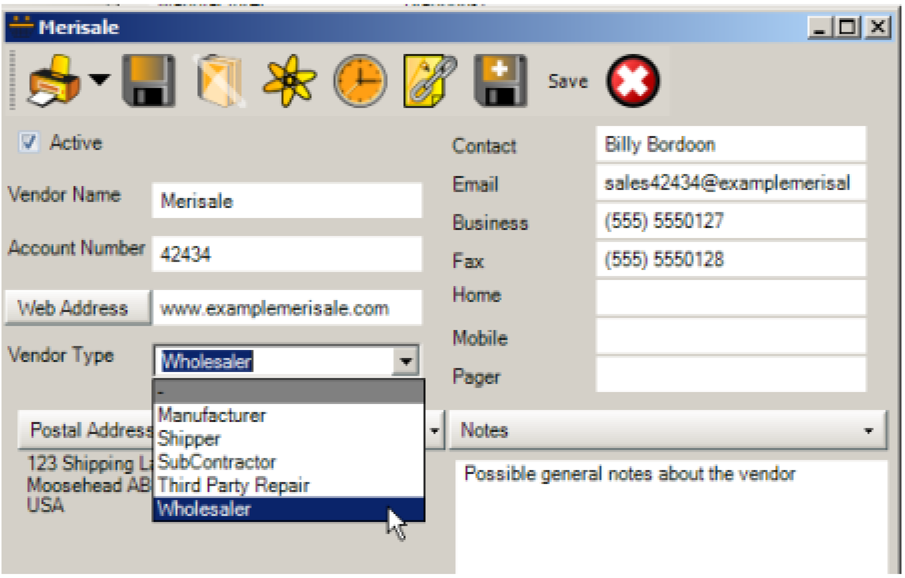
Notes
Enter in this text field descriptive notes regarding this project.

Rate fields
By pre-entering the common rates (Hour, Half Day, Day, Week, etc), when the loan item is selected in the workorder entry screen, you will be able to easily

select a rate, enter in a quantity, and have that rate automatically multiplied by the quantity to obtain the total charge.

See also:
Custom Field Designer

5.17 Vendors



There are five pre-set types of vendors:

1. Manufacturers refer to those that create the Parts or may be to whom you ship units to for outside service. For example, Samsung is a manufacturer of the computer monitor model SyncMaster 711T. Manufacturers are selected in Part entry screen, Outside Service sub-section of workorder entry screens and in Unit Model entry screen.

2. Wholesalers refer to those where you can purchase a number of different Parts at less than retail price. For example, Ingram is a wholesaler of computer related parts. Wholesalers are selected in Part entry screens and Unit entry screens.

3. Shippers refer to those with whom you ship or receive through. You may also receive tracking numbers for your shipments. For example, FedEx is a shipper. Shippers are selected in Outside Service sub-section of workorder entry screens

4. Subcontractors may be those that you send units to that need repair. Subcontractors are selected in the Outside Service sub-section of workorder entry screens.

5. Third party repair centers refer to where you may send warranty repairs. Third party repair centers are selected in the Outside Service sub-section of workorder entry screens.

And of course, you can localize these to whatever text you want using the Localized Text Designer too!

Security Group internal object: Object.Vendor

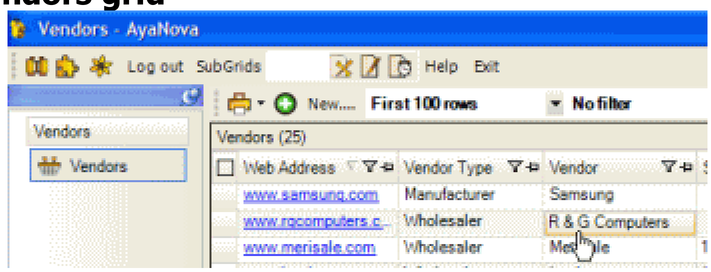
Forbidden : User of that security group can not access the Vendors grid nor entry screen at all

Read Only : User can view the Vendors grid and entry screen but can not edit it

Read/Write : User can access the Vendors grid, view, create and edit

Read/Write/Delete : User can access the Vendors grid, view, create and edit and delete

Vendors grid

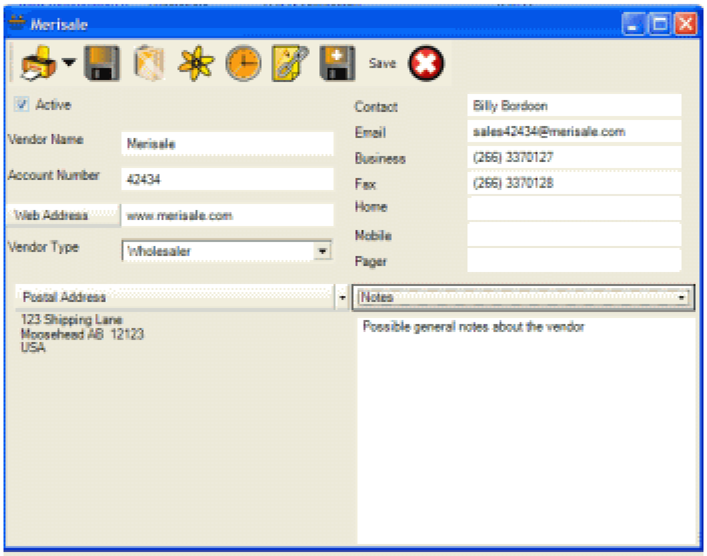


To open an existing Vendor, select the vendor's name in the Vendor column

To create a new Vendor, select the 

menu option to open an new empty Vendor entry screen

Vendors entry screen



Active
If checked, this indicates that this vendor will be displayed in drop down selection lists appropriate to its vendor type.

It is not recommended to delete an inactive Vendor. If a vendor is no longer in business or no longer used, you should make the vendor inactive by un-checking it so that any history associated with it is maintained.

Vendor Name
This field is used to fill any Vendor list in AyaNova associated with that vendor type where you need to select a vendor.

Vendor names should be unique to make them easily selected from within the drop down selection fields.

If you have branches of the same Vendor with the same name to enter, we recommend you append to their name something descriptive so you can tell them apart when selecting.

For example you could append the Vendor name with the street name or city name or country or branch number if the Vendor numbers their branches

Account Number
This field would be for informational purposes.

Web Address
This is useful because you once you enter in the address here, you can just click on the Web Address button which will open up your default web browser and automatically enter in the URL to bring you to the vendor's website.

Vendor Type

Select what type of vendor this is. Identifying this here allows you to easily select the vendor from within other areas of AyaNova that display only certain types of vendors. For example, in the Outside Service screen field Shipped Via: only those vendors identified as Shippers would be listed.

Contact
Suggestion is to enter the first and last name of the main contact for this vendor in this field

Email
Enter in the main contacts email address here

Business, Fax, Home, Mobile, Pager
Enter appropriate phone numbers where indicated.

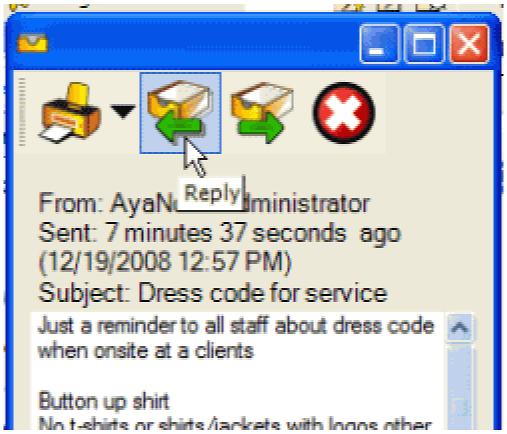
Postal Address and Physical Address
The Postal Address would be the address where they receive mail. The Physical Address would be where they receive deliveries or where they are physically.

You can switch between these two addresses by clicking on the drop down arrow to display, and then clicking on either the Postal Address or Physical Address.

Notes
These are notes about this vendor for viewing when on the vendor record screen only. They are not intended to be used elsewhere in the program.

See also:
Custom Field Designer

5.18 Memos



The memo feature in AyaNova is used to communicate **between users of AyaNova**.

It is not linked in any way to external email; it is strictly internal to AyaNova.

Memos would be typically used to inform AyaNova users of information internal to their organization, or notes to themselves, etc.

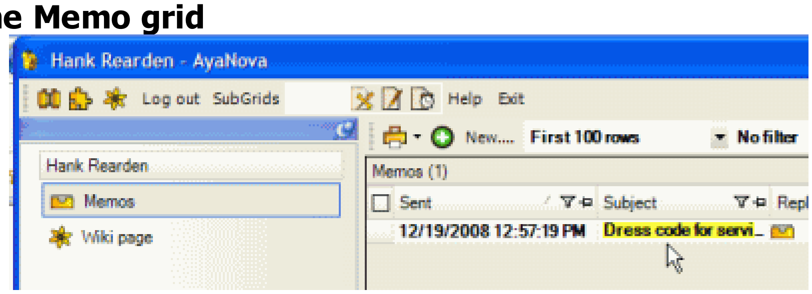
For example, it may be used to send a memo to all scheduled users advising them of approved attire on jobs.

You can view existing memos, create new memos, send to multiple AyaNova users, reply to a received memo, and forward a memo to another AyaNova user.

You can also be notified of an AyaNova event via memo if the delivery method for your notification subscription is an internal AyaNova memo

See also:
[Subscribing to a Notification]

The Memo grid



The Memo's grid is accessed via the <Username> navigation pane, where <Username> is the user's name logged in.

This is where you can create a new memo, view in grid format messages received that have not been deleted, and refresh the Memo grid. When viewing a memo that you have received, you can reply to that memo to the user that sent it, as well as forward that memo to other AyaNova users.

As with other grids in AyaNova, you can move the columns, pin the first column, and filter by columns.

Memos not yet read will display all text in **bold**

Memos that you have replied to or forwarded will display an icon of in the Replied column

In addition to the column identifying the status of the memo, there are also columns identifying who the memo was from, the column identifying the subject, a column identifying the sent date, and a column identifying the relative sent.

The Sent (relative) is useful so you can see at a quick glance how long ago someone sent the memo

Click on the Refresh... Refresh button at the top of the grid to refresh the grid.

Security Group internal object: Object.Memo

Forbidden : User of that security group can not access the Memos grid in their user navigation pane

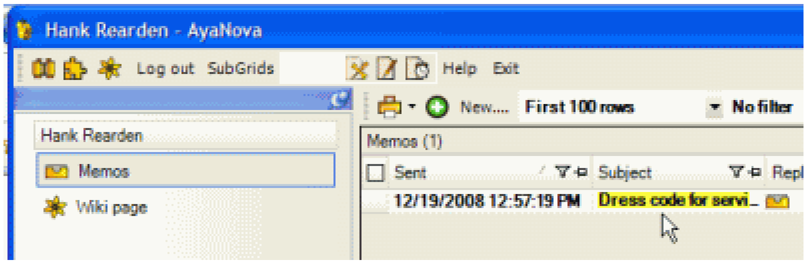
Read Only : User can view the Memos grid in their user navigation pane and memo's themselves but can not edit or create

Read/Write : User can access the Memos grid in their user navigation pane, view, create and edit

Read/Write/Delete : User can access the Memos grid in their user navigation pane, view, create and edit and delete

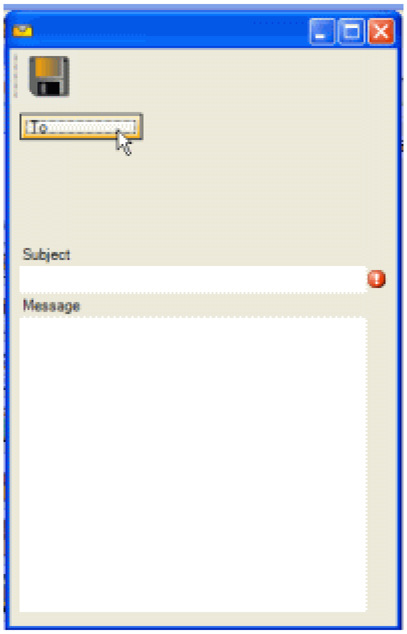
To view an existing memo

Click on the memo's Subject to open up that memo



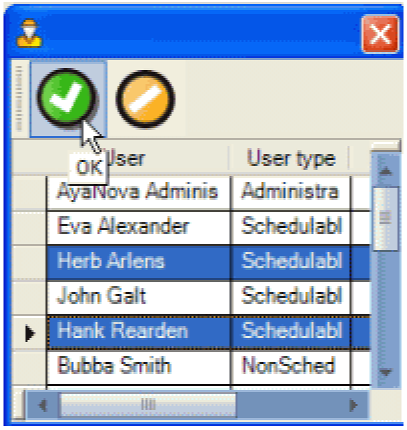
To create a new memo

Select the  New…. button to create a new memo which opens a new memo entry screen



Select the AyaNova users to send to by clicking on the **To** button which opens a grid of active AyaNova users.

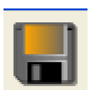
Click to highlight the AyaNova user you wish to send the memo to, and then click on the **OK** button.



Select multiple AyaNova users by holding down the CTRL key and clicking on each user you wish to send to.

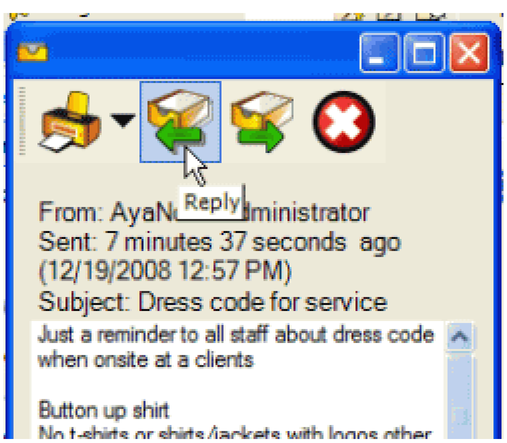
You will note that on the right of the Subject field is a little red exclamation mark. As with this when seen in other areas in AyaNova, this indicates a required field – it can **not** be left blank. Note how the red exclamation mark disappears once you enter text in the Subject field.

This also applies to the Message field.

Click on the  Save & Exit button on the menu bar of the Memo entry screen which saves the memo, closes the memo and sends it to those specified in to the To field.

Replying to a memo

If you wish to reply to an AyaNova user that sent you a memo, with the memo open, select the Reply button at the menu top

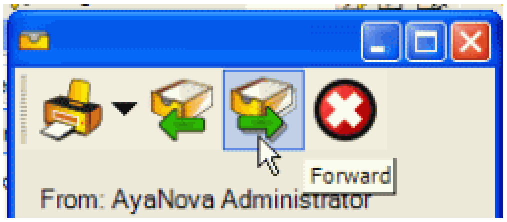


This will copy the contents of the memo to a new memo, and automatically place the original sender's name in the To field.

You can edit which users are in the To field by clicking on the To field button, and selecting those users you do wish to reply to. Remember to hold down the CTRL button when selecting multiple users, including the original user you wish to reply to.

Forwarding a memo

If you wish to forward a memo to another AyaNova user, with the memo open, select the Forward button at the memo top

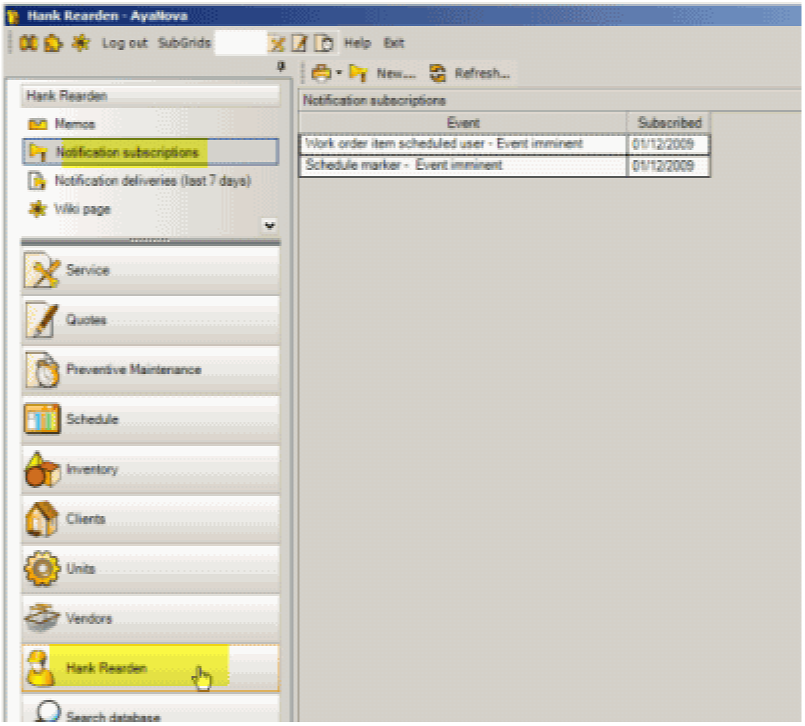


This will copy the contents of the memo to a new memo.

You can edit which users are in the To field by clicking on the To field button, and selecting those users you do wish to reply to. Remember to hold down the CTRL button when selecting multiple users.

5.19 Notification Subscriptions

5.19.1 What do I use Notifications Subscriptions for?



Notifications Subscriptions are where you (your AyaNova username) can subscribe to be notified either in advance of or when a certain event occurs in AyaNova.

Select the 

New... menu option to open the Event Selection screen where you would select the event you wish to be notified about.

See also:
Requirements for Notification Subscriptions
How to subscribe to a Notification
Notification Subscriptions available to subscribe to

Refer to Client Notifications for automatic client notifications of events related to service workorders

Note the following:

- You can subscribe to every event in the list or only specific events.
- Each AyaNova user themselves has to subscribe to each event individually.
- Notification can only result if that user (username) subscribes to an event.

- Notifications can **only** occur for records that **have been created after you subscribe**. For example, if you have subscribed to be notified about parts received for a workorder where you are scheduled, you would not be notified if the parts were requested before you subscribed.

- Notification can be via external email, via external SMS text paging, via internal AyaNova popup, and via internal AyaNova memo.

- For notification generator processing to occur in a stand-alone default installation of AyaNova, the user logged in can **not** be logged in using the AyaNova Administrator username and password; and the AyaNova program must be run as a new session (i.e. if you Log Out and log back in, the internal stand-alone Generator will **not** run. You must have Exit out of AyaNova and run AyaNova)

- **NOTE**: Even if the AyaNova Administrator subscribes to a delivery method of Popup, the AyaNova Administrator does not receive popups. The AyaNova Administrator user is meant to be used only for administrative functions - not ongoing day to day use.

- For notifications to occur in an AyaNova network configuration, the Event Generator **must** be installed and successfully running, and Global Settings regarding notifications must be set and saved.

  See also:
  Event Generator
  Notification - Global Settings
  Notification Deliveries (last 7 days) grid

Security Group internal object: Object.Notification
Forbidden : User of that security group can not access the Notifications grid in their user navigation pane *Read Only* : User can view the Notifications grid in their user navigation pane but can not edit or create *Read/Write* : User can access the Notifications grid in their user navigation pane, view, create and edit *Read/Write/Delete* : User can access the Notifications grid in their user navigation pane, view, create and edit and delete

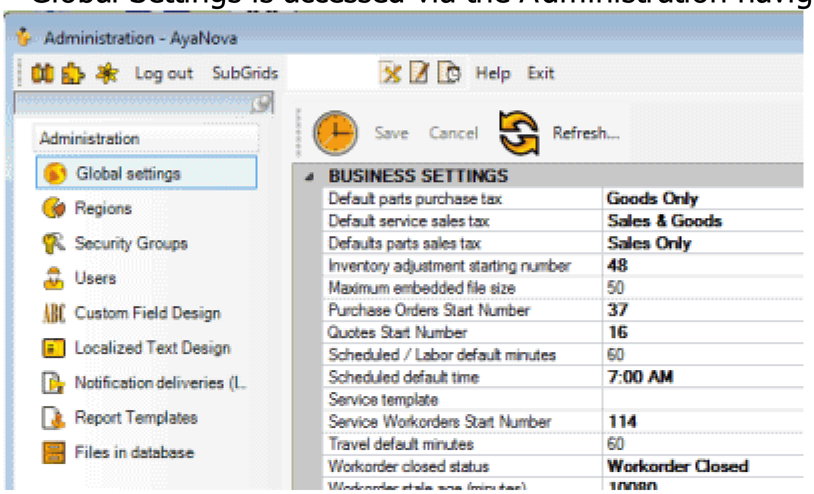
5.19.2 Requirements for Notification Subscriptions

For users to be notified of AyaNova events, you need the following items:

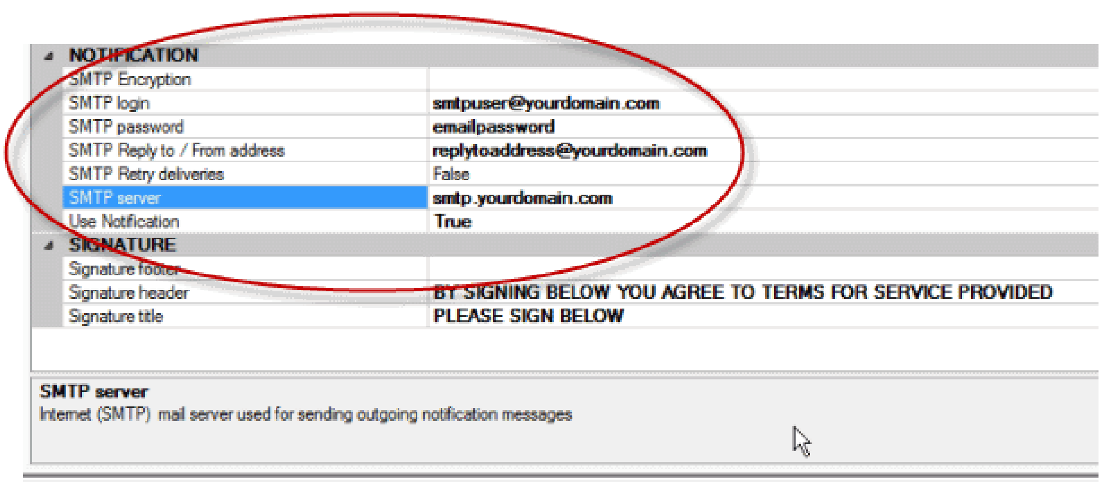
1. **Notifications must be set in Global Settings**
2. **The Generator must be running and tested**
3. **The user must be subscribed to the subscription before the record that the event is for occurs**
4. **The event occurs for data that is also assigned to the same region**

1. **Notifications must be set in Global Settings**

- Global Settings is accessed via the Administration navigation pane



- **Use Notification** must be set to **True** and the other fields filled out with your SMTP information



- If any users subscribed to notifications have a delivery method of external Email or SMS, than the SMTP settings must be set.
- Refer to the Global Settings section on Notifications for details

2. **The Generator must be running**

- The Generator checks every five minutes to see if there is any notifications to be sent
- Refer to the Generator section of this Help file for details whether running stand-alone or networked.
- Perform and successfully complete the Generator testing steps

3. **The user must be subscribed to the subscription before the record that the event is for occurs**

- Notifications can **only** occur for records that **have been created <u>after</u> you subscribe**.
- For example, if you have subscribed to be notified about parts received for a workorder where you are scheduled, you would not be notified if the parts were requested before you subscribed.
- Refer to How to subscribe to a Notification for more details

4. **The event occurs for data that is also assigned to the same region as the user**

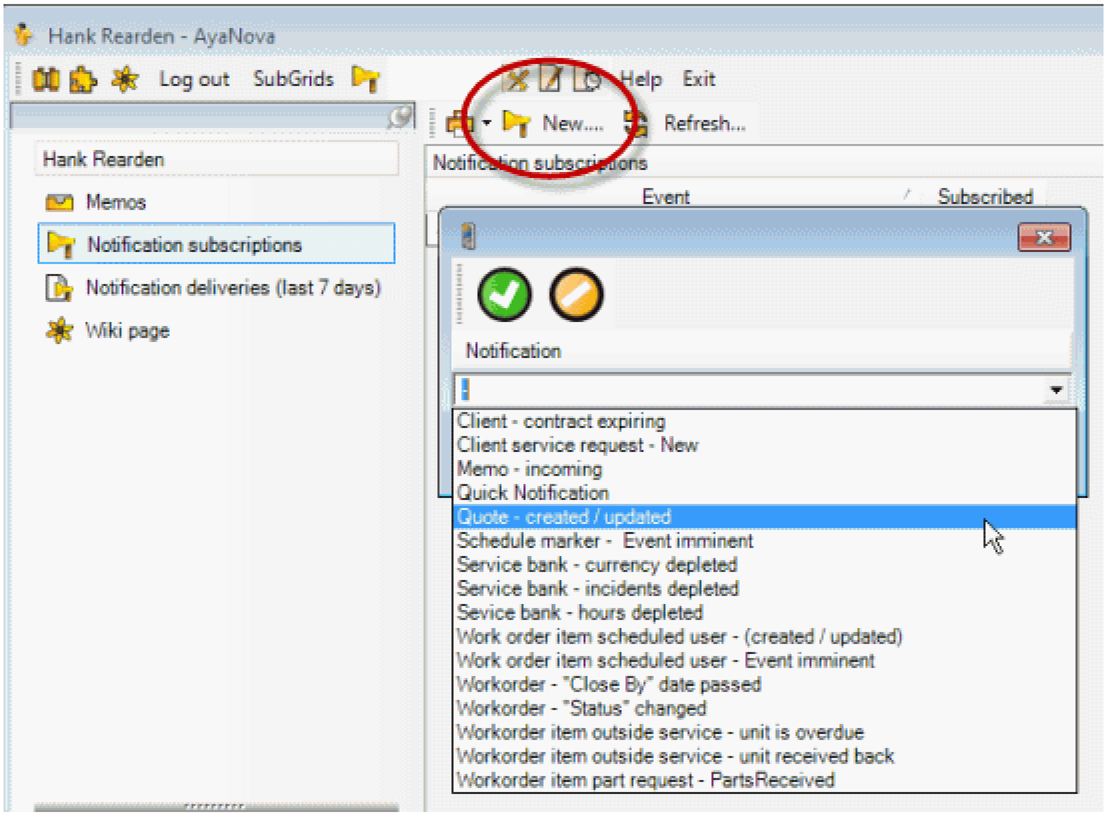
For example, let's say an AyaNova user is wondering why not receiving notification about an expiring contract for a specific client.

Check to see what Region the user is assigned to.

Now check to see what Region the client is assigned to.

If the user is set to a specific region other than All Regions, that user will only be notified if the client is also the same region as him.

5.19.3 Notification Subscriptions available to subscribe to



The following are notification subscriptions that may be subscribed to and what they are for:

Client – Contract Expiring

- Event that occurs: The Contract Expire By date is reached in any newly created or edited Client entry screen since subscribing to this event
- Will get notified if: (username) subscribed

Client Service Request – New / Updated

- Event that occurs: A new or edited Client Service Request is made
- Will get notified if: (username) subscribed

Memo – incoming

- Event that occurs: A new memo is sent to (username)
- Will get notified if: (username) subscribed

NOTE: If you set your delivery method for this subscription as "internal AyaNova memo" that would just cause a loop (a memo would be sent to you to let you know that a memo has been sent to you, and then another memo would be sent about that memo, and so). Therefore AyaNova will ignore this if you set the delivery method as being a memo.

Quick Notification

- Event that occurs: a Quick Notification is sent to (username)
- Will get notified if: (username) subscribed

Quote - created/updated

- Event that occurs: a Quote for a client of the same region or All Regions is created or updated
- Will get notified if: (username) subscribed

Schedule Marker – event imminent

- Event that occurs: A new or edited Schedule Marker's (or Follow Up) Start Date & Time is reached.
- Will get notified if: (username) is Source of this Schedule Marker

Schedule Marker – just created

- Event that occurs: A new Service Marker (or Follow Up) is created
- Will get notified if: (username) is Source of this Schedule Marker

Service Bank – currency depleted

- Event that occurs: A Banked Service's Currency Balance goes from a positive number to a negative number or zero balance
- Will get notified if: (username) subscribed

NOTE: Notification is sent when the amount falls to **0 or less**. If the amount is already 0 when you subscribe, you will not be notified if it goes below 0 unless you at some point added to the balance to first bring it above 0 before depleting it.

Be sure to subscribe to the notification on what you enter into Banked Service - if you enter $ amounts, then subscribe to the Service bank - currency depleted. If you enter hours, subscribe to Service bank - hours depleted.

Service Bank – incidents depleted

- Event that occurs: A Banked Service's Currency Incidents goes from a positive number to a negative number or zero balance
- Will get notified if: (username) subscribed

NOTE: Notification is sent when the amount falls to **0 or less**. If the amount is already 0 when you subscribe, you will not be notified if it goes below 0 unless you at some point added to the balance to first bring it above 0 before depleting it.

Be sure to subscribe to the notification on what you enter into Banked Service - if you enter $ amounts, then subscribe to the Service bank - currency depleted. If you enter hours, subscribe to Service bank - hours depleted.

Service Bank – hours depleted

- Event that occurs: A Banked Service's Hours Balance goes from a positive number to a negative number or zero balance
- Will get notified if: (username) subscribed

NOTE: Notification is sent when the amount falls to **0 or less**. If the amount is already 0 when you subscribe, you will not be notified if it goes below 0 unless you at some point added to the balance to first bring it above 0 before depleting it.

Be sure to subscribe to the notification on what you enter into Banked Service - if you enter $ amounts, then subscribe to the Service bank - currency depleted. If you enter hours, subscribe to Service bank - hours depleted.

Workorder item scheduled user – (created / updated)

- Event that occurs: A new or edited Scheduled User in a workorder item is created
- Will get notified if: The Scheduled User selected is (username)

Workorder Item scheduled user – event imminent

- Event that occurs: A new or edited Scheduled User's Start Date & Time is reached
- Will get notified if: The Scheduled User selected is (username)

Workorder – "Close By" date passed

- Event that occurs: A new or edited service work order's Close By date has been reached.
- Will get notified if: (username) subscribed

Workorder – "Status" changed

- Event that occurs: A new or edited service work order's Workorder Status has been edited (note: this is not a Workorder Item Status).
- Will get notified if: (username) subscribed

Workorder item outside service – unit is overdue

- Event that occurs: A new or edited workorder item's Outside Service's ETA Date has been reached without the Returned Date being entered.
- Will get notified if: (username) subscribed

Workorder item outside service – unit received back

- Event that occurs: A new or edited workorder item's Outside Service's Returned Date has been entered.
- Will get notified if: The Scheduled User selected is (username)

Workorder item part request – parts received

- Event that occurs: A new or edited workorder item's Part Requests have been received into inventory via a Purchase Order Receipt.
- Will get notified if: The Scheduled User for the workorder item where the part was requested is (username)
- Will get notified if: If (username) was the user who was logged in that created the original part request

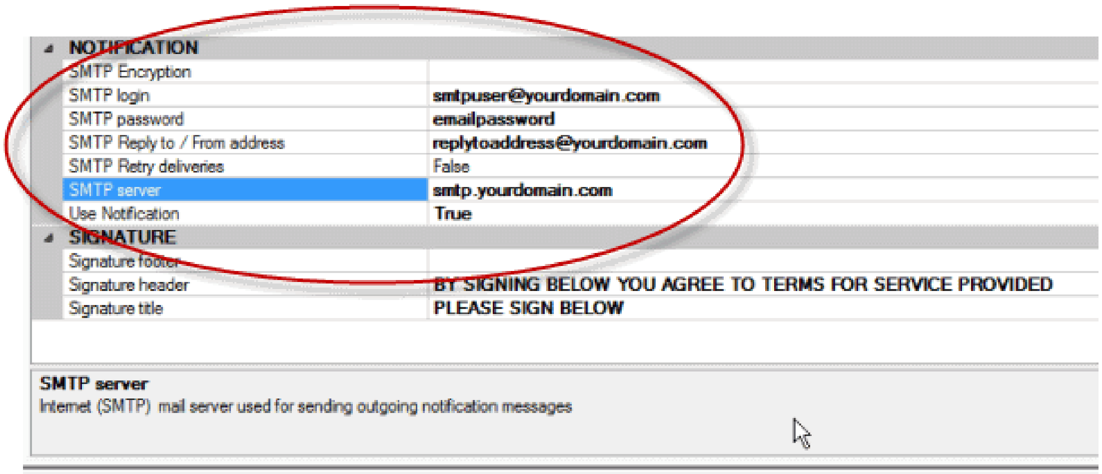
5.19.4 How to subscribe to a Notification

To subscribe to a subscription event:

1. **Notification setting in Global Settings configured for external notifications**
2. **Generator is working**
3. **Log in with your username**
4. **Select the specific notification subscription you want to subscribe to**
5. **Select a Delivery Method for that notification subscription**
6. **Save the notification subscription**
7. **An "event" occurs that results in the Generator (either internal or external if networked) generating the notification about that event**
8. **If experience an issue...**

1. Notification setting in Global Settings

If you want to be notified via external means such as email or SMS pager, the Notification settings in Global Settings needs to have been edited for your external email and saved.



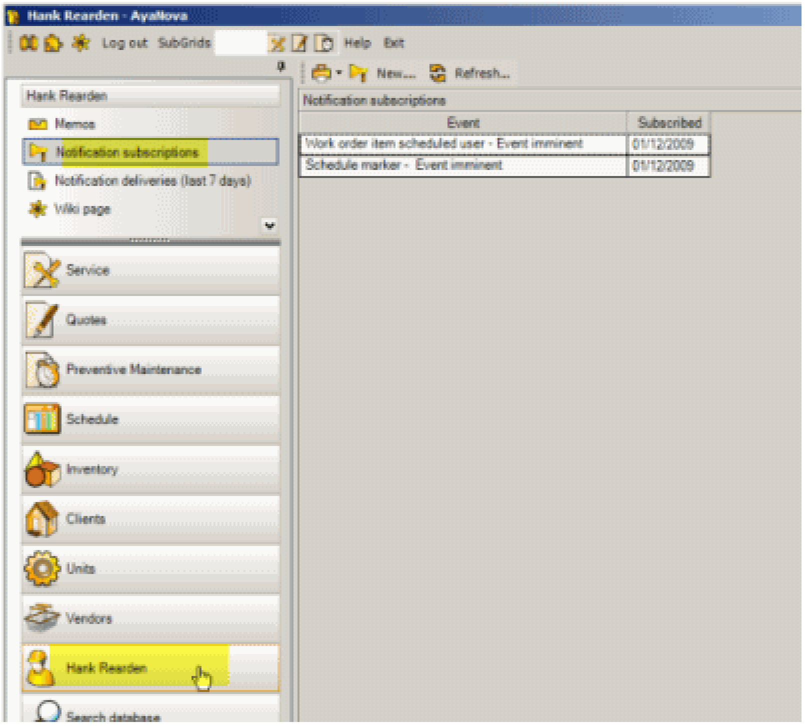
- see also the Notification - Global Settings section

2. Generator is working correctly

- If using the stand-alone default installation of AyaNova for a single computer, the generator runs automatically when logged in as other than the AyaNova Administrator
- If AyaNova is configured for network use, the network Generator has been installed and configured and is confirmed running successfully
- See also Generator

3. Log in with your AyaNova username

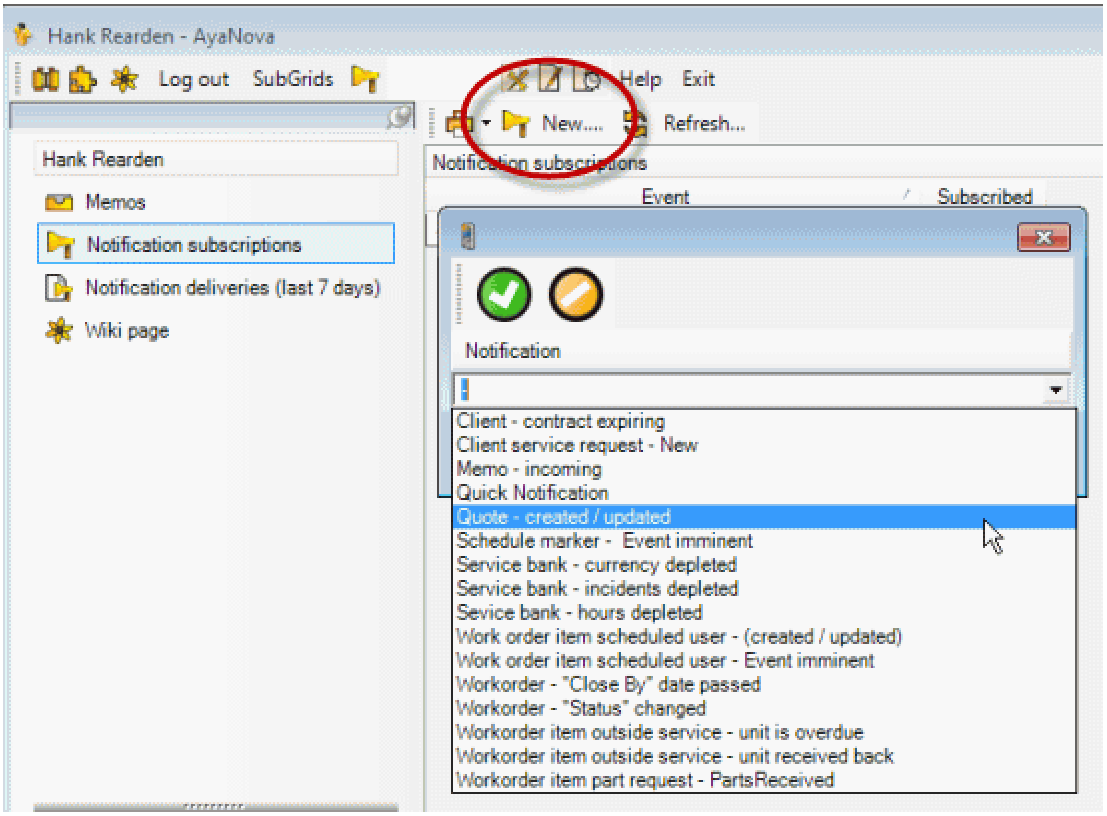
In the example below, the example user Hank has logged in, so it shows Hank Rearden in the navigation pane on the left when he logs into AyaNova



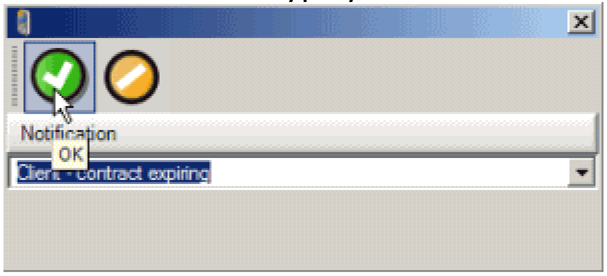
4. Select the specific notification subscription you want to subscribe to

a. Select New... 

menu option which will display the drop down selection of different event subscriptions

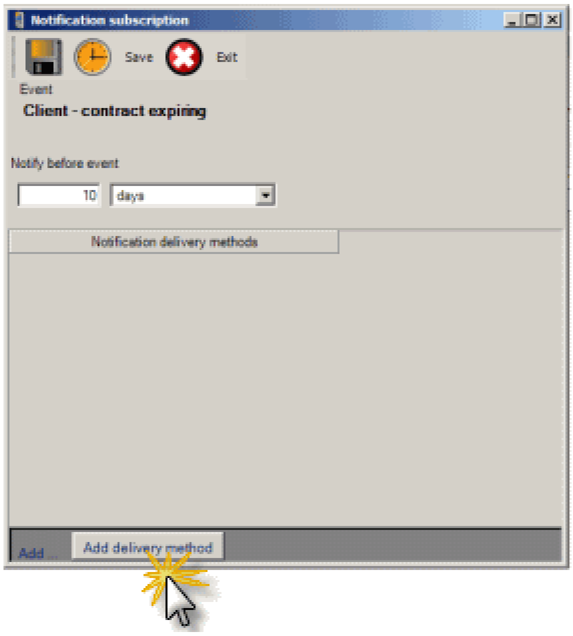


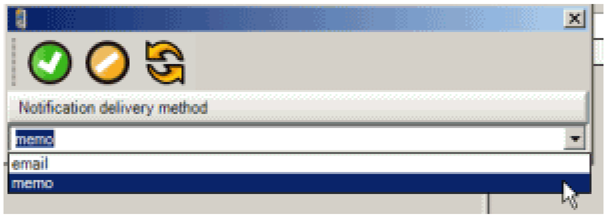
b Select the Event Type you wish to subscribe to and select the **OK** button



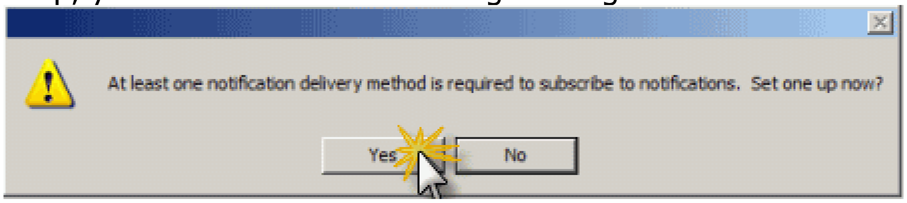
5. Select a Delivery Method for this notification subscription you have selected

a. If one or more method of notification delivery has been set up already, then click on the **Add Delivery Method** button and select one of your existing delivery methods you have already entered





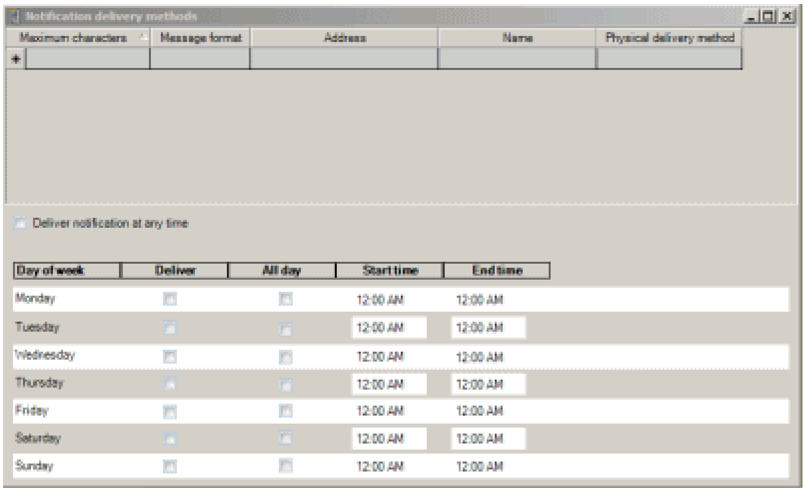
b. If instead no methods of notification delivery (memo, email, etc) has **yet** been set up, you will receive the following message:



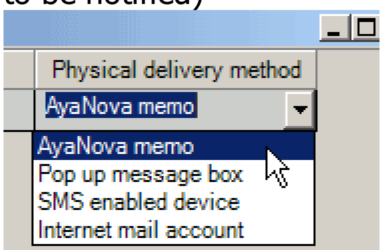
A notification delivery method is “how” AyaNova will notify you – i.e. popup, memo, email, SMS text messaging, and with that “how” additional settings. You need to set this up if not yet done so.

Select Yes to set up delivery methods

The Notification Delivery Methods window opens.



Select a **Physical Delivery Method** (this tells the Generator how you want to be notified)



NOTE: Even if the AyaNova Administrator subscribes to a delivery method of Popup, the AyaNova Administrator does not receive popups. The AyaNova Administrator user is meant to be used only for administrative functions - not ongoing day to day use.

Name field is where you enter in text identifying this delivery method for yourself so you can easily select it

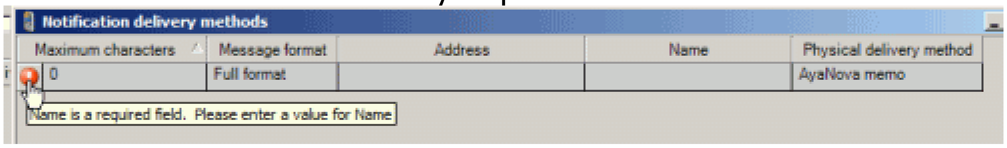
Address field is where you enter the address if an Internet mail account (i.e *emailaddress@domain.com*) or SMS enabled device (i.e. *5559998888@mymobiledevice.com)*

Message Format is where you indicate if you want the notification to be sent in its internal Full Format (all possible information internally coded to be sent), or Brief Format (minimal text)

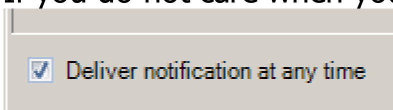
If you have selected a Physical Delivery Method of SMS Enabled Device, it is recommended to use the Brief Compact because your device may be limited in the number of characters it can receive.

Maximum Characters only need to be set **if** had selected SMS Enabled Device, otherwise leave at 0 to indicate no maximum

You will note a reminder of any required fields needed to be entered



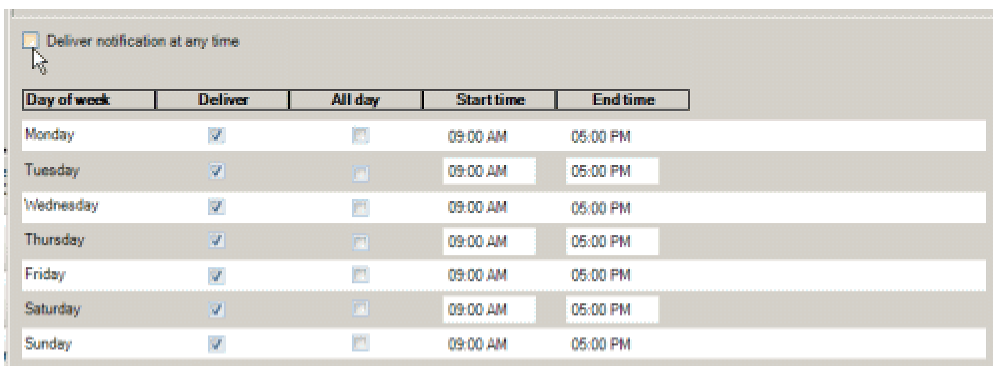
If you do not care when you are notified – leave the checkmark



Of course, if the delivery method is Popup Message Box or AyaNova Memo – these would **only** occur when the user is actually logged into AyaNova.

If instead you have selected SMS Enabled Device or Internet Mail Account. you may want the notification to only occur during work hours.

In that case, uncheck the Deliver Notifications at Any Time to allow editing of the specific day and times.

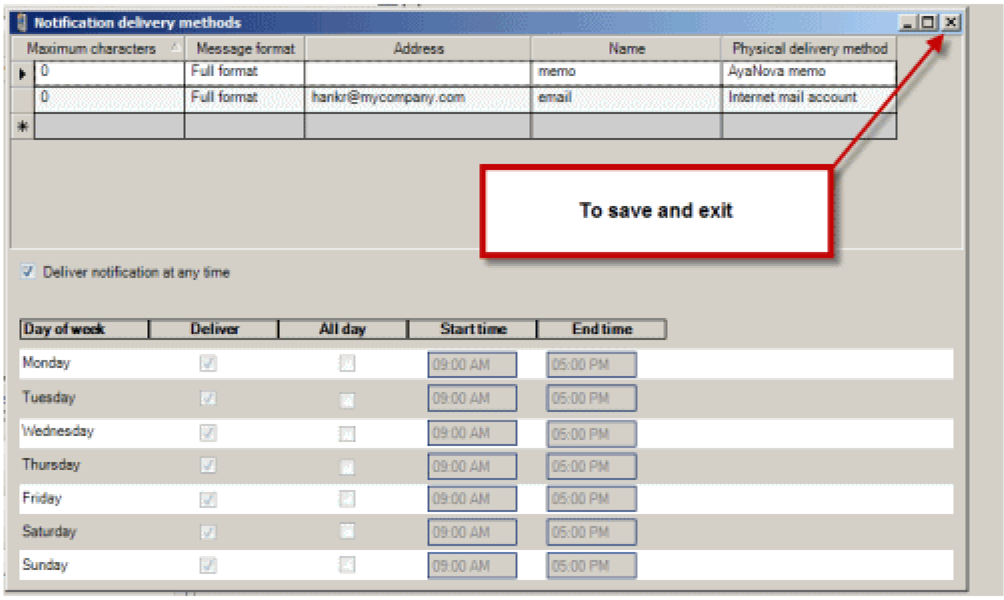


Deliver column is to identify if you wish delivery on that day.

All Day column is to identify if you wish delivery at any time during that day (12AM to Midnight)

If All Day column is unchecked you can specify a start and end time when you would be notified on this day – it defaults to 9AM start with 5PM stop for ease of use, but of course you can edit as needed.

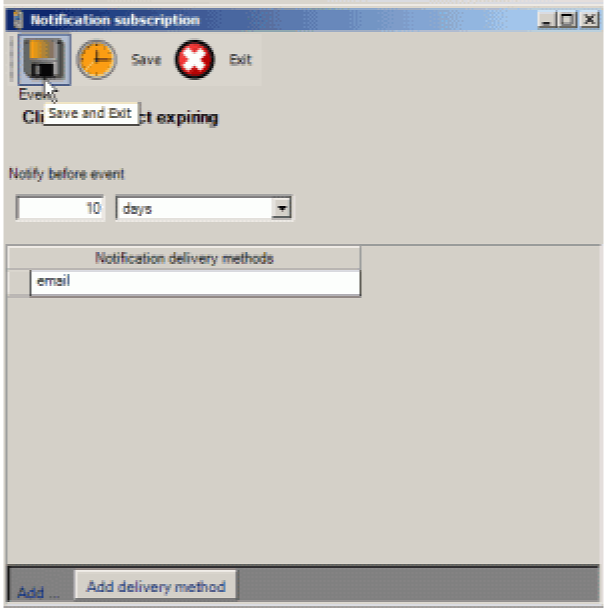
To save and close out of the Delivery Methods grid, select the X in the upper right hand corner



You can set up as many different Notification Delivery Methods as needed, as you will select the specific you want for any Notification Subscription.

Remember, you can always view, edit, and/or add delivery methods by clicking on the Notification delivery method "jump" button after selecting Add delivery method.

6. Save the notification subscription



7. An "event" occurs that results in the Generator (either internal or external if networked) generating the notification about that event

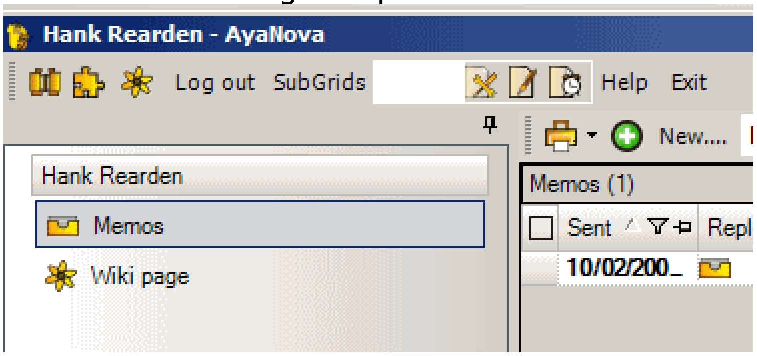
In our example steps above, the user Hank will be notified via an external email notification when a client's contract is 10 days before it expires - the Contract Expiry Date set in that client's entry screen.

For example, a new client is created and a contract is selected for the client with an Expiry Date of 01/09/2009, so Hank will be notified via email 10 days before which is December 31 2008 via external email

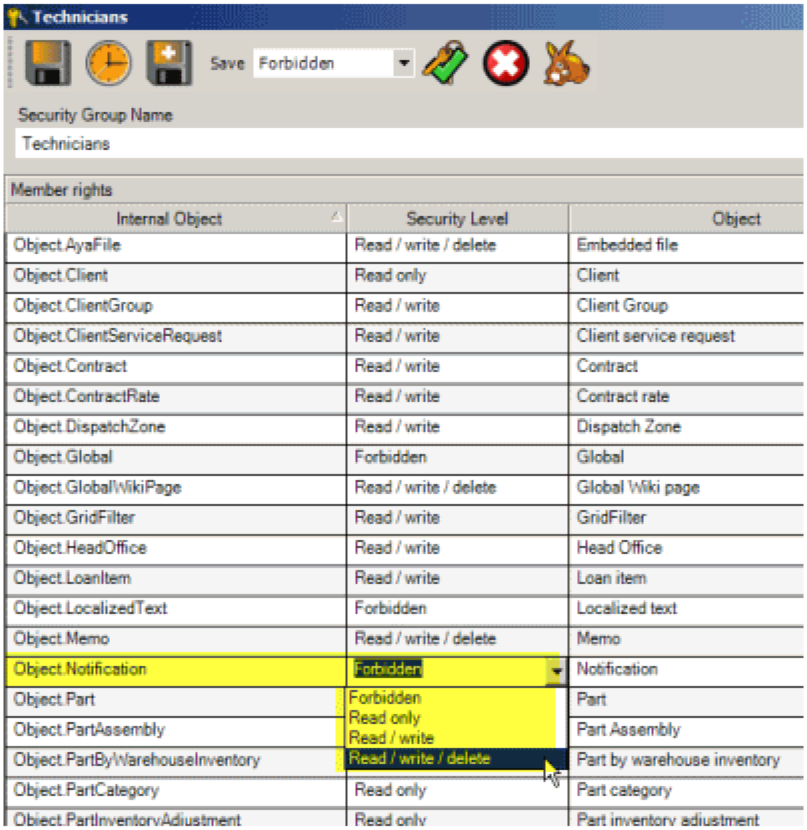
8. If experience an issue....

1. User logs in, but there is not Notification Subscriptions selection in their username navigation pane

For example, Hank first logs in, but there is only Memos and his personal Wiki available in his navigation pane



This means that the AyaNova Administrator needs to set the security group right Object.Notifications to either Read/Write or higher for the security group Hank is a member of.



Then have Hank log in again, and the Notification Subscriptions grid will be available.

2. No notification occurs

A. Confirm each of the Generator testing steps

B. Confirm your notification subscription steps
- that your username is actually subscribed to the notification subscription
- that there is a delivery method selected
- and that you subscribed to the event before the event itself occurred.

C. Check the Notification Logs (last 7 days) grid to see if it shows an error for the notification. Also note that once a notification has been sent or attempted to be sent, it will be deleted.

D. If unable to determine the issue, be sure to provide confirmation of each of the above (send your actual steps, confirmation, screenshots etc) so that we can help you troubleshoot.

NOTE: you can add multiple delivery methods for each subscription event - i.e. you can be notified via internal AyaNova memo, as well as external email

- AyaNova will deliver via all methods that are valid at that day of the week and time.
- AyaNova will then remove the event from the list of events.

NOTE: a delivery method of AyaNova Memo or Popup Message will be delivered regardless whether the user is logged in or not.

- If a Popup Message, the messages will popup on login.
- If an AyaNova Memo, it will display within the user's Memos grid.

NOTE: if delivery methods for that subscription event are all invalid at that day and time, AyaNova will keep that event in its list until a valid delivery method occurs.

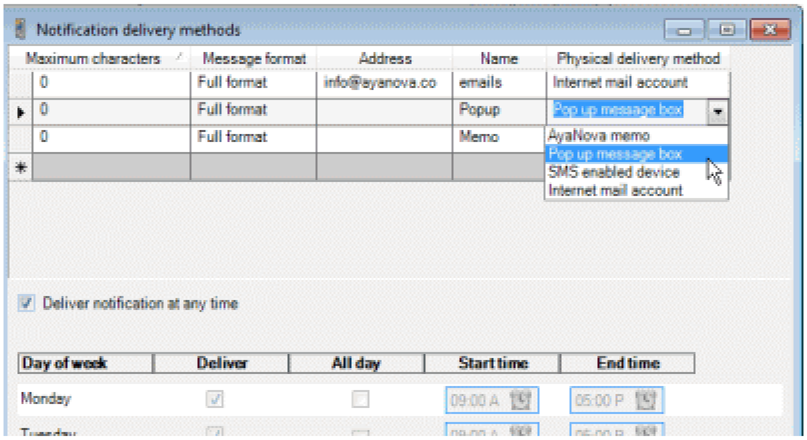
See also:
Event Generator (to set up the Event Generator for network use, as well as to test)
Global Settings
Notification Deliveries (last 7 days) grid (what you view to see if any errors or issues with a notification)

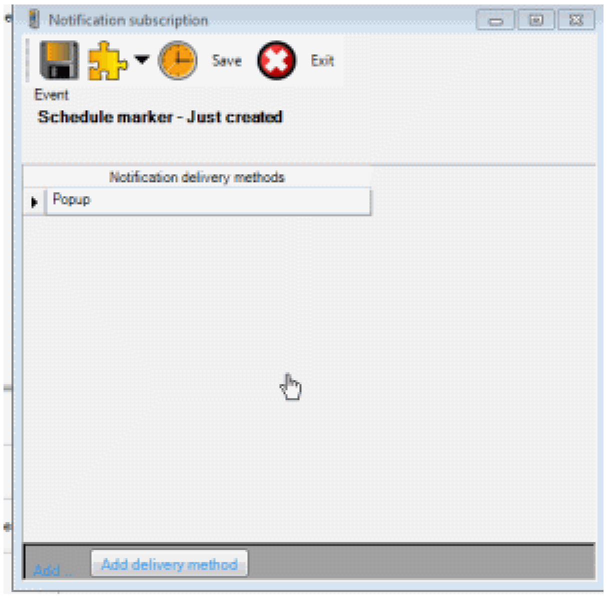
5.19.5 Pop-Ups

Receive a pop-up if you have subscribed to a notification subscription, and told it to use the **delivery method** of Pop-up.

Below is an example of how a pop-up works:

A. Hank has subscribed to be notified via Pop-Up when a new schedule marker is created for him.

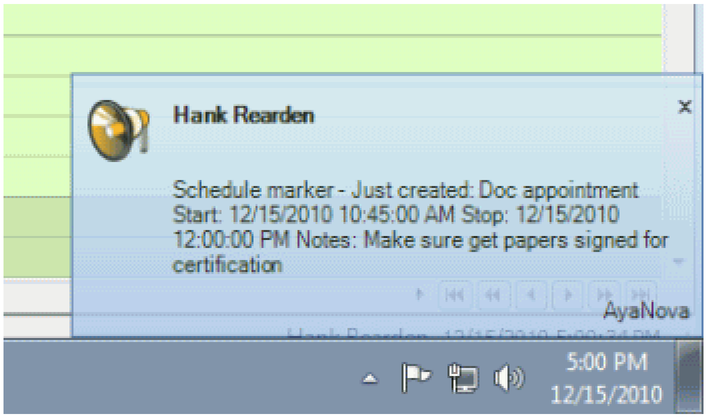




B. The Generator (either internal if running stand-alone default installation or the network Generator service if running a network AyaNova configuration) will poll the database approximately every five minutes to see if there is an "event" it should notified a subscribed user about.

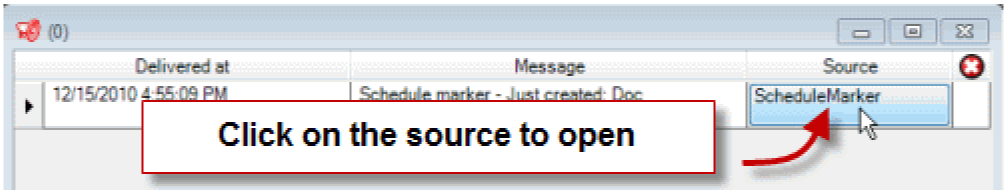
When it polls, and sees that the user has subscribed with a notification delivery method of Pop-Up Message Box, that user will be sent a Popup message.

C. Hank will receive in the lower right-hand corner of his computer screen a popup when the notification occurs that will fade.

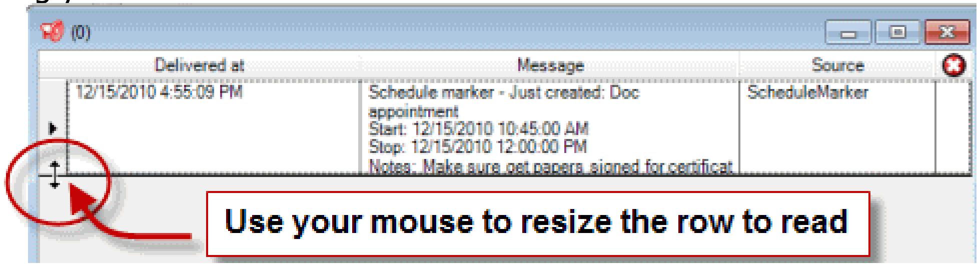


D. And he can open and view his Popups at any time from the main menu of his AyaNova

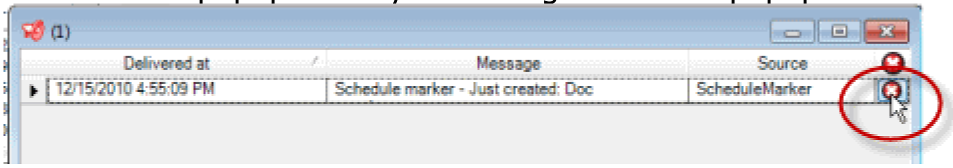
E. Select the Source to open what the event is about. In the screenshot below, the event that Hank is being notified about is that a Schedule Marker has been created. So if he clicks on the ScheduleMarker under the Source column, that Schedule Marker screen will open for him.



F. You can also resize the row to read information directly from the Popup grid using your mouse on the row selector.



G. Delete the popup row if you no longer want the popup to show



Review Notifications for more details

NOTE: Even if the AyaNova Administrator subscribes to a delivery method of Popup, the AyaNova Administrator does not receive popups. The AyaNova Administrator user is meant to be used only for administrative functions - not ongoing day to day use.

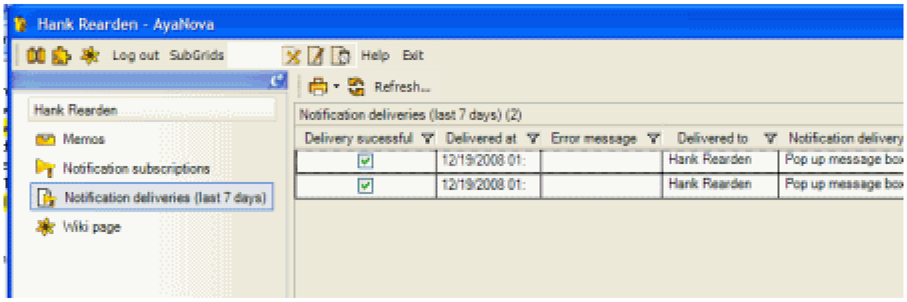
NOTE: If experience the issue of not receiving popups, and your computer/LAN has a firewall, do set an exception for your AyaNova program folder and for the executable AyaNova.exe

5.19.6 Notification Deliveries (last 7 days) grid

- **The Notification Deliveries (last 7 days) grid provides the following**
- **Read the error if there is one to help you troubleshoot**
- **If no record of the notification in the log**
- **SMTP connection is attempted first before sending**
- **Security Group internal object: Object.Notification**

The Notification Deliveries (last 7 days) grid provides the following:

- Confirmation that the Generator sent out the notification if successful
- Or if attempted to be sent out but failed, what the error is about notifications sent out over the last 7 days of events.



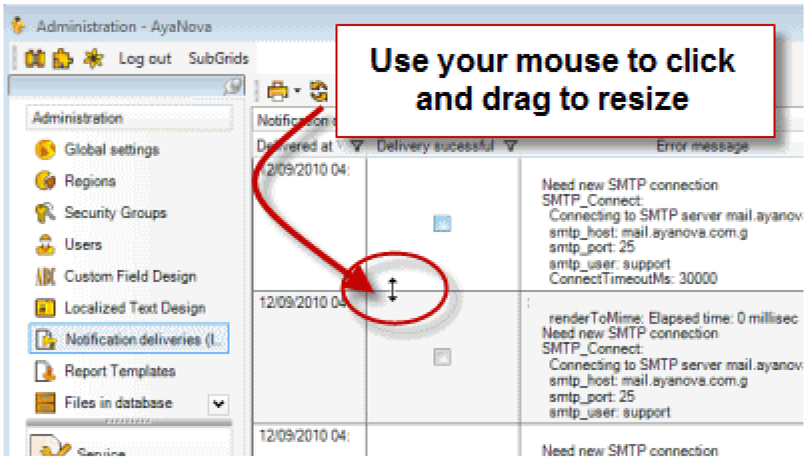
The Notification Deliveries (last 7 days) **under the Administration navigation** pane identifies notifications of events that have occurred in the last 7 days of events for **all** users.

The Notification Deliveries (last 7 days) **under the <username> navigation pane** identifies notifications of events that have occurred in the last 7 days of events for **only that user** (where <username> is the name of the person logged into AyaNova)

Read the error if there is one to help you troubleshoot:

If a record of the notification does show in this log and it has an error - **read that error** and fix based on what that error is.

For example, if the error says *SMTP Delivery Error: One or more required fields are empty. Undeliverable.* check your Global Settings and make sure all required fields in the Notification section are filled including password for your SMTP server.



Once a notification has been sent (or in the case of an error, attempted to be sent) the notification message itself is deleted from AyaNova. So if an error occurs and you then fix the issue, you will not receive that notification as it has already been deleted **UNLESS** you have set SMTP Retry Deliveries to TRUE in Global Settings - Notification

If no record of the notification in the log:

If a record of the notification does not show in this log, then that means something else is the cause and you need to troubleshoot why

1. If the event occurred for an item that was created or modified before you subscribed, you will not be notified.

2. Check your notification settings – such as email address, pager number, etc

3. Checked your notification deliveries as it may be set to not send on certain days or certain times.

4. Confirm the AyaNova Generator settings

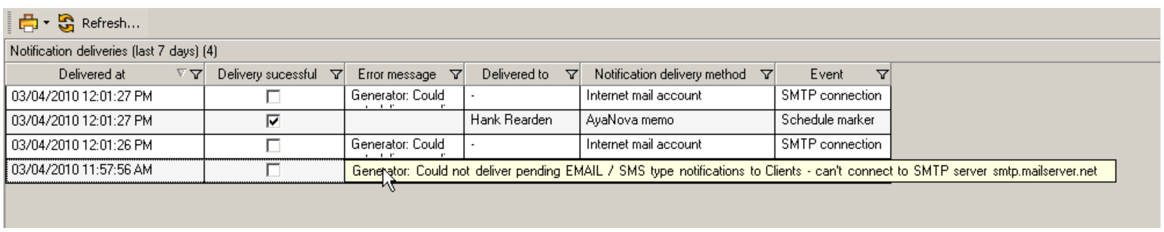
5. Perform a test to ensure that it is sending similar types of notifications for other events.

SMTP connection is attempted first before sending:

Notification generation now includes the new feature that when processing notifications, checks to see if there are *any* SMTP delivery method ones, if so then before any delivery attempts the Generator probes SMTP server by attempting a connection first.

If this fails then logs it through the Administration navigation pane's Notification Deliveries (last 7 days) log if in generator service and skip all SMTP type notifications but continue to process others that *can* be delivered (i.e. internal memo and/or popups).

This way the AyaNova Administrator can easily see by the error in the Administration navigation pane's Notification Deliveries (last 7 days) grid that SMTP is down which is why no one is receiving their email or SMS notifications.



Security Group internal object: Object.Notification

NOTE: Only if the user is of User Type Administrator User will this user be able to view the Notification Deliveries (last 7 days) grid in the Administration navigation pane

Forbidden : User of that security group can not access the Notification Deliveries (last 7 days) grid at all

Read Only or Read/Write or Read/Write/Delete: User can view the Notification Deliveries (last 7 days) grid

Grid columns:

Delivered At	The date and time the delivery was made
Delivery Successful	Checkmark shows if the notification was successfully delivered

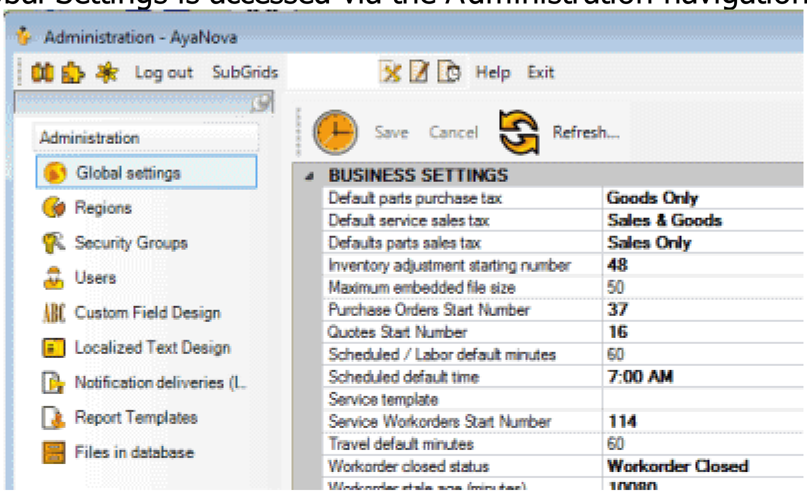
Error Message	If delivery unsuccessful, read the error message here to see what the issue is
Delivered To	The AyaNova username that subscribed to the notification and was notified
Notification Delivery Method	identifies whether notification sent via AyaNova memo, popup or external email or SMS
Event	The event that occurred that resulted in the notification

5.20 Global Settings

Global Settings is where the administrator would set default and global settings that affect **all** users of AyaNova, and all features of AyaNova when the user logs into the AyaNova program.

> **NOTE**: In some cases, a specific client or specific user may have settings that override the Global Settings. If you have a situation where a client or user is not getting the same settings as others, check their entry screen.

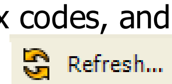
Global Settings is accessed via the Administration navigation pane



If you edit any of these settings, **make sure all** staff exit out of AyaNova until you have saved the new settings and exited AyaNova yourself.

Global Settings affect **every** user when they log into the AyaNova program.

Edited Global Settings won't be in effect for an AyaNova user **until after that user exits out and logs back in**.

If selecting such as default tax codes, and have recently entered in new Tax Codes, just select the Refresh 

menu option to refresh the list of selectable options.

Global Settings include:

- Business Settings
- Company Info
- Display Settings
  - Workorder Item Summary Template tags
- Use Inventory
- Language Settings
- Notification

[Signature](#)

Security Group internal object: Object.Global

NOTE: Only if the user is of User Type Administrator User will this user be able to view the Global Settings grid

Forbidden : User of that [security group](#) can not access the Global Settings grid at all

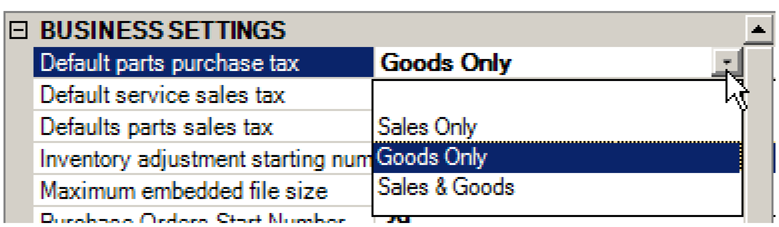
Read Only : User if is of User Type Administrator User can view the Global Settings grid but can not edit

Read/Write or Read/Write/Delete : User if is of User Type Administrator User can access the Global Settings grid, view and edit

5.20.1 Business Settings - Global

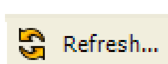
Business Settings

These are global settings that affect default taxes, starting numbers, default status, minutes range and more



Default parts purchase tax

Tax used by default for parts on purchase orders. Select an existing created [Tax Code](#) that you want to default for parts selected in a purchase order. Note you can still change in the Purchase Order.

Use the Refresh menu option 

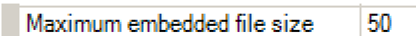
if newly entered taxes are not yet showing in the drop down selection.

Default service sales tax

Sales tax used by default for services on workorders. Select an existing created [Tax Code](#) that you want to default for labor selected in a workorder. Note you can still change in the workorder.

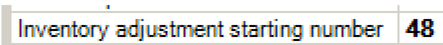
Default parts sales tax

Sales tax used by default for parts on workorders. Select an existing created Tax Code that you want to default for parts selected in a workorder. Note you can still change in the workorder.



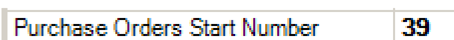
Maximum Embedded File Size

The maximum file size for an attached document via any Wiki. Do note that you can set the maximum to less than 50MB but you can not set to higher than 50MB. You can check the size of all files being kept in your database by viewing the Files in Database grid in the Administration pane.



Inventory adjustment start number

You can enter whatever number you want here as the Inventory Adjustment starting number. Do note that it must be greater than existing used numbers for Part Inventory Adjustments. Once you have entered a number and saved, you can not enter a smaller number.



Purchase orders start number

You can enter whatever number you want here as the Purchase Orders starting number. Do note that it must be greater than existing used numbers for Purchase Orders. Once you have entered a number and saved, you can not enter a smaller number.

Quotes start number

You can enter whatever number you want here as the Quotes starting number. Do note that it must be greater than existing used numbers for Quotes. Once you have entered a number and saved, you can not enter a smaller number.

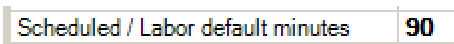
Service workorders start number

You can enter whatever number you want here as the Service Workorder starting number. Do note that it must be greater than existing used numbers for Service Workorders. Once you have entered a number and saved, you can not enter a smaller number.

NOTE about starting numbers – when editing starting number for workorders, quotes, purchase orders or inventory adjustments, do be aware that the value displayed in the Global Settings screen is the existing highest existing number for that table.

Even if you edit the Global Settings starting number, until you make a new workorder, po, quote etc, the highest existing number is still the same as it was previously in the record.

So if you edit the starting number – you **<u>need to</u>** make at minimum one new workorder or new quote, etc to actually "set" the new starting number as the highest existing number.

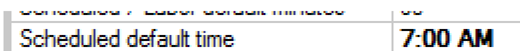


Scheduled / Labor Default Minutes

Enter in minutes the default time span for a Start and Stop Date/Time for Labor and for Scheduled Users in a workorder.

For example, if you enter in 90, that means if you enter in a Start Date/Time for Labor of 9:00AM the Stop Date/Time **will automatically pre-enter** 90 minutes later for you at 10:30AM to save typing time. You can of course still edit the Stop Date/Time.

Whereas if you enter in 0, that turns off automatic entry and no start or stop time would be entered.

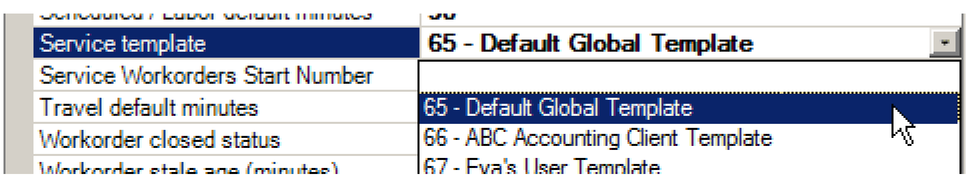


Scheduled Default Time

Enter the default time you want new Scheduled User records to default to when created via the service workorder, quote or PM entry screen.

Leave empty if you want it to default to midnight

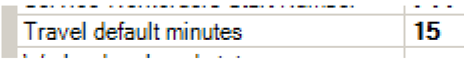
Do note a Scheduled User record will default to <u>today's time</u> if today's date is selected when creating the Scheduled user record, regardless of what you enter in this business setting.



Service Template

Select the specific service workorder template you want to be selected by default when a user creates a new service workorder via the Service Workorders grid New... menu option. You can leave this blank if you do not want a default template selected.

<u>NOTE</u>: Client template setting and/or user template setting may override.

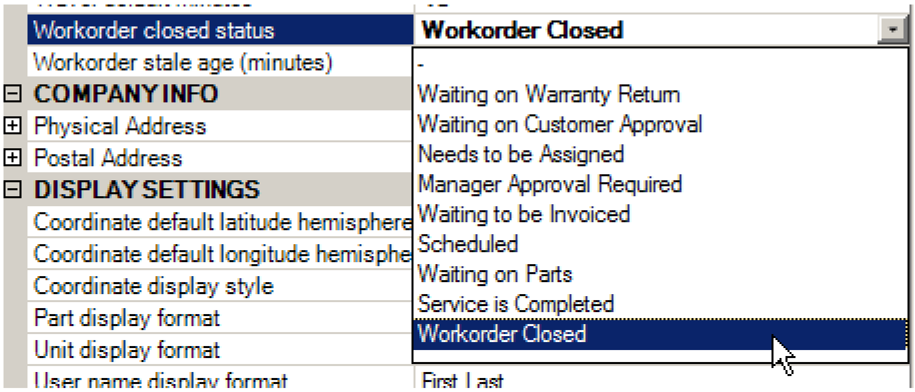


Travel Default Minutes

Enter in minutes the default time span for a Start and Stop Date/Time for Travel in a workorder.

For example, if you enter in 15, that means if you enter in a Start Date/Time for Travel of 9:00AM the Stop Date/Time will automatically pre-enter 15 minutes later for you at 9:15AM to save typing time. You can of course still edit the Stop Date/Time.

Whereas if you enter in 0, that turns off automatic entry and no start or stop time would be entered.



Workorder closed status

If a specific Workorder Status is selected here, when a workorder is checkmarked Closed, it will automatically take this status. This is very useful to ensure for reporting that you have the correct status on a closed workorder. You can leave this blank if you do not want the Closed workorder's status affected.

Note to SDK/API users: a property (AllowAutomaticClosedWorkorderStatus) was added to the AyaBizUtils class to enable 3rd party software to override this automatic behaviour, simply set it to false before closing the work order in your code.

Workorder stale age (minutes)

Minutes after a workorder is created that it should be closed by.
When a work order is created this time span is added to the current date / time to set the Close By Date field in the Service workorder entry screen automatically.
Set to zero if not used.

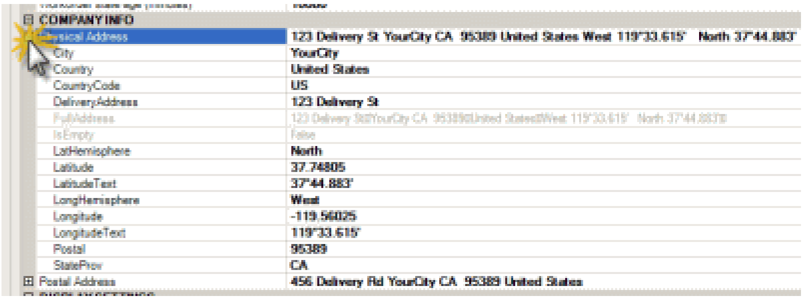
1440 minutes = 24 hours

10080 minutes = 7 days
44640 minutes = 31 days

5.20.2 Company Info - Global

Company Info

These Global Settings fields are **not** tied into any reports or other information. These fields are purely at this time for viewing only.



Some properties are further expandable to edit additional aspects of the property, such as Physical Address and Postal Address. Click on the + sign on the left hand side to expand the property so it can be viewed completely as well as edited.

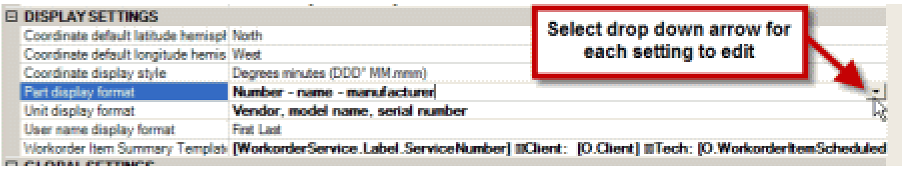
To edit your report templates company information, refer to the tutorials on report template design.

To edit your license registration name, contact AyaNova support providing a copy of your ayalog.txt file and details.

5.20.3 Display Settings - Global

Display Settings

These Global Setting fields are where you set how you want combined fields to display elsewhere in AyaNova grids - such as parts to include part number and part name etc.



Coordinate default latitude hemisphere
Coordinate default longitude hemisphere
Coordinate display style

Determines how geographic co-ordinates are displayed

Part display format

Sets the format for how parts are displayed for selection.

Examples of suggested use:

- **Number – Name – Manufacturer**: set to use this display if you and your staff most commonly select based on the part number.
- **Name - Number:** set to use this display if you and your staff most commonly select based on the part name.
- And more display options

There are additional options for selection too. Select the display format that displays the fields you need to identify for selection.

Regardless of the format selected, the part number is what is sorted by if first column in a grid.
Whereas if grouping within a report template, the sort order will be based on the format.

Unit display format

Sets the format for how units are displayed for selection. For example the display may be changed from Vendor – Model – Serial to instead display as Serial Number only.

Examples of suggested use:

- **Model number, Model name, Serial number**: set to use this display format when your company prefers units are listed based on their model number but also include the model name and serial number for ease of selection.
- **Serial Number, Description**: set to use this display format when your company does not have Unit Models.
- And more display options

There are additional options for selection too. Select the display format that displays the fields you need to identify for selection.

The unique identifier in each Unit is its Serial Number.

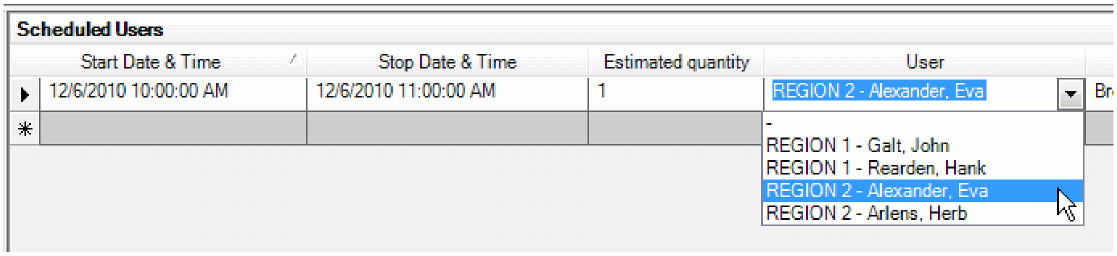
Regardless of the format selected, the serial number is what is sorted by if first column in a grid.
Whereas if grouping within a report template, the sort order will be based on the format.

User name display format

Sets the format of how Schedulable Users display within drop down selection boxes, and to display in screens and on reports.

Regardless of the format selected, the Last Name is what is sorted by in grids if first column in a grid. Whereas if grouping within a report template, the sort order will be based on the format.

Suggestion of use is for example, if you use Regions to restrict access to data, use the User name display format that includes the Region name so that you can see at a glance which region the technician is a member of, and assign to the appropriate client.

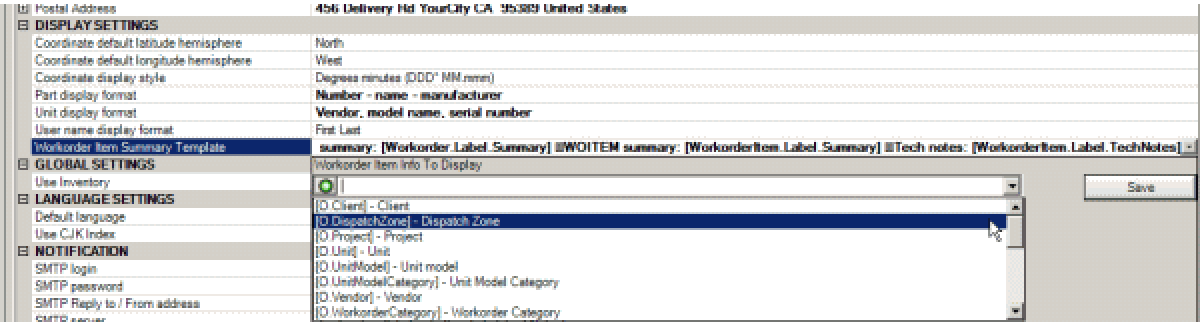


Workorder Item Summary Template

This determines what information from a service workorder item will display on the Schedule screen.

See also:
Workorder Item Summary Template tags
How do I edit the Workorder Item Summary Template Editor for popup on the Schedule Screen?

5.20.4 Workorder Item Summary Template tags



The **Workorder Item Summary Template** field in Global Settings is where you set what information from a service workorder item to display on the Schedule screen when you hover your mouse over a scheduled workorder item.

NOTE: There is a maximum of 500 characters (including spaces and returns) that can be entered in this field.

See also:

[How do I edit the Workorder Item Summary Template Editor for popup on the Schedule Screen?]

Below identifies the tags available for the **Workorder Item Summary Template** field in Global Settings - what each equates to in the workorder item itself.

[O.Client] - the name of the client of the scheduled workorder

[O.DispatchZone] - the dispatch zone of the client of this workorder

[O.Project] - the project identified in the workorder

[O.Unit] - the unit selected in this workorder item

[O.UnitModel] - the unit model of the unit selected in this workorder item

[O.UnitModelCategory] - the unit model category of the unit model of the unit selected in this workorder item

[O.Vendor] - the vendor of the unit model of the unit selected in this workorder item

[O.WorkorderCategory] - the workorder category selected in this workorder

[O.WorkorderItemScheduledUser] - the scheduled user of this workorder item

[O.WorkorderStatus] - the workorder item status of this workorder item

[Workorder.Label.CustomerContactName] - the Contact text entered in the workorder

[Workorder.Label.CustomerReferenceNumber] - the Reference # text entered in this workorder

[Workorder.Label.InternalReferenceNumber] - the Internal Reference # text entered in this workorder

[Workorder.Label.Onsite] - displays True if Onsite is checked, or False if Onsite in the workorder is not check-marked

[Workorder.Label.Summary] - the Workorder Summary text entered in this workorder

[WorkorderItem.Label.TechNotes] - the Service Notes text entered for this workorder item

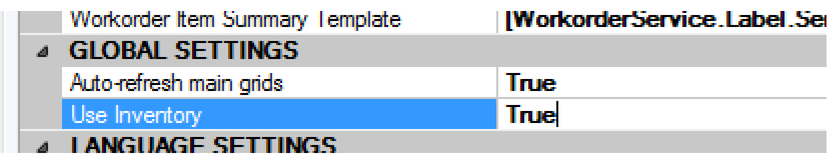
[WorkorderItemScheduledUser.Label.StartDate] - the Start Date/Time for the Scheduled User of this workorder item

[WorkorderItemScheduledUser.Label.StopDate] - the Stop Date/Time for the Scheduled user of this workorder item

[WorkorderService.Label.InvoiceNumber] - the Invoice # text entered in this workorder

[WorkorderService.Label.ServiceNumber] - the service workorder number of this workorder

5.20.5 Use Inventory & Auto Refresh - Global



Auto-refresh main grids

If set to True, the main grids will be automatically refreshed approximately every 5 minutes.

For example, if you are viewing the Customer Service Request grid and a client request service which will create a new record, your CSR grid will automatically refresh every five minutes so that you don't have to remember to click on the Refresh button and won't accidental miss seeing the new request.

Whereas you may want to turn off auto-refresh by setting it to False, if instead of printing off a report list, you are working your way down through a list of records in a main grid (such as list of parts) and don't want the grid to refresh and lose your place.

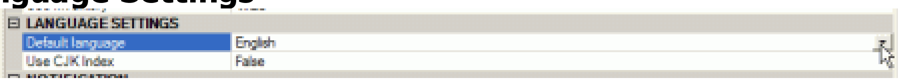
Use Inventory

If set to TRUE, able to use Purchase Orders, Receipts, view Inventory Status, make Inventory Adjustments, and request order of Parts within service workorders.
If set to FALSE, only able to enter Parts, and select Parts without affecting inventory.

NOTE: Changing Use Inventory to False, entering a quantity of parts in workorders, and changing Use Inventory back to True can result in on-hand amounts becoming out of synch as inventory is not tracked when set to False. If you do this, you may need to make Inventory Adjustment entries to adjust for the inconsistencies of parts entered in workorders where inventory tracking was not in use.

5.20.6 Language Settings - Global

Language Settings



Default language

When a new AyaNova user is created, this is the default language locale that will be selected in their user entry screen.

See also:
[Localized Text Designer]
[User entry screen]

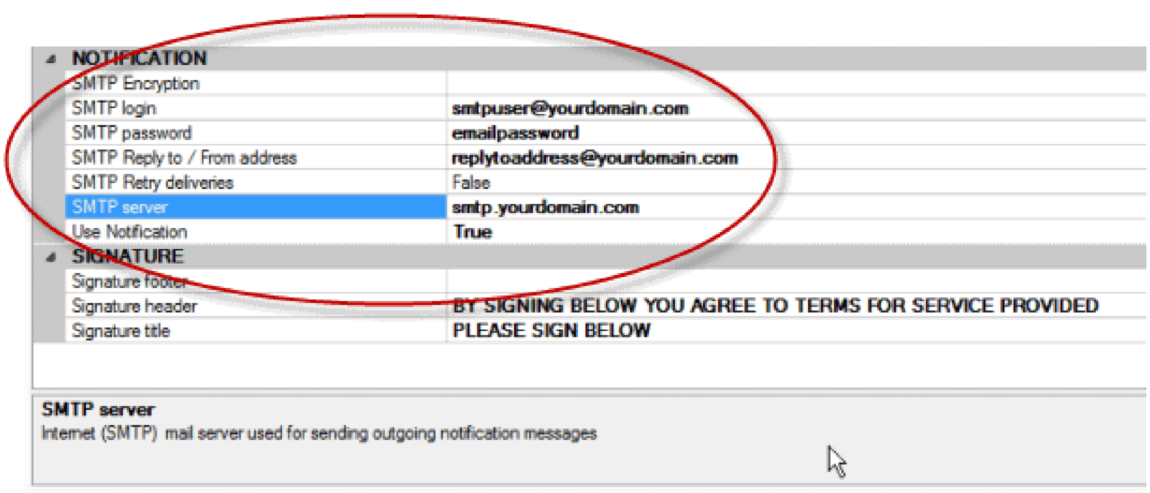
Use CJK Index

Only set to TRUE if entry of Chinese, Japanese or Korean characters into fields and labels. TRUE uses intensive indexing features not required by other languages that can affect performance.

5.20.7 Notification - Global

Notification

These fields are where you set whether to allow external notifications or not, and how to connect.



SMTP Encryption - Encryption method to use with SMTP server. Valid values are TLS, SSL or empty for no encryption.
This field may be left empty if encryption not used with your SMTP server.

- A value of SSL will cause notifications to connect to the SMTP server using the older SSL style encryption protocol (don't forget to edit the **SMTP server** field with the port number - for example, if using Gmail, your SMTP Server would be smtp.gmail.com:465 if encryption is SSL)
- A value of TLS will cause notifications to issue a STARTTLS command to switch over to a secure TLS connection prior to authenticating and sending email (don't forget to edit the **SMTP server** field with the port number - for example, if using Gmail, your SMTP Server would be smtp.gmail.com:587 if encryption is TLS)

SMTP login - Login account for SMTP mail server
This field is required.

SMTP password - Password for SMTP login account
This field is required.

NOTE: do not use special characters in your SMTP password. Use only letters and numbers.

SMPT Reply to / from address - From email account (reply to address) to use when sending outgoing notification
This field is required.

SMTP Retry deliveries

When set to True, then SMTP / SMS notifications that fail to deliver due to unable to connect to smtp server will no longer be removed from the notify event table but will be kept and re-attempted on next delivery until the smtp server can be connected to.

If set to False (the default) then on next generate if the smtp server is still not connectable then they will be removed.

This setting is useful if the SMTP server is not always available (i.e. the database is on a notebook computer that is not always able to connect to the mail server). Or any situation where admin wants to keep notifications until SMTP service is available. This option only relates to an SMTP server that is unavailable, it's *not* related to individual notifications that can't be delivered for any other reason, i.e. invalid email address etc. Those will still be deleted.

SMTP Server

Internet (SMTP) mail server used for sending outgoing notification messages.
Note that if your SMPT server requires other than port 25, you need to specify that in this field. For example, if your SMTP server is mail.blah.net and the port to access is 587, enter it as mail.blah.net:587
This field is required.

Use Notification

If set to TRUE turns on notification system. Required whether using internal notification and/or external.
If set to FALSE, turns off notification processing.

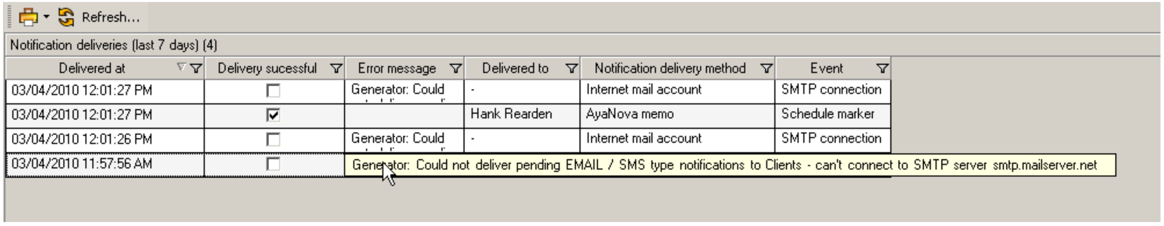
See also:
Notification Subscriptions
Network Generator for use with Notification
Client Notifications

A Note about SMTP connection:

Notification generation now includes the new feature that when processing notifications, checks to see if there are *any* SMTP delivery method ones, if so then before any delivery attempts the Generator probes SMTP server by attempting a connection first.

If this fails then logs it through the Administration navigation pane's Notification Deliveries (last 7 days) log if in generator service and skip all SMTP type notifications but continue to process others that *can* be delivered (i.e. internal memo and/or popups).

This way the AyaNova Administrator can easily see by the error in the Administration navigation pane's Notification Deliveries (last 7 days) grid that SMTP is down which is why no one is receiving their email or SMS notifications.

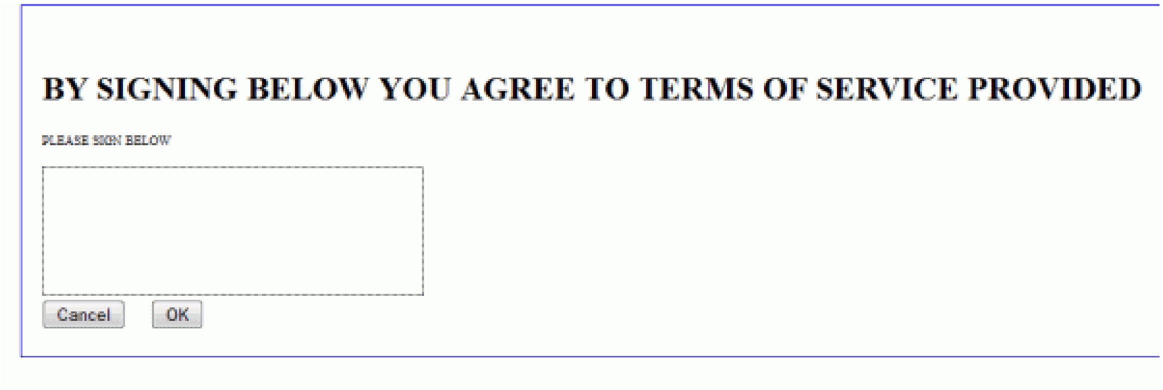


5.20.8 Signature - Global

Signature

These fields are where you set what displays above and below the signature field in MBI and/or WBI

For example, in this signature example, only the Signature header and Signature Title has been set in Global Settings so shows as per below via MBI



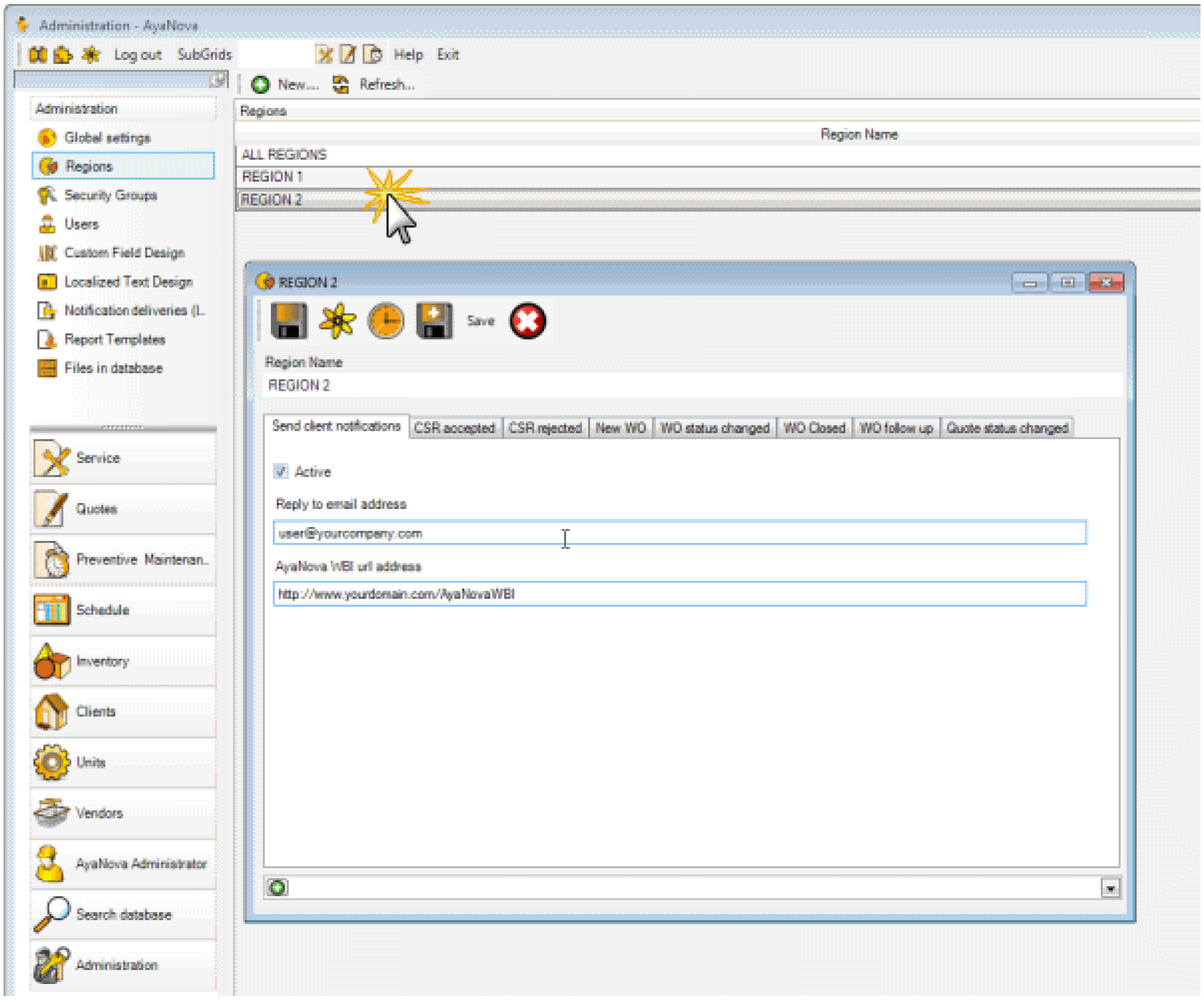
If you make a change in Global Settings for the signature settings, you will need to restart the MBI site or WBI site (and log back into MBI or WBI afterwards) before being able to see any changes.

Restart by:

- rebooting the server where MBI or WBI is installed on
- recycle the application pool used by the web application
- or edit the web.config file in a comment area and save which will itself force a restart for you

5.21 Client Notifications

5.21.1 Automatically send your client notifications



Client notifications are set up via the Regions entry screen in the Administration navigation pane.

This is because client notifications are sent based on the Region the client is a member of.

In the screenshot above, only clients set to the region called Region 2 would receive those notifications set up in that Region 2 entry screen.

Do review the requirements for Client Notifications

And follow along with the two tutorials which will provide you with an example of setting the tags in the message fields too:
Example of setting up WO Closed notification with tags
Example of WO Status Changed with attached report

AyaNova provides notifications based on different events:

- **CSR Accepted** - Client of that region receives an email when a Customer Service Request has been received
- **CSR Rejected** - Client of that region receives an email when a Customer Service Request is rejected
- **New WO** - Client of that region receives an email when a new workorder is created for that client
- **WO Status Changed** - Client of that region receives an email (and report if set) when the Workorder Status is set to the selected workorder status in a workorder. (different statuses can be set, each with their own report sent)
- **WO Closed** - Client of that region receives an email when a Workorder has been Closed. Email message can also include a workorder report if set.
- **WO Follow Up** - Client of that region receives a follow up email the set number of days after a workorder has been Closed
- **Quote Status Changed** - Client of that region receives an email when a quote is set to a specific quote status. Email message can also include a workorder report if set.

NOTE: For the client notification CSR Accepted or New WO - when a new wo is created from a CSR, the CSR actually creates and saves the workorder **before** the user sees the newly opened workorder on their screen.

So the notification for a new workorder created from accepting a CSR is sent **as soon as the CSR is accepted** and **does not** include any edited data you may have entered in the workorder's entry screen after selecting to accept the CSR.

For example, if you have the tag [O.WorkorderStatus] in the message for a New WO, and you accepted a CSR and then edited the workorder such as entering a workorder status, etc - that workorder status you selected will NOT show in the message sent to the client because it was entered after the notification was already sent to the client.

5.21.2 Requirements for Client Notifications

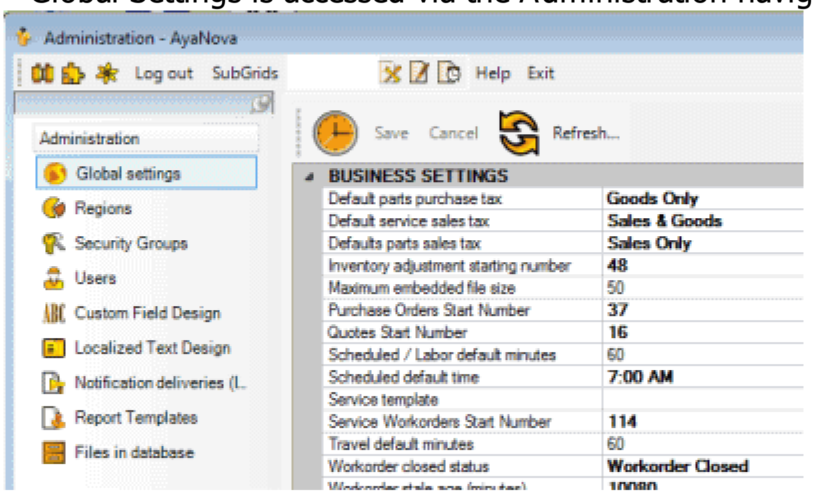
For clients to be notified, you need the following items:

1. **Notifications must be set in Global Settings**
2. **The Generator must be running and tested**

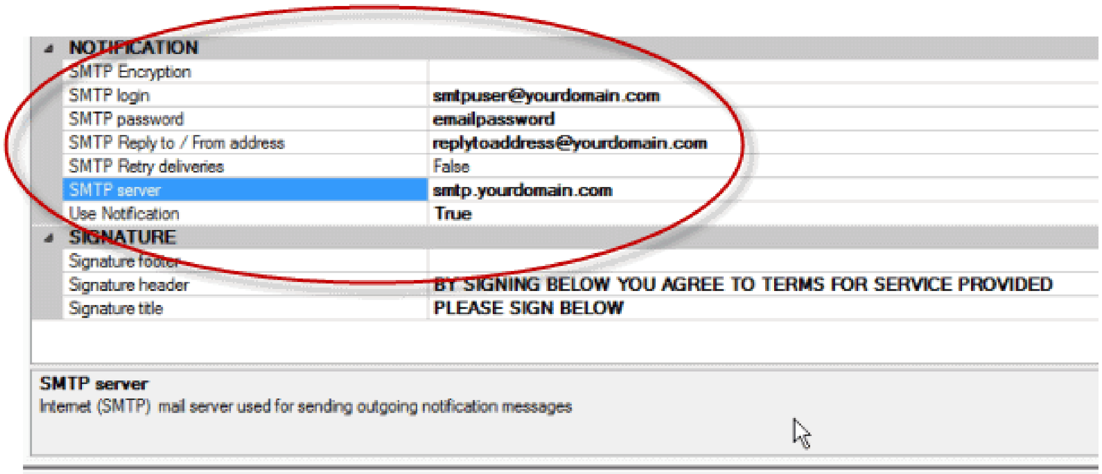
3. [Client Notifications entry screen - Active field in the Send Client Notifications tab is check-marked]
4. [Client Notifications entry screen - valid return address in Send Client Notifications tab]
5. [Client Notifications entry screen - Active field for the specific client notification is check-marked]
6. [Client's entry screen - specific Region the client notification setup is for is selected]
7. [Client's entry screen - Send Client Notifications is check-marked]
8. [Client's entry screen - valid email address]
9. [Security group settings must have minimum Read Only for Object.Region]
10. [Additional information to be aware of]

1. **Notifications must be set in Global Settings**

- Global Settings is accessed via the Administration navigation pane



- **Use Notification** must be set to **True** and the other fields filled out with your SMTP information

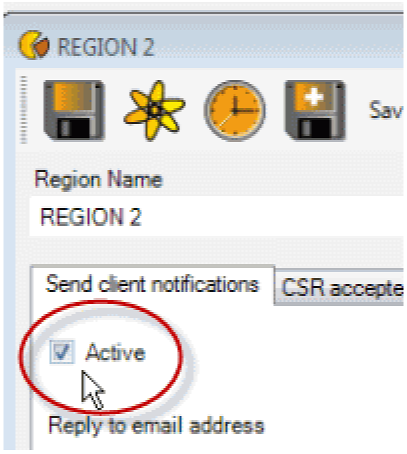


- Refer to the Global Settings section on Notifications for details

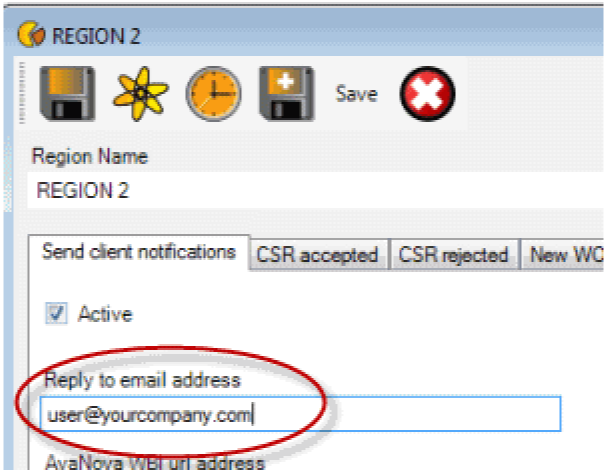
2. **The Generator must be running and tested**

- The Generator checks every five minutes to see if there is any notifications to be sent
- Refer to the Generator section of this Help file for details whether running stand-alone or networked.
- Perform and successfully complete the Generator testing steps

3. The **Active** field in the **Send Client Notifications** tab is check-marked for that region

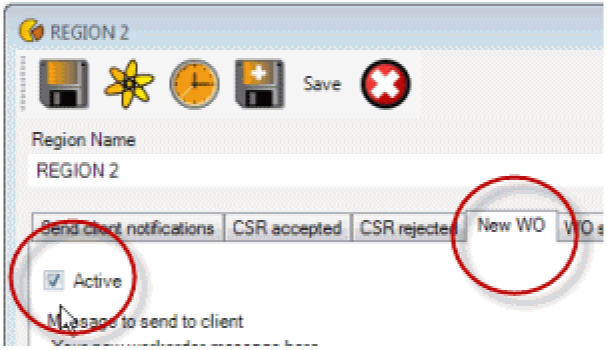


4. The reply to field has a valid email address in it

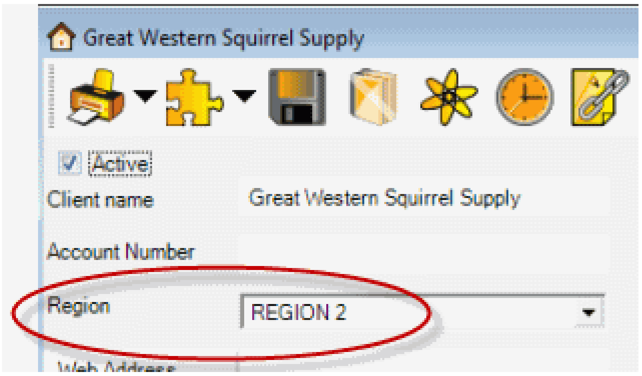


The **AyaNova WBI URL Address** field is where you would enter your WBI URL here so that it is a tag available for the email message for each client notification if needed (without having to manually edit every message).

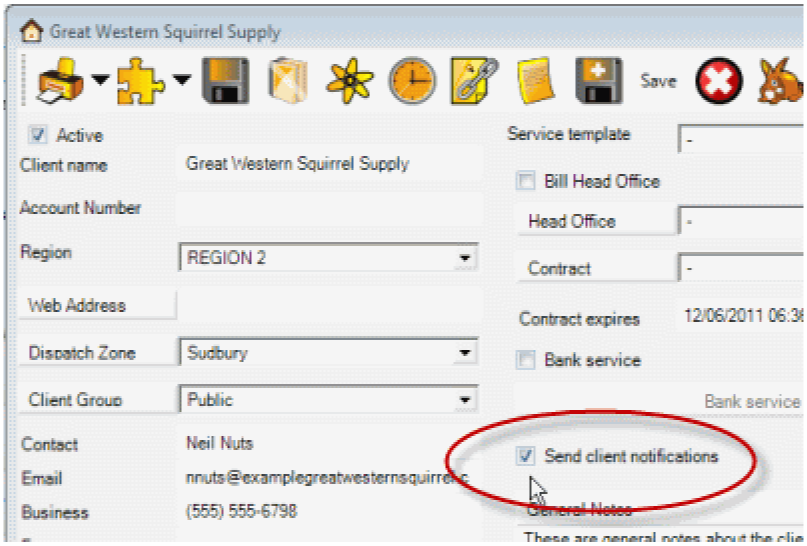
5. The **Active** field for the **specific** client notification is check-marked



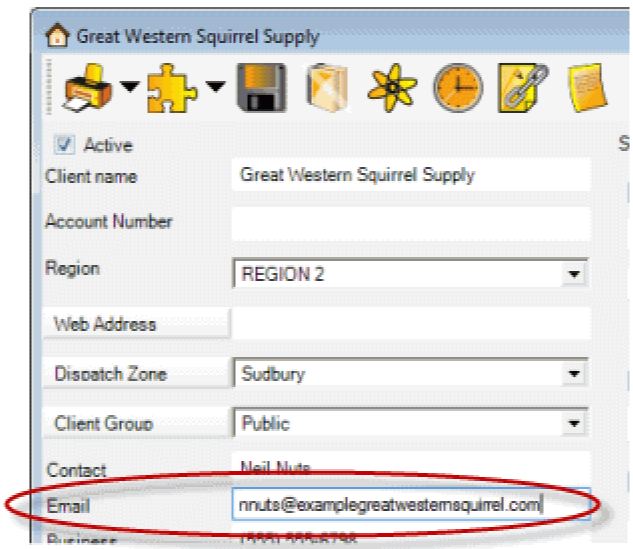
6. The specific **Region** the client notification setup is for is also selected in the **client's entry screen**



7. The **Send Client Notifications** in the **client's entry screen** is check-marked



8. There must be a **valid email address** in the **client's entry screen** for a notification to occur



9. ***Security group settings for your users** that accept Customer Service Requests, create service workorders and create quotes **must have minimum Read Only for Object.Region**

Once you have client notifications enabled (which is a subset of Regions), users that accept Customer Service Requests, create service workorders and create quotes now require that their security group for Object.Region be set minimally to Read Only

Additional Information to be aware of:

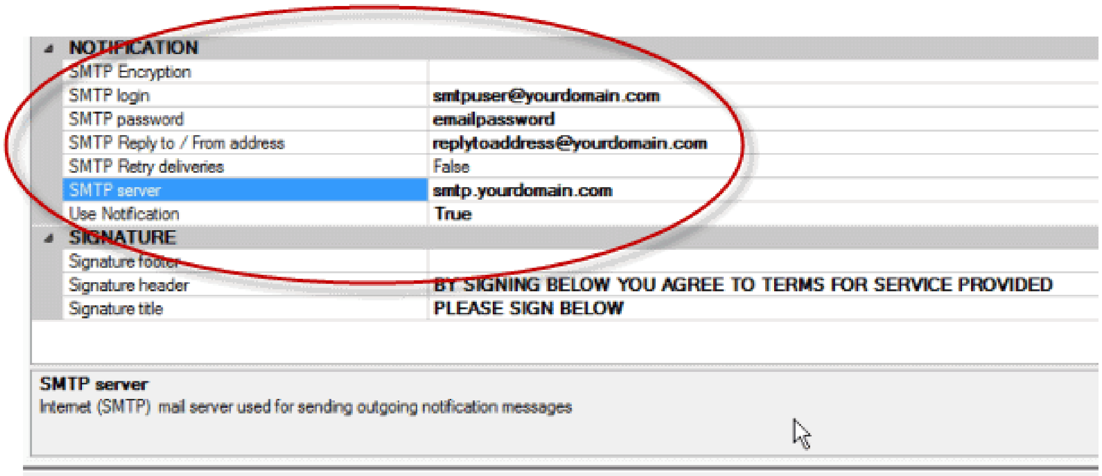
- Delivery method is always via email
- Delivery is always right away
- Events apply to all workorders of clients for that region - you can not specify client notification to occur for some workorders and not others
- You do not have to have purchased WBI for Client Notifications to occur
- Client notifications are for clients only - notifications are not sent to Head Offices
- Report attachments default always to PDF
- The notification is always deleted after it is handed over to be sent. Check your Notification Deliveries grid in the Administration navigation pane to see if the client notification was sent. If there was an error (i.e. there is an invalid email address for the client, or your SMTP settings in Global Settings are incorrect etc) do note that the notification will have already been deleted and can not be resent.

5.21.3 Example of setting up WO Closed notification with tags

The following provides an example of setting up the WO Closed notification - perform similar steps for the other client notifications.

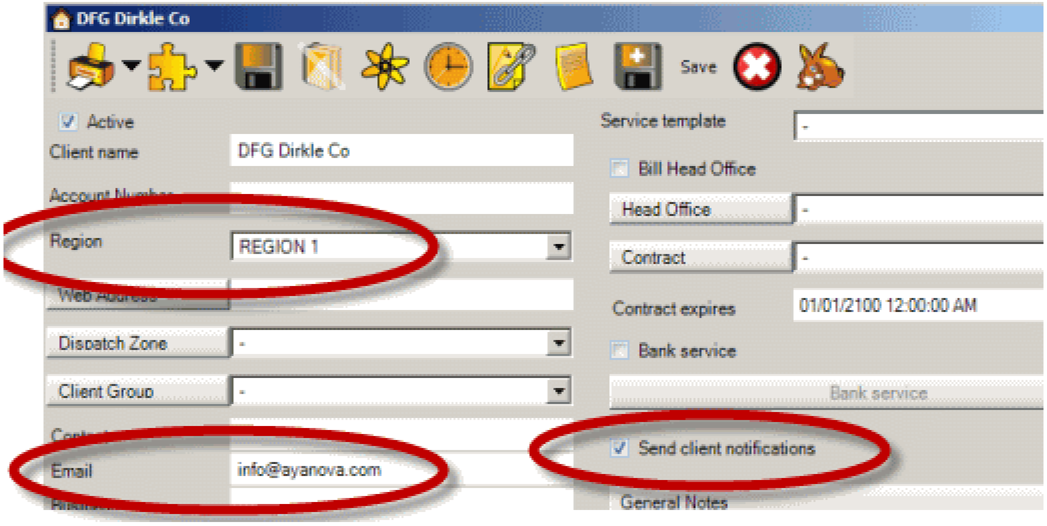
1. Generator is working correctly
    - If using the stand-alone default installation of AyaNova for a single computer, the generator runs automatically when logged in as other than the AyaNova Administrator
    - If AyaNova is configured for network use, the network Generator has been installed and configured and is confirmed running successfully
    - See also Generator

2. The Notification settings in Global Settings have been edited for your external email and saved.

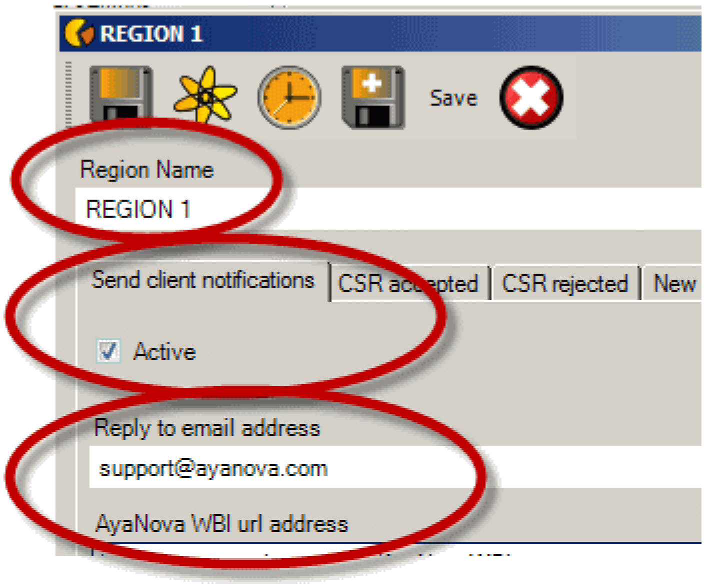


- see also the [Notification section of Global Settings]

3. In the client entry screen, there is a **valid** email address for the client, **and** the Send client notifications is check-marked, **and** the client is set to a specific Region

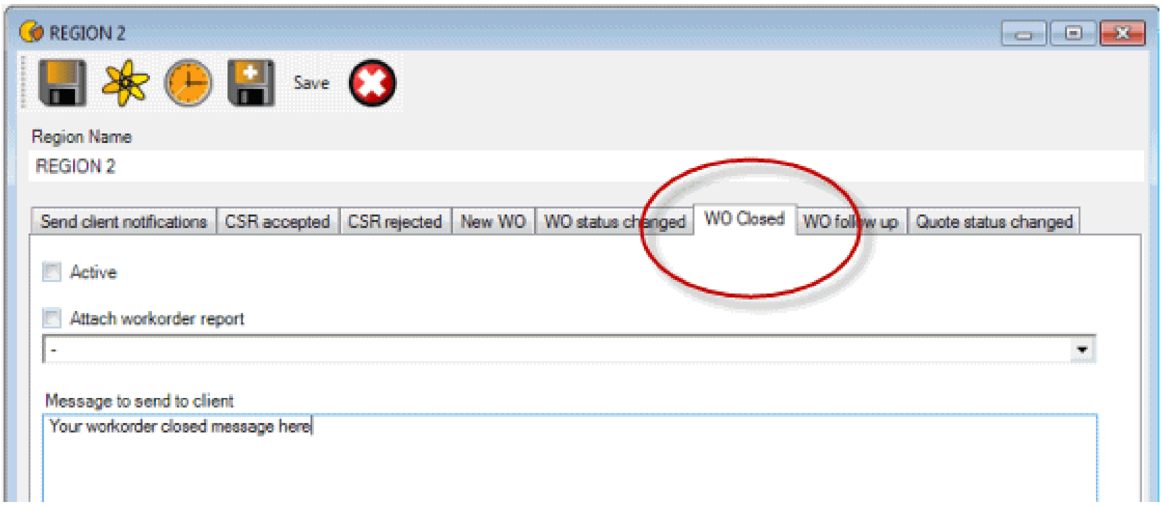


4. The region entry screen of that same region for the client has Send Client Notifications check-marked Active, and have a valid email address in the Reply to email address



The **AyaNova WBI URL Address** field is where you would enter your WBI URL here so that it is a tag available for the email message for each client notification if needed (without having to manually edit every message).

5. In this region entry screen, select the WO Closed tab



6. Place a checkmark in the **Active** field as this field **must** be check-marked for this Client Notification to take effect.

7. Place a checkmark in the **Attach workorder report field** if you do want a report of this workorder that was closed to be attached to the email.

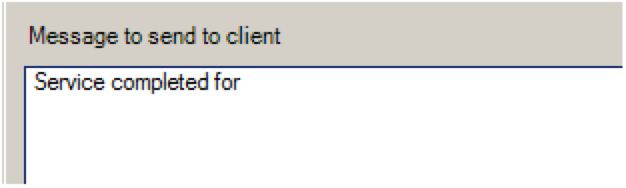
8. Select the report template that you want to use for the report that is attached.

9. The **Message to send to client** is where you enter text and tags if desired that you want to display in the email message to the client - this is your "template".

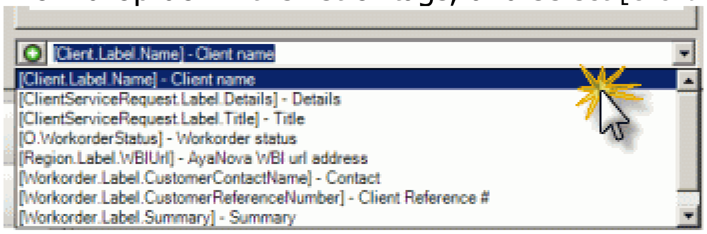
> **NOTE:** The first 100 characters of the first line in the template is used as the Subject line of the email sent to the client, as well as shows in the email message itself

10. Type in the first line which shows as the Subject line of the email (as well as the first line of text in the email)

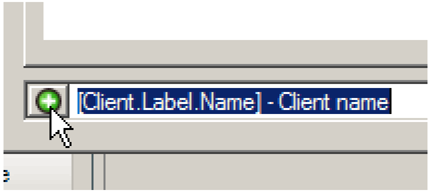
Service completed for



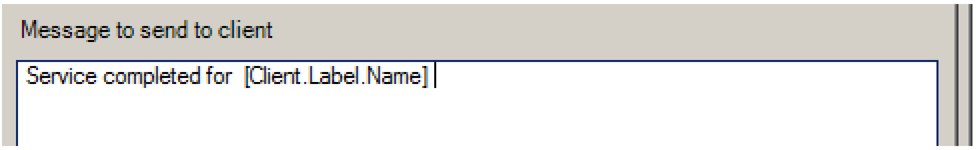
11. Now drop down the list of tags, and select [Client.Label.Name]



12. Click on the  which adds the tag into the message area.



13. The tag gets added at the end of the last text entered



14. Continue entering text and tags as desired. For example

Service completed for [Client.Label.Name]

Hello [Workorder.Label.CustomerContactName] of [Client.Label.Name]

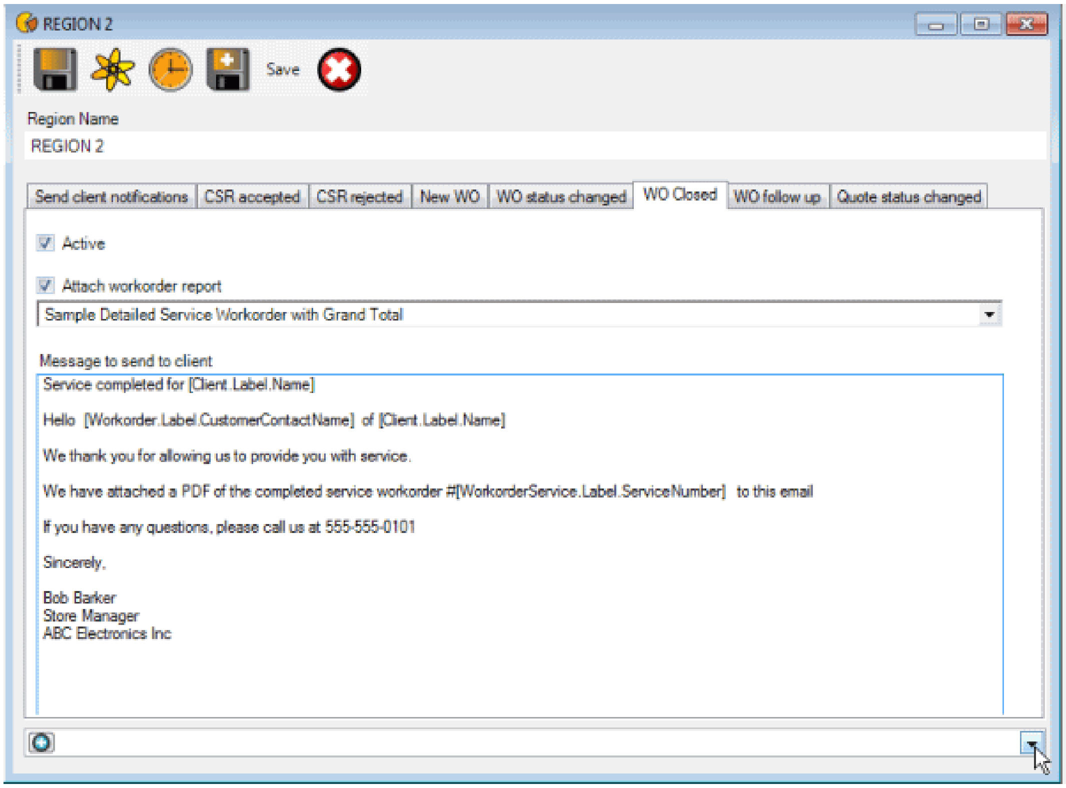
We thank you for allowing us to provide you with service.

We have attached a PDF of the completed service workorder #[WorkorderService.Label.ServiceNumber]   to this email

If you have any questions, please call us at 555-555-0101

Sincerely,

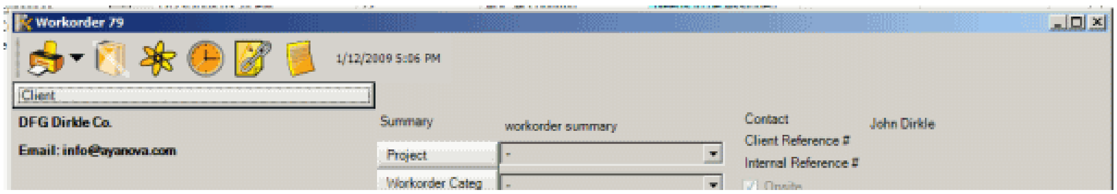
Bob Barker
Store Manager
ABC Electronics Inc

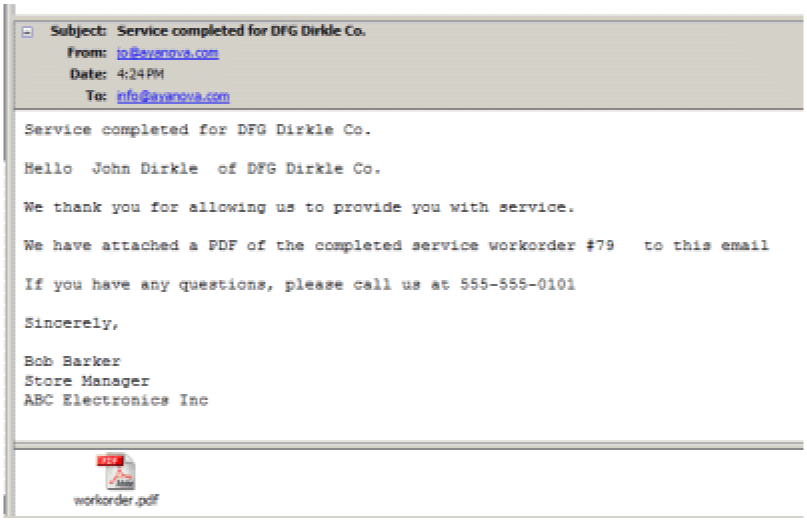


15. Save & Exit once completed.

16. Now any clients of that region, when a workorder is Closed, will receive via email the selected report for their workorder with their data entered where ever tags are set.

For example, when the workorder #79 is Closed, the data from its Client's name, it's workorder number, its Contact field is used in the email message emailed to that client's email address (as entered in its client's entry screen)





NOTE: For the client notification CSR Accepted or New WO, when a new wo is created from a CSR, the CSR actually creates and saves the workorder **before** the user sees the newly opened workorder on their screen.

So the notification for a new workorder created from accepting a CSR is sent **as soon as the CSR is accepted** and **does not** include any edited data you may have entered in the workorder's entry screen after selecting to accept the CSR.

For example, if you have the tag [O.WorkorderStatus] in the message for a New WO, and you accepted a CSR and then edited the workorder such as entering a workorder status, etc - that workorder status you selected will NOT show in the message sent to the client because it was entered after the notification was already sent to the client.

5.21.4 Example of WO Status Changed with attached report

The following provides an example of setting up WO Status Changed notifications for two different workorder statuses - each can have a different report sent.

WO Status Changed notification has a slightly different setup than the other notifications because you can set up for multiple different workorder statuses, each with its own report to send out

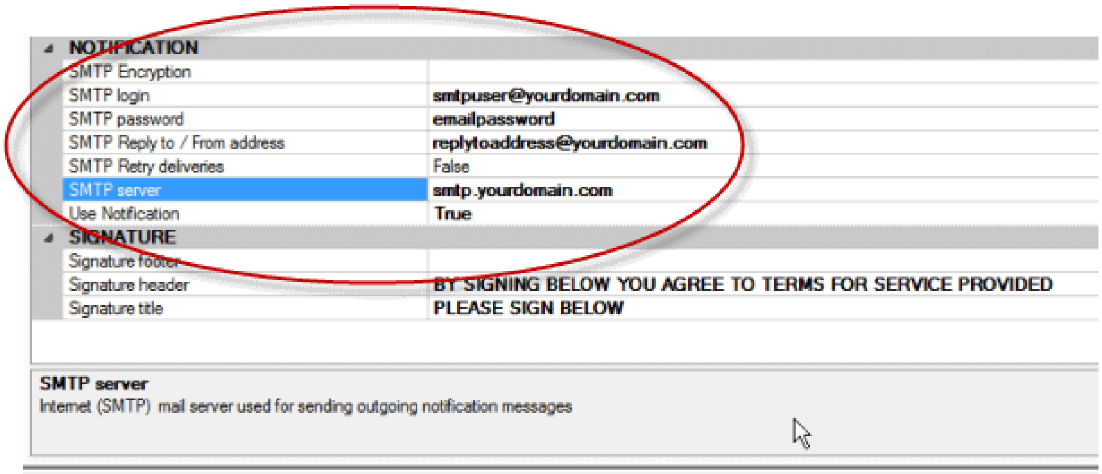
For example, you might have a contract with your client where they are notified of each stage of service - from unit received at shop, problem identified, service scheduled, waiting on parts, labor completed, ready for pickup, etc etc.

With this Client Notification, you can easily set this up so that the client is notified automatically via email and sent the appropriate report too by having a Workorder Status for each stage.

1. Generator is working correctly

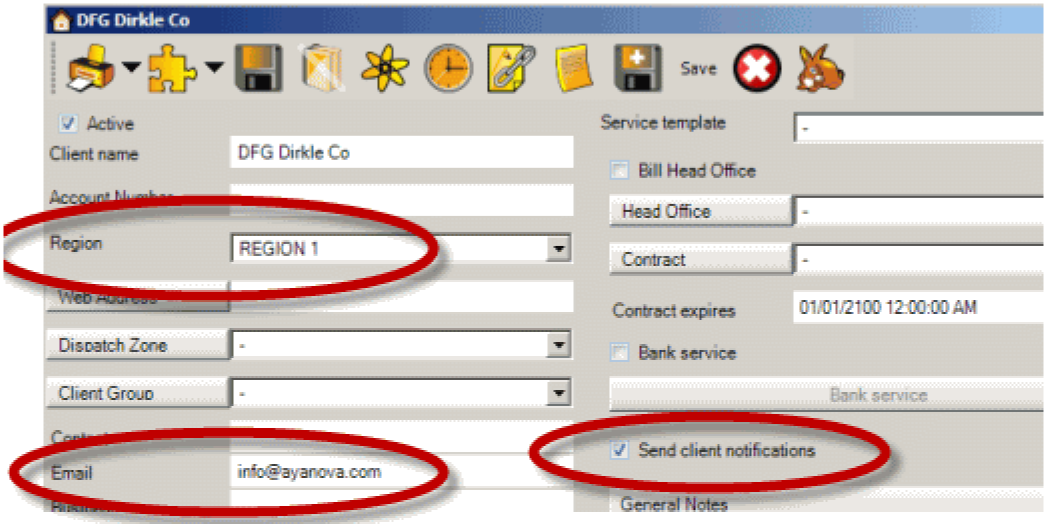
- If using the stand-alone default installation of AyaNova for a single computer, the generator runs automatically when logged in as other than the AyaNova Administrator
- If AyaNova is configured for network use, the network Generator has been installed and configured and is confirmed running successfully
- See also Generator

2. The Notification settings in Global Settings have been edited for your external email and saved.

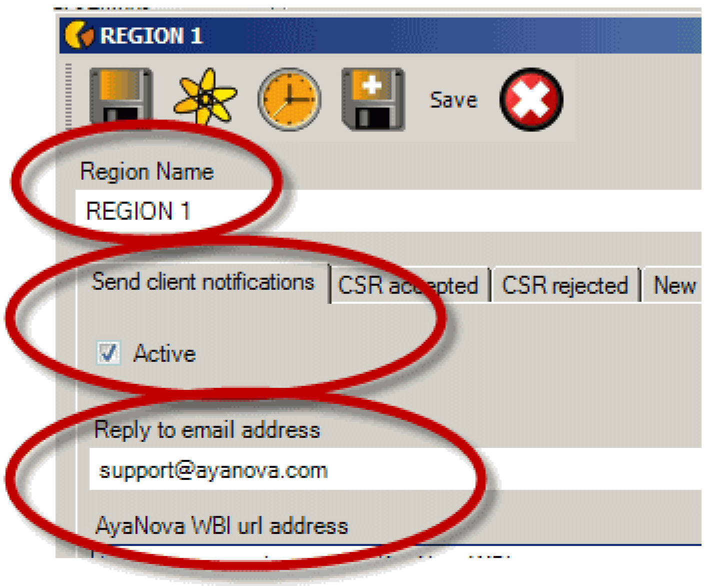


- see also the Notification section of Global Settings

3. In the client entry screen, there is a **valid** email address for the client, **and** the Send client notifications is check-marked, **and** the client is set to a specific Region

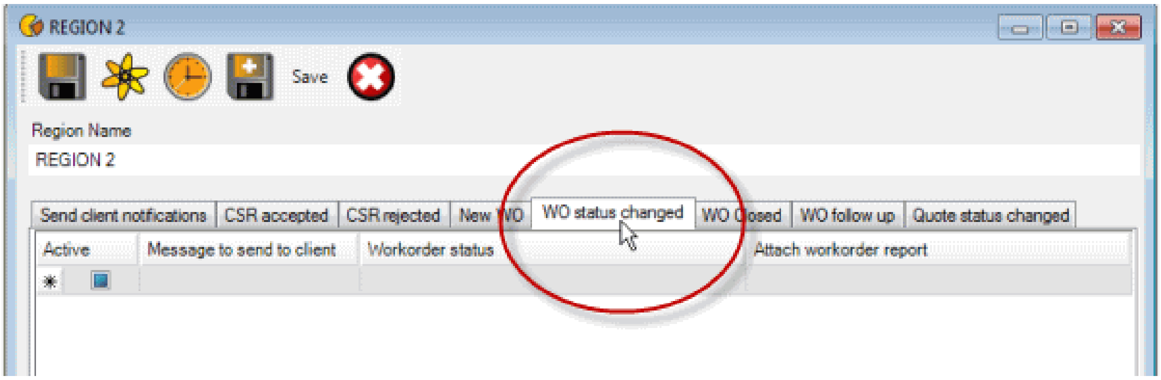


4. The region entry screen of that same region for the client has Send Client Notifications check-marked Active, and have a valid email address in the Reply to email address

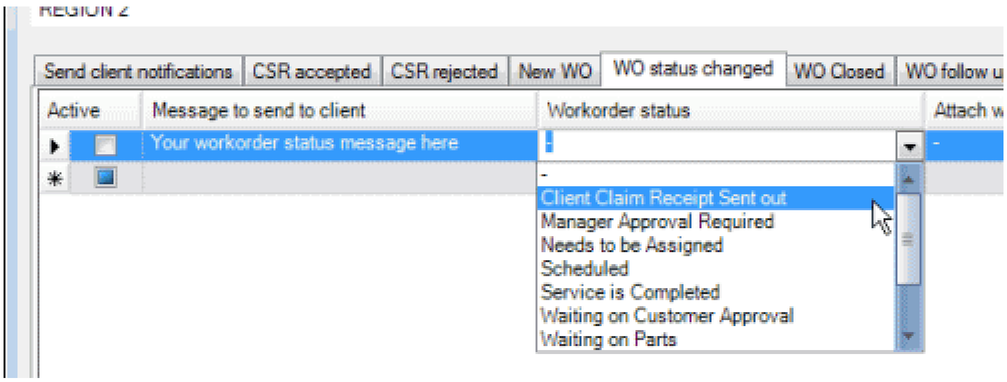


The **AyaNova WBI URL Address** field is where you would enter your WBI URL here so that it is a tag available for the email message for each client notification if needed (without having to manually edit every message).

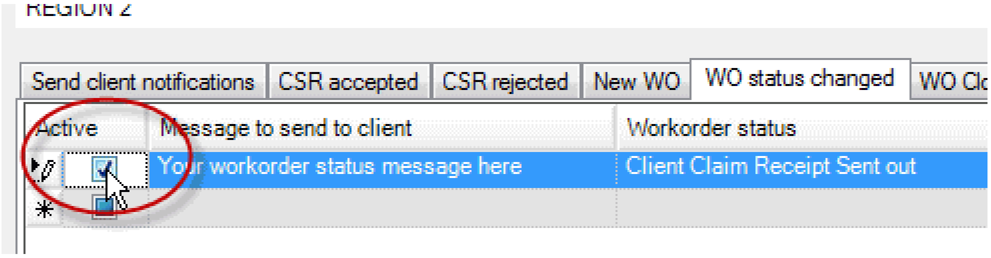
5. In this region entry screen, select the **WO Status Changed** tab



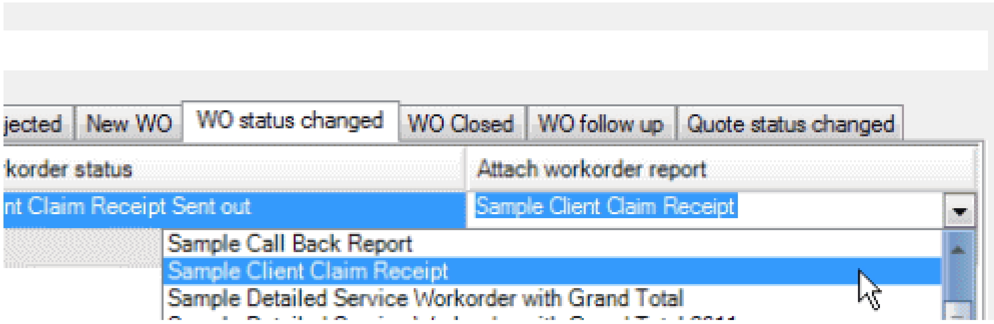
6. Select the Workorder Status that the workorder when set to, the clients of this region are notified.



7. Place a checkmark in the **Active** field of that row



8. Select the report template that you want to be attached with this notification when this specific workorder status is set in the workorder.

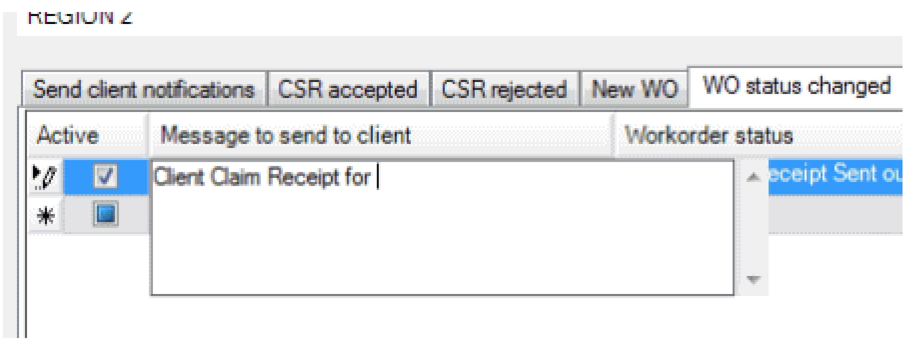


9. The **Message to send to client** is where you enter text and tags if desired that you want to display in the email message to the client - this is your "template".

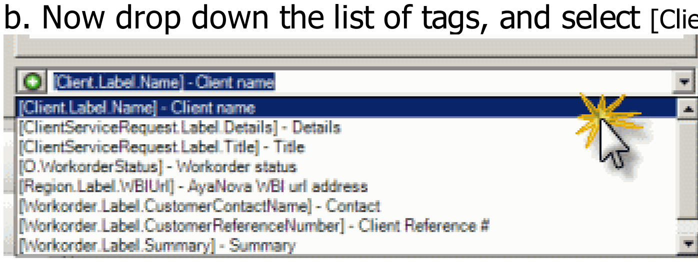
NOTE: The first 100 characters of the first line in the template is used as the Subject line of the email sent to the client, as well as shows in the email message itself

a. Type in the first line which shows as the Subject line of the email (as well as the first line of text in the email)

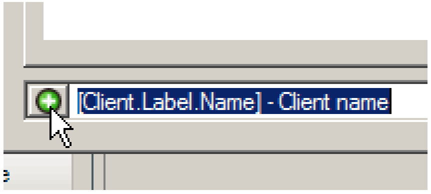
Client Claim Receipt for



b. Now drop down the list of tags, and select [Client.Label.Name]



c. Click on the  which adds the tag into the message area.



d. The tag gets added at the end of the last text entered

e. Continue entering text and tags as desired. For example

Client Claim Receipt for [Client.Label.Name]

Hello [Workorder.Label.CustomerContactName] of [Client.Label.Name]

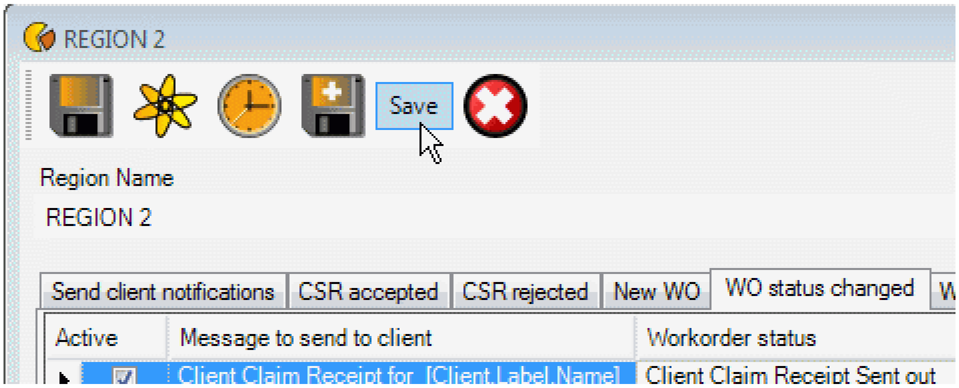
Please find attached a copy of your Client Claim Report # [WorkorderService.Label.ServiceNumber]

If you have any questions, please call us at 555-555-0101

Sincerely,

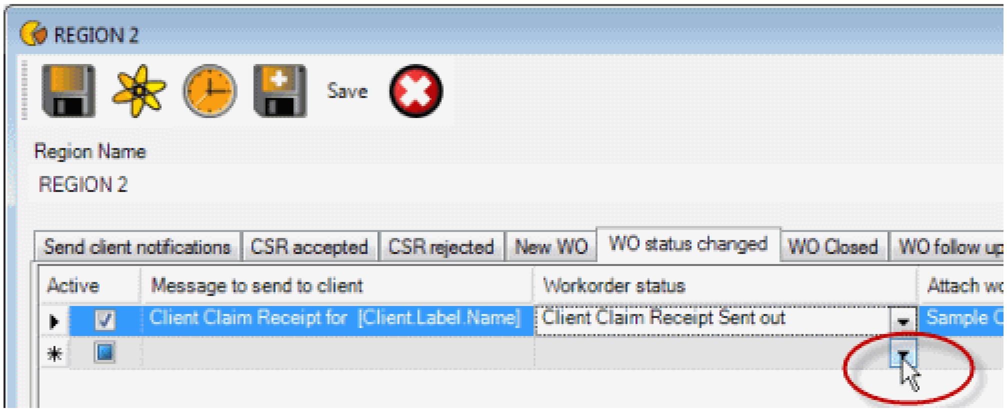
Bob Barker
Store Manager
ABC Electronics Inc

f. Select the Save menu option once completed.



10. Now perform the same steps for the second workorder status you want the clients of this region to be notified about.

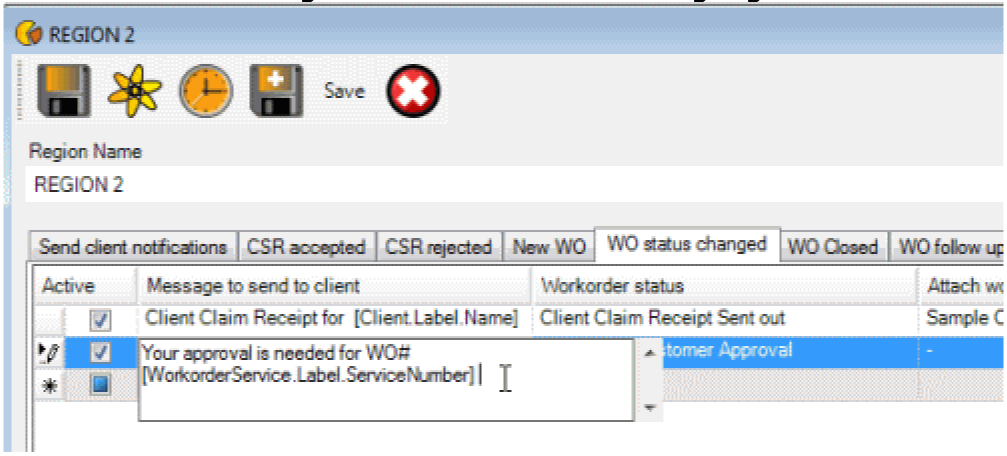
a. Create a new record by selecting the workorder status



b. Select a workorder report if desired (you don't have to select a report if not needed).

c. Checkmark the Active field in the row

d. Enter in the Message to send to the client using tags if needed.



e. Save when done, and continue with a new record if need your clients to be notified when other workorder statuses are set in a workorder.

5.22 Regions

5.22.1 What are Regions used for?

Use Regions to **restrict access to data based on the region** assigned to.

By "data", we mean clients, service workorders, quotes, preventive maintenance, schedules, client service requests (CSR's), contracts, loan items, projects, and part inventory in regionalized part warehouses.

If instead you want to restrict access to a user having access to for example any client etc such as editing or deleting or even viewing, then you would set that in their Security Group that user is a member of. Other AyaNova data is available based on security access to that feature regardless of the user's set region.

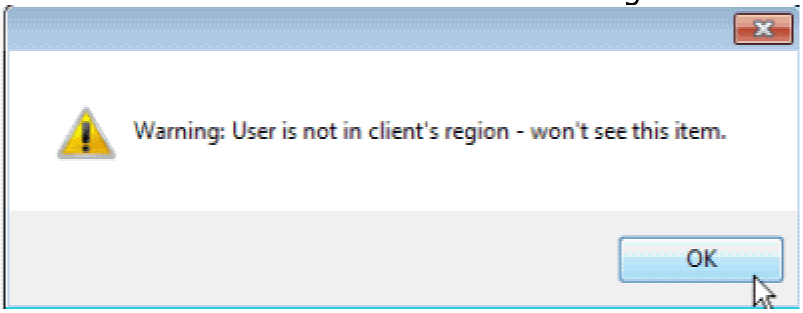
NOTE: If using Regions, do note that users can only view data that is assigned to the same region as theirs.

So if you created a workorder and assigned a schedulable user to that workorder, but that client is of one region and the schedulable user is of another, be aware that the schedulable user will not see that scheduled workorder when they log into AyaNova.

One recommendation is to create Schedulable User Groups for each region of schedulable users so that it is very easy to always assign techs of the same region to clients of that same region.

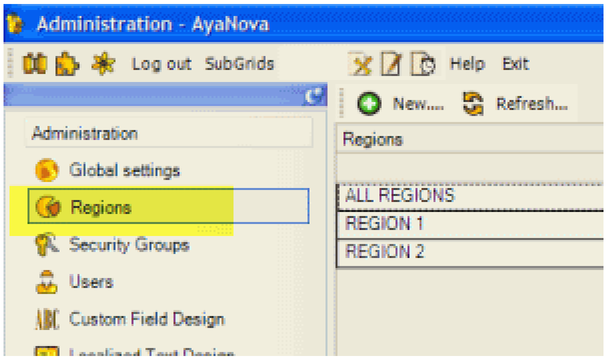
Another recommendation is to include the Region in the User Display Format in Global Settings so that you can see at a glance what region that user belongs to, and schedule them only to clients of the same region.

And too if the schedulable user selected is a member of a different region than the client, a warning message will pop up letting you know that schedulable user when logged in won't be able to see the service workorder because this client is a member of a different region.



Where to access and create Regions:

Access the Regions grid from the Administration navigation pane



Where a Region is selected:

User entry screen
Client entry screen
Contract entry screen
Dispatch Zones subgrid entry screen
Loan Items entry screen
Projects entry screen
Rates subgrid entry screen
PM, Quote and Service Workorder Templates entry screen
Part Warehouses subgrid entry screen
Schedulable User Groups
Report Templates grid entry screen

Example use of Regions:

BNM Company has one AyaNova database providing service management to two regions.
They don't want their techs in one region to see data pertaining to other region and vice versa.
They do want their dispatcher John to be able to see all techs in all regions so that he can schedule for all regions.

BNM Company sets up the following regions

- DEFAULT which is the default "all" region is labeled "All Regions"
- REGION 1 (note this is just an example of what they called it, you may call it by its area name or whatever)
- REGION 2

- The two schedulable users Bill and Bob provide service for clients in Region 1 so in Bill's and Bob's user entry screen, REGION 1 is selected

- The two schedulable users Mary and Mark provide service for clients in Region 2 so in Mary's and Mark's user entry screen, REGION 2 is selected
- John the dispatcher, has the ALL REGIONS region selected in his user entry screen so that he sees all data pertaining to all regions whether the data is set to the region "All Regions", "Region 1" or "Region 2".

When Mary logs into AyaNova, the Schedule screen by default will have her selected showing her scheduled items only. And if she selects <All> as the Schedulable User Group, then she will only see scheduled items for her and for Mark as they are the only two techs set specifically for REGION 1. Bill and Bob are not listed as they are set for a different region.

When Mary is logged into AyaNova, she can only view workorders for clients that have REGION 1 or ALL REGIONS set as their region.

When Mary is logged into AyaNova, only part warehouses that are set to the region called REGION 1 or ALL REGIONS are available for her to select part quantities from in workorders.

When Mary is logged into AyaNova, only those rates that are set as REGION 1 or ALL REGIONS will display for selection in workorders

When Mary is logged into AyaNova, only those report templates that are set for REGION 1 or ALL REGIONS will display for selection

When Mary is logged into AyaNova, only those Service Workorder Templates set to REGION 1 or ALL REGIONS will display for selection when creating a new workorder.

When Mary is logged into AyaNova and editing a service workorder, only those Projects that are set to REGION 1 or ALL REGIONS will display for selection in a service workorder.

When Mary is logged into AyaNova and editing a service workorder, only those Loan Items that are set to REGION 1 or ALL REGIONS will display for selection in a service workorder.

Mary also runs QBI to invoice out ready to be billed workorders into QuickBooks. Only those workorders of clients in her region or ALL REGION will display for invoicing.

Only those client service requests of clients that are set to REGION 1 or ALL REGION will show in the Customer Service request grid for acceptance.

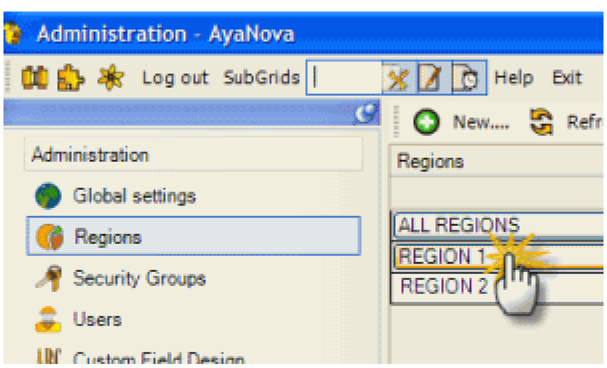
Whereas when John the dispatcher logs in and views the Schedule screen, his <ALL> will show Bill, Bob, Mary and Mark. He can also create Schedulable User

Groups by the techs that are available for a particular region. And he will see all clients regardless of the region set in each client entry screen. And so on.

Security Group internal object: Object.Region
NOTE: Only if the user is of User Type Administrator User will this user be able to view the Regions grid *Forbidden* : User of that security group can not access the Regions grid at all nor entry screen *Read Only* : User if is of User Type Administrator User can view the Regions grid and entry screen but can not edit *Read/Write* : User if is of User Type Administrator User can access the Regions grid, view, create and edit *Read/Write/Delete* : User if is of User Type Administrator User can access the Regions grid, view, create and edit and delete

5.22.2 Region entry screen

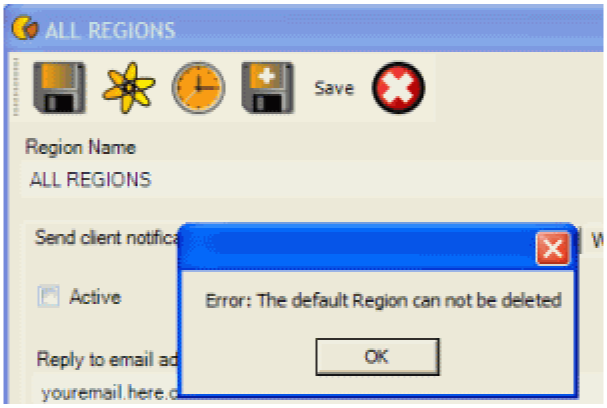
Edit an existing Region by selecting it from the Regions grid in the Administration navigation pane



Delete a Region by selecting the Delete menu option in its entry screen.

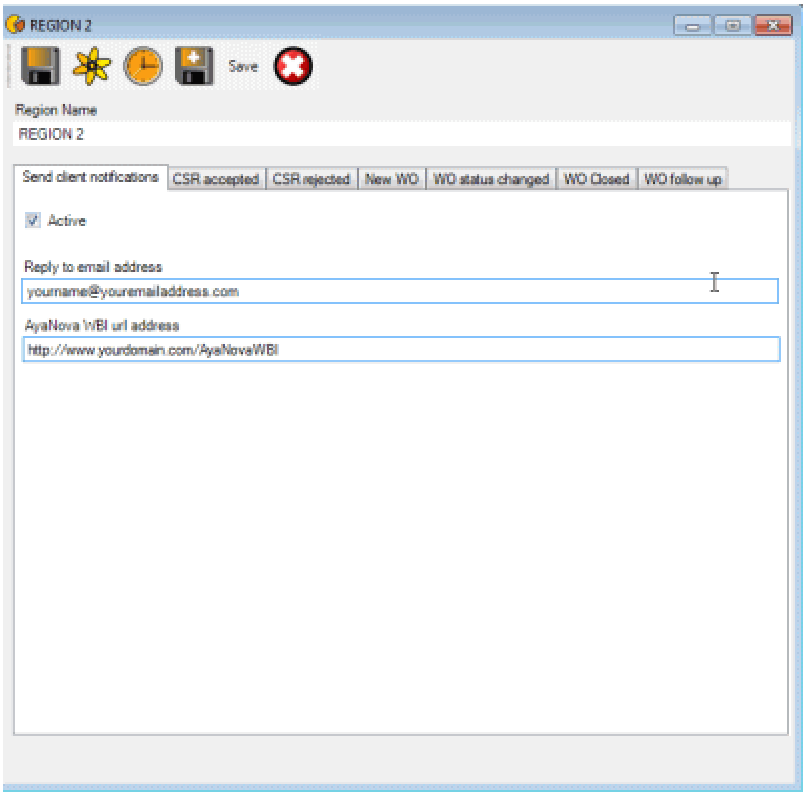
Do note that a Region can **not** be deleted if it is the "default" region - the region that signifies all regions. If you attempt to delete it, you will receive the message

Error: The default Region can not be deleted



Create a new Region by select the New... 

menu option at the top of the Regions grid in the Administration navigation pane which will open up a new Region entry screen.



Region Name

Enter in a descriptive name for the Region Name. The Region Name is what is displayed in drop down selection list - i.e. in the Client entry screen, the User entry screen etc.

Active

If you do want clients to receive notifications for the active events identified in each specific tab, checkmark this Active field under Send Client Notifications

Reply to email address

Enter here the email address you want to display in notification emails sent to clients.

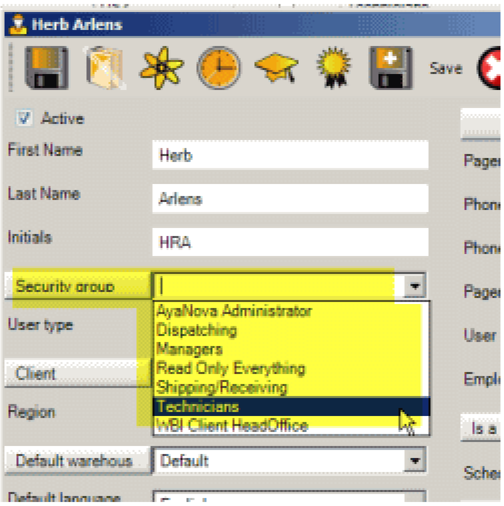
AyaNova WBI url address

Enter here your WBI URL address if you want to use the WBI URL tag in any notification template.

See Client Notifications for details on configuring of each client notification and notification template design.

5.23 Security Groups

5.23.1 What do I use Security Groups for?



The security group a user belongs to is selected in that User's entry screen

Security groups dictate the AyaNova features a user has access to, and what what level of access they will have.

> For example: if you want a user to be able to view Client entry screens, but not edit or delete, you would have that user's Security Group Object.Client set to Read Only

> If instead you want to restrict a user to being able to access specific clients, or access specific workorders based on who the client is, etc, then you would assign data to Regions.

- An AyaNova user **must** be a member of a security group.
- It is suggested to create specific security groups for the different types of users.

> For example, all dispatchers may have the same access rights; and all schedulable users may have the same access rights.

- Security groups do not set access to specific data - only to the feature as a whole. For example, security rights set access to all workorders, all clients, etc.
- You can also assign a specific security group to be able to see a specific report template.

- The security group AyaNova Administrator can not be edited, or deleted. This is the default security group available. This security group allows full read / write / delete access to every feature.

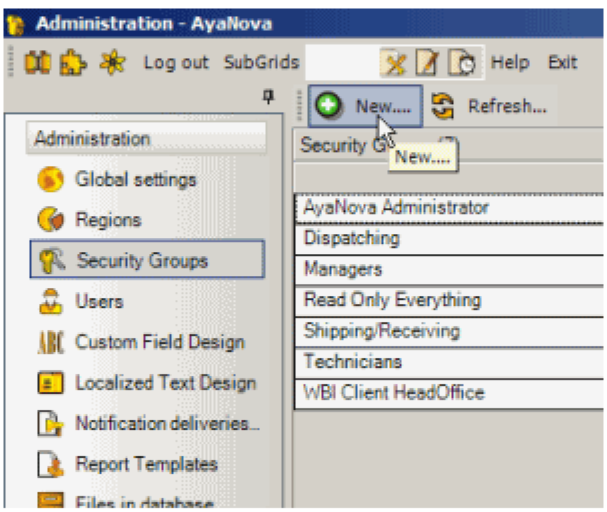
- It is recommended that at least one other username should be assigned to the AyaNova Administrator security group. Having a second user assigned to the AyaNova Administrator group allows you to log in, in the event you have lost or forgotten the AyaNova Administrator password.

- Because of the high security of the AyaNova database, we are not able to recover any usernames or passwords you may have set in the AyaNova database, including that of the AyaNova Administrator. A suggestion is to make a note of the AyaNova Administrator username and password and place it in a safe place such as a safe.

5.23.2 security group rights

Enter topic text here.

5.23.3 Security Groups grid

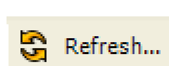


The Security Groups grid is available via the Administration navigation pane - of course the screenshot above is just an example of security groups, as you can create your own.

The Security Groups grid lists all security groups via one column – the security group name.

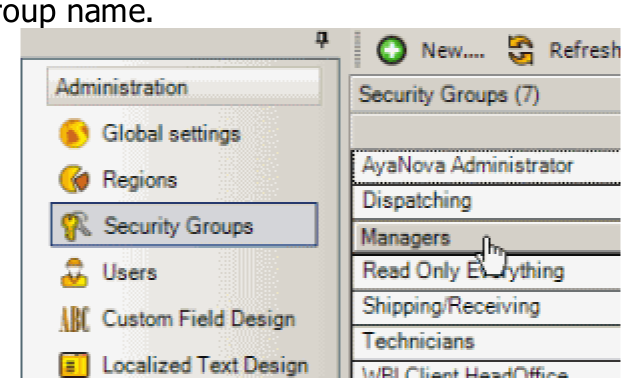
To create a new security group, select the New... 

menu option at the top.

The menu option Refresh 

refreshes the list of security groups

To view or edit the existing security group access rights, click on the security group name.



Security Group internal object: Object.SecurityGroup

NOTE: Only if the user is of User Type Administrator User will this user be able to view the Security Groups grid

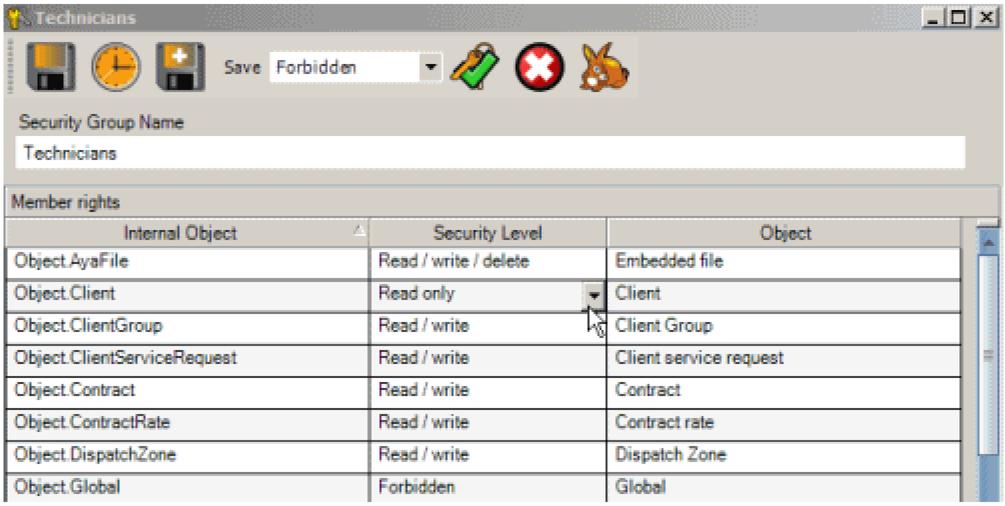
Forbidden : User of that security group can not access the Security Groups grid at all nor entry screen

Read Only : User can view the Security Groups grid and entry screen but can not edit

Read/Write : User can access the Security Groups grid, view, create and edit

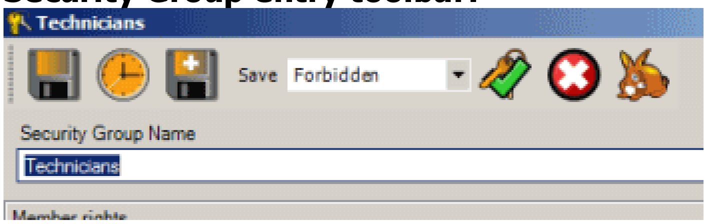
Read/Write/Delete : User can access the Security Groups grid, view, create and edit and delete

5.23.4 Security Groups entry screen



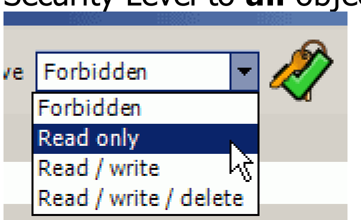
The Security Group entry screen is where the information on a Security Group is entered or edited, such as its name and what type of access to AyaNova features are enabled for this group.

Security Group entry toolbar:



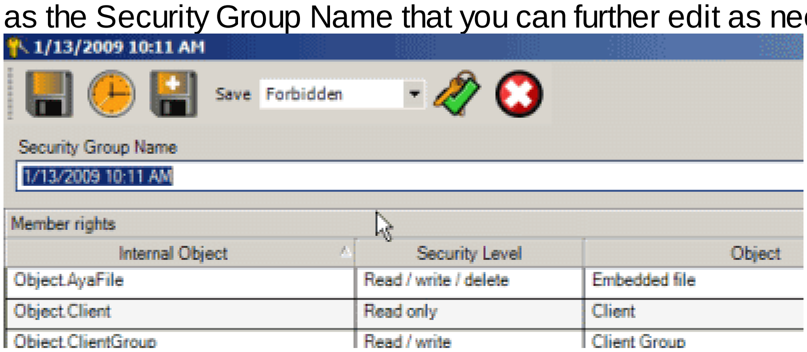
Set all Security Levels to selected Level

Select a specific access right, and click on the  to apply that selected Security Level to **all** objects in that security group.



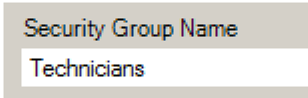
Duplicate

To make a duplicate of the existing security group, select the Duplicate  option. A new security group entry screen will display with todays date and time as the Security Group Name that you can further edit as needed.

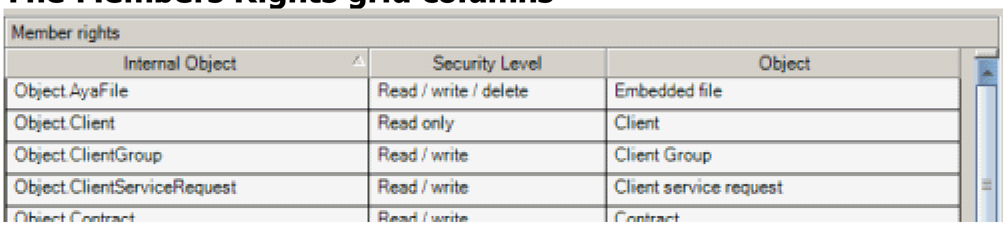


Security Group Name

Enter a descriptive name for the security group for easier selection within each user entry screen.
A name is required.



The Members Rights grid columns


Member rights

Internal Object	Security Level	Object
Object.AyaFile	Read / write / delete	Embedded file
Object.Client	Read only	Client
Object.ClientGroup	Read / write	Client Group
Object.ClientServiceRequest	Read / write	Client service request
Object.Contract	Read / write	Contract

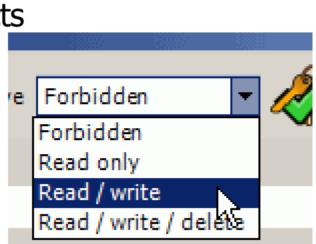
Internal Object - This equates to the AyaNova database's internal name for the object

Object - This displays your localized name for the object

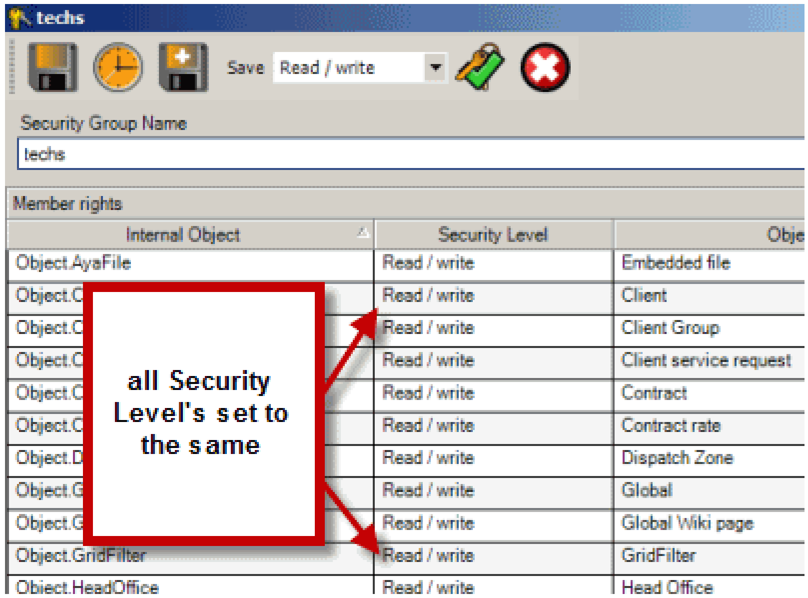
Security Level - This is the security level for that object

There are two ways to set security levels for the AyaNova objects:

1.Select a security level from the menu option, and select to apply to all objects

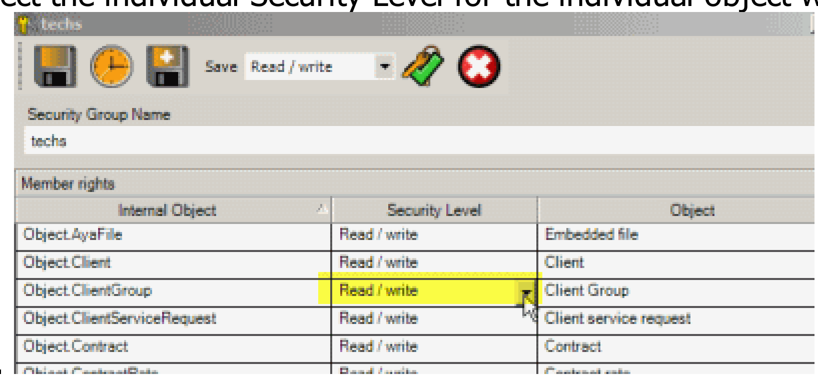
a. 

b. 

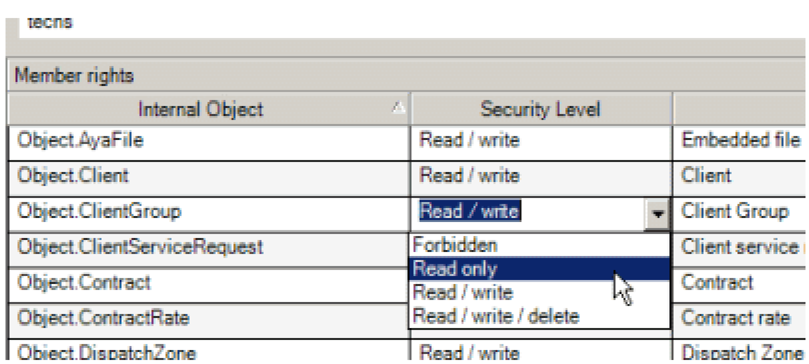


c.

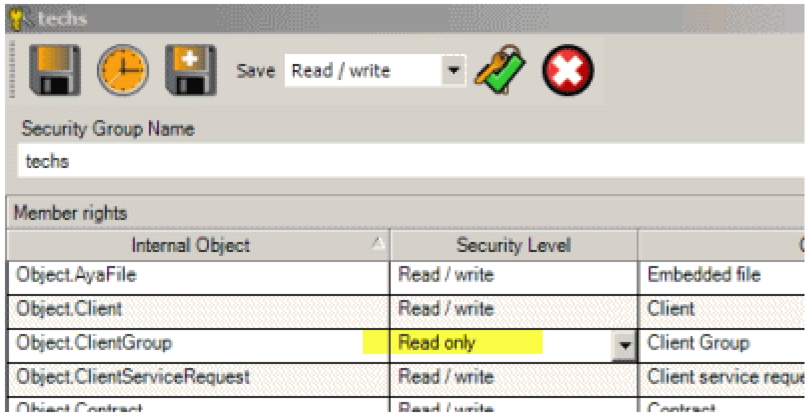
2.Select the individual Security Level for the individual object within the grid.



a.



b.

c. 

5.23.5 Security Group objects identified

NOTE: You are setting access rights for editing that object – not for selection of that object via other entry screens.

For example, if setting Read Only access for the Client Group object – this would restrict users that are members of this security group to only be able to view the Client Group subgrid and not create any new client groups. This does not restrict selection of the client group within a Client entry screen.

NOTE: If the object is a "child" of another object, the "child" will only ever have at maximum the rights of the "parent"

Only access rights set for a "child" less or equal to the rights of the "parent" will take effect

Access rights set for a "child" that are greater than the rights of the "parent" will not take effect.

For example:

If you set security rights for Object.Client to Read/Write/Delete, all users of that security group will be able to create new clients, edit any existing clients and delete any clients. Those same users will also be able to edit banked service and documents as these are "children" of the Client object.

Internal Object	**What is affected by the security level set**
Object.AyaFiles	Files in Database grid in Administration navigation pane

Object.Client	Clients grid and Client entry screen and Client column in grids
Object.ClientGroup	Client Group subgrid and Client Group column in grids
Object.ClientServiceRequest	Client Service Request grid and entry screen
Object.Contract	Contract grid and Contract entry screen and column in grids
Object.ContractRate	ability to select rate in Contract entry screen
Object.DispatchZone	Dispatch Zone subgrid and column in grids
Object.Global	Global Settings screen
Object.GlobalWikiPage	Global Wiki via main menu
Object.GridFilter	Filter Drop List and saved Filters
Object.HeadOffice	Head Office grid and Head Office entry screen and column in grids
Object.LoanItem	Loan Item grid and Loan Item entry screen and column in grids
Object.LocalizedText	Localized Text grid and locales entry screen
Object.Memo	Memo grid and Memo entry screen
Object.Notification	Notification Subscriptions grid and selection; Notification Delivery Log (last 7 days) grid
Object.Part	Part grid and Part entry screen and column in grids
Object.PartAssembly	Part Assembly subgrid and column in grids
Object.PartByWarehouseInventory	Part Inventory grid
Object.PartCategory	Part Category subgrid and column in grids
Object.PartInventoryAdjustment	Part Inventory Adjustment grid and entry screen
Object.PartWarehouse	Part Warehouse subgrid and column in grids
Object.Priority	Priority subgrid and column in grids
Object.Project	Project grid and entry screen and column in grids
Object.PurchaseOrder	Purchase Order grid and entry screen; Purchase Order Receipt grid and entry screen
Object.Rate	Rate subgrid and column in grids
Object.RateUnitChangeDescription	Rate Unit Change Description subgrid

Object.Region	Region grid and entry screen and column in grids **Also minimum Read Only required if Client Notifications are enabled
Object.Report	Report Templates grid and Print ability from all grids and entry screens
Object.ScheduleableUserGroup	Schedulable User Group entry screen
Object.ScheduleableUserGroupUser	Schedulable User Group entry screen
Object.ScheduleForm	Schedule screen
Object.ScheduleMarker	Schedule Marker entry screen
Object.SecurityGroup	Security Group grid and entry screen
Object.ServiceBank	Service Bank subgrid and ability to apply Labor to a client or a unit's Banked Service
Object.Task	Task entry screen
Object.TaskGroup	Task entry screen
Object.TaskGroupTask	Task entry screen
Object.TaxCode	TaxCode subgrid and column in grids
Object.Unit	Unit grid and entry screen and column in grids
Object.UnitMeterReading	Unit Meter Reading subgrid
Object.UnitModel	Unit Model grid and entry screen and column in grids
Object.UnitOfMeasure	Unit of Measure subgrid
Object.UnitServiceType	Unit Service Type subgrid and column in grids
Object.User	User grid and entry screen and column in grids **NOTE:** Read/Write access required if want user of this security group to be able to edit their Override TimeZone via WBI or RI
Object.UserCertification	User Certification entry screen and User Certification menu option in Users entry screen
Object.UserCertificationAssigned	in conjunction with Object.UserCertification
Object.UserSkill	User Skill entry screen and User Skill menu option in Users entry screen
Object.UserSkillAssigned	in conjunction with Object.UserSkill
Object.Vendor	Vendor grid and entry screen and column in grids
Object.WikiPage	Wiki page for service workorders, quotes, PM's, client's, head office's, unit's, unit

	model's, vendor's, contract's, project's, loan item's, purchase order's and the AyaNova user logged in
Object.Workorder.Close	Close checkmark field in Service Workorder entry screens **Example of use: you do not want users of a certain security group to be able to Close a workorder until you yourself as mgmt have checked it. As a closed workorder can not be edited by anyone once closed**
Object.WorkorderCategory	Workorder Category subgrid
Object.WorkorderItem	Workorder item section of a service workorder, quote and preventive maintenance
Object.WorkorderItemLabor	Labor section of a service workorder, quote and preventive maintenance Also Labor grid of a service workorder, quote and preventive maintenance
Object.WorkorderItemLoan	Loans section of a service workorder, quote and preventive maintenance Also Loans grid of a service workorder, quote and preventive maintenance
Object.WorkorderItemMiscExpress	Misc Expenses section of a service workorder Also Expenses grid of a service workorder, quote and preventive maintenance
Object.WorkorderItemOutsideService	Outside Service section of a service workorder Also Outside Service grid of a service workorder, quote and preventive maintenance
Object.WorkorderItemPart	Parts section of a service workorder, quote and preventive maintenance Also Parts grid of a service workorder, quote and preventive maintenance
Object.WorkorderItemScheduledUser	Scheduled Users section of a service workorder, quote and preventive maintenance Also Scheduled Users grid of a service workorder, quote and preventive maintenance

Object.WorkorderItemTask	Tasks section of a service workorder, quote and preventive maintenance
Object.WorkorderItemTravel	Travel section of a service workorder, quote and preventive maintenance Also Travel grid of a service workorder, quote and preventive maintenance
Object.WorkorderItemType	Workorder Item Type subgrid
Object.WorkorderItemUnit	Unit section of a service workorder, quote and preventive maintenance
Object.WorkorderPreventiveMaintenance	Preventive Maintenance navigation pane and grids and entry screen
Object.WorkorderQuote	Quote navigation pane and grids and entry screen
Object.WorkorderService	Service navigation pane and grids and service workorder entry screen
Object.WorkorderService.CloseByDate	Close By Date field in the Service Workorder entry screen **Example of use: if mgmt is subscribed to be notified if a workorder is not closed by a certain time period and you do not want your staff to change the Close By Date**
Object.WorkorderStatus	Workorder Status subgrid

5.23.6 Service workorder entry screen security

The following is the structure of a workorder entry screen's rights

Object.WorkorderService = parent
  Object.WorkorderItem = child
    Object.WorkorderItemUnit =grandchild
    Object.WorkorderItemScheduledUser = grandchild
    Object.WorkorderItemTasks = grandchild
    Object.WorkorderItemLabor = grandchild
    Object.WorkorderItemParts = grandchild
    Object.WorkorderItemTravel = grandchild
    Object.WorkorderItemOutsideService = grandchild
    Object.WorkorderItemMiscExpenses = grandchild
    Object.WorkorderItemLoan = grandchild
    Object.WorkorderItemCustom = grandchild

Object.WorkorderQuote applies to any quote, and **Object.WorkorderPreventiveMaintenance** applies to any preventive maintenance order, while **Object.WorkorderService** applies to any service workorder.

- **Note** that all objects under the parent apply to all three: service workorders, quotes **and** PM's entry screens.

  For example, the Scheduled Users subsection will NOT show in **any** service workorder entry screen, quote entry screen **or** PM entry screen for users of that security group **if** you set Object.WorkorderItemScheduledUser to Forbidden in that security group.

  This is because what you set for Object.WorkorderItemScheduledUser is applied to all three - service workorders, quotes and PM's.

- Note how the WorkorderItem is a "child" of the Workorder; and the WorkorderItemLabor is a child of the WorkorderItem and a "grandchild" of the Workorder
  - If the object is a “child” of another object, the “child” will only ever have at maximum the rights of the “parent”
  - Only access rights set for a “child” less or equal to the rights of the “parent” will take effect
  - Access rights set for a “child” that are greater than the rights of the “parent” will not take effect.
  - A "grandchild" will only be given the maximum rights set of the "child" regardless what you set in the security group. And the "child" will only be given the maximum rights set of the "parent" regardless what you set in the security group.

Example 1:
If you have set Read Only access to the Service Workorder root object (Object.WorkorderService) for a security group, even if you set Read/Write access to any of the child objects – Read / Write access will be ignored as the Service Workorder root object access right takes precedence. Users of the security group where you set this will only be able to view a workorder and its items and subsections (labor, parts, etc) but not edit.

Example 2:
If you want users of the security group to be able to view and edit all aspects of the workorder except only view the Scheduled Users subsection, you would set all

the workorder related objects to Read/Write, but set Object.WorkorderItemScheduledUser to Read Only

Object Name in Security Group screen	What this object refers to	What to set to give users of this security group minimum ability to edit and create a service workorder
Object.WorkorderService	service workorder entry screen **NOTE: access given to this affects all Object.WorkorderItem type objects**	Read/Write
Object.WorkorderItem	Workorder item section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemUnit	Unit section of a service workorder, quote or PM	Read/Write
Object.WorkorderItemLabor	Labor section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemLoan	Loans section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemMiscExpress	Misc Expenses section of a service workorder	Read/Write
Object.WorkorderItemOutsideService	Outside Service section of a service workorder	Read/Write
Object.WorkorderItemPart	Parts section of a service workorder, quote and preventive maintenance	Read/Write
Object.WorkorderItemScheduledUser	Scheduled Users section of a service workorder, quote and preventive maintenance Also Scheduled Users grid for Service, Quotes and Preventive Maintenance navigation panes	Read/Write
Object.WorkorderItemTask	Tasks section of a service workorder, quote and	Read/Write

	preventive maintenance	
Object.WorkorderItemTravel	Travel section of a service workorder, quote and preventive maintenance	Read/Write
Object.Workorder.Close	Close checkmark field in Service Workorder entry screens **Example of use: you do not want users of a certain security group to be able to Close a workorder until you yourself as mgmt have checked it. **	
Object.WorkorderService.CloseByDate	Close By Date field in the Service Workorder entry screen **Example of use: if mgmt is subscribed to be notified if a workorder is not closed by a certain time period and you do not want your staff to change the Close By Date**	
The Objects listed below must be set to **minimum Read-Only** for the users of the Security Group to be able to view in a workorder		
Object.Client	To be able to select a client	
Object.Contract	To be able to select a client with a contract	
Object.ContractRate	To be able to select a client with a contract	
Object.Task	To be able to select the Task jump button	
Object.TaskGroup	To be able to select the Task jump button	
Object.TaskGroupTask	To be able to select the Task jump button	
Object.Unit	To be able to select a unit	
Object.UnitModel	To be able to select a unit	

Object.Priority	To be able to view the Priorities subgrid	
Object.Project	To be able to view the Project jump button	
Object.Report	To be able to print	
Object.WorkorderCategory	To be able to view via the Workorder Category subgrid	
Object.WorkorderStatus	To be able to view the Workorder Statuses subgrid	
Object.WorkorderItemType	To be able to view the Workorder Item Types subgrid	
Object.ScheduleMarker	To be able to view Follow Ups	
Object.ServiceBank	To be able to view client's banked service	
Object.UnitMeterReading	To be able to view unit's meter reading	
Object.Part	To be able to create a new part from within a workorder	

5.23.7 WBI Client security group settings

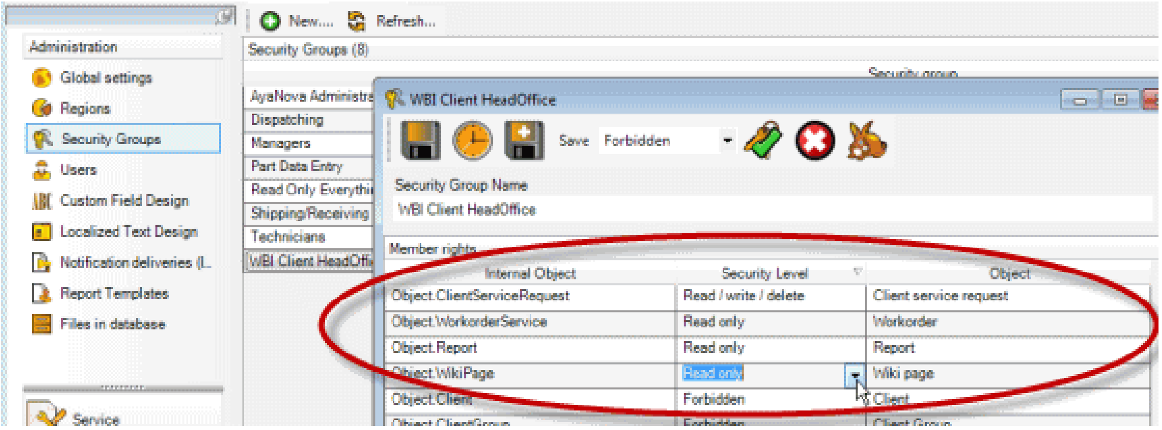
Configuring a client's access via WBI is similar to doing so for an AyaNova user - but with a few major differences that makes AyaNova recognize the client logging in as a client.

There are five major steps that must be performed:

1. Via the AyaNova program - configure security groups for clients/head offices
2. Via the AyaNova program - create user accounts for clients/head offices
3. Via WBI - Global Settings - configure the Default Client Login Workorder Report
4. Via WBI - Global Settings - configure the Client info service request info text field
5. Via WBI - Global Settings - set ability to see Wikipage of the service workorder

1. Via the AyaNova program, create security group for Clients / Head Offices to be a member of

a. There are only **__four__** security setting objects that are relevant at this time to a client / head office user logging in



i. the Object.ClientServiceRequest

i) Set to Read Only if you want the client/head office to only be able to view existing service requests

ii) Set to Read/Write if you want the client / head office user to be able to view existing service requests and to create new service requests.

iii) Set to **Read/Write/Delete** if you want the client/head office user to be able to view existing service requests, create new service requests **and delete** service requests that have not been accepted or rejected (Open).

ii. the Object.WorkorderService

i) Set to minimum Read Only to allow the client/head office to view the Client Service Workorders grid (even if you set to a higher security group right, the client/head office will only ever be able to view)

iii. the Object.Report

i) Set to minimum Read Only to allow the client/head office to view and print individual service workorders (even if you set to a higher security group right, the client/head office will not be able to ever edit or delete)

iv. the Object.Wikipages

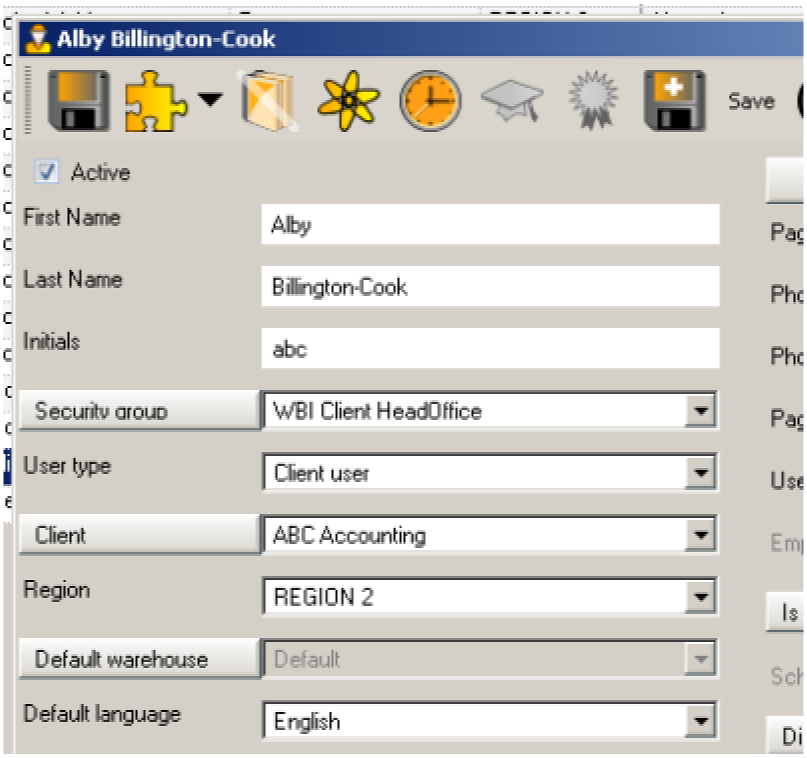
i) Set to minimum Read Only to allow the client/head office to view the Wiki page associated with the service workorder.

ii) Also note that Wikipage access must also be set in the Global Settings via WBI for clients too.

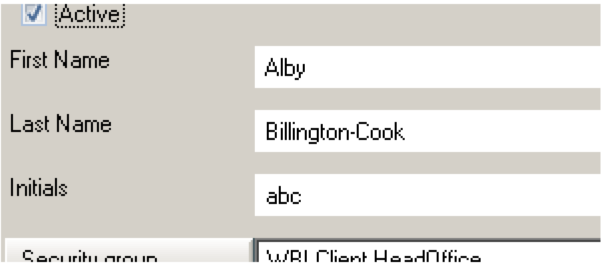
Note that even if you set Object.Wikipages or Object.Report or Object.WorkorderService to Read/Write or Read/Write/Delete, the **client can only view** and can not edit.

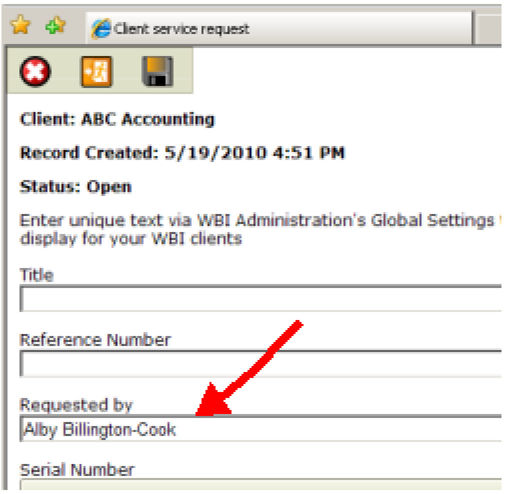
Set all other Objects to a security right of Forbidden (even if you set to something else, client/head office does not have the ability to access)

2. Via the AyaNova program create User account for client / head office for WBI access



a. What you enter in the **First Name** and **Last Name** will display automatically in the **Requested By:** field in the Customer Service Request entry screen (note of course, user can still edit what is in that field, but this way it is there automatically for them)





b. What you enter in the **Initials** field displays in the **Record Created By** column in the WBI Client's grid and in the CSR grid in AyaNova.

c. Select the Security Group relevant for this client / head office.

d. Select either ***User Type*** of **Client user** or **Head Office client user** and tab off (or click elsewhere) so that the field below it for selecting either the Client or the Head Office is activated

i. If you select ***User Type*** of **Client user**, the field directly below it will display with the label Client, and when you drop down, only clients are selectable

ii. If you select the ***User Type*** of ***Head office client user***, the field directly below it will display with the label Head Office, and when you drop down, only head offices are selectable

NOTE: if you do not select an actual Client or Head Office, that customer of yours **will be able to see all** clients service requests and workorders.

e. Continue entry of a first name, last name, initials (initials will display for the client in their list of service requests in the event a client has multiple client users that log in via WBI to be able to distinguish who made the service request), and other fields, including login name and password

f. Save the User entry screen.

g. Log in via WBI under the newly created username and password, and ensure access before giving your client the login information.

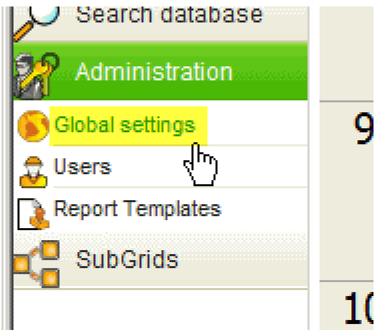
A User Type of Client user or Head office client user **is not able to log in via the AyaNova program** - only via WBI. If a client/head office attempts to log in via the AyaNova program, they will receive the following message:

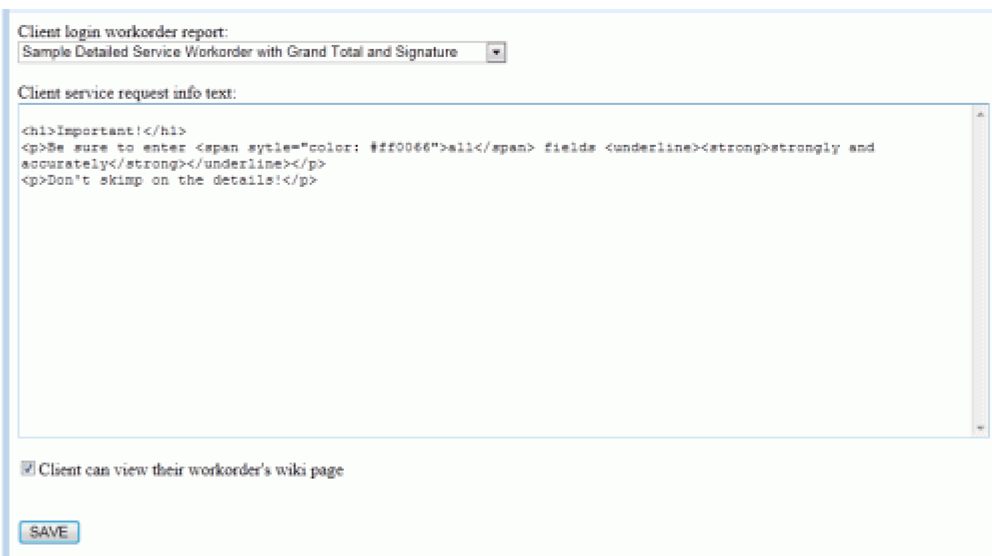
A User Type of Head office client user will have the ability to view existing service requests, create new service requests and delete existing Open service requests for all of its clients. It is suggested to log in as the head office user so you can see the difference between a client log in and a head office login.

3. Via WBI, set the Client Login Workorder Report in Global Settings

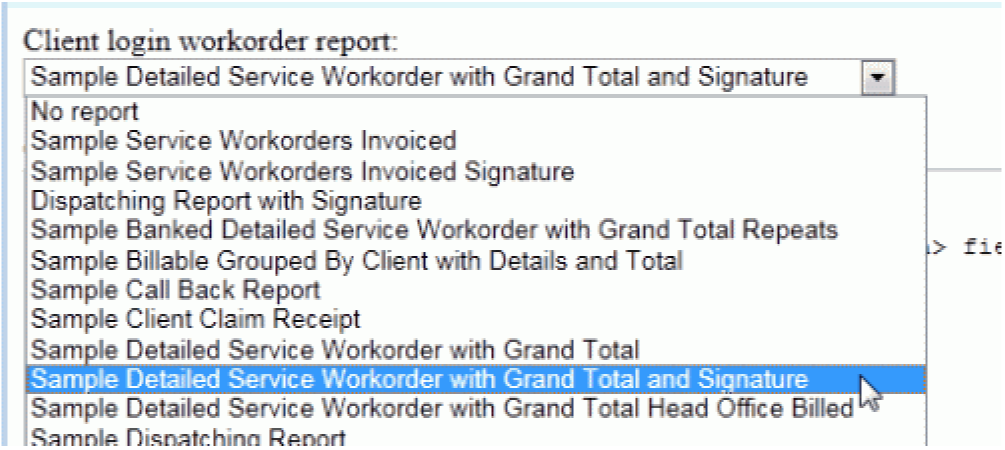
a. Log in via WBI (as the option to set these settings is **not** available via the AyaNova program) as the AyaNova Administrator user or a user that is of User Type AyaNova Administrator

b. Select the **Global Settings** via the Administration navigation pane when logged in via WBI





c. Drop down the list of available service workorder report templates and select the report template that client's will view individual service workorders by (your list of selectable reports may differ of course)



i. Select a report template that will show details to your client - for example, the Sample Detailed Service Workorder with Grand Total that has been customized with your company name and information.

ii. You have total control over what the client does and does not see of the service workorder as you can **customize an existing report template or create a new report template specifically for clients** when viewing their service workorders via WBI.

iii. The report template selected applies to **all** clients/head offices that have the security group right to view their workorders.

d. Select the Save button

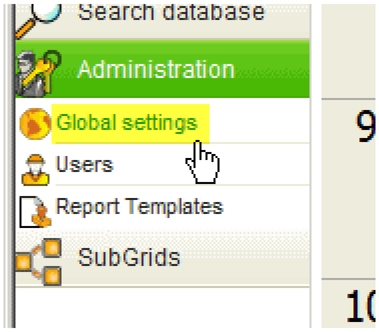
e. Close the web page (it will not auto-close by itself)

f. Log in as a client user, select a service workorder and confirm it displays using this report just selected.

4. Via WBI - configure the Client info service request info text field via Global Settings

a. Log in via WBI (this option is not available via the AyaNova program) as the AyaNova Administrator user, or user with rights to Global Settings (Object.Global)

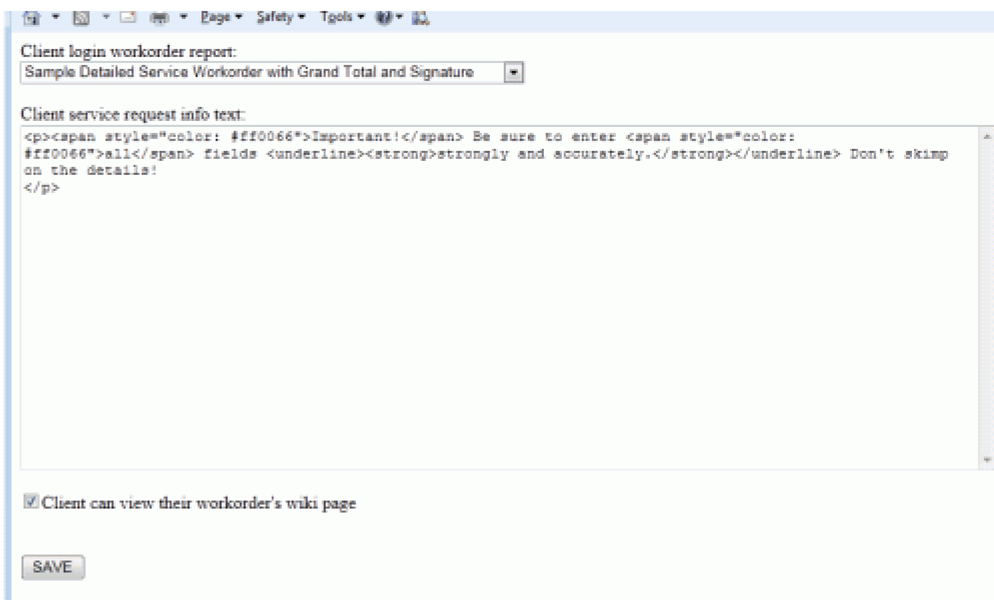
b. Select the **Global Settings** via the Administration navigation pane when logged in via WBI

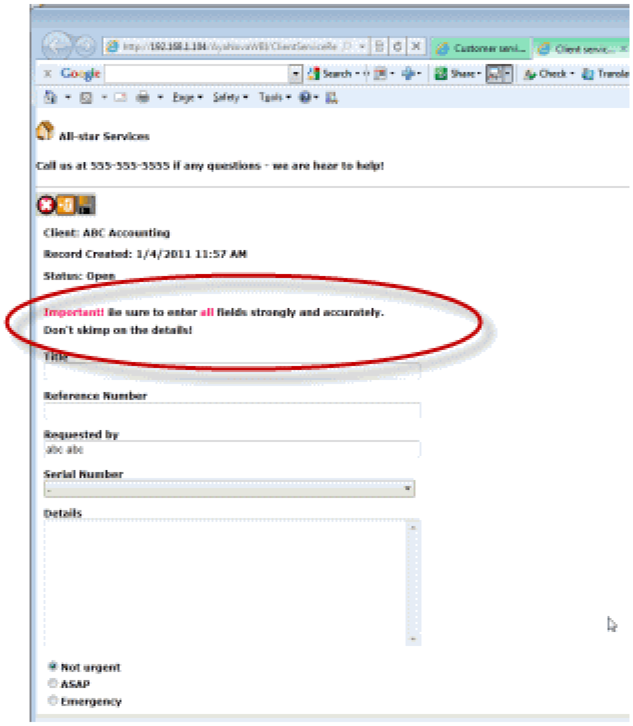


c. Enter in text (or raw HTML) that you want to have displayed on the Customer Service Request form that all WBI Clients see.

d. Select the Save button to save any changes you enter here.

e. What you enter in that field will then show in the Customer Service Request entry form for the client when next logs in - for example, if have edited the Client service request info text: field, the following will display in the Client's service request entry screen:

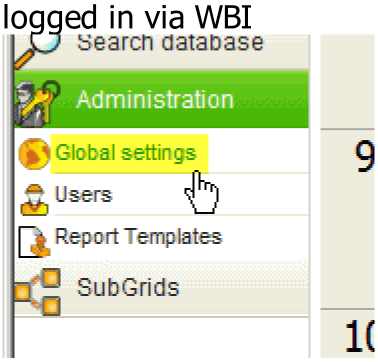




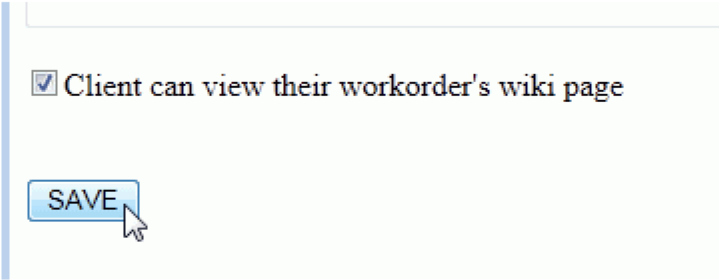
5. Via WBI - set ability to see Wikipage of the service workorder

a. Log in via WBI (this option is not available via the AyaNova program) as the AyaNova Administrator user, or user with rights to Global Settings (Object.Global)

b. Select the **Global Settings** via the Administration navigation pane when logged in via WBI

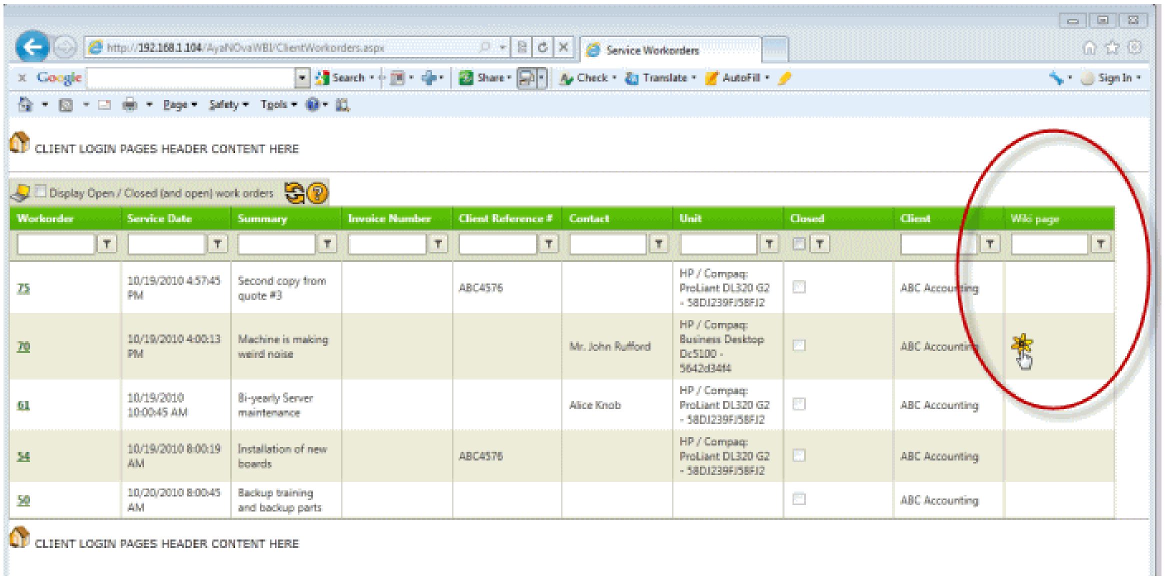


c. Checkmark the field Client can view their workorder's wiki page



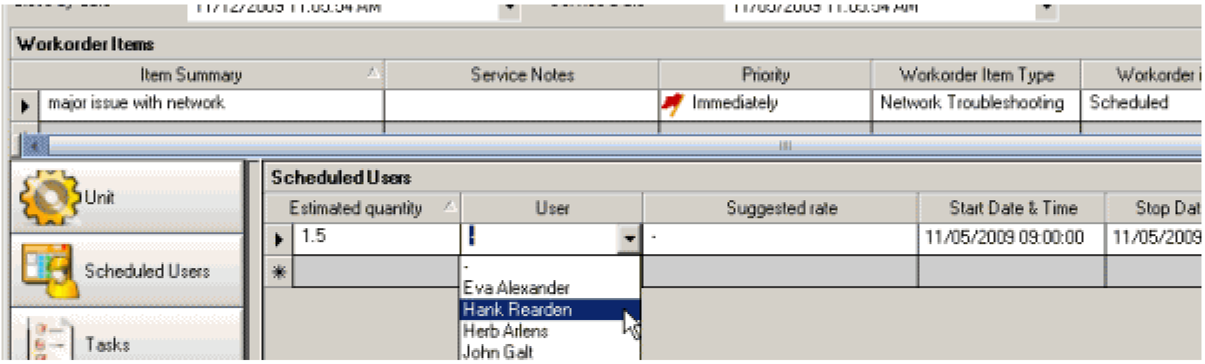
d. Select the Save button to save any changes you enter here.

e. Now the client when next logged in will be able to view the Wiki page if associated with the service workorder



5.24 Users

5.24.1 What do I use Users for?



Users in general identify those that can log into AyaNova.

- You should create an AyaNova user account for every person that you wish to log into AyaNova and view and enter data - as the AyaNova database maintains identification of the AyaNova user that created a record, and the AyaNova user that last modified a record, you would want each person to have a separate AyaNova user account.
- Every AyaNova user requires a username and a password
- Every AyaNova username must be unique
- When a new user is first created, the grid and form settings of the AyaNova Administrator are initially used by the new user when they first log in.
- When an AyaNova user logs out – any changes of their screen and grid settings are saved for the next time they log in. For example, your technician may wish to view the Service Workorders grid columns in a specific order that would be different than what your shipper would use – each having a separate log in allows them to view how they had it the last time they logged in.
- AyaNova Users are assigned to security groups – from which they get their access rights to various features in AyaNova.

The Type of user dictates whether can be scheduled or not, and whether a Default warehouse can be set. Refer to the User Type section of the User entry screen for details.

- A Schedulable User uses a license; is a user that can be scheduled in workorders; shows on the Schedule screen; as well as can enter and view data in AyaNova based on the rights of their security group and their region.

- A non-schedulable user does not use a license, and can enter and view data in AyaNova based on the rights of their security group and their region.

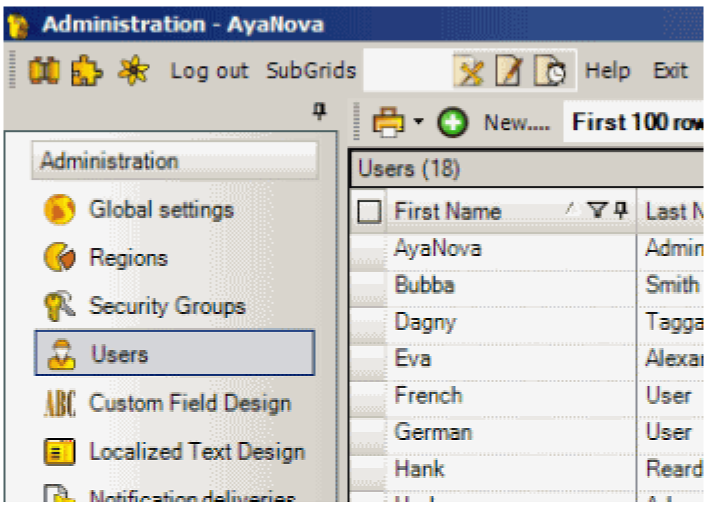
Where a Schedulable User only is selected and used:

Workorder, Quote and PM entry screen - Scheduled Users
Workorder, Quote and PM entry screen - Labor
Workorder, Quote and PM entry screen - Travel
Workorder, Quote and PM entry screen - Expenses
Quote entry screen
Project entry screen

Where a User (schedulable or not) is selected and used:

Quote entry screen
Project entry screen

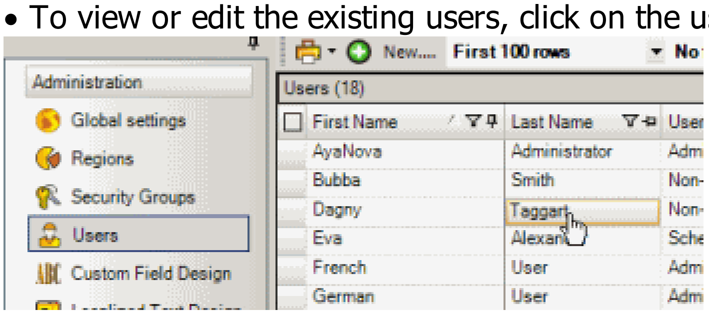
5.24.2 Users grid



The Users grid is available via the Administration navigation pane

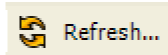
The Users grid lists user records and their fields from the User entry screen

- To view or edit the existing users, click on the user name



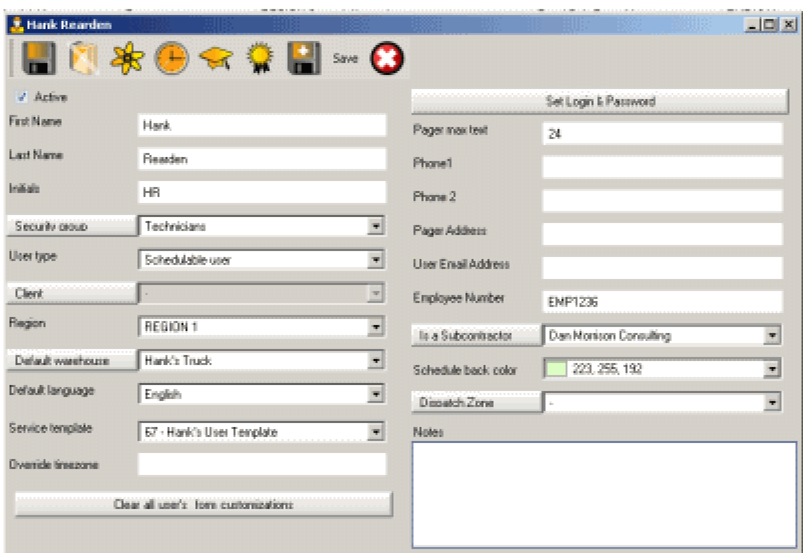
- To create a new user, select the New... 

 menu option at the top.

- The menu option Refresh  refreshes the list of users

Security Group internal object: Object.User
NOTE: Only if the user is of User Type Administrator User will this user be able to view the Users grid *Forbidden* : User of that security group can not access the Users grid at all nor entry screen *Read Only* : User can view the Users grid and entry screen but can not edit nor create *Read/Write* : User can access the Users grid, view, create and edit *Read/Write/Delete* : User can access the Users grid, view, create and edit and delete

5.24.3 Users entry screen



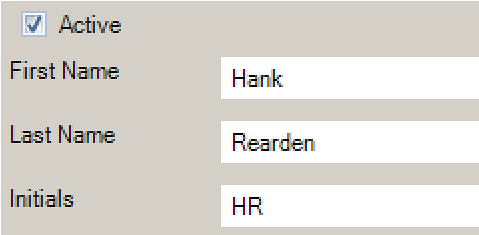
User entry screen additional menu options

 **User Skills** – Collection of skills this user possesses which would be used via the Schedule screen to display users with these skills.

 **User Certificates** – Collection of certifications this user possesses which would be used via the Schedule screen to display users with these certifications.

User entry screen

Active



This denotes whether this AyaNova user is able to log in, and if a Schedulable User, available in drop down selection lists.

NOTE: You can only set a user that is of type Schedulable User to inactive if they are presently assigned to workorders that have been checkmarked Closed (service workorders that are not Closed, and/or in a Quote or PM) and not selected in any open service workorders or in any quotes or PMs.

NOTE: If a user that is of type Scheduleable User is set and saved to inactive, an automatic scan will be triggered for Follow Ups that have a stop date that is later than the current moment and compiles them into a list and sends it via memo to the Administrator account so that the AyaNova Administrator account can edit those Follow Ups and assign to another Scheduleable User

First Name

This is an identification field used in the global setting on how to display users in drop down selection lists.

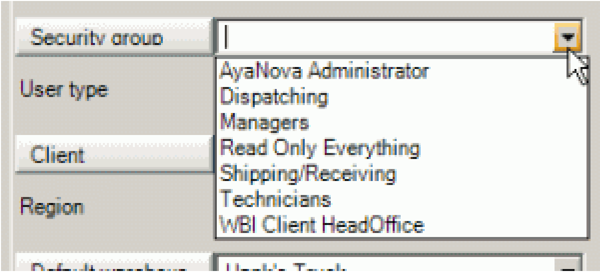
Last Name

This is an identification field used in the global setting on how to display users in drop down selection lists.

Initials

Initials of the user may be used in various grids and screens.

Security Group

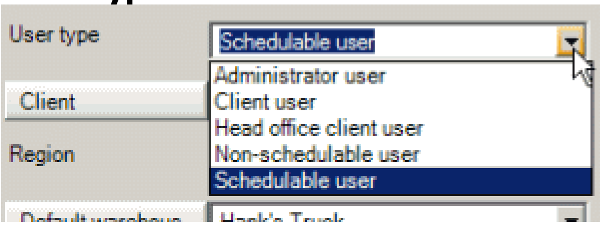


The user is made a member of a security group which sets what rights to various features in AyaNova are available for this user

What security groups display depends on the security groups you have made

See also:
Security Groups

User Type



This identifies the type of user.

The types that are available are:

- **Administrative User**
  AyaNova comes with one default created Administrative User that can **not** be deleted or edited except for username login and password, and locale.

  You should create at least one more account that is an Administrative User in the event you forget the main Administrative user login and password.

  NOTE: Only a user that is of User Type Administrator User can see the Administration navigation pane and its grids, even if you have set the security group for the user of other user types to Read or higher.

- **Client User**
  This user would be the Client who can log in via the optional WBI web browser interface to request service, view their requests, and view their workorders. If the selected type is Client User, then the client must be selected in the next field.

  Refer to the WBI (web browser interface) documentation for details.

- **Head Office Client User**

If select the type as Head Office User, able to select the Head Office name in the next field. This user would be the Head Office who can log in via the remote web feature to request service for clients that have this head office selected, as well as view the existing requests for the clients, and view workorders for their clients.

Refer to the WBI (web browser interface) documentation for details.

- **NonSchedulable User**
  Select for an employee that would view and enter data, but not be available in drop down selection fields.

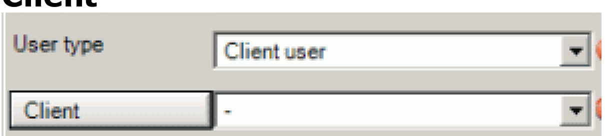
- **Schedulable User**
  Selection of Schedulable User as a type will affect license consumption – every user set as Active and as a Schedulable User requires an AyaNova license.

  Only users set to User Type of Scheduleable User can have a specific warehouse selected as default different from the actual default warehouse (whatever you may have re-named it)

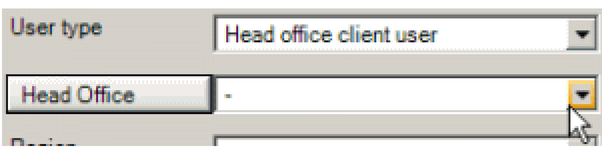
  NOTE: You can only set a user that is of type Schedulable User to inactive if they are presently assigned to workorders that have been checkmarked Closed (service workorders that are not Closed, and/or in a Quote or PM) and not selected in any open service workorders or in any quotes or PMs.

  NOTE: If a user that is of type Scheduleable User is set and saved to inactive, an automatic scan will be triggered for Follow Ups that have a stop date that is later than the current moment and compiles them into a list and sends it via memo to the Administrator account so that the AyaNova Administrator account can edit those Follow Ups and assign to another Scheduleable User

Client



If the User Type selected is ***Client User*** , this field is where you select the actual client.



If the User Type is a ***Head Office Client User*** , the label changes to Head Office and only Head Offices are selectable.

Refer to the WBI (web browser interface) documentation for configuring a client to have access through WBI for details.

Region

If you select the default region, then this user has access to all data regardless of what region the data is assigned to.
If you select a specific region, then this user is restricted to only viewing data available for that region.

Also see: [Regions](#)

Default Warehouse

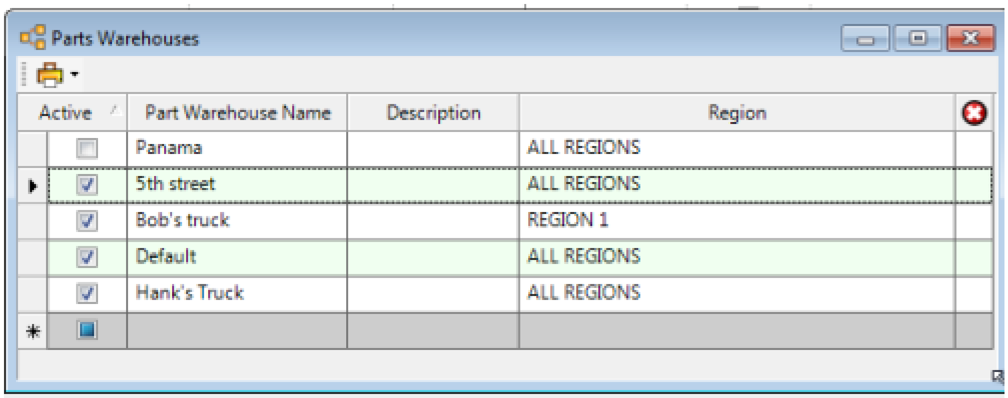
When a new user is created, this will default select to the Default Warehouse (you may have renamed that Default warehouse to something else, but it is still to AyaNova its default warehouse).

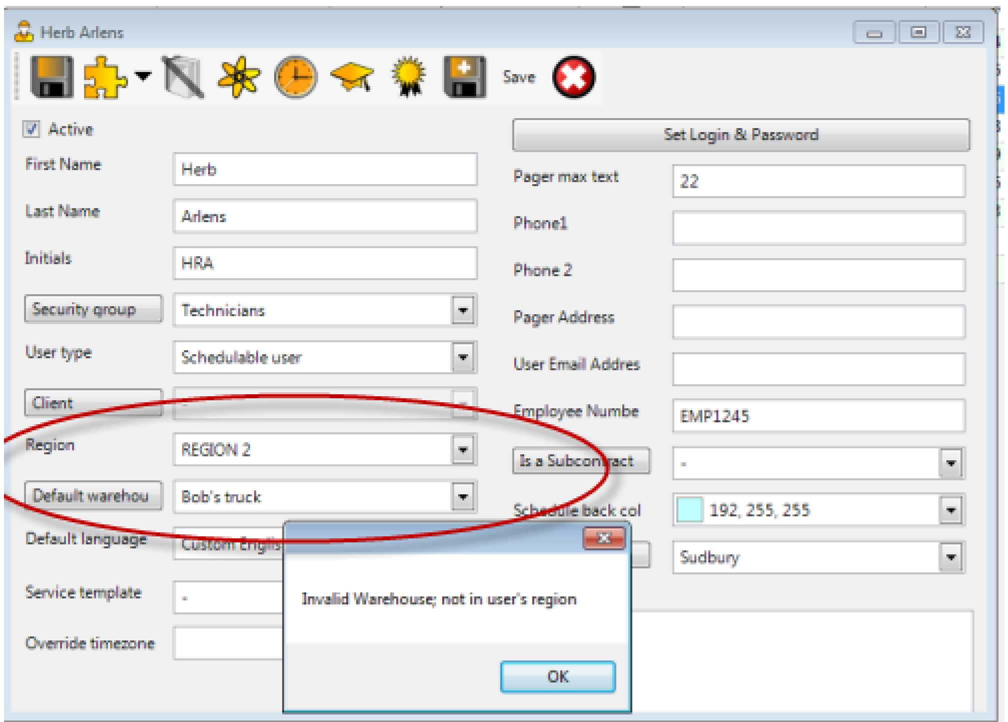
If the User Type is Scheduleable User, the suggestion is to set to the warehouse that this scheduleable user most commonly selects parts from on a work order to save time and help your technician to select the correct warehouse.

New as of AyaNova 7.5
If the User record that has been assigned to a specific region, and a part warehouse is then selected that has been assigned to a different specific Region, AyaNova will advise "Invalid Warehouse; not in user's region" and not allow saving until a warehouse with an accessible Region is selected.

An example:

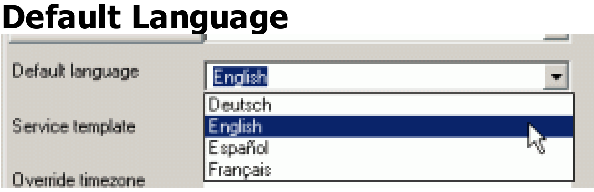
- The part warehouse Bob's truck region is set to REGION 1
- The user Herb's region is set to Region 2
- When you select Save after editing the warehouse selected, if the warehouse is assigned to a specific Region different than the user, you will get the message "Invalid Warehouse, not in user's region" and need to select a different warehouse to be able to save.
  - NOTE: if the warehouse selected for the scheduleable user is edited after, to a region that is not accessible by the user, that user will just not have any default warehouse selected.





Also see: [Part Warehouses]

Default Language



A default language is required. New users default to the default language set in Global Settings.

New installation of AyaNova will also install sample Deutsch (German), Español (Spanish) and Français (French) language locales.

See also:

[Localized Text Designer](#)

Service Template

If you select a specific service template here, when this user is logged in and creates a new workorder for any client, it will default to selecting that service template

Override TimeZone

All dates and times in the AyaNova database are internally saved in GMT. What a date/time displays to you is dependant on what time zone you are using.

This field is for those users that are in a different time zone than where their AyaNova database resides.

Entry is either a + or - number that denotes hours ahead or behind GMT. (i.e. -6 would be 6 hours behind GMT which would equate to Standard Time Zone with daylight savings time in November 2009)

Do review the section [TimeZones & what date/time displays](#)

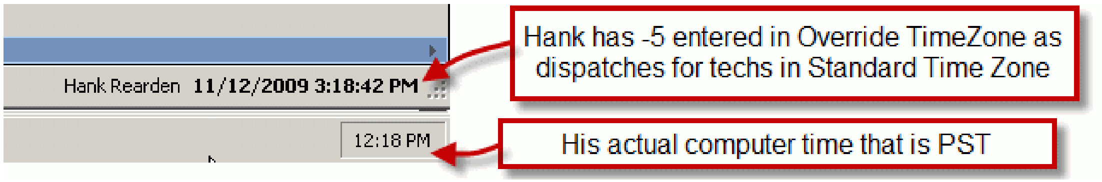
For example, your AyaNova database may be in California, but you are in New York and want to see any times displayed in AyaNova in relation to the time it is for you.

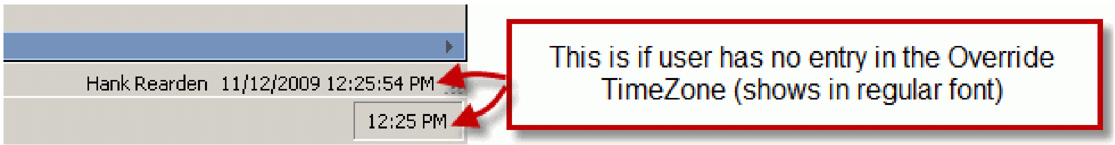
No entry in this field means that the user logged in connecting through a local area network will use their computer's time zone, and when logged in via WBI or Data Portal will use the server's time zone. This is the default setting as most people will have their AyaNova database in the same time zone where they are working so do not have to change this.

An entry of 0 will mean that the user when logged into AyaNova (via LAN, DP, WBI, etc) will to use GMT (Greenwich Mean Time)

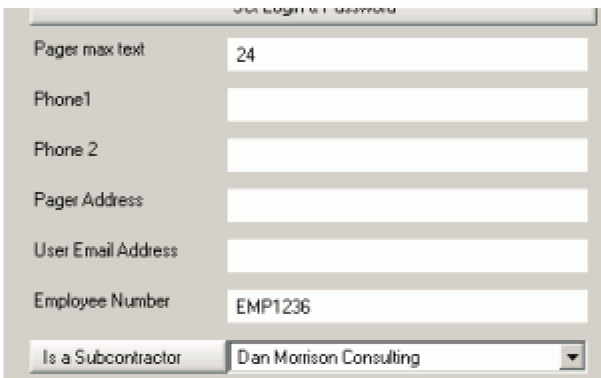
An entry of -8 will mean that the logged in user's displayed times will be 8 hours behind GMT.

Do note that if you have entered an offsetting number here to force a specific time zone for a user that you will want to edit when daylight savings is enforced or removed (as that changes how many hours behind or after GMT)





When user is logged in via the AyaNova program, they can see at a glance what "their" time is in the bottom right hand corner of the main AyaNova screen - as it will show in BOLD if it is an override, or regular font if not overridden.



Pager Max Text

This is for informational purposes only and not tied to Notification Subscriptions

Phone 1

This would be for informational purposes to display for contact.

Phone 2

This would be for informational purposes to display for contact.

Pager Address

This is for informational purposes only and not tied to Notification Subscriptions

User Email Address

This is for informational purposes only and not tied to Notification Subscriptions

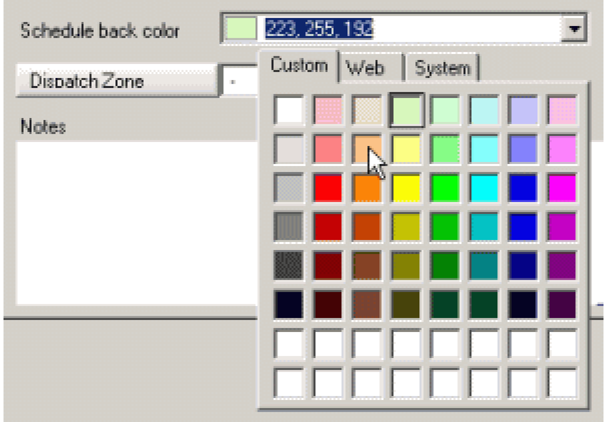
Employee Number

This is an identification field used in the global setting on how to display users in drop down selection lists.

Is a subcontractor

A user may be of a type Schedulable User but also be a subcontractor. Select the vendor if they are. Note that this does not affect how data is viewed.

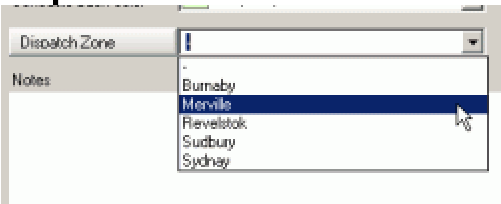
Schedule Back Color



When viewing the Schedule screen, this schedulable user' workorder items will have this back color for easy viewing.

Also see: [Schedule screen]

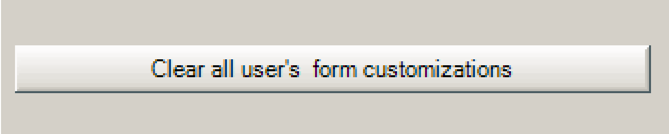
Dispatch Zone



If a schedulable user, assigning to a specific dispatch zone allows for easy selection when creating Schedulable User Groups for the Schedule screen.

Also see: [Dispatch Zones]

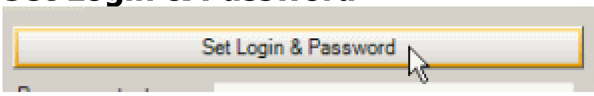
Clear all users' form customizations



When selected, this will clear any changes a user has made to grids such as column placement, display or not display columns, and sizing. When the user next logs in, the grid display (position of columns in grids) will have taken the saved grid settings of the AyaNova Administrator.

This is useful if the user has done something funky with their grids or entry screens, and you want to reset them back to that of the AyaNova Administrator to reset it.

Set Login & Password



Every AyaNova user requires a username and a password. Every AyaNova username must be unique.

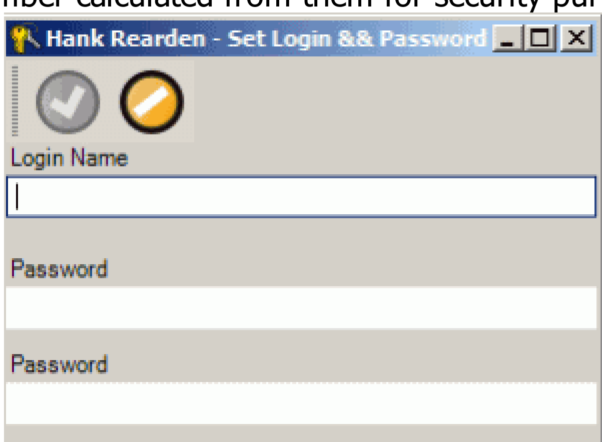
Login name and password are encrypted once saved.
They will NOT display after save.
We can not recover any user's username and password entered in the AyaNova database.
AyaNova does not store the original user name or password as text, only a number calculated from them for security purposes - encrypted.

If a user forgets their login name and/or password, an administrator would need to enter a new login name and password and save.

It is your responsibility to maintain documentation of any user's username and password, including the AyaNova Administrator account if changed from the default of "manager" with password "letmein".

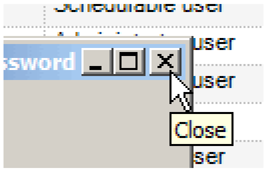
This opens the sub-screen where the user login name and password can be set.

The previous username and password if previously saved, will not display.
AyaNova does not store the original user name or password as text, only a number calculated from them for security purposes - encrypted.



Enter what you want the user' login name in the Login Name field, and the users' password entered twice for confirmation.

Select the  OK button to accept the changes

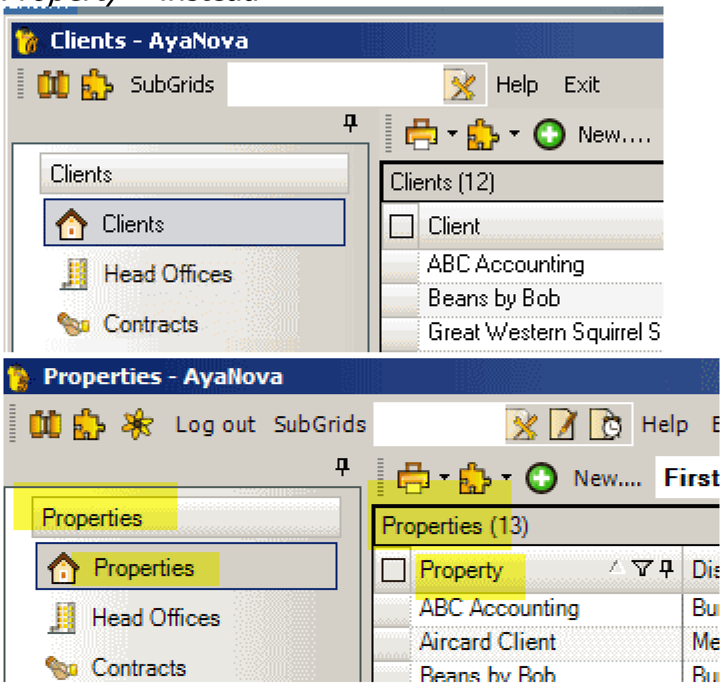
If you select the  Cancel button or the 

X in the upper right-hand corner, no entries will be saved and it will revert to the previously entered username and password.

5.25 Localized Text Designer

Use the Localized Text Designer to create custom locales that have all labels in AyaNova display the text that works best for your needs.

- For example, you may be in property management service and want what is labeled as *Clients* or *Client* throughout AyaNova to display as *Properties* or *Property* instead



Localization can be the process of changing text to display in another language or to change terminology to suit your unique business requirements.

Follow along with the two tutorials How do I create new cusotm locale using Localized Text Design? and How do I customize an existing locale on the fly?

For example, you may localize a text field to change what is presently displayed as “Unit” to display as “Bus” if your service organization only services buses for clients. Or your may even localize all text fields to a language other than English.

AyaNova includes four sample localizations with English as the default selected in each sample user entry screen. The sample locales are English, French, German and Spanish.

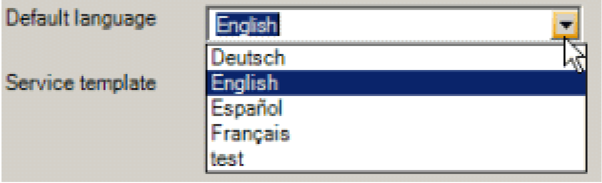
- The default **English** locale is not directly customizable. You must create a copy of an existing locale, and then edit that custom locale.

- If you would like to preview AyaNova using one of the additional three language locales, log in as one of the following sample users if you have not erased the sample data:

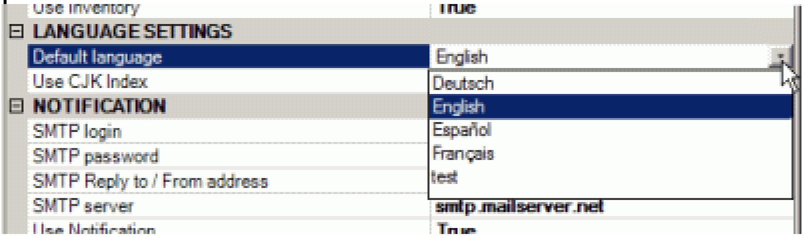
Username	Password	Uses Locale
german	german	Deutsch
spanish	spanish	Español
french	french	Français

Where selected:

Select the locale in the User entry screen for the field Default Language



Select and edit the locale in Global Settings within the Administration navigation pane

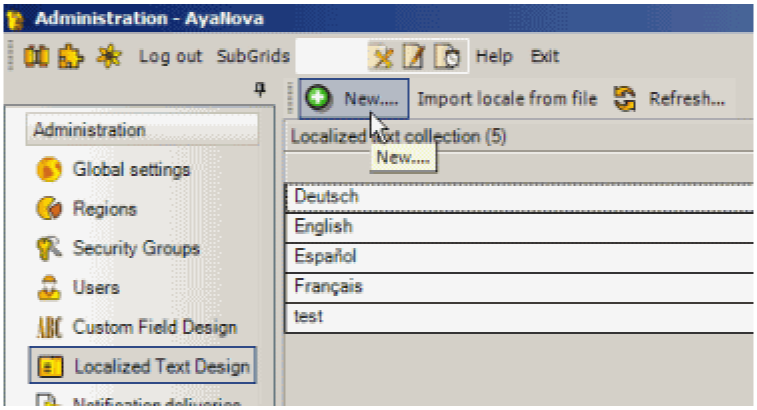


NOTE:The locale selected in the user's entry screen overrides the locale selected in Global Settings.

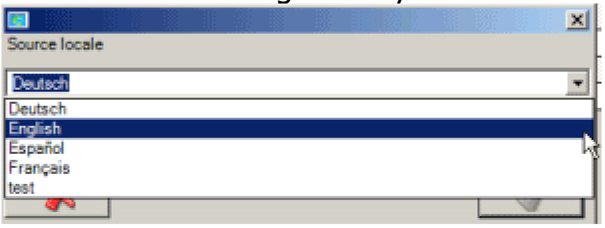
NOTE: A change in locale does not take effect until the user has completely exited and then next logs in. This is because localized text for labels is loaded only when the user newly logs in.

How to create a new locale:

1. In the Localized Text Designer grid, select the menu option New... which will open up the window where you select the Source and enter in the new Locale name



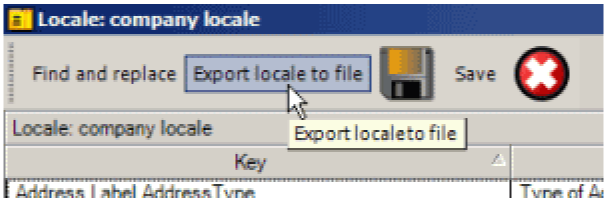
2. Select the existing locale you want to base your new locale on



3. Enter your new locale name, select OK (this can take a couple minutes as it is generated), and then edit the Standard Display Text as you want it to display.

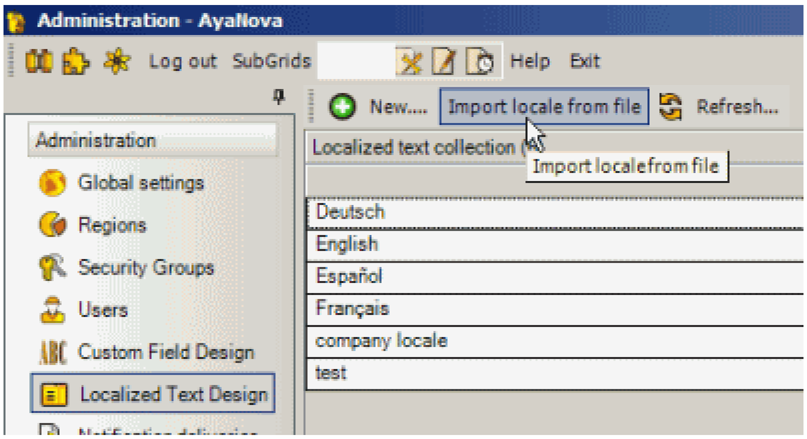
How to export a locale to a file for use by some one else's AyaNova database:

With the custom locale window displayed, select the menu option Export locale to file, enter file name and save.



How to import a locale from a file into your AyaNova database:

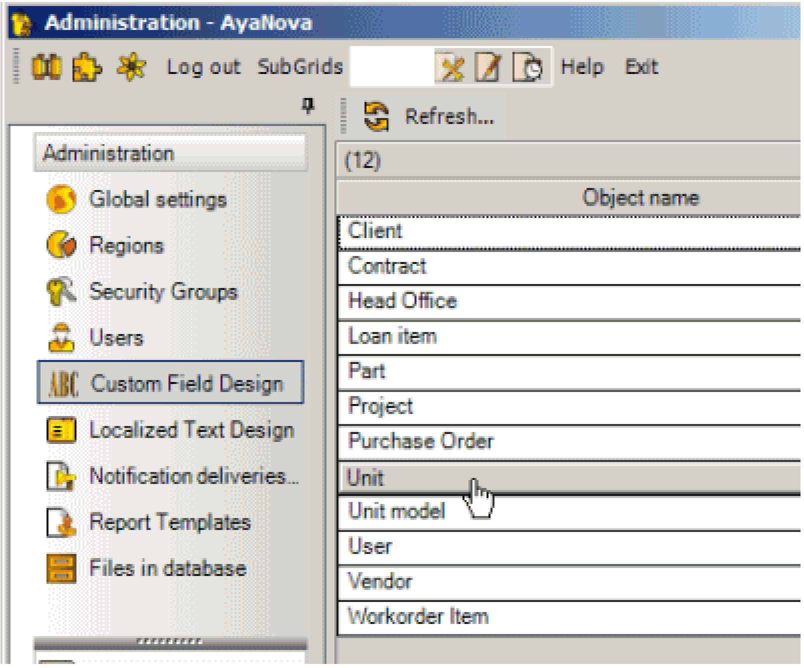
In the Localized Text Designer grid, select the menu option Import locale from file



See also:
[How do I create new cusotm locale using Localized Text Design?]
[How do I customize an existing locale on the fly?]

Security Group internal object: Object.LocalizedText
NOTE: Only if the user is of User Type Administrator User will this user be able to view the Localized Text grid *Forbidden* : User of that security group can not access the Localized Text grid at all *Read Only* : User can view the Localized Text grid but can not edit *Read/Write* : User can access the Localized Text grid, view and edit *Read/Write/Delete* : User can access the Localized Text grid, view and edit and delete

5.26 Custom Field Designer



The Custom Field Designer is where you choose the specific business object you want to have up to 10 custom fields display.

> Follow along with the tutorial [How do I create custom fields for a Unit?]() to see how easy it is to add!

Custom fields can be set so that they display on the following entry screens:

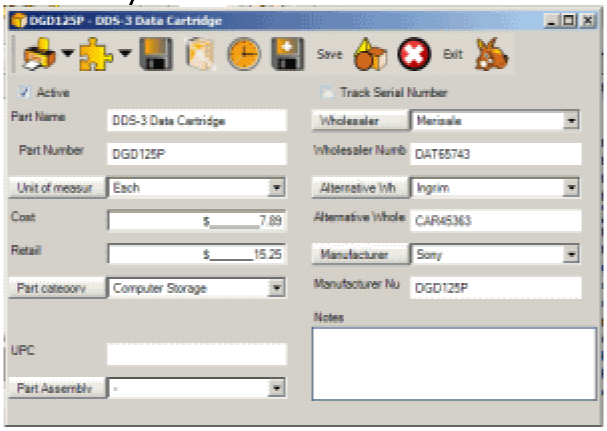
- Client entry screen
- Contract entry screen
- Head Office entry screen
- Part entry screen
- Purchase Order entry screen
- Loan Item entry screen
- Unit entry screen
- Unit Model entry screen
- Vendor entry screen
- Workorder Item screen (displays within service workorder, quote and pm)

Up to 10 additional custom fields can be added to any and all of the above listed entry screens. Each custom field can be customized to display as text, currency, date and/or time, true or false.

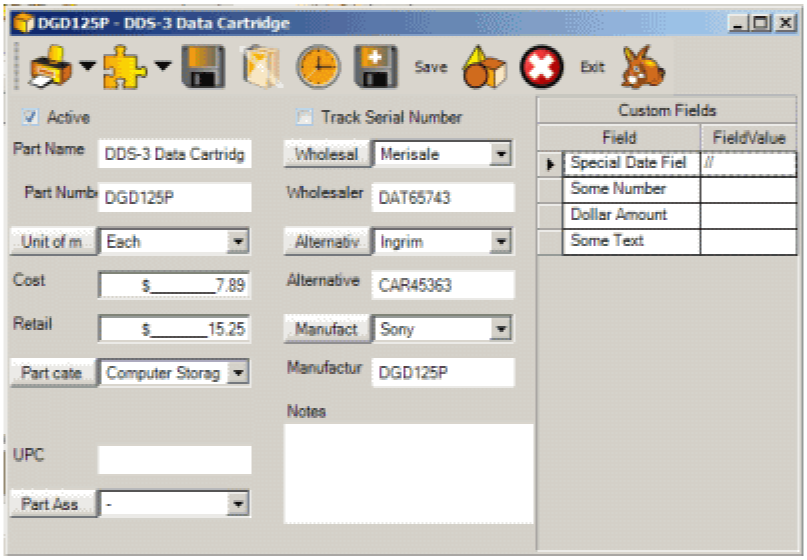
Custom fields are only available in reports for that object itself. Custom fields for an object are not available in reporting from another object. For example, if you add custom fields to a Part entry screen, those custom fields are **not** accessible in a report from a service workorder entry screen.

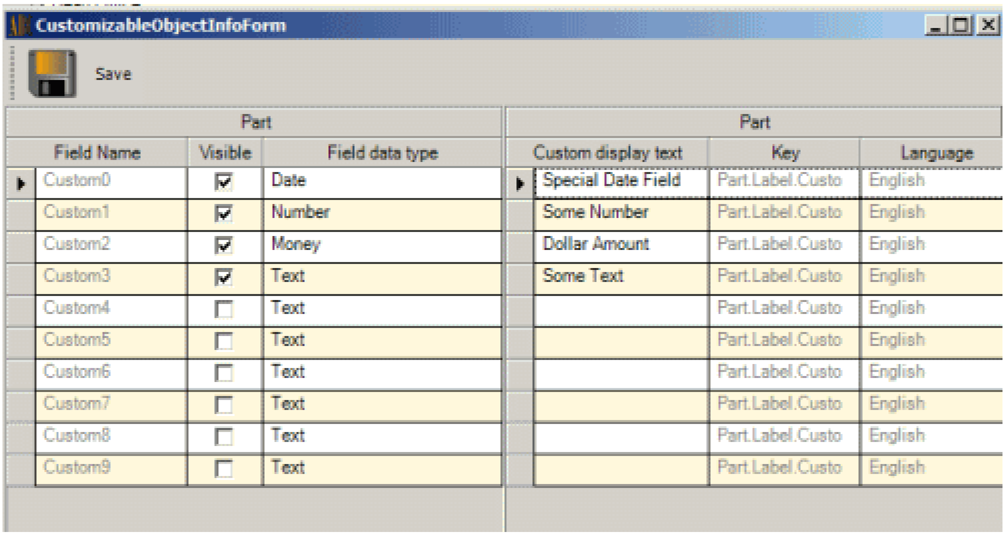
If you make visible custom fields for a business object, those custom fields will display for **every** record for that business object.

> For example, if you set custom fields for the Unit business object, custom fields will display in the Unit entry screen for every unit.
>
> For example, if custom fields are not enabled for the Part entry screen, the Part entry screen will look like this:



> If you do enable custom fields for the Part object, the Part entry screen will instead look like this:





The screenshot above is an example of the Part object edited to have four custom fields set to display with custom display text set.

The columns on the left side dictate whether the custom field is visible, and of what data type. And the columns on the right side are where you enter the custom text to display to label the custom field.

Field Name column
These are not editable.
These identify the present field name

Visible column
These are editable.
These indicate whether the custom field is visible within the selected screen.

For example, you may initially have these visible to enter data, and then later may not wish the custom fields to be displayed for AyaNova users, but still maintain the data within the AyaNova database.

If any row in this column is checkmarked then the object entry screen will display the custom fields section.

Field Data Type column
These are editable.
This is a drop down selection list of possible field data types that you may want this custom field to be. For example, if you want to be able to enter in text into the field, then select Text. If you want to be able to select a date within the custom field, then select Date and so on. Note that all the data for custom fields are stored internally as text this format is simply to aid in consistent and faster data entry.

Custom Display Text column

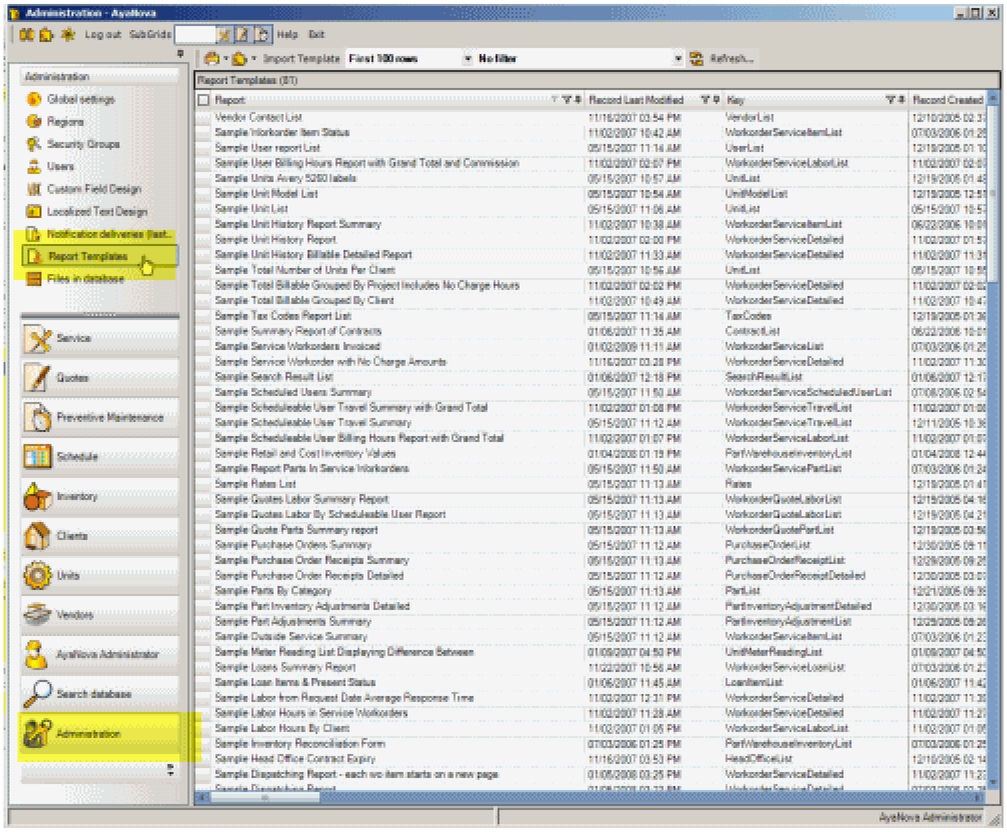
This field is editable
This field is where you would enter in what you wish the custom field labeled with within the Custom Field section for the selected screen.

Key column
This field is not editable.
This field is for your reference to identify if editing via Localization Text Designer

Language column
This field is not editable.
This field is for your reference to identify if editing via Localization Text Designer

5.27 Report Templates grid

5.27.1 Report Templates grid



The Report Templates grid in the Administration navigation pane displays reports that are presently available within your AyaNova database.

From this grid you can

- Make reports inactive so they do not display for selection
- Change report names as they are displayed for selection
- Identify the size of the report, perhaps determining why a report takes longer to print than another.
- Determine who created the report template and who last modified it and when.
- Import report templates obtained from other AyaNova users, consultants, and from the AyaNova website
- Export report templates to provide to other AyaNova users
- Assign report template access for a specific security group
- Assign report template access for users of a specific region

This Reports grid is **not** where you customize the report template; it is for managing reports as a whole.

If you need to edit the actual design of a listed report template, you would go to that grid or entry screen from where that report template is selected, and open it via the Design view to edit it.

For example, if you wanted to customize the Client Banked Service Balance report template, you would open the Clients navigation pane, open the Client grid, drop down the Print selection, hold the SHIFT key and select the report template Client Banked Service Balance

Security Group internal object: Object.Report
NOTE: Only if the user is of User Type Administrator User will this user be able to view the Report Templates grid *Forbidden* : User of that security group can not access the Report Templates grid at all (nor can view any reports from any grid or entry screen has access to) *Read Only* : User can view the Report Templates grid but can not edit (and can view reports from grids and entry screens have access to but not create new or edit existing) *Read/Write* : User can access the Report Templates grid, view and edit (and can view reports from grids and entry screens have access to, as well as create new and edit existing report templates) *Read/Write/Delete* : User can access the Report Templates grid, view and edit and delete (and can view reports from grids and entry screens have access to, as well as create new and edit existing report templates)

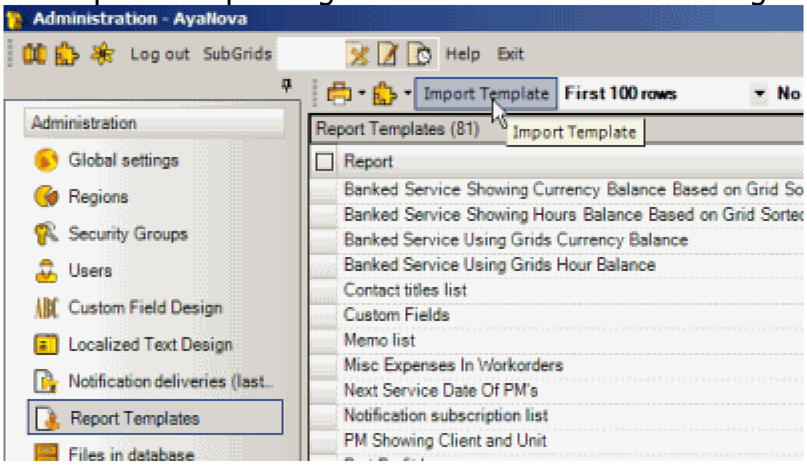
Report Template grid columns:

Active	Identifies if this report template is active or not	
Key	Identifies from where this report template is available from	
Record Created	Displays the date this report template was first created	
Record Created By	Displays who first created this report template	
Record Last Modified	Displays the date this report template was last modified	
Record Last Modified By	Displays who last edited this report template	
Region	Displays the Region this report template will display for	
Report	Identifies the name of the report template as it displays in AyaNova	Select to open the Report Template display window
Size	Identifies the size this report template takes up in the database	

5.27.2 Importing a report template

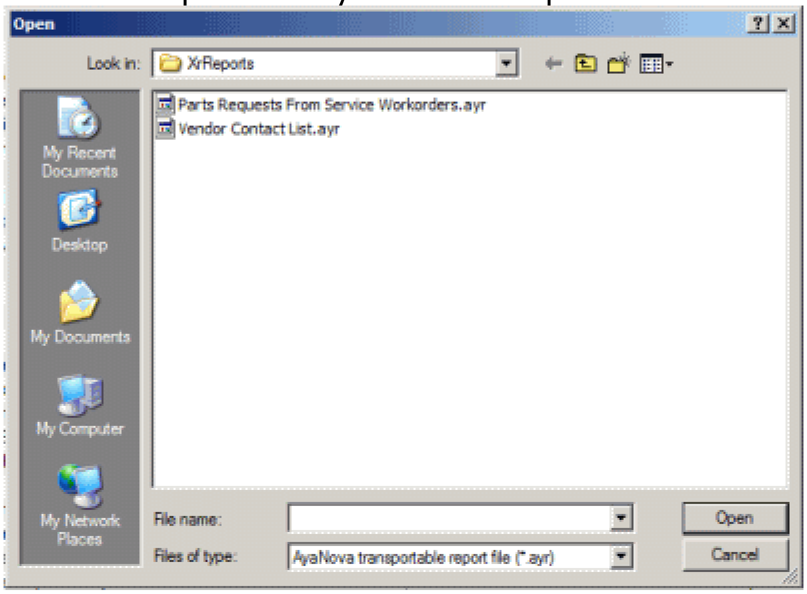
With AyaNova, you can import report templates that others have made. For example, you might want to download and import a sample report template from the AyaNova Support Forum's Additional Sample Report Templates & Tutorials

1. To import a report template, select the menu option **Import Template** from the Report Templates grid in the Administration navigation pane



2. Move / browse to the location of the exported file that you wish to import

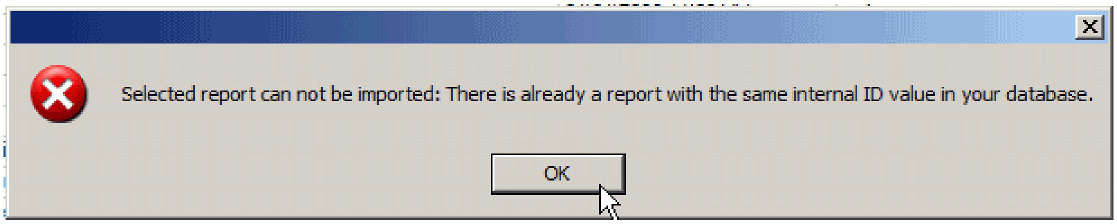
3. Select the exported file you wish to import



4. Select Open. AyaNova will read the exported report template file and import it into the AyaNova database so that it automatically becomes available in the Print location for its dataset.

5. If you encounter the message "*Select report can not be imported: There is already a report with the same internal ID value in your database*", this is because as it says, the report template already exists in your database. The report template that is already in your database may or may not have the same name, but it has the same internal ID so AyaNova won't allow you to import and overwrite the existing.

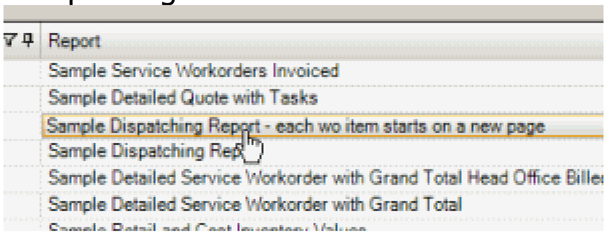
   What you need to do is identify the existing report template and delete it before you can import your report template.



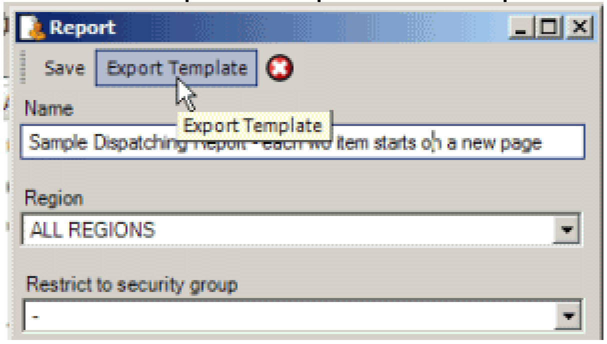
5.27.3 Exporting a report template

With AyaNova you can export report templates to a file so that you can share with other AyaNova users.

1. View the display features of a report template by selecting it from the Report Templates grid



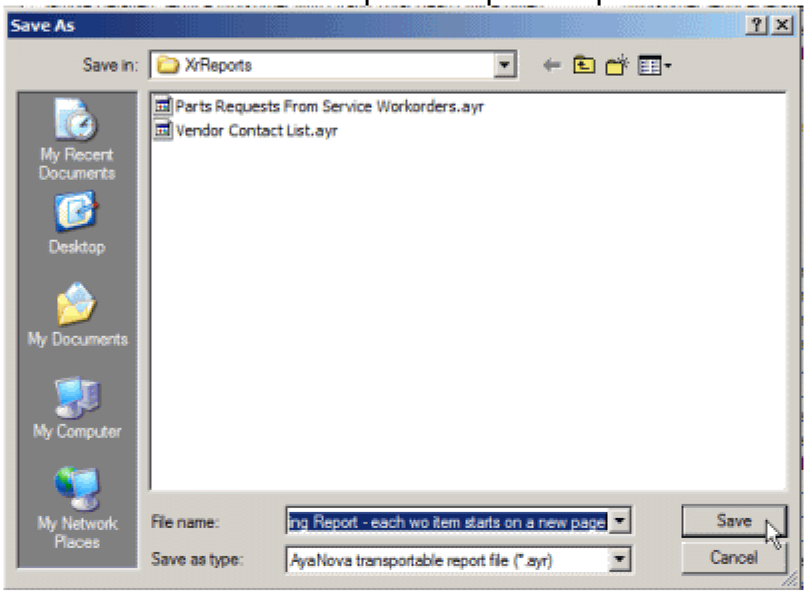
2. Select the Export Template menu option



3. Move to the file system location where you wish to save the report

4. The file name will default to the name of the report and the extension .ayr

5. Select Save to save the report template export file

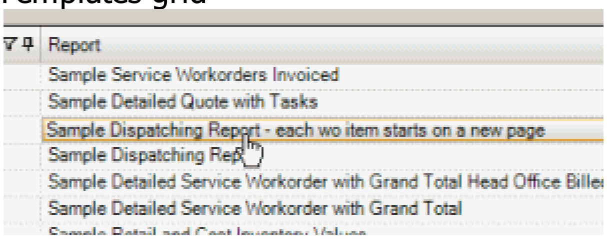


6. You could now provide that report template file to another user who can import it into their database for use.

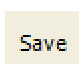
5.27.4 Rename a report template

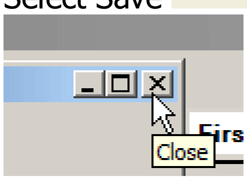
An example of why you might rename a report template is to rename an existing sample report template

1. View the display features of a report template by selecting it from the Report Templates grid



2. Edit the name of the report template

3. Select Save 

to save the report template export file and exit out 

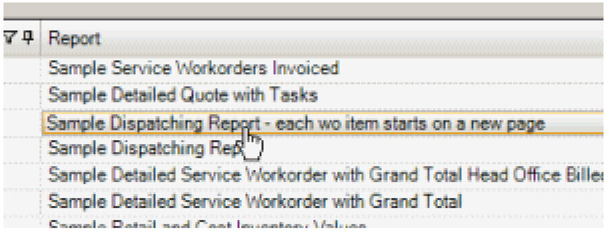
of the display window

4. This report template will now show for selection in its Key area with the new name.

5.27.5 Delete a report template

Do note that if you delete a report template, just like if you delete any record in AyaNova, that completely removes it from the database - it is not recoverable, there is no Undo button.

1. View the display features of a report template by selecting it from the Report Templates grid

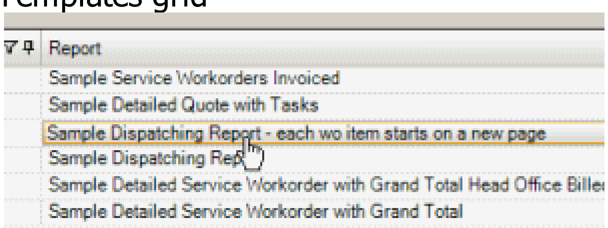


2. Select the Delete  menu option

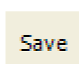
3. AyaNova will ask you to confirm. Once you do, the report template is deleted and is not recoverable.

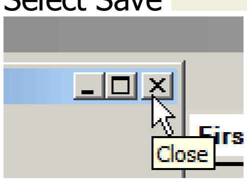
5.27.6 Set a report template to inactive

An example where you may want to set a report template to "inactive" is a report template is presently showing for selection in a grid, but you do not want to delete it, just not have it show right now.

1. View the display features of a report template by selecting it from the Report Templates grid


2. Uncheck the Active field

3. Select Save 

to save the report template export file and exit out 

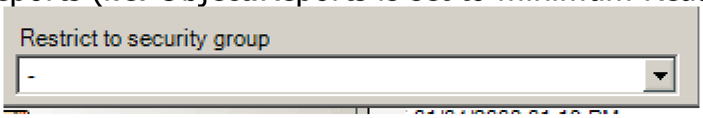
of the display window

4. This report template will now no longer show for selection in that grid

5.27.7 Restrict access to report template by security group

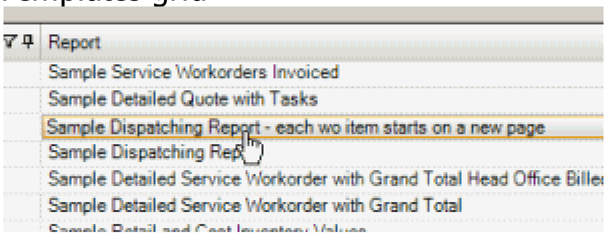
You might want only users of a specific security group to have access to certain report templates. If so, you can select that security group for that specific report template.

- **NOTE**: If no security group is selected as in the screenshot below, then the report will be available for all security groups that have access to view reports (i.e. Object.Reports is set to minimum Read Only)

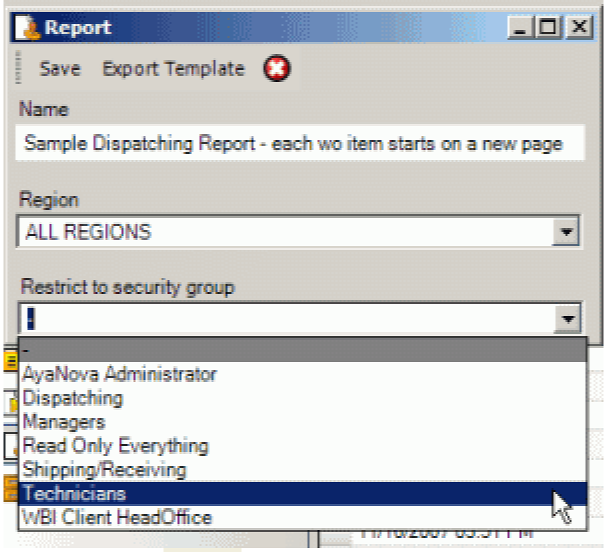


- **NOTE**: The AyaNova Administrator user continues to be able to view the report regardless whether set to a specific security group or not.

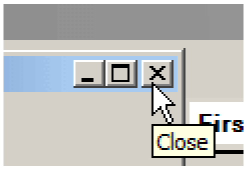
1. View the settings of a report template by selecting it from the Report Templates grid



2. Drop down the list of security groups and select the specific one you want this report template to be available to.



3. Select Save 

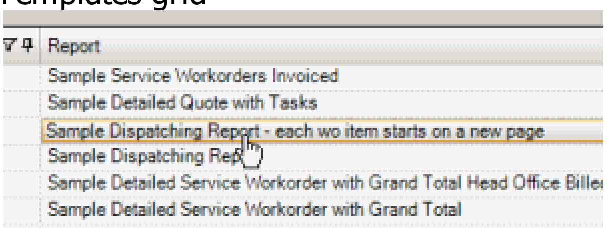
to save the report template export file and exit out 

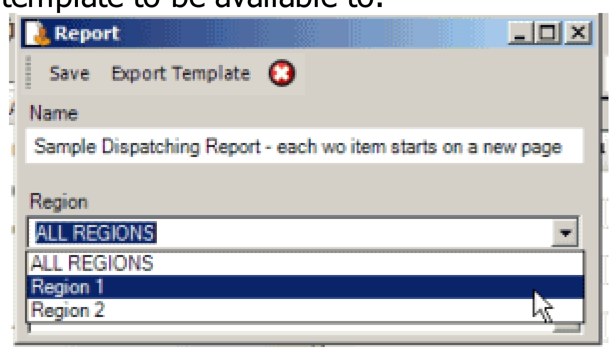
of the display window

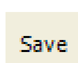
5.27.8 Restricting access to report template by Region

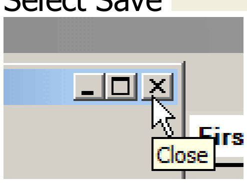
You might want only users of a specific Region to have access to certain report templates. If so, you can select that Region for that specific report template.

- **NOTE**: By default, the default region that is for all regions is selected for each report template unless you have changed it.

1. View the settings of a report template by selecting it from the Report Templates grid


2. Drop down the list of Regions and select the specific one you want this report template to be available to.


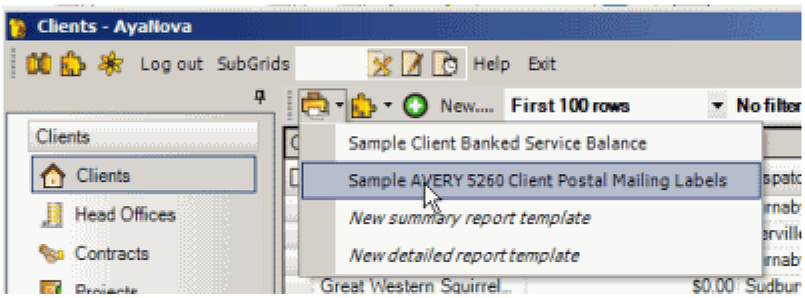
3. Select Save 

to save the report template export file and exit out 

of the display window

5.28 Report Template Designer

5.28.1 What do I use Report Templates for?



Report templates define the content, layout and presentation of data either from the records you have displaying in a grid, or from the entry screen you are viewing.

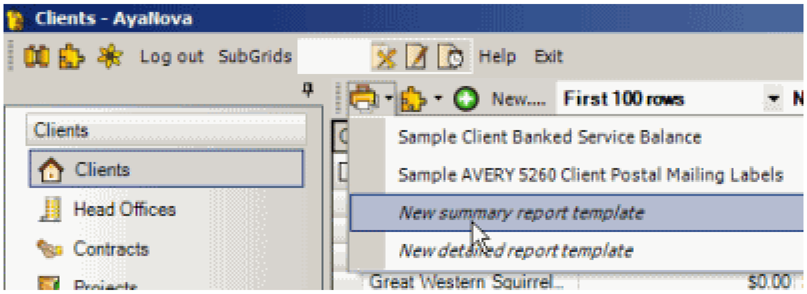
When you select Print menu option from any grid or entry screen, a list of existing report templates are displayed for selection.

When AyaNova is installed, it contains many sample report templates. You can customize any of these existing sample report templates as well as create your own report templates. You can also export report templates to a file for others to import into their AyaNova database and vice versa. And you can also download and import additional sample report templates from the AyaNova Support Forum

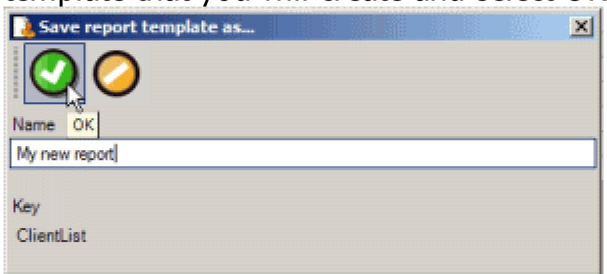
NOTE: A report template can only display data based on the datafields available for selection in its dataset. Not all fields from other objects are available for all reports.

5.28.2 How to creating a new report template

1. Select the menu option Print from the location where you would like the new report template to be accessed from
2. Select either *New summary report template* **or** *New detailed report template* to open the report designer with that grids dataset.



3. The name defaults to Report - enter in a descriptive name for this report template that you will create and select OK

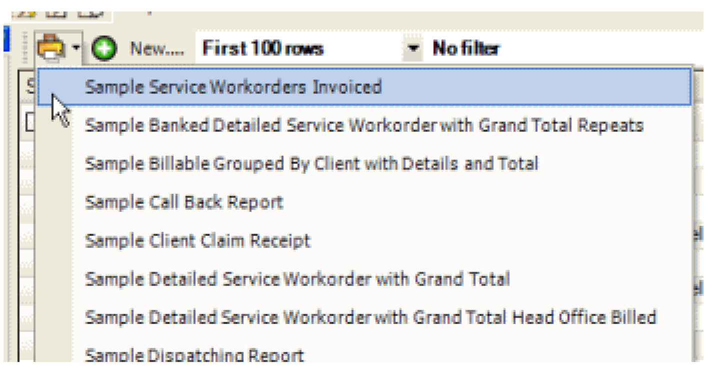


4. The internal [report designer](#) screen appears

5. Continue with your report template design

For summary report templates see also:
[How do I create a report template using the Wizard?](#)
[How do I create a label report template using the Wizard?](#)

5.28.3 How to open an existing report template in the Designer



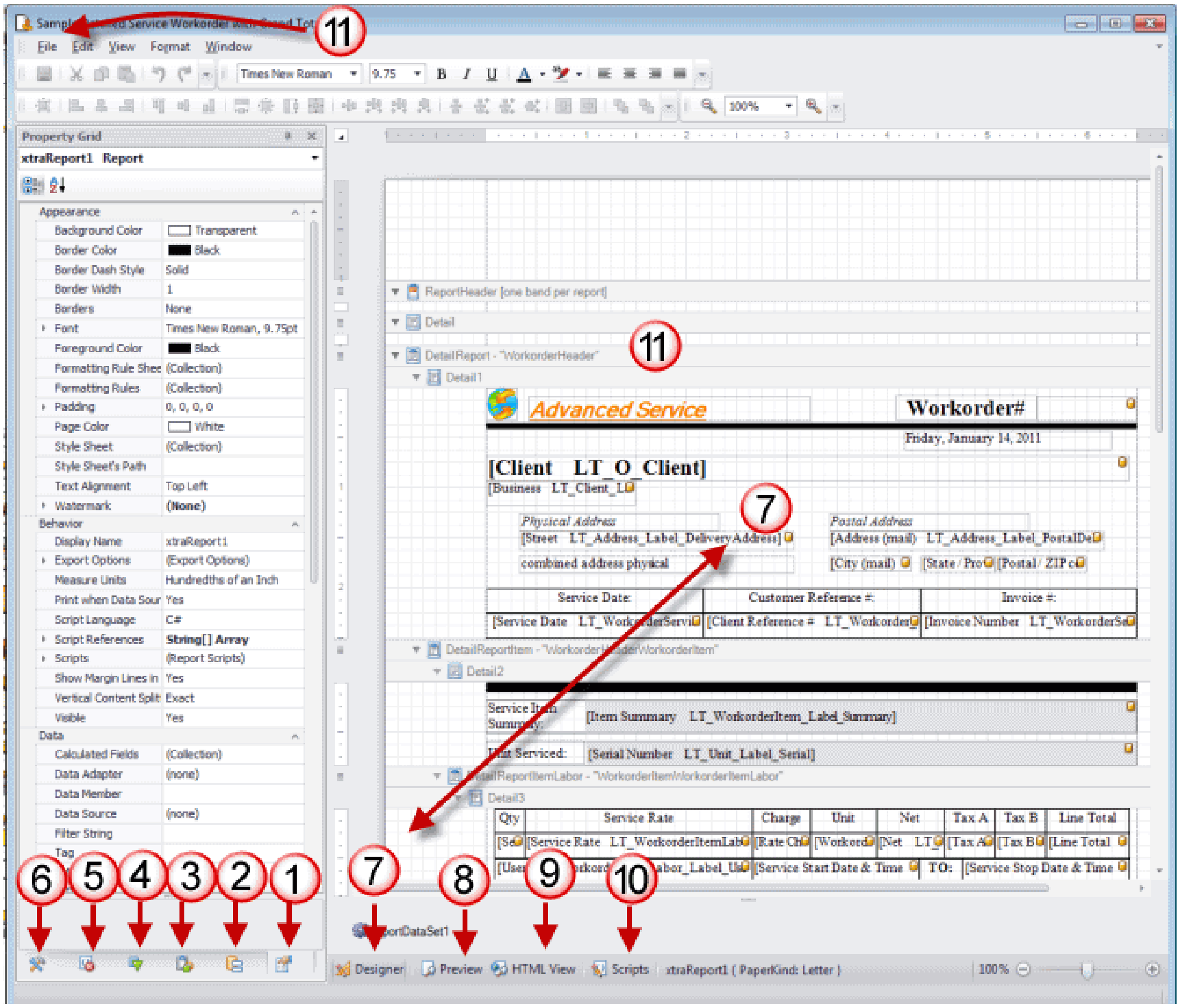
1. Drop down the  Print menu option button whether in a grid or within an entry screen

2. Hold down the SHIFT key on your keyboard and at the same time select the report template you want to edit.

3. The report template will open in the internal report designer so that you can now edit it as needed.

See also:
How do I put my company logo on a report template?
How do I add additional datafields to a report template?

5.28.4 The Report Designer



The Report Designer is where you design and edit a report template

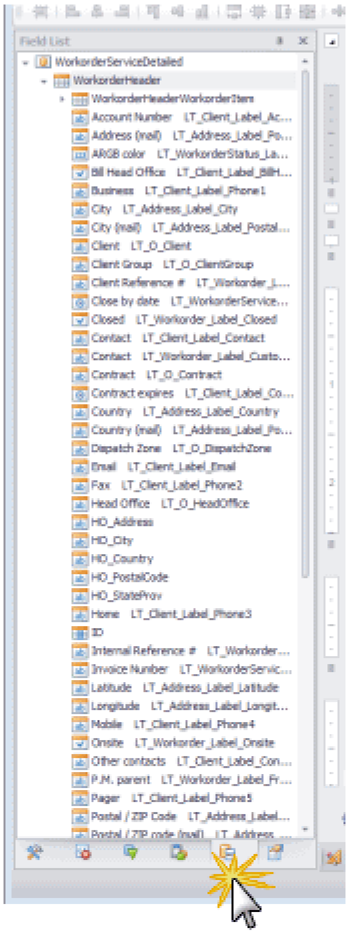
The Report Designer is shown when you have created a new report template

The Report Designer is shown when you are customizing an existing report template

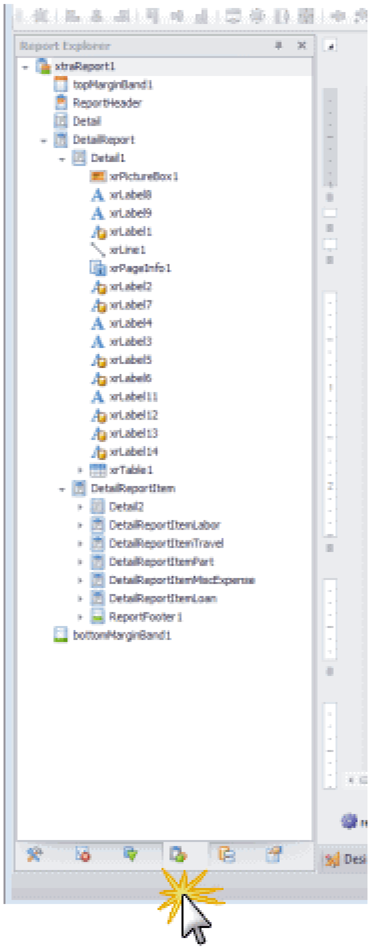
The Report Designer consists of the following layout elements:

1. Properties panel - (shown clicked on in the screenshot above). This panel is used to change properties of the report elements (entire report, or individual bands, controls and/or datafields) including font, border, scripts, what datafield bound to and more

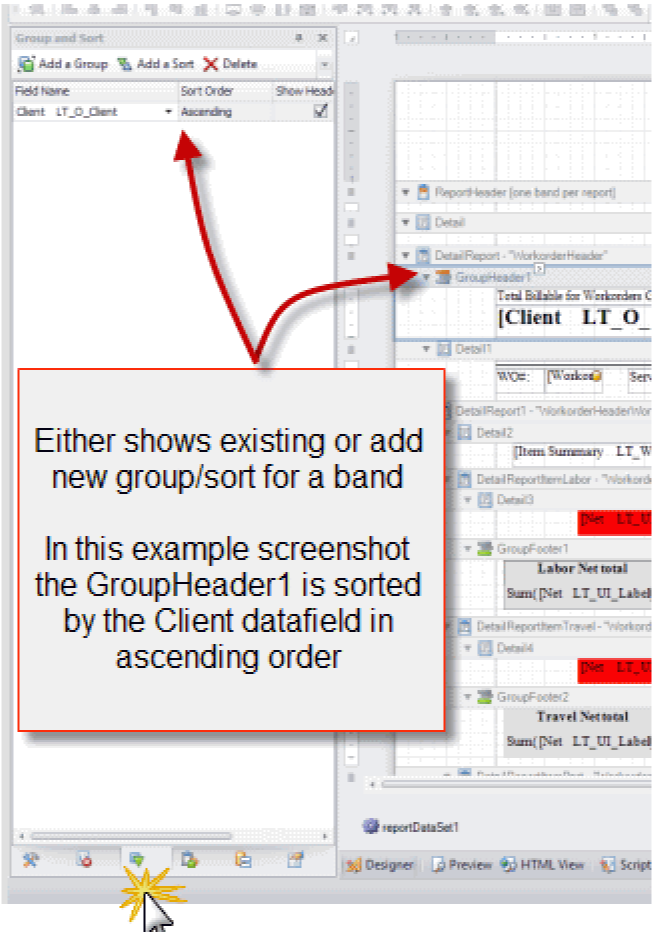
2. Field List panel - Shows the structure of a report's data source, and is used to bind report controls to data. . You can drag datafields directly onto the design area from here too!



3. Report Explorer Represents the Report Explorer tree in the report designer. It shows a report's structure in a tree form and provides easy navigation through the report.



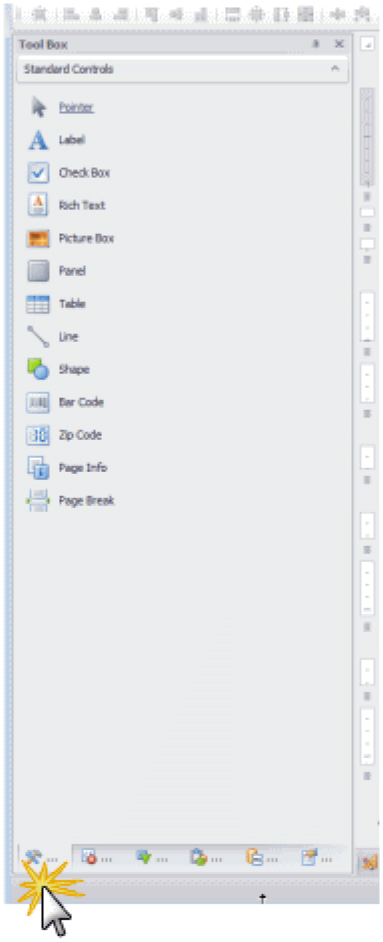
4. Group and Sort Allows you to quickly perform grouping and sorting operations throughout a report, and visually represents the report's grouping structure.



5. Scripts Errors panel **-** When errors are found in a report's scripts (after clicking Validate in the Scripts tab), lists these errors. Clicking an error opens the corresponding script section in the Scripts tab.

See also [using scripts in report templates]

6. ToolBox panel - This toolbox contains all the report controls and is used to drag and drop new controls onto the report's area.



7. Design Panel The main element in the End-User Designer which allows a report's layout to be edited. It contains rulers, design and preview tabs, a status panel and the current report's surface, including its bands and controls.

8. Preview To view results of what you have presently designed. Very useful as you do not have to close the report template while it is in design mode to test it out

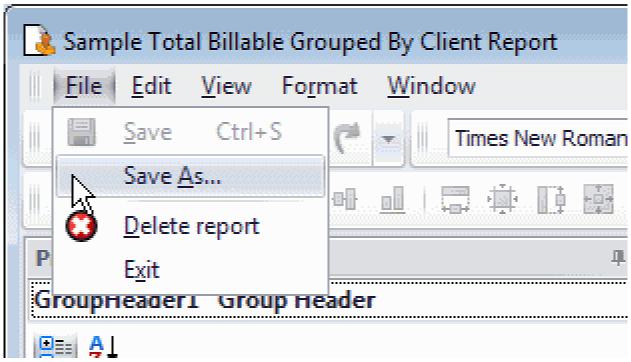
9. HTML View To view results of what you have presently designed if was viewing via a web browser.

10. Scripts To view all existing scripts for this report template. Can also edit the scripts via this. See also [using scripts in a report template]

11. Menu Represents the main menu where you save any customizations, or delete the report template.

Includes also the toolbars where you can format text and design.

File menu option is where you would Save As or delete the report template.



When discussing aspects of customizing report templates, we encourage you use this terminology so everyone is in the same loop.

5.28.5 Difference between Summary and Detailed report template

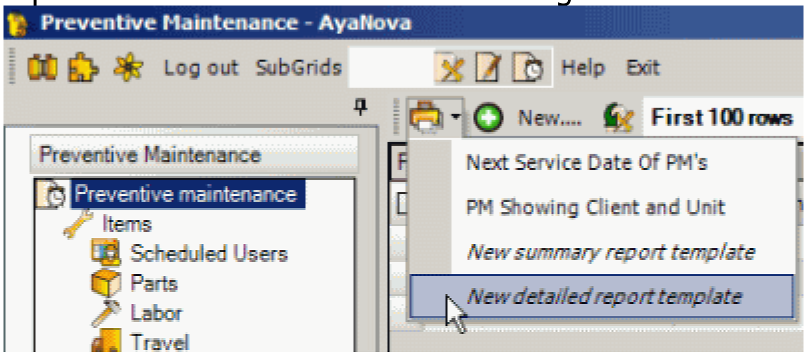
When creating a new report template, some grids/entry screens will have **both** New summary report template and New detailed report template for selection, whereas others have **only** New summary report template.

Summary reports refer to reports that work with simple "flat" data sources where there is a table of data with single rows.

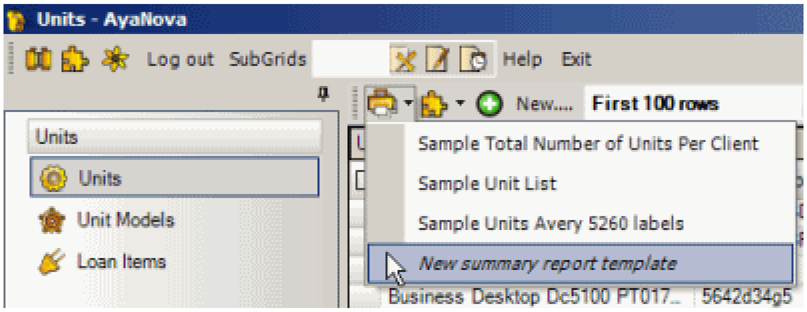
Whereas a detailed report refers to a report that reports off a more complex data source where each row has one or more child rows.

The majority of the reports in AyaNova are summary reports with detailed reports generally required for more complex inventory and work order reporting.

example from the Preventive Maintenance grid



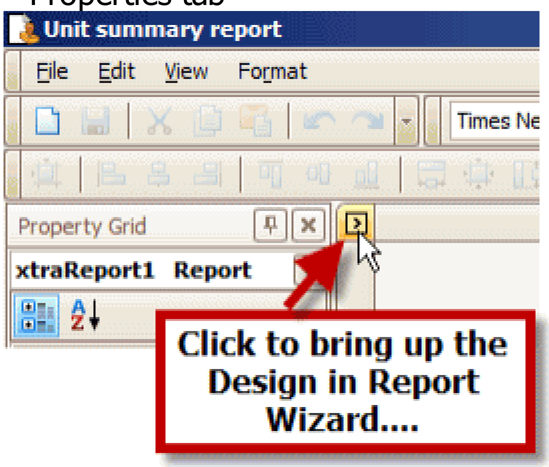
example from the Units grid

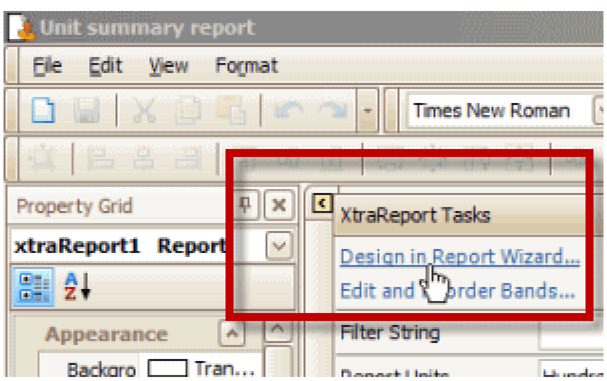


A summary report template is different from a detailed report template

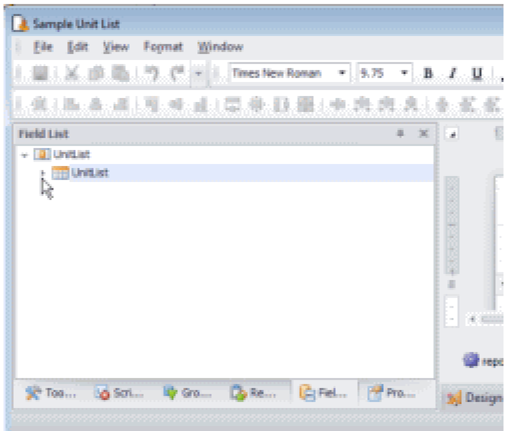
Summary report template in the report designer:

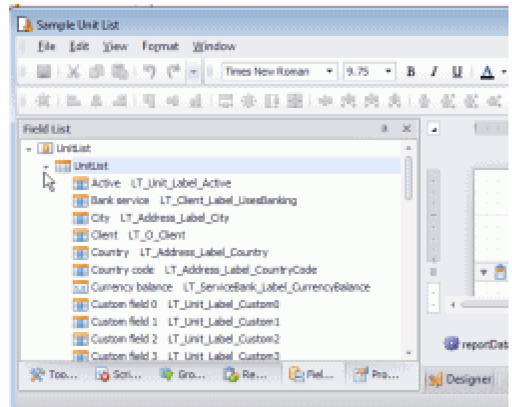
- Able to create a new summary report using the Report Wizard from the Properties tab





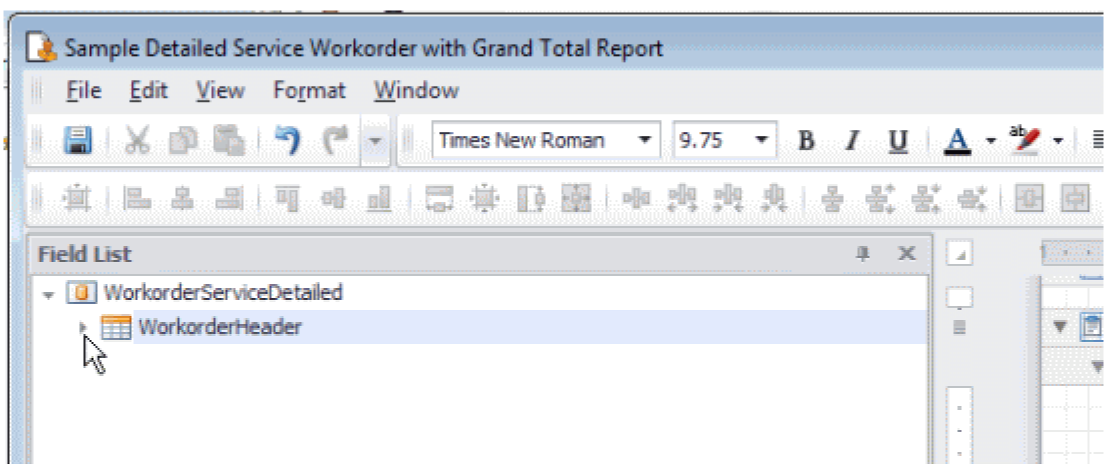
- Only one dataset displays in the Fields tab that when expanded shows the exact same fields as the columns that show for that grid

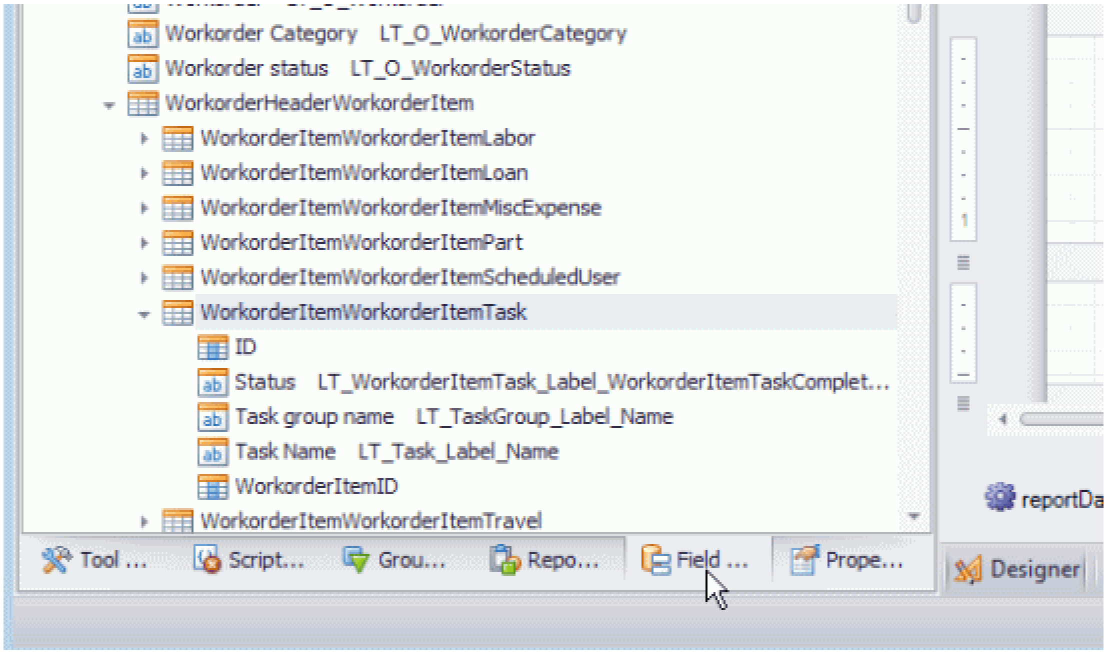




Detailed report template in the report designer:

- In the Fields tab, when you expand the dataset WorkorderHeader, you will see that there are sub-datasets WorkorderHeaderWorkorderItem, and under that WorkorderItemWorkorderItemLabor, WorkorderItemWorkorderItemPart and WorkorderItemWorkorderItemScheduledUser



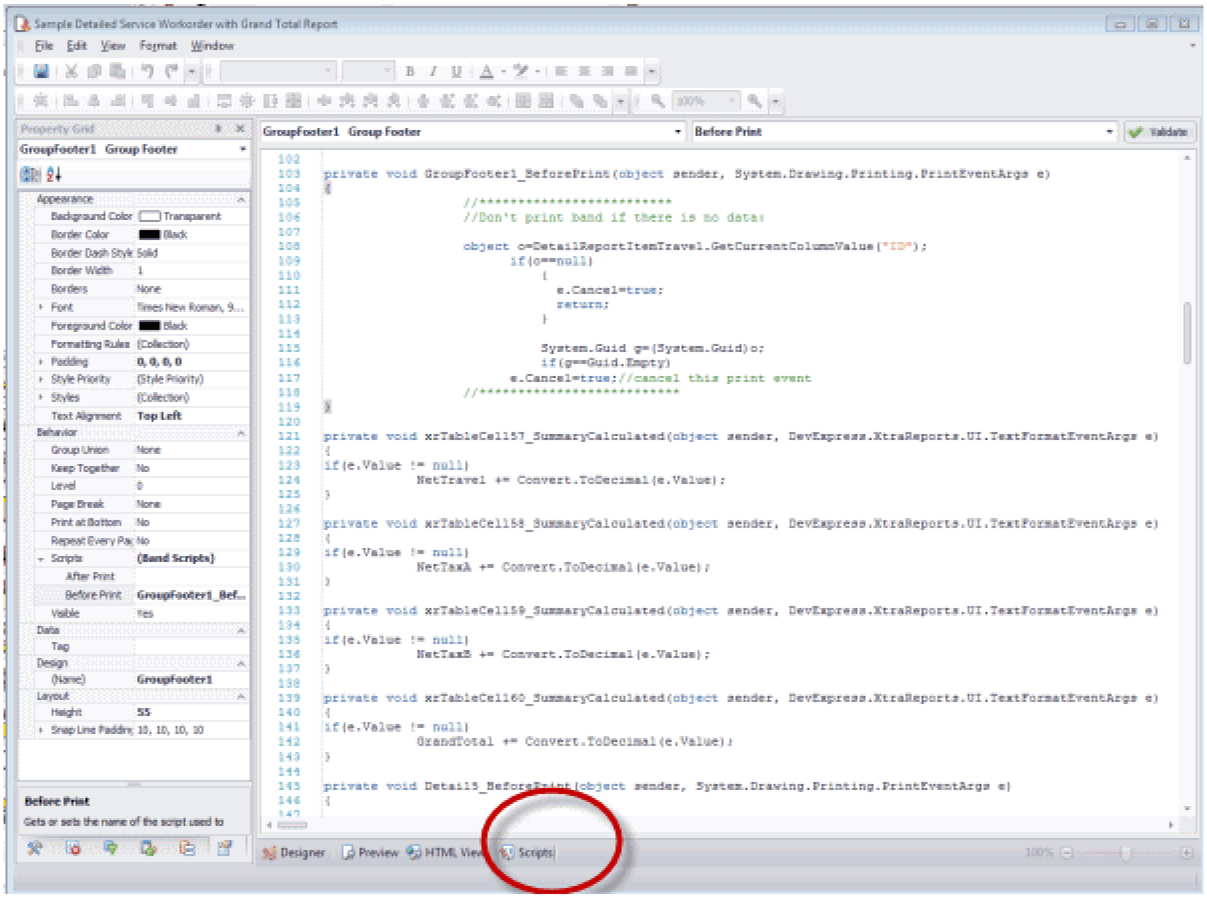


- Due to the sub-datasets, a Wizard for making report templates is not available for Detailed type report templates.

5.28.6 Using scripts in a report template

Scripts in a report template can be used to:

- obtain a grand total of amounts
- manipulate amounts
- display custom fields in a certain way
- set format
- provide custom summaries
- prevent bands from displaying if no data
- merge multiple datafields to display in the same field
- display checkbox instead of text True or False
- have custom field display as currency
- and much more uses

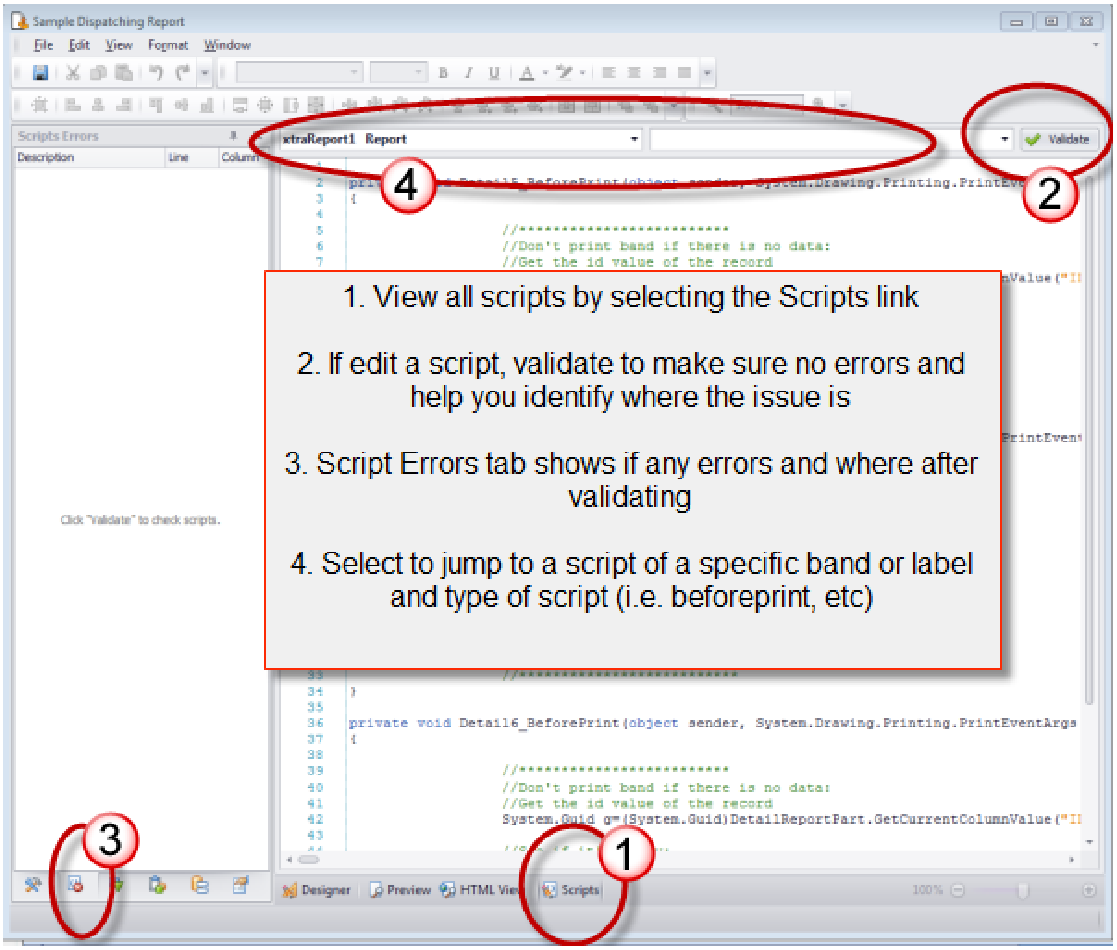


- Using scripts requires that you have a working knowledge of C#

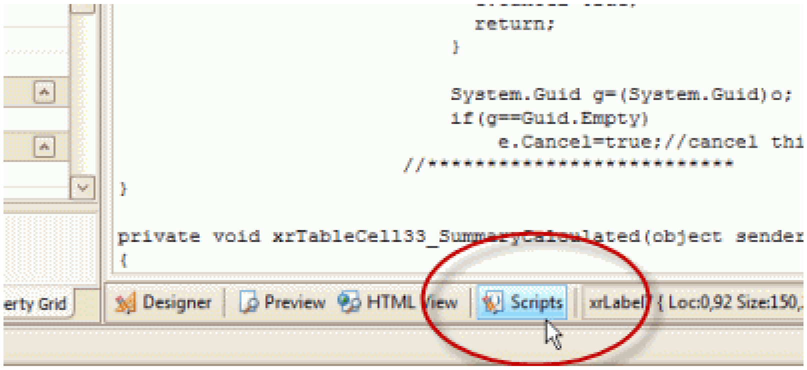
  You can familiarize yourself with report scripts by: examining the existing sample report templates, checking out the AyaNova Support Forum https://forum.ayanova.com , and in the tutorials in this Help file.

  Another suggestion is to do searches online (i.e. Google) entering in text such as C# and whatever it is that you are trying to do - for example to get an overview of what might be needed, enter the text ***C# string empty*** in a Google search to determine if a string is empty and read over the results to get ideas and examples

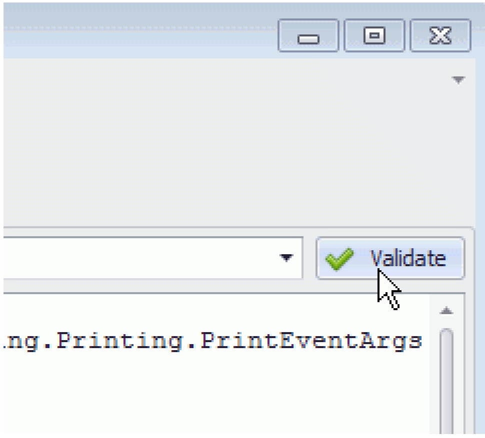
1. **View existing scripts**
2. **Validate existing scripts**
3. **To see Scripts Errors after validation**
4. **To jump to a specific existing script**
5. **To create new script for a specific band or label**
6. **Providing script support**



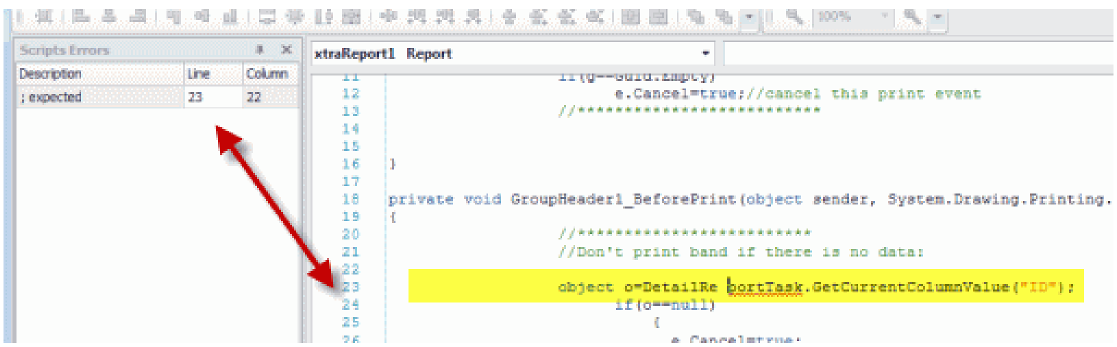
1. To see existing scripts in a report template, click on the Scripts panel selection



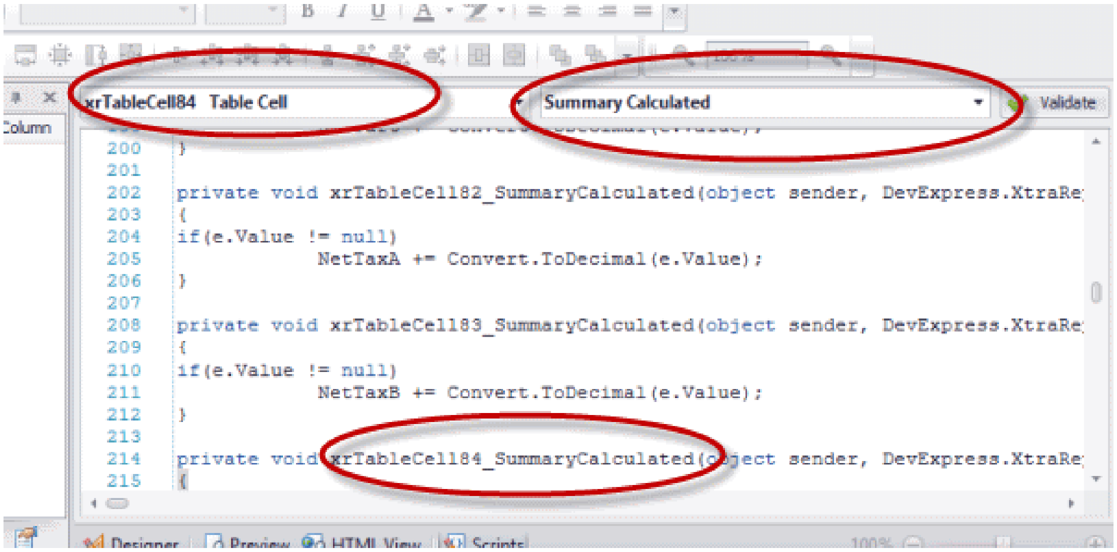
2. If you make any edits to any scripts, use the Validate to make sure no errors. It will not fix the errors, but it will let you know if there are errors.



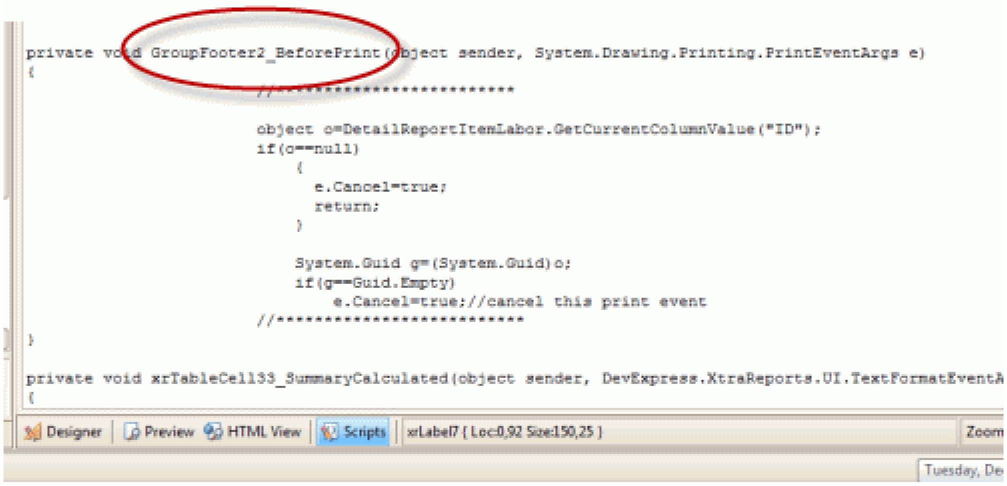
3. Errors will display in the Scripts Errors tab so you can see what line and column has an issue, and resolve it. Of course, the error description because of the way scripts are, may not be specific to resolve the issue - as in that in the screenshot below, the issue is actually because the DetailReportTask has a space in it.



4. If you want to edit a specific script for a specific field or band without scrolling through them all, just drop down and select the band or field the script is for <u>and</u> what type of script it is



- Note of course, that if you select a band or script, and a script type that does not presently have a script, the report designer will input for you at the bottom of the list of existing scripts as assuming you meant to create a new script
- You can identify which script is for which band or label etc as each is identified in its code. For example, the screenshot below, we know this is the Before_Print script for the GroupFooter2 band.

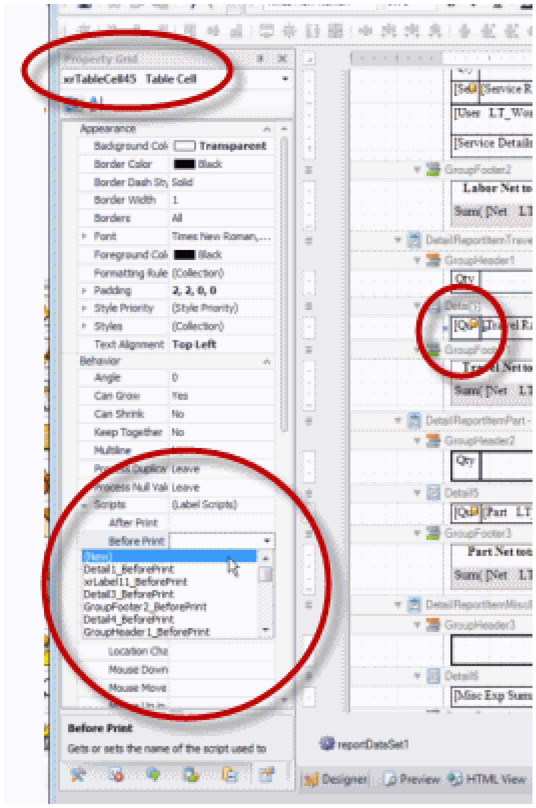


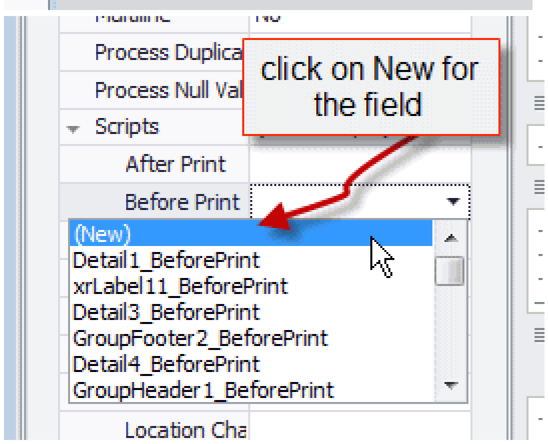
5. Create a new script for a specific band or label either from the Properties for the band/label, or selecting within the Scripts panel:

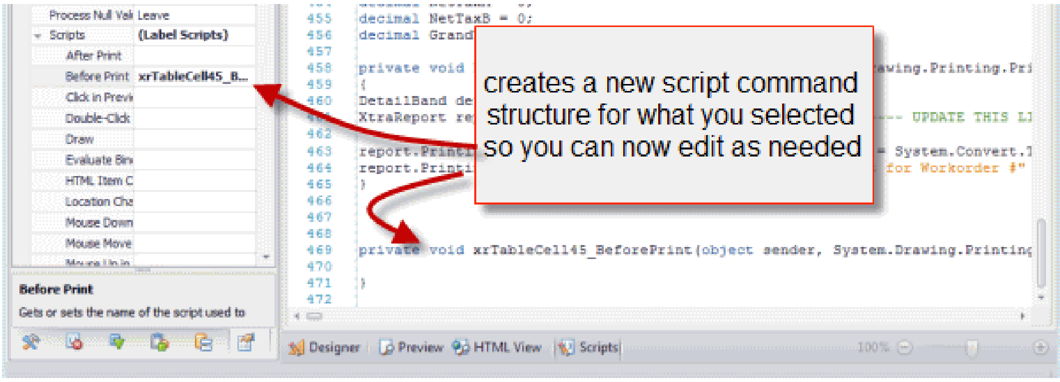
   a. Create new script from the Properties for the band/label:

      i. click on the band or label you want to create the script specifically for

ii. view the Properties tab
iii. expand the Scripts property, and select **New** for the script type you want
iv. the script command structure will be added into the Scripts for you to now edit as needed

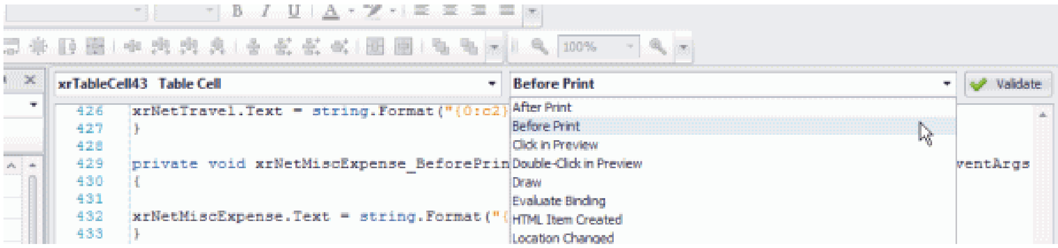






b. Create new script from within Scripts panel:

i. instead of via the Properties tab, just select the band/label from the selection at the top of the Scripts panel
ii. than select the type of script (i.e. Before Print, etc)
iii. the script command structure will be added into the Scripts for you to now edit as needed



6. Providing script support is outside of the realm of AyaNova's free support.

If you are interested in having a custom report template created for you, provide the following information sent directly to *support@ayanova.com*

- a mockup of the report you would like (in Word, Excel, PDF) or existing report template exported to file from AyaNova that you want further customized.
- identify from what AyaNova entry screen or grid this report is for (from Service Workorder entry screen, from Client entry screen, from Labor grid in Service navigation pane, etc)
- identify in red font in the mockup the datafields that correspond with fields of that AyaNova entry screen
- if report will use logos or images, be sure to provide also attached to your email
- any additional information you believe may be relevant that will help me understand how the report will look and act with actual data and how it will react based on the data.

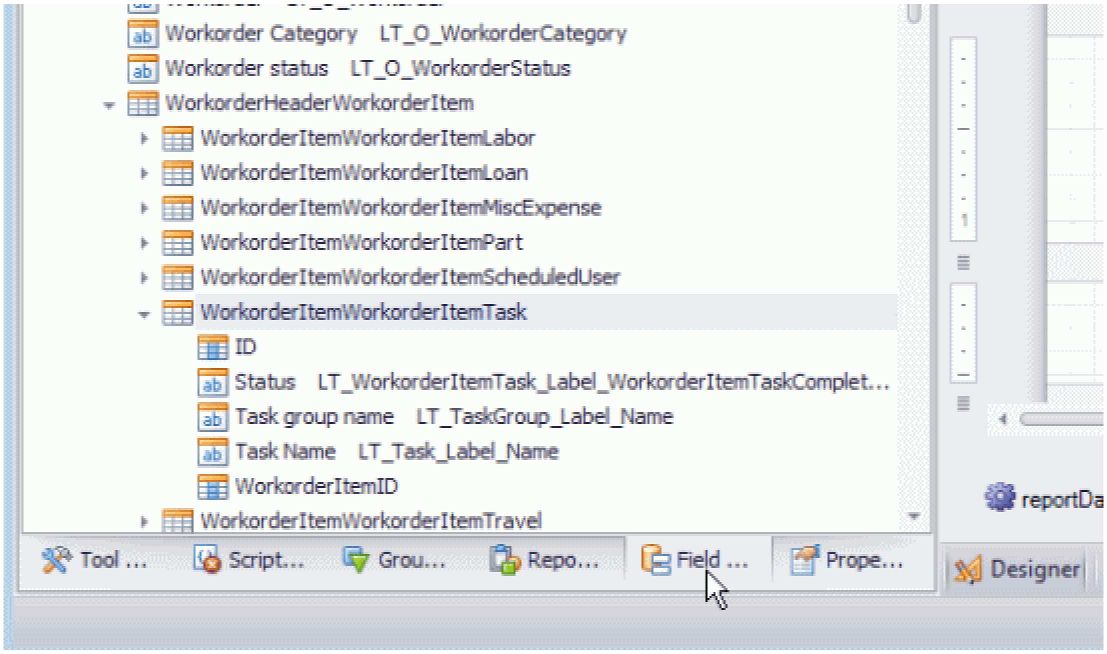
5.28.7 Accessing additional data fields not available in Field List

Please note that the following information is meant for experienced developers only. Additional support is considered outside of our no charge support and a fee to provide may be incurred. We are happy to provide you with custom scripts as needed for a fee - send us detailed information on what you would like and we would be happy to provide a quote.

AyaNova 6.4 and higher provides the ability to include user chosen ad-hoc information in the report templates via scripts using the AyaNova API methods from the code behind reports in the report editor.

> For example, you may want what is in the Unit entry screen's Custom fields to show on your detailed type service workorder report template.

Normally what datafields are available for dragging and dropping onto the design panel in the report designer are hard coded in and based on those directly available from that grid/entry screen where you are creating the report template from.



> For example, in the screenshot below this report template made from the Service Workorders grid will have the WorkorderItem Request Date and WorkorderItem Summary, but does not list for dragging and dropping the unit's Custom datafields.

Whereas if use scripting and the AyaNova API methods, you can "call" the data from the business objects in AyaNova.

The AyaNova Support Forum API section https://forum.ayanova.com/c/ayanova-reporting-development/development-sdk-api/ provides a few examples using the API to "call" and display data.

Also check too in the Report Template section of the forum such as https://forum.ayanova.com/c/ayanova-reporting-development/ayanova-printing-report-templates

Also refer to the https://api.ayanova.com for available Members. For example:

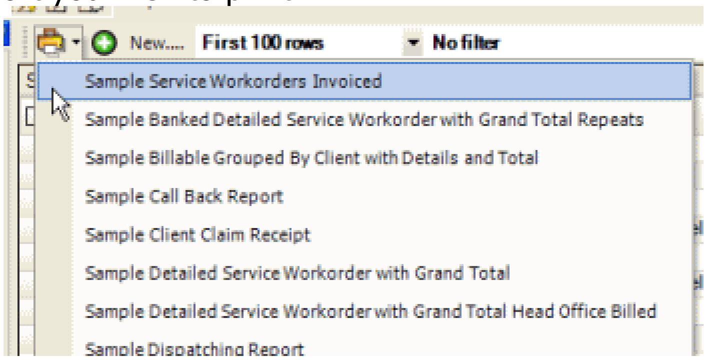
- in https://api.ayanova.com click to expand the GTZW.AyaNova.BLL namespace
- scroll down and view the Client Class
- under Member is listed that you might use when scripting

Additional support on report template design including use of accessing additional data fields for your reports is considered outside of our no charge support and a fee to provide may be incurred. We are happy to provide you with custom scripts as needed for a fee - send us detailed information on what you would like and we would be happy to provide a quote.

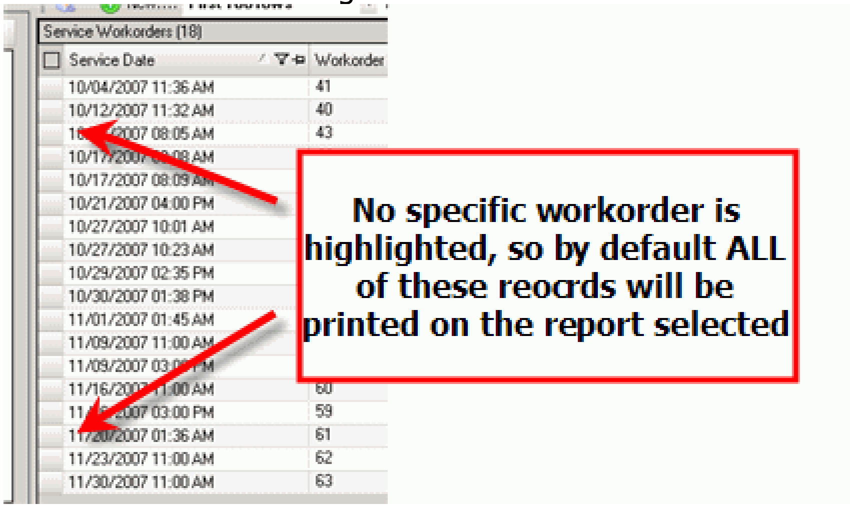
5.29 Printing

5.29.1 Printing from a grid

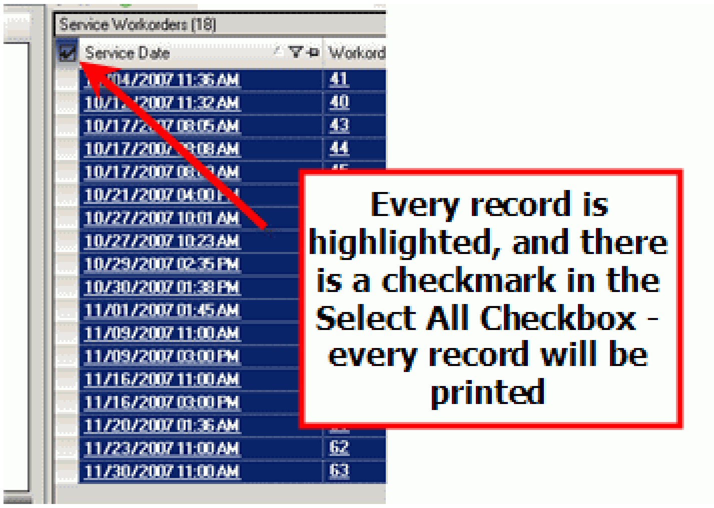
To print from a grid, select that grid's Print menu option, and select the appropriate report you wish to print



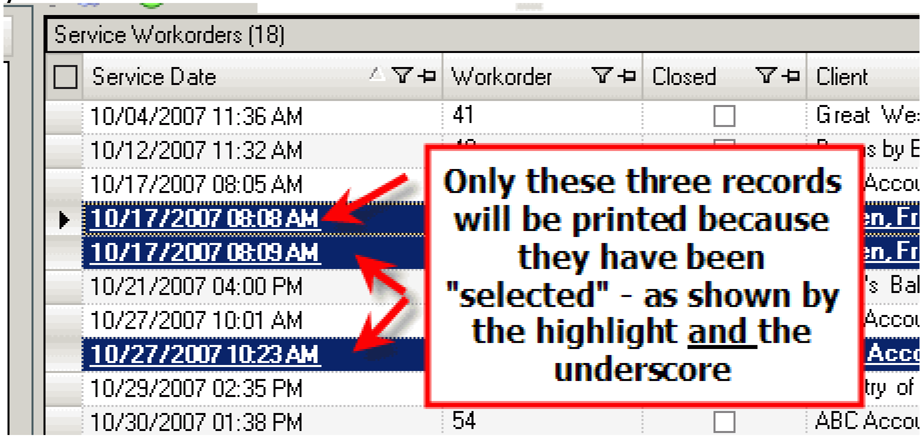
If records are not specifically selected, by default all record's data will be printed when select Print from the grid menu.




Or checkmark the upper left hand corner box (Select All Checkbox) which will automatically select all records, and all record's data will be printed when select Print from the grid menu.



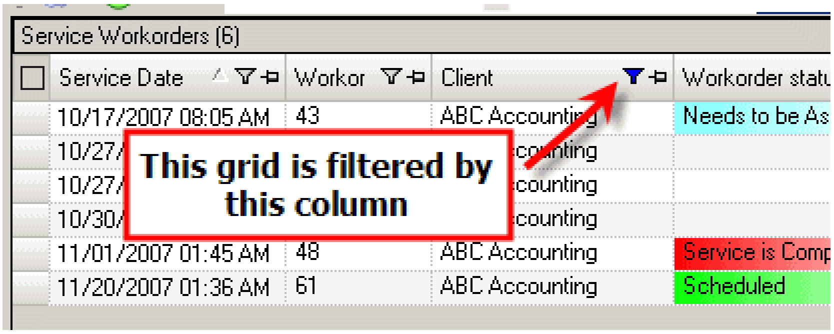
If a specific record is selected, only that record's data will be printed when select Print from the grid menu. **NOTE**: a record is selected when it is highlighted **and** you can see underlines on each cell



More than one specific record can be selected from an entire list of records by holding the CTRL key and using your mouse to select different records.

Or select multiple records by selecting the first record, and then hold the SHIFT key and select the last record - all records from first to last will be selected

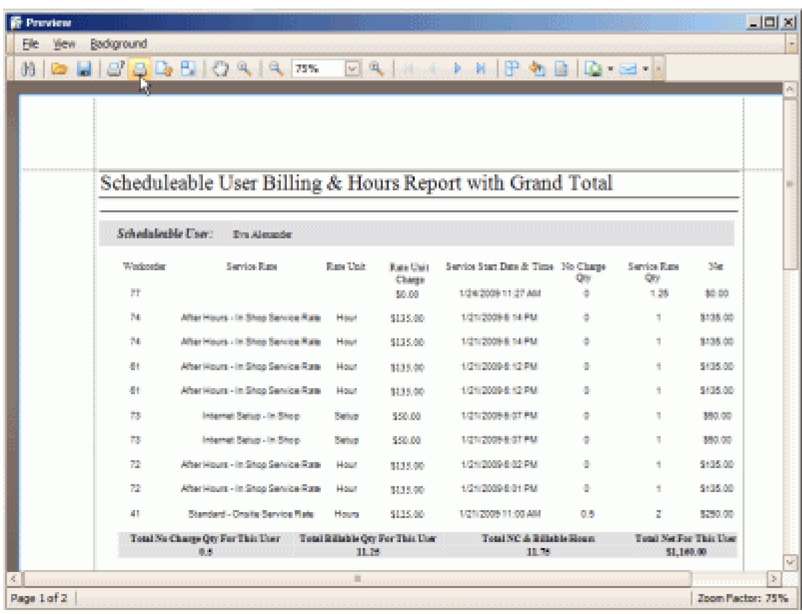
Or use the filtering feature of AyaNova's grids to filter to display only records you want to print from.



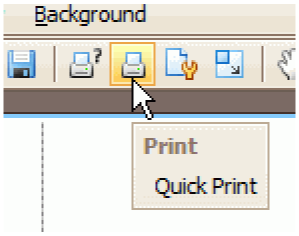
Unless a report template has specific over-riding internal settings, the data will be printed out in the same sort order the records are listed in the grid.

See also:
[Filtering a grid]
[Sorting a grid]
[How do I filter a grid and print a report for the records that show]?

Once you have selected the report template for the records you want to print about, the Print Preview for this report will display.



Select the Print menu option to print to your default printer.

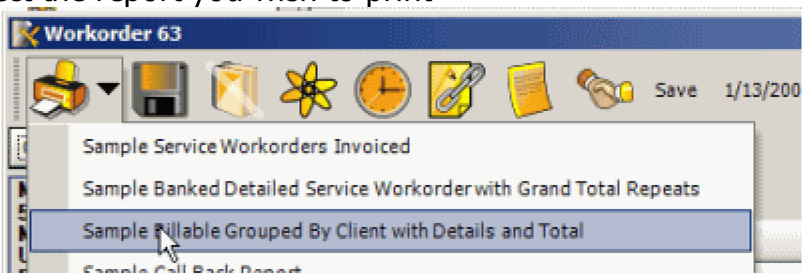


See Also:

[Exporting a report to a file]
[Sending a report via email]
[Changing Printers]

5.29.2 Printing from an entry screen

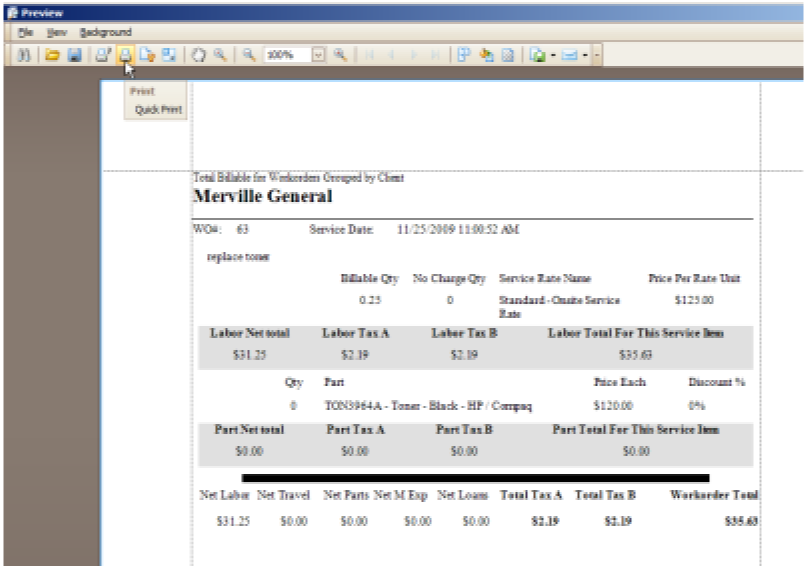
To print from any entry screen, select that entry screen's Print menu option, and select the report you wish to print



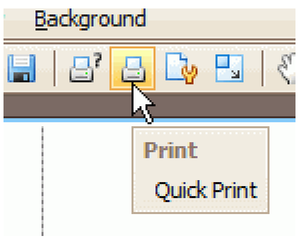
- Do not forget that you do need to select Save **before** printing, otherwise your changes won't show on the report.
- Each object entry screen displays the same report template selections as the grid for that object.

  For example, the Service Workorder grid's report templates listed via the Print menu are the same report templates available for selection within the Service Workorder's entry screen

The Print Preview of the report you selected will display.



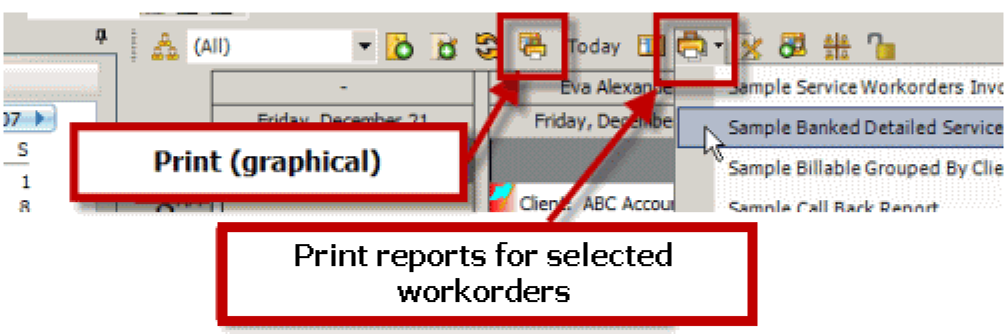
Select the Print menu option to print.



See Also:

[Exporting a report to a file]()
[Sending a report via email]()
[Changing Printers]()

5.29.3 Printing reports from the Schedule Screen



1. Select the workorder items you want to print - you can select more than one by holding the CRTL key and using your mouse.

2. Select the menu option **Print Selected Workorders** to display a list of Service Workorder report templates

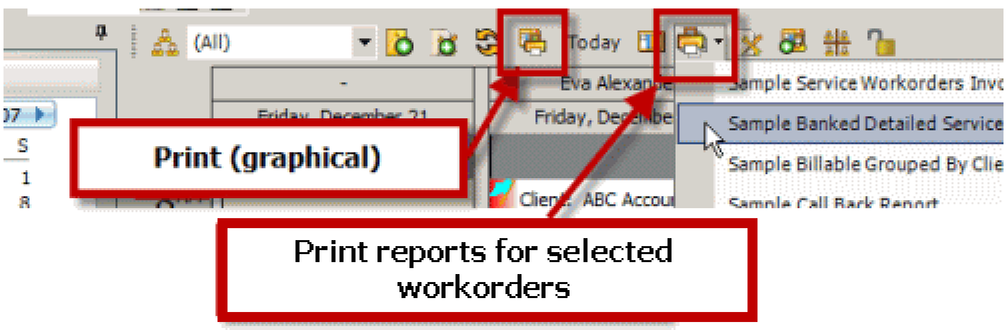
3. Select the report template you want to print based on those workorder items you selected.

This makes it even easier for the tech to view their schedule, select the workorder items they need print outs for, and print them out to go perform the service.

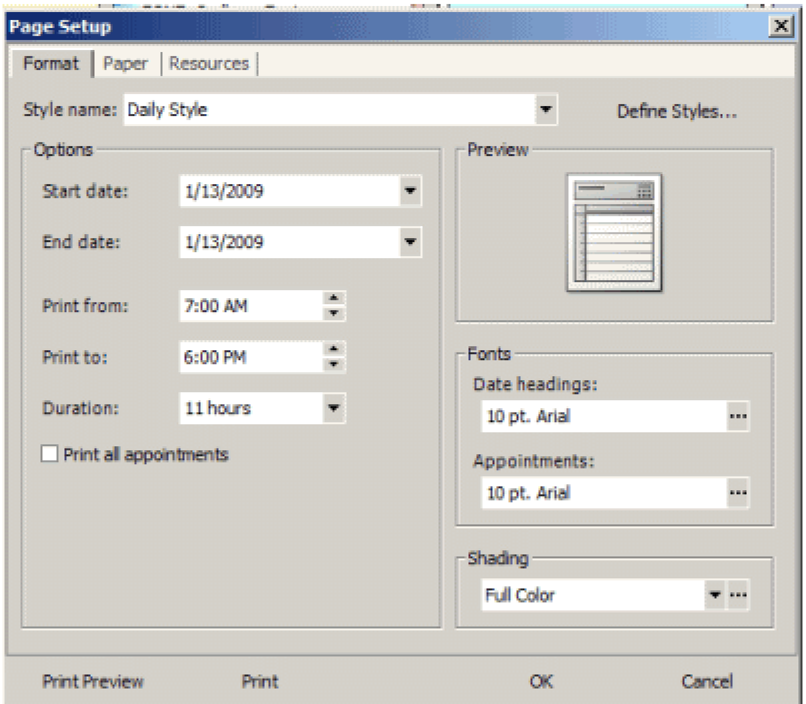
> **NOTE**: The Print selected workorder items menu option only displays if you have selected one or more workorder items in the Schedule screen.

See also:
[How do I print out dispatches for myself from the Schedule screen?](#)

5.29.4 Graphical printout from Schedule Screen



Select the Print menu option to bring up the Page Setup window where you can select the Style Name:, Start Date and End Date, the time range, and if a specific resource.

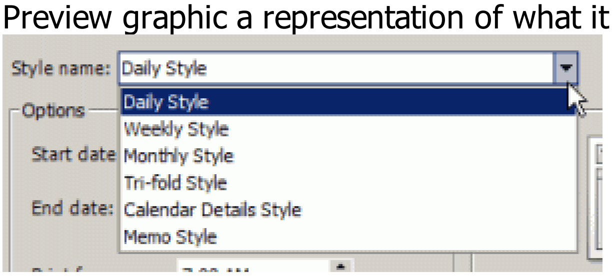


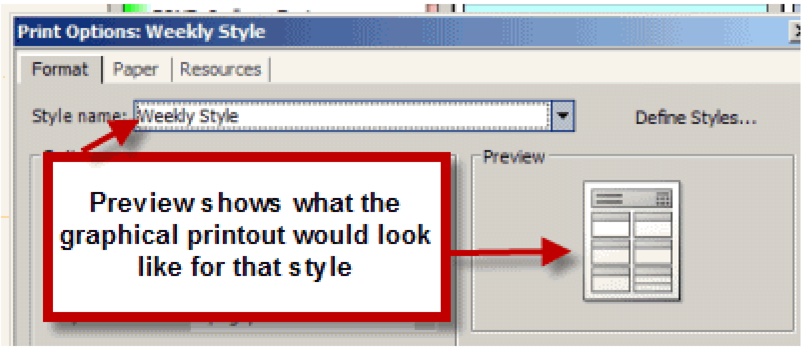
NOTE: This Print graphical option **requires** that you specifically state what you want to print in this Page Setup **before** you can preview or print. It does **not** rely on what you were showing in the Schedule screen nor what you selected in the Schedule screen.

Identification of fields of the Page Setup window:

Format tab:

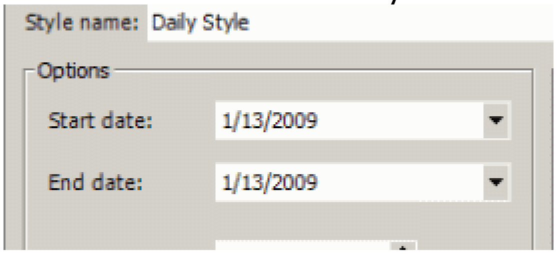
Style Name:
This identifies what view type you want printed out - and you can see in the Preview graphic a representation of what it would show





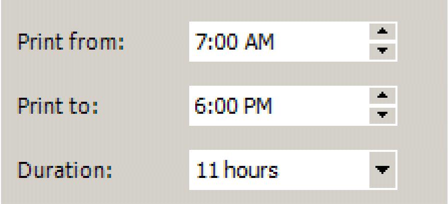
Start Date: and **End Date:**
Specify here the start and end date of the graphical view you want to print out. For example, if you want to print out a Daily Style, then edit the start and end date to be the same date.

These dates default to today's date. There is not a setting to change the default



Print From: and **Print To:**
Specify the start and end time in these fields

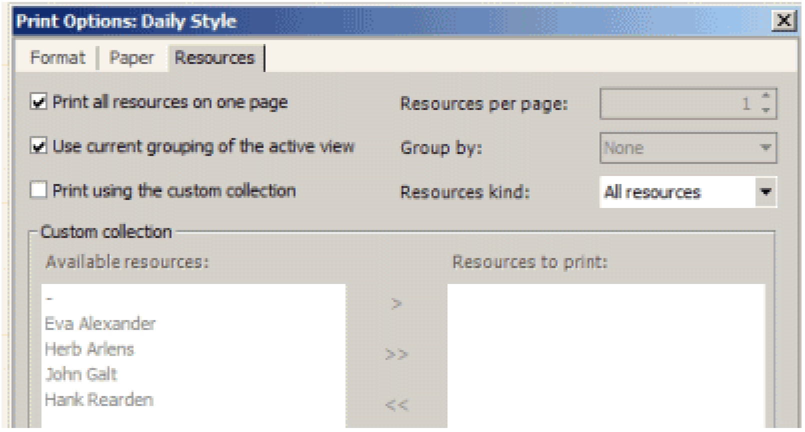
These times default to 7:00AM to 6:00PM. These is not a setting to change the default.



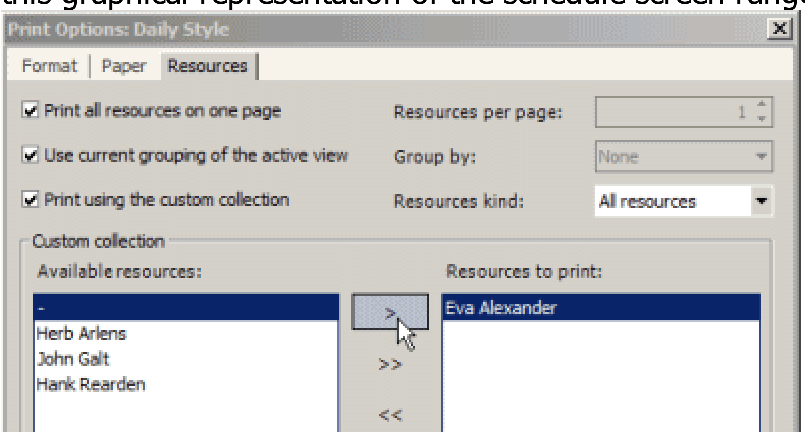
Duration:
This is tied to the Print From: and Print To: setting. If you select 12AM to 8AM for your Print From: and Print To: this would be 8 hours.

Resources tab:

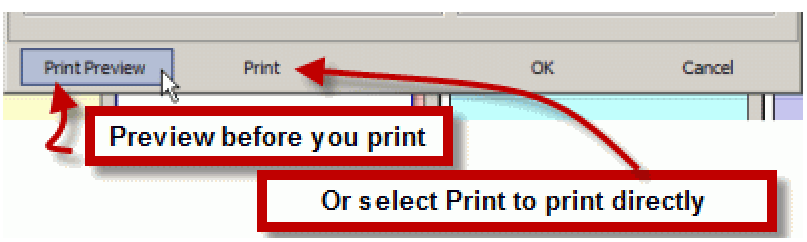
On first opening, this tab will default to print all the resources on the same page - scheduled items for all schedulable users.



If instead you checkmark the **Print using the custom collection**:, you will be able to specifically select which resources (schedulable users) you want to print this graphical representation of the schedule screen range for.



We encourage you to try different Styles, etc to get the graphical print out you want. Preview to see what it looks like.

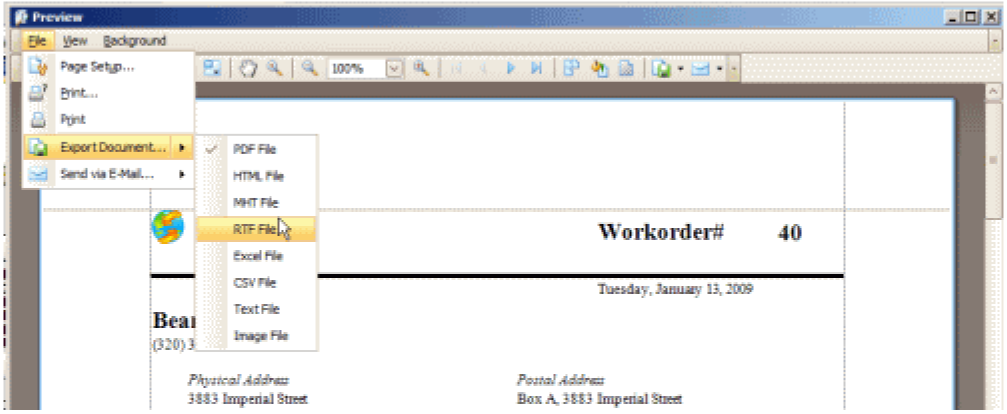


See also:
How do I print out a graphical day view of the Schedule?

5.29.5 Exporting a report to a file

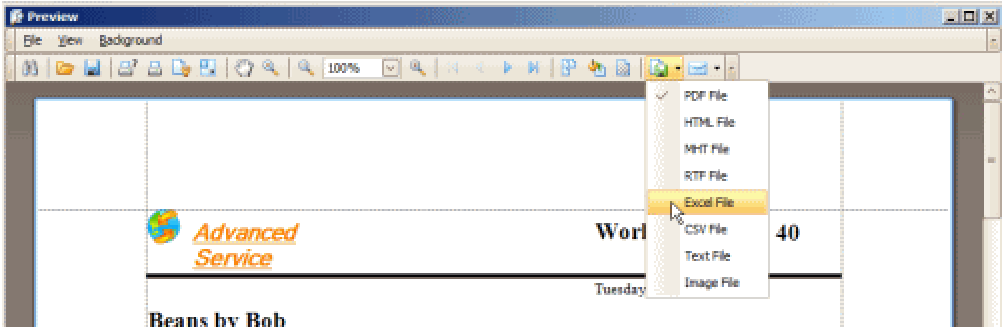
In some cases, instead of printing a report to your printer, you might want to have the report saved to a file

1. In the Print Preview screen of a report, select File -> Export Document... -> the format you want the report saved in



The Print Preview screen displays whenever a report template is selected. There is not an option to disable the Print Preview.

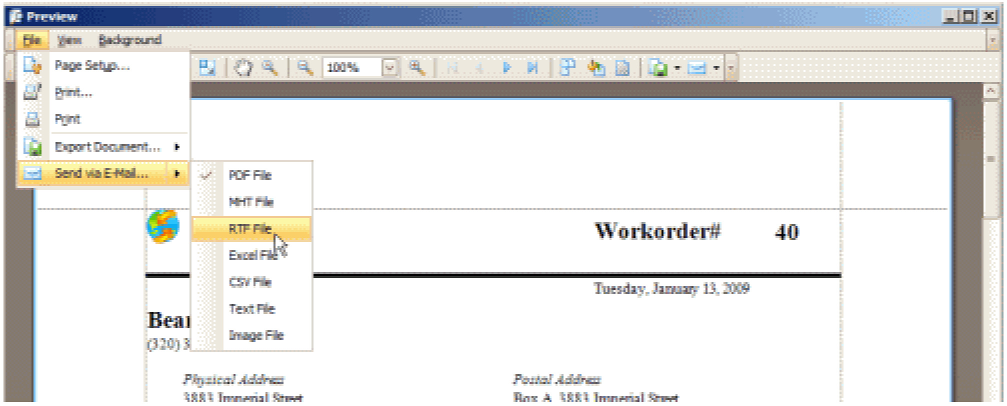
2. Or select the menu option Export Document... and the format



5.29.6 Sending a report via email

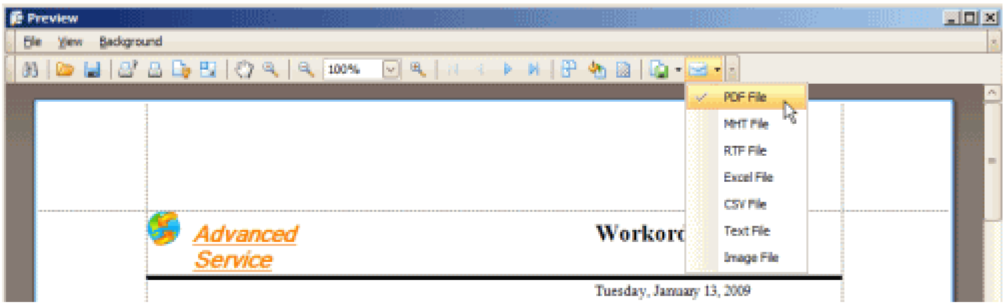
You can email a report directly from the Print Preview window

1. In the Print Preview screen of a report, select File -> Send via Email... -> the format you want the report saved in

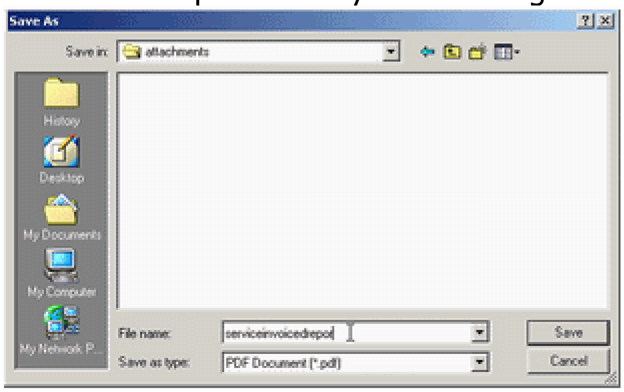


The Print Preview screen displays whenever a report template is selected. There is not an option to disable the Print Preview.

2. Or select the menu option Send via Email... and the format

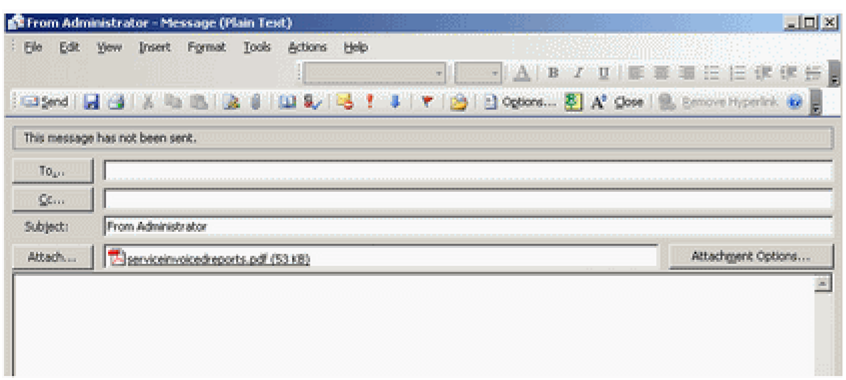


3. Enter in the report name you want to give it and save the file



4. Then your email program on your computer will open with that document already attached ready to be emailed

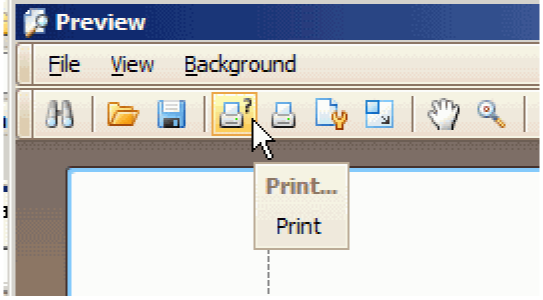
Below is a screenshots after having selecting PDF file as the format, editing the filename of the attachment, and your default email program automatically opening with the file attached with the subject line “From (username)” where (username) is the name logged into the computer as.



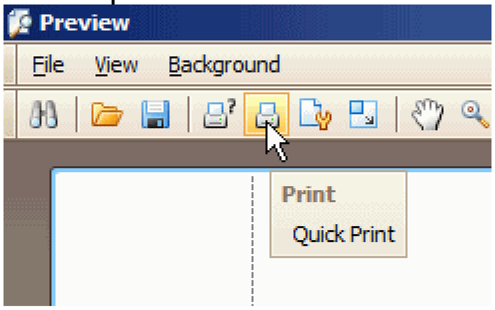
5.29.7 Changing printers

By default, AyaNova will print to your Windows default printer.

If the report you want to print should be printed to a different printer, select the menu option **Print...** in the Print Preview so that you can select the specific printer

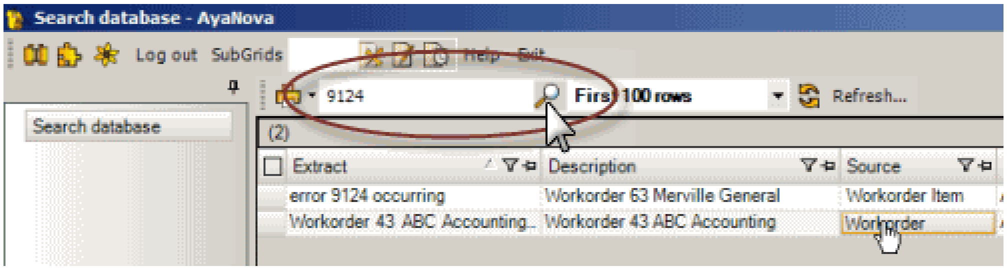


Whereas if you select the Quick Print, the report will print to your Windows default printer



5.30 Search Database

Use the Search Database feature to perform a search on text **entered by users** in AyaNova.



The Search Database feature allows wildcard searches and multiple word searches.

Wildcard search

You can use the asterisk wildcard character at the start or end of a word to find all records that partially match your search word.

For example “cab*” would match the word cable or the word cabinet. Wildcard is asterisk character * and can be used at the start or end of any term in the search phrase: “*sun*” would match “Samsung”, you can also do it more than once so “*sun* not*” would match “Notes about Samsung”

Multiple word searches

You can enter multiple words and AyaNova will return search results with the words in the exact order, as well as within the same text field but not necessarily in that exact order.
AyaNova will display rank indicating whether the words are found close to each other.

Combination of both

You can enter search terms that include the wildcard character, as well as multiple words.

For example, you may enter in “install* software” to return any records that have both the text install and software, whether install is part of the word installation or not, etc.

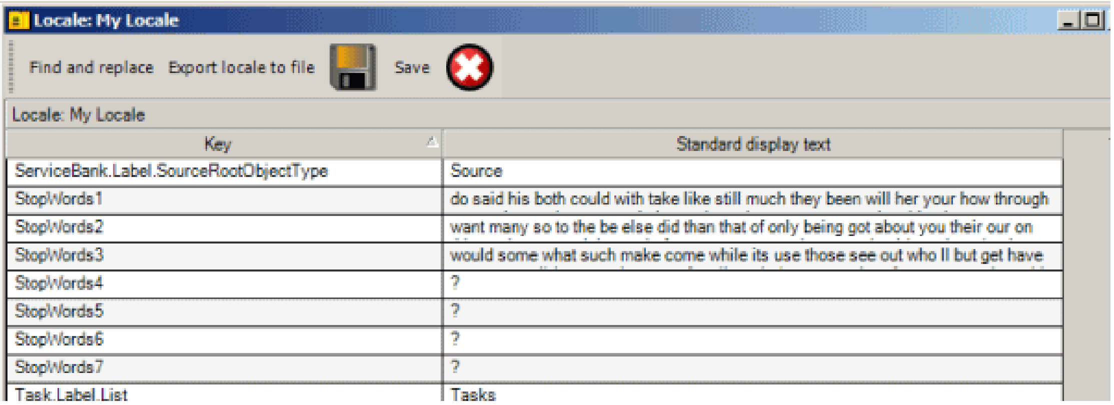
Stop Words

Words such as “the”, “same”, “not”, "between" etc are common words that are excluded from searches.

You can edit what stop words to use via creating a custom locale, and editing the StopWords Keys. And with StopWords being set via the locale used, you can enter your own common words in the language of your locale

For example, if you have a client whose name is Between Company, and you want to be able to perform a search on the text between, you would create a custom locale that does not include this stop word

Refer to How do I create and/or customize an existing locale? for an overview of customizing a locale



NOTE: Entering in a client's name into the Search Database feature DOES NOT return all workorders where this client was selected. That is NOT the function of the Search Database feature. If you wanted to view all workorders for a specific client, see Listing all workorders for a specific client or unit

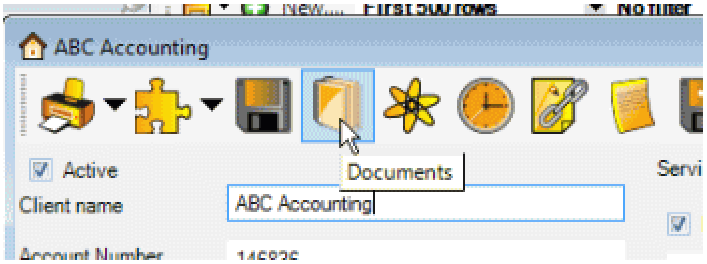
NOTE: If your organization will be entering CJK text (Chinese, Japanese, or Korean) language characters, it is recommended that you set this within Global Settings to True 

Do **not** set Use CJK Index to True if you are utilizing any other language other than Chinese, Japanese, or Korean as it will affect the speed of indexing.

Columns of the Search Database grid:

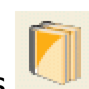
Rank	Identifies the internal ranking of the search term	
Source	Identifies the object where the search result was found For example: if Source displays Workorder, then the search result was found in a Workorder header (which may be a service workorder, quote or pm). It Source is Unit Model, then the search result was found in a Unit Model entry screen.	Select this field to open the object where the search result was found
Description	Provides a brief description of the source For example: if the source is a workorder, this column will state the whether a Preventive maintenance, quote or service workorder, the number, and the client for whom the workorder is for.	
Extract	This column “extracts” or displays the contents of the field from where the search term was found.	If you place your mouse over this column field, a popup will display the entire extraction
Record Created	Displays the date this object was first created	
Record Created By	Displays who first created this object	
Record Last Modified	Displays the date this object was last modified	
Record Last Modified By	Displays who last edited this object	

5.31 Documents



Documents are links to external (outside AyaNova) files and resources that can be associated with the following objects:

- Service Workorder
- Quotes
- Preventive Maintenance
- Clients
- head offices
- Contracts
- Vendors
- Units
- Unit Models
- Parts
- Loan Items
- AyaNova Users

You can open the Documents entry by clicking on the Documents  image on the menu bar

A Documents image with a faint white line in the image indicates that this object **does not** presently have any documents associated with it. This is useful so you can see at a glance without having to open.

NOTE: If the security group the user is a member of rights to the object are also pass to the Documents menu option. For example, if the user's security group has Read/Write rights to the Object.Client, then that user can also read and edit the Documents for clients.

Dependencies of being able to associate Documents

Being able to view an associated document would be dependant on the following:

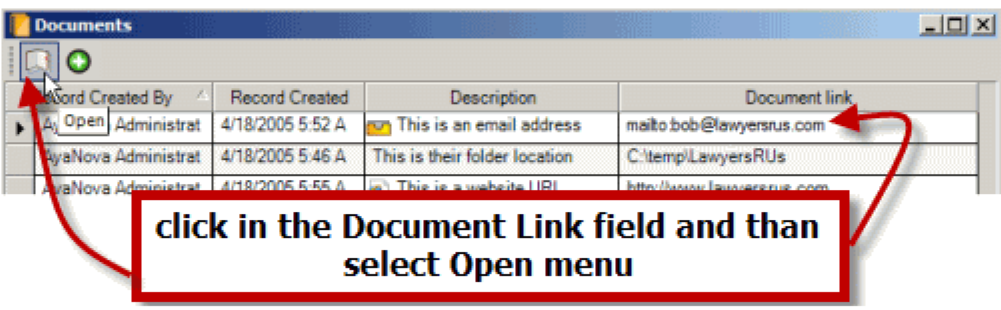
- Does the AyaNova user attempting to view the document have a compatible program to open the document
    - Is the program used to view this document installed on their computer?

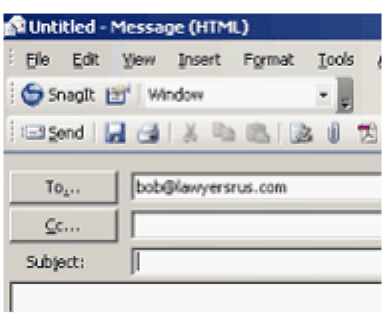
   - Is the filename extension associated with the correct program on their computer?
- If the document is entered as a path and filename, does the user have rights to access this path (these rights are provided outside of AyaNova)
- If the document is entered with a path and filename, does the user have access to this path (if a mapped network drive, does the user have this drive letter)

Note: Use the Wiki feature and embed files instead of this document feature if you want to be sure they are available to all AyaNova users regardless of location and don't mind files being stored directly in the AyaNova database.

Not Just Documents

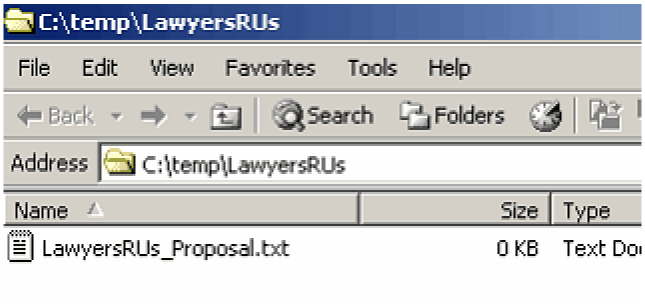
1. You can enter in email addresses with the prefix of *mailto:* as the prefix mailto: lets AyaNova “know” that you want it to open your default email program when you select the menu Open after selecting that Document Link





2. You can enter in Internet URL’s such as *http://www.ayanova.com* etc as AyaNova will automatically know that if it starts with http:// it should open your default Internet browser automatically

3. You can enter in a folder path, so that when you open it, it opens Windows Explorer opening that folder

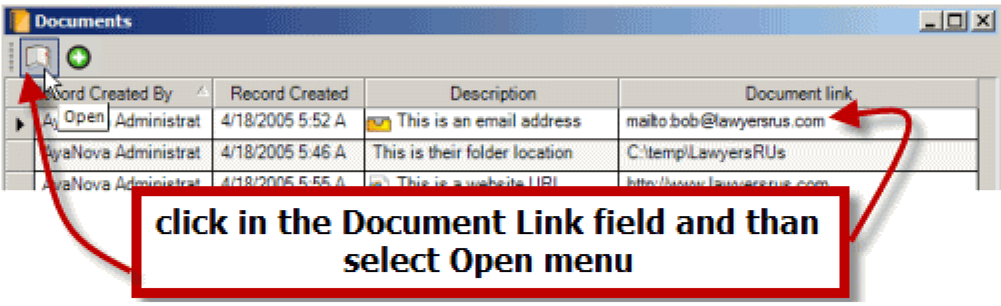


4. You can enter in program executables (of course only programs that will run by just having the executable run – those that require knowing path and other info won't)

5. You can also associate graphic files, music files, etc

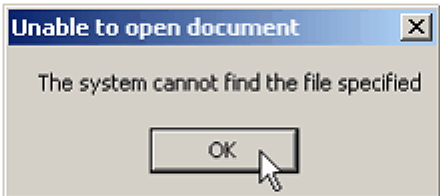
View an associated document

To view an associated document, place your mouse cursor within that document row, and then select the Open menu option



If your computer has a program associated with that file type and extension, then the program will open and you will be able to view the document.

If your computer can not find the file (either it has been moved, deleted, or you do not have the file type or extension associated with any program on your computer) a message will display



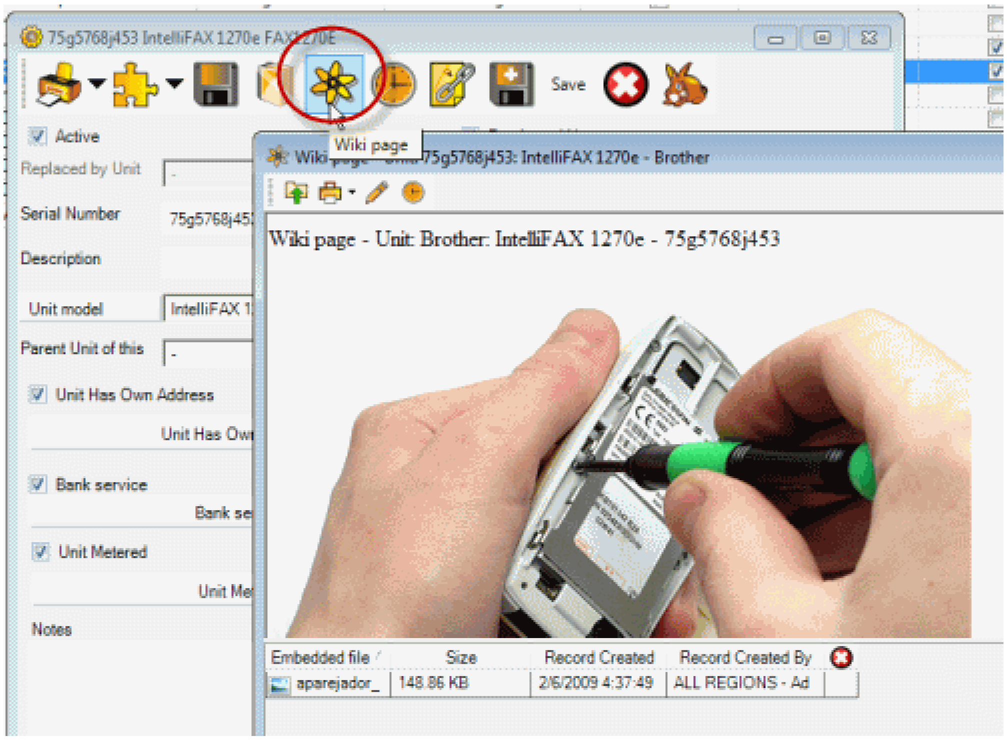
If you get this message, do the following:

1. Check to see if the file has been moved or deleted by opening Windows Explorer and moving to said directory and looking
2. If the file is there, you may need to install the proper program so that you can view the document
3. If the file is there, and you do have a program installed that will open the file, you may need to associate the file type with a program on your computer. Refer to your operating system Help topics on File Associations.
4. If the file is there, and you do have a program installed that will open the file, and the file type is associated correctly, it may be that the file is corrupted or other. Test by opening the file directly with the correct program and not through AyaNova.

See also:
How do I associate a document to an AyaNova object?

5.32 Wiki

5.32.1 Wiki



What is Wiki:

Wiki is a knowlegebase feature that allows AyaNova users to freely create and edit documentation for an AyaNova "object" (be it globally, a purchase order, a service workorder, etc) that supports hyperlinks, can embed images, allows the user to attach documents and files that are accessible by all users, and is searchable via the Search Database feature.

What you can do with Wiki:

- Create, view and edit additional documentation for an AyaNova "object" (be it globally, a client, a purchase order, a service workorder, etc)
- Embed images directly into the Wiki page
- Embed documents to the Wiki page that are maintained in the database themselves so that all users can access regardless of location
- Hyperlink to external URL's or email address
- AyaNovaLink to AyaNova unit's or clients

The following AyaNova objects have the Wiki feature:

- Global Wiki - All users
- Workorders - individual Service, Quote and Preventive Maintenance work orders

- Each client, head office, unit, unit model, vendor, contract, project, loan item
- The AyaNova user logged in - personal wiki
- Each Purchase Order
- Each Part

See Also:

Files in Database

Set restriction on size of attached documents to Wiki in Global Settings

Security Group internal object: Object.GlobalWikiPage
Forbidden : User of that security group can not access the Global Wiki at all *Read Only* : User can access the Global Wiki and view it but can not edit it. *Read/Write* or *Read/Write/Delete* : User can access the Global Wiki, view and edit

Security Group internal object: Object.WikiPages
Forbidden : User of that security group can not access their <Username> Wiki page nor Wiki for any object that the user has rights to access *Read Only* : User can view their <Username> Wiki page and view Wiki for any object that the user has rights to access. (Example: user has Read Only rights to Clients and Forbidden to Units - user can view Wiki page of Clients but as can not view Units , then can not view Unit's wiki pages) *Read/Write* or *Read/Write/Delete* : User can view and edit their <Username> Wiki page; and can view and edit the wiki page for any object the user also has corresponding rights to. (Example: user has Read/Write rights to Object.WikiPages, Read Only rights to Clients and Forbidden to Units - even though Read/Write to Wiki, the user can only view and NOT edit Wiki page of Clients. And can not view Units , then can not view Unit's wiki pages)

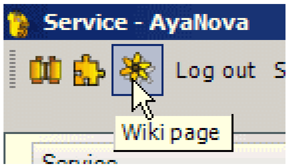
5.32.2 Editing a Wiki page

To edit a Wiki page, you must go into its Edit mode by selecting the Edit menu option

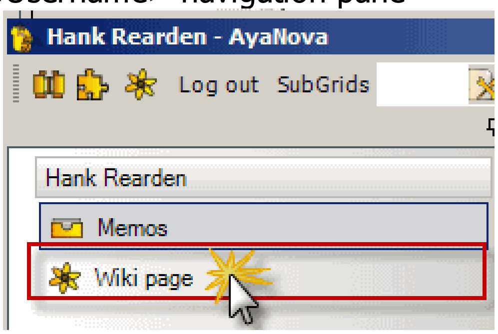
1. View the Wiki for that object by selecting the Wiki menu option for that object

For example:

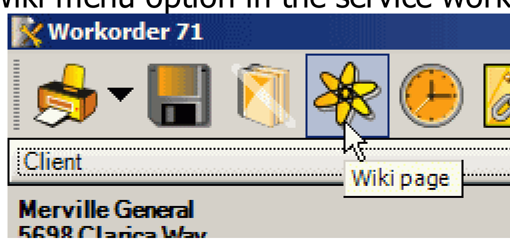
- If you want to edit the Global Wiki that is available for all AyaNova users (if their security group has access to Object.GlobalWiki of course), select the Wiki menu from the main AyaNova menu



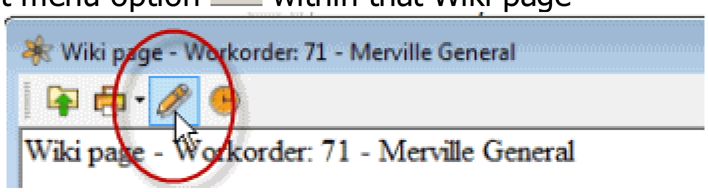
- If you want to edit the Wiki page for yourself, select the Wiki in your <Username> navigation pane



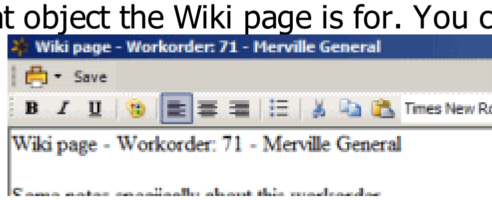
- If you want to edit the Wiki page for a specific service workorder, select the Wiki menu option in the service workorder entry screen



2. To edit that Wiki page for that object, you must be in Edit mode. Select the Edit menu option within that Wiki page



3. Each Wiki object automatically by default will have text entered that identifies that object the Wiki page is for. You can edit this text of course.



4. Web URL's that are entered with http:// will automatically be hyperlinked in Edit mode. Email addresses will display hyperlinked once you have saved and have exited out of the Wiki page and are viewing the Wiki page.

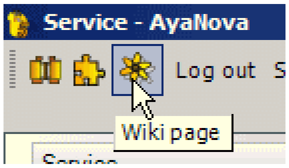
5.32.3 Pasting into a Wiki page

To paste into a Wiki page, you must first go into its Edit mode by selecting the Edit menu option, and then select the Paste menu option. There is no right-click ability to select Paste.

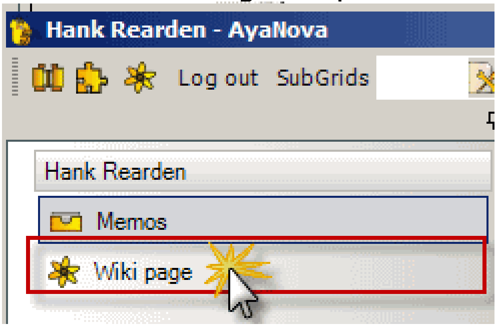
1. View the Wiki for that object by selecting the Wiki menu option for that object

For example:

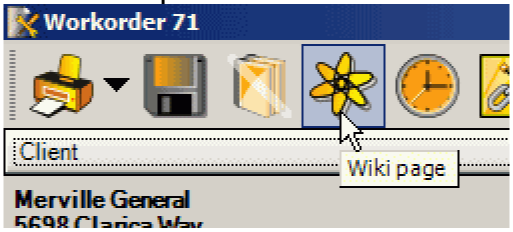
- If you want to view the Global Wiki that is available for all AyaNova users (if their security group has access to Object.GlobalWiki of course), select the Wiki menu from the main AyaNova menu



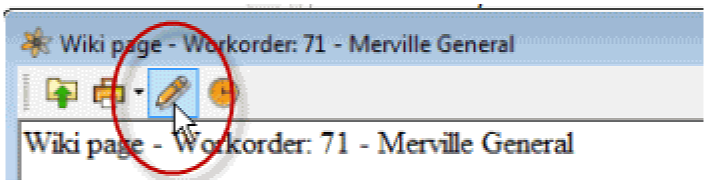
- If you want to view the Wiki page for yourself, select the Wiki in your <Username> navigation pane



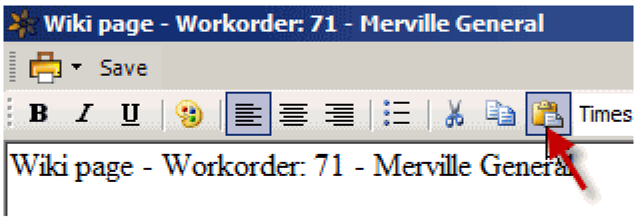
- If you want to view the Wiki page for a specific service workorder, select the Wiki menu option in the service workorder entry screen



2. To paste into the Wiki page, you must be in Edit mode. Select the Edit menu option  within that Wiki page



3. Now that you are in Edit mode, use your mouse to click in the Wiki page where you want what is to be pasted to go, and then select the Paste menu option 



Please note in some cases such as pasting images with text that you have copied from a Word document, the image will increase in size when you next view the Wiki page. For this reason, it is highly recommended to use the [Embed Images](#) if you want images in your Wiki page rather than pasting in the image.

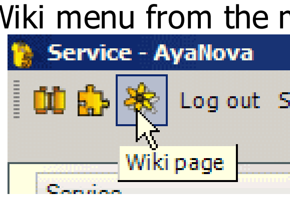
5.32.4 Copying from a Wiki page

To copy from a Wiki page, you must first go into its Edit mode by selecting the Edit menu option, and then select the Copy menu option after selecting what you want to copy. There is no right-click ability to select Copy.

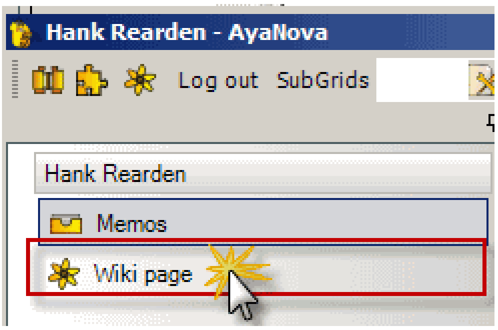
1. View the Wiki for that object by selecting the Wiki menu option for that object

For example:

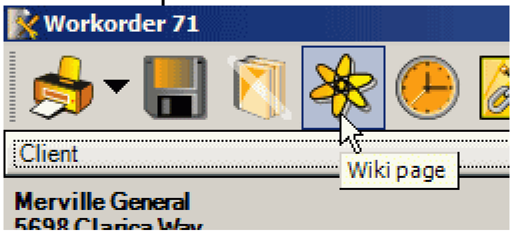
- If you want to view the Global Wiki that is available for all AyaNova users (if their security group has access to Object.GlobalWiki of course), select the Wiki menu from the main AyaNova menu



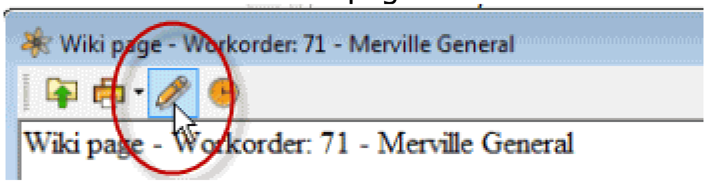
- If you want to view the Wiki page for yourself, select the Wiki in your <Username> navigation pane



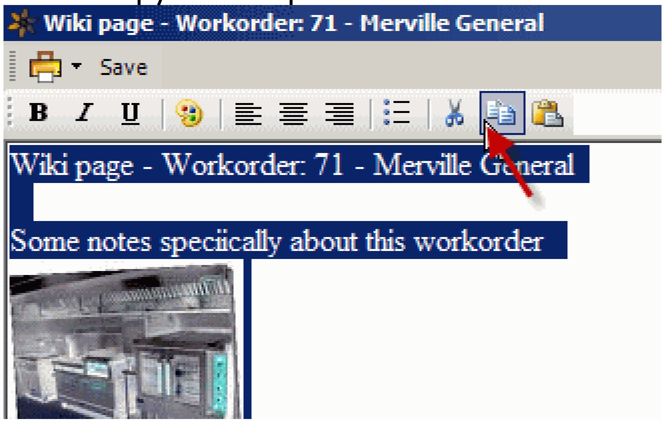
- If you want to view the Wiki page for a specific service workorder, select the Wiki menu option in the service workorder entry screen



2. To copy from the Wiki page, you must be in Edit mode. Select the Edit menu option  within that Wiki page



3. Now that you are in Edit mode, highlight what you want to copy, and then select the Copy menu option 



4. Now you can paste elsewhere

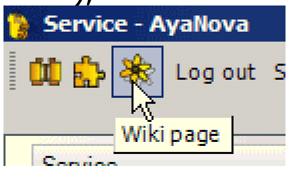
5.32.5 Embed image into a Wiki page

To embed an image into a Wiki page, you must first go into its Edit mode by selecting the Edit menu option, and then select the Embed Image menu option. There is no right-click ability to embed an image into a Wiki page.

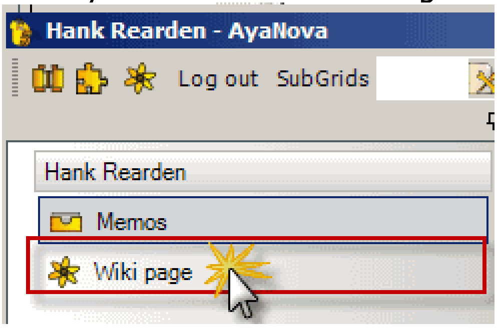
1. View the Wiki for that object by selecting the Wiki menu option for that object

   For example:

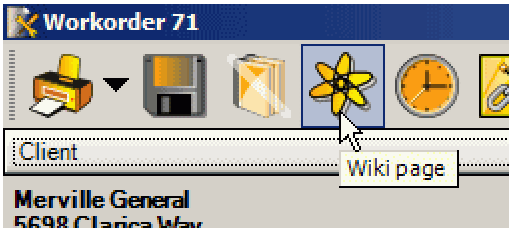
   - If you want to embed a image into the Global Wiki that is available for all AyaNova users (if their security group has access to Object.GlobalWiki of course), select the Wiki menu from the main AyaNova menu

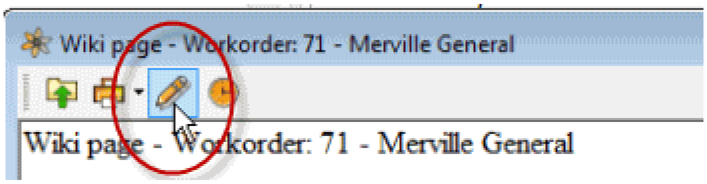
   - If you want to embed a image into the Wiki page for yourself, select the Wiki in your <Username> navigation pane

   - If you want to embed a image into the Wiki page for a specific service workorder, select the Wiki menu option in the service workorder entry screen

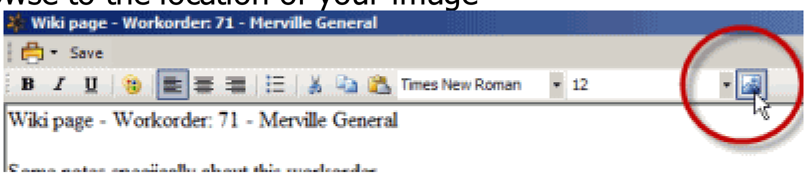
     

2. To embed an image into that Wiki page for that object, you must be in Edit mode. Select the Edit menu option  within that Wiki page

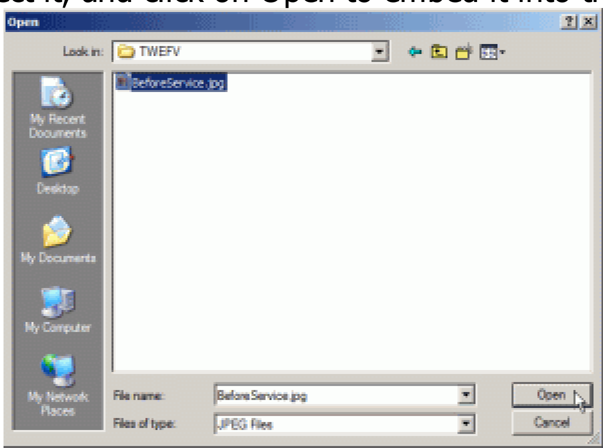


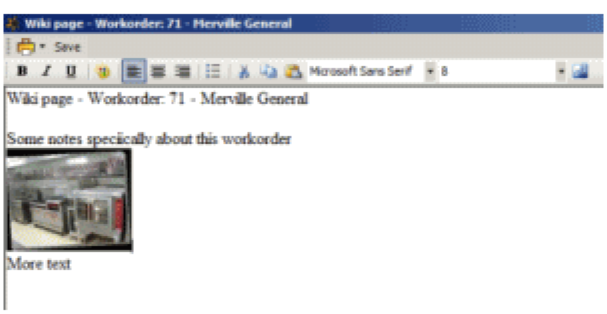
3. Now that you are in Edit mode, click with your mouse within the Wiki page where you want the embedded image to be placed

4. Select the Embed Image menu option to open up the window where you browse to the location of your image



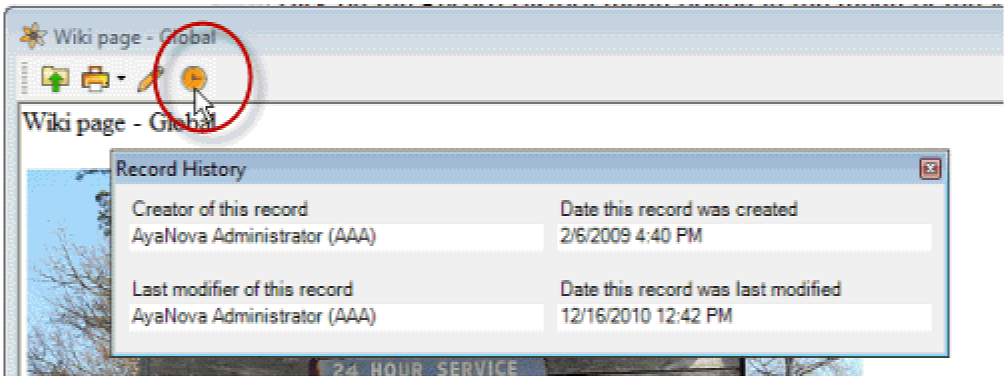
5. Browse to the location of your image file, select the File Type of the image, select it, and click on Open to embed it into this Wiki page





5.32.6 View who last edited Wiki page

To easily see who initially edited a Wiki page for an object and when, as well as who last edited and when, just click on the Record History menu option  in the menu of the Wiki object.



The Record History screen will display show the Creator and when created, and the Last modifier and when last modified.

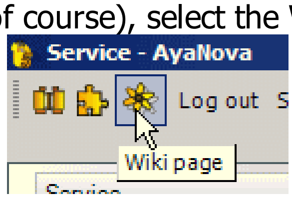
5.32.7 Upload files via a Wiki page

To upload/embed documents to a Wiki page, you are not in Edit mode of the Wiki page

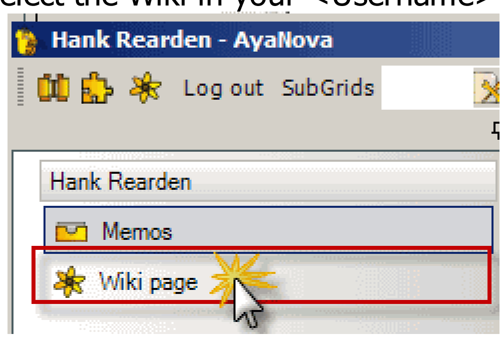
1. View the Wiki for that object by selecting the Wiki menu option for that object

   For example:

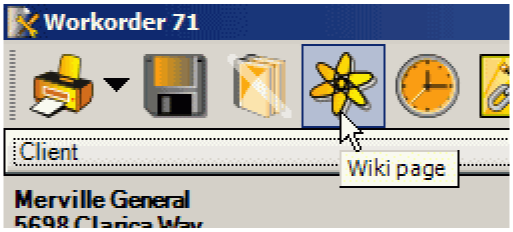
   - If you want to upload/embed a document to the Global Wiki that is available for all AyaNova users (if their security group has access to Object.GlobalWiki of course), select the Wiki menu from the main AyaNova menu

   - If you want to upload/embed a document to the Wiki page for yourself, select the Wiki in your <Username> navigation pane

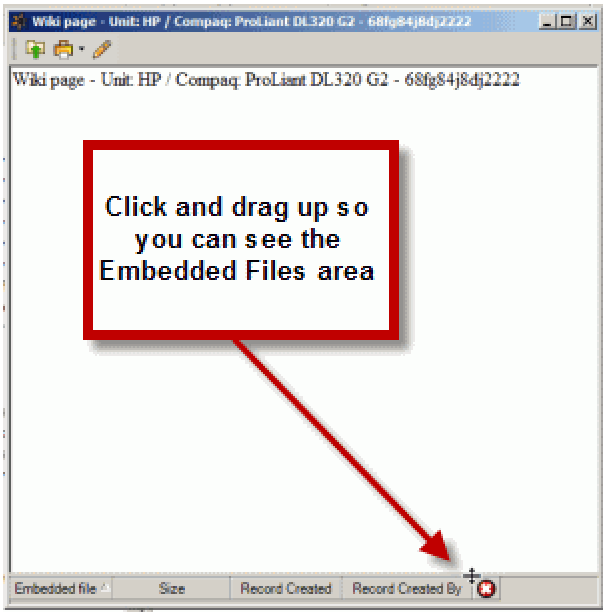
     

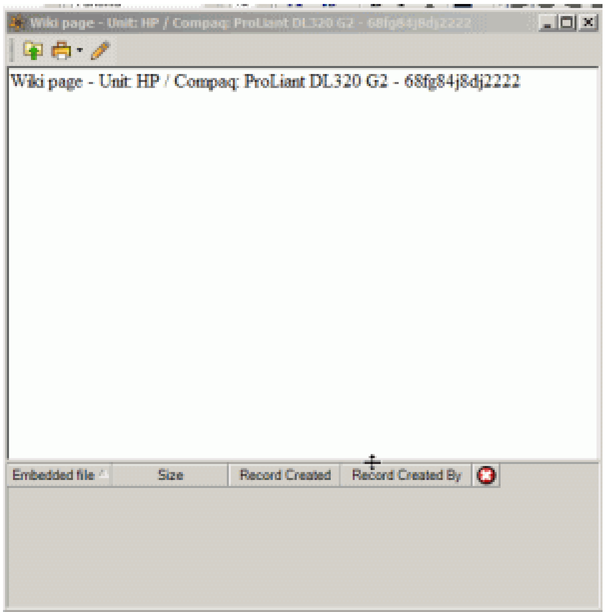
   - If you want to upload/embed a document to the Wiki page for a specific service workorder, select the Wiki menu option in the service workorder entry screen



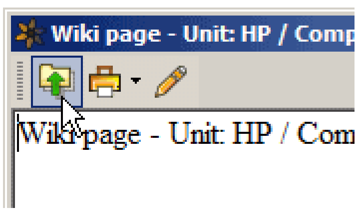
2. At the bottom of the Wiki page is where you upload documents.

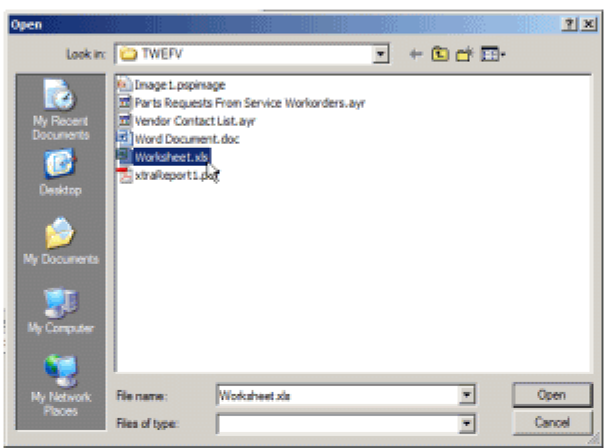
   You may need to drag up the bottom of the Wiki page so that you can see the section where your Embedded Files are if not visible

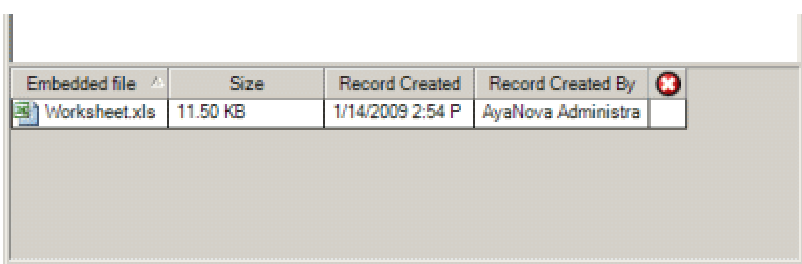




3. To embed a document in the Wiki page, select the Upload File menu option 







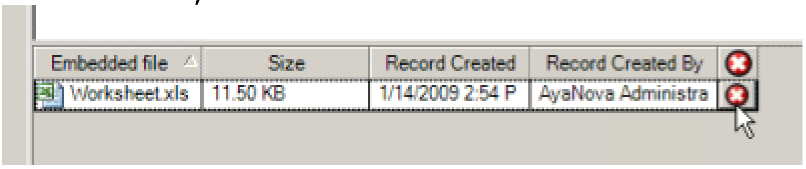
5.32.8 Editing or deleting embedded files

Delete an Embedded File
Edit an Embedded File

Delete an Embedded File
There are two ways to delete and edit embedded files - for users with sufficient rights inside the wiki page and for the administrator via the Administrators files in database control panel:

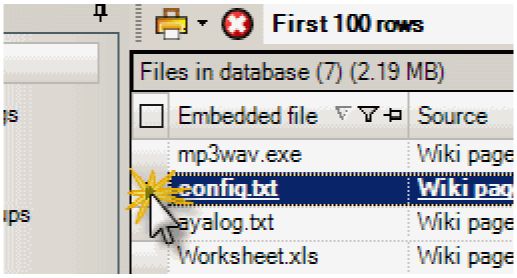
Delete via Embedded File grid in the Wiki page

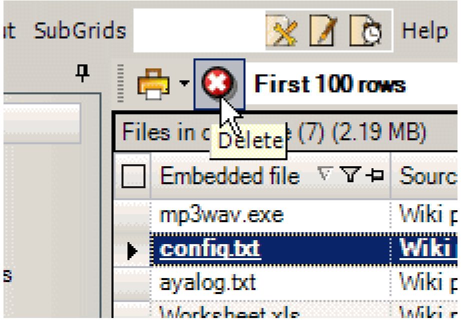
1. View the Wiki page
2. At the bottom where the Embedded Files are listed, place your mouse in the field below the Delete column. The Delete button will appear for that embedded file, and click on it



Delete via Administration navigation pane Files in Database

1. Log in as the AyaNova Administrator or a user that is of the User Type Administrator User
2. View the Files in Database grid in the Administration navigation pane
3. Click on the row identifier to highlight the specific file you want to delete and select the **Delete** menu option

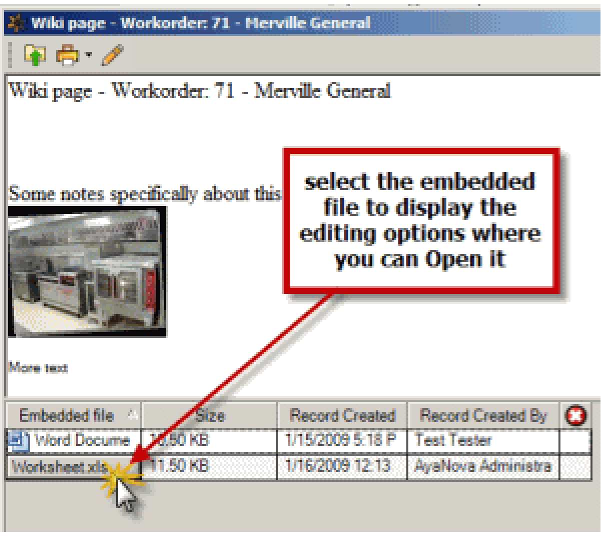




Edit an Embedded File

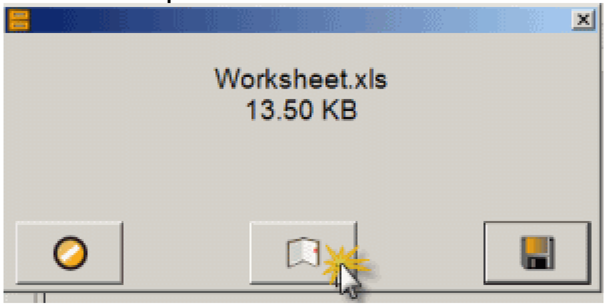
Edit via Embedded File subgrid in the Wiki page

1. View the Wiki page of the object itself by selecting its Wiki menu option
2. Select the embedded file which will display its editing options window same as above

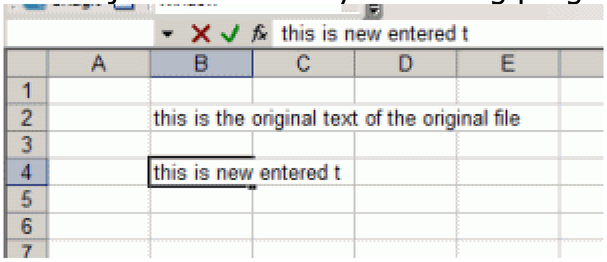


3. Click on the embedded file that you want to edit which opens up its editing options

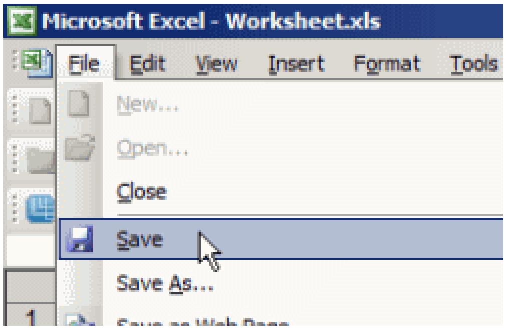
4. Select the Open button



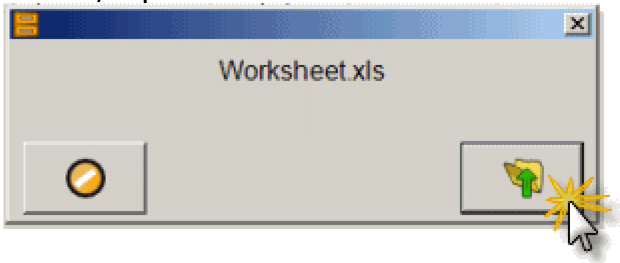
5. The document will open now on your computer using your installed program for that file format
6. If the Cancel / Upload window appears overtop, do **NOT** cancel it as you need this to be able to upload your changes to the AyaNova database.
7. Instead just click within your editing program and edit as needed



8. Save in that program

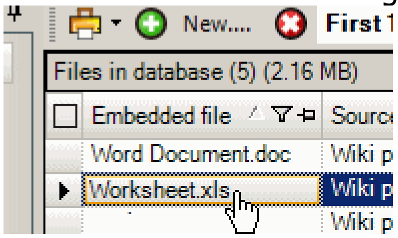


9. Now you need to upload again by selecting the Upload menu option in the Cancel / Upload window



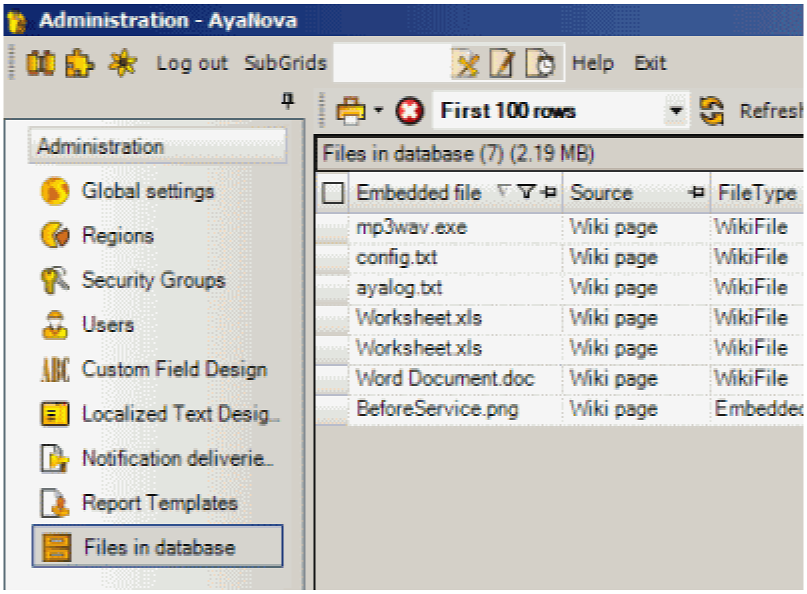
10. If you now open that embedded file again, you will see that your editing has been saved and uploaded to the AyaNova database

Edit via the Administration navigation pane Files in Database

1. Log in as the AyaNova Administrator or a user that is of the User Type Administrator User
2. View the Files in Database grid in the Administration navigation pane
3. 

4. Do the same steps as above - select the Open button, edit your document, save, and then Upload

5.32.9 Files In Database

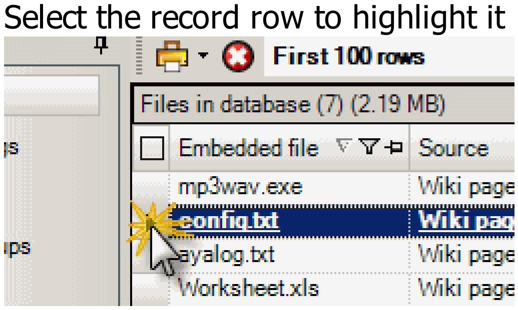


The **Files In Database** grid in the Administration navigation pane displays files that are presently uploaded in the AyaNova database via Wiki pages

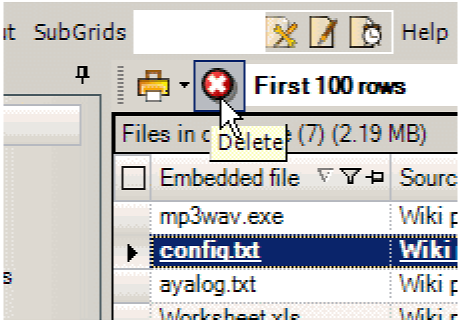
- It will list at the top total amount of database space taken up by all the files in the title bar just above the grid lines.

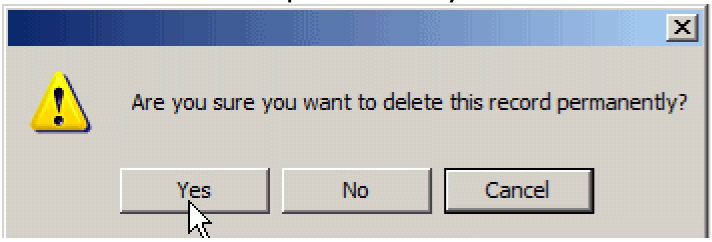
  If management has any concerns about the size of the AyaNova database, they can easily and quickly check here to see total size due to Wiki documents and attachments.

- You can delete embedded files directly from this Files In Database grid.

  - Select the record row to highlight it
  - 

  - Select the **Delete** menu option

- 

- Select Yes to delete permanently
- 

Embedded File	Displays the name of the embedded file	Select to display the embedded file Cancel/Open/Save window
Source		Select to view the Wiki page where this file is embedded through
Size	Displays the actual uncompressed size of the file	
Size Stored	Displays the compressed size of the file in the AyaNova database when not viewed	
Record Created	Displays the date this file was embedded	
Record Created By	Displays the AyaNova user who embedded the file	
Record Last Modified	Displays the date embedded file was last modified	
Record Last Modified By	Displays the AyaNova user who last modified this embedded file	

Security Group internal object: Object.AyaFiles

NOTE: only user that is of User Type ***Administrator User*** can view the Files in Database grid in the Administration navigation pane regardless of the Security Group setting.

Forbidden : User of that security group can not access the Files in Database grid at all

Read Only : User can view the Files in Database grid and entry screen but can not edit

Read/Write : User can access the Files in Database grid, view, create and edit

Read/Write/Delete : User can access the Files in Database grid, view, create and edit and delete

5.33 AyaNovaLink

The AyaNovaLink feature provides two ways to create a link to an AyaNova client or unit:

1. Create a AyaNovaLink within a Wiki page so you can easily open that object from within the Wikipage

2. Create a desktop shortcut to an AyaNova Client or Unit via AyaNovaLink so that you can quickly open that client or unit from your desktop

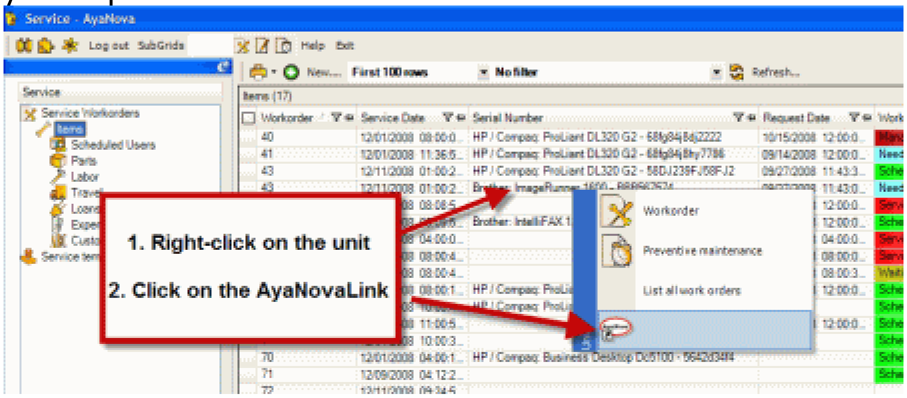
NOTE: If the AyaNova program files are just copied from another computer, AyaNovaLink will not work. AyaNova must be *installed* using the AyaNovaSetup.exe file for AyaNovaLink to work

An example of using an AyaNovaLink may be that you might have made an AyaNovaLink to a specific unit so that you can easily jump from the Wiki page to that unit's entry screen.

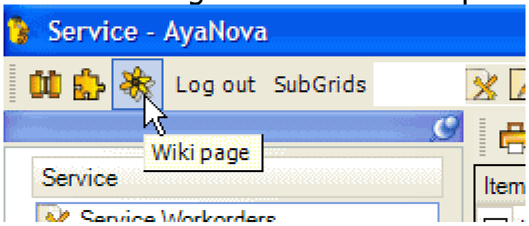
1. Create a AyaNovaLink within a Wiki page:

1. Right-click on the Unit's serial number in any grid in the AyaNova program. This drops down a list of features you can do including the AyaNovaLink

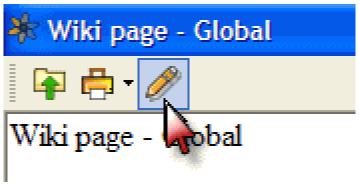
2. Click on the AyaNovaLink option. This copies the internal ID needed to your clipboard.



3. Select the global Wiki menu option

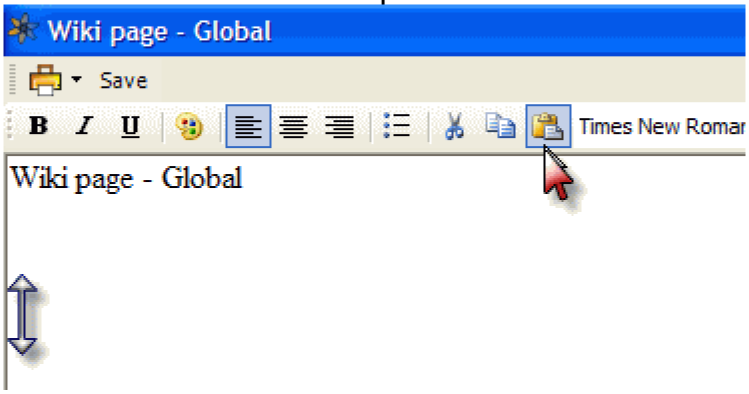


4. Select the Edit menu option so that you can edit the Wiki page

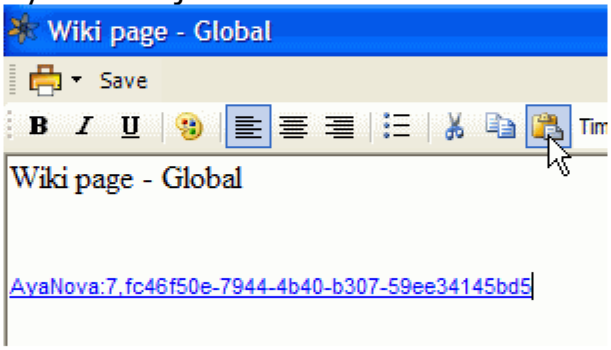


5. Click within the wiki page where you want the link to go

6. Select the Paste menu option

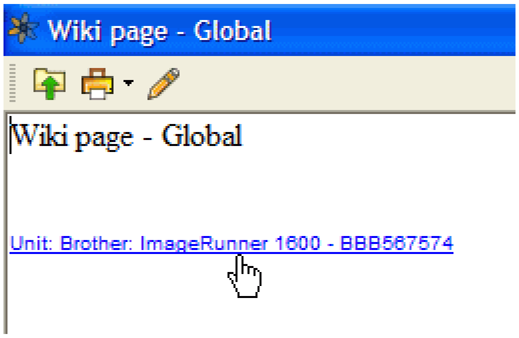


7. Yes, the initial paste appears with a bunch of numbers. When wiki is in edit mode, the link will always appear this way as it referencing an internal AyaNova object.



8. Save and exit out of the wiki

9. Open up the global Wiki page again to view - you will now see that the link identifies the unit by name for easy selection. And if you click on it, will open up that unit's entry screen.

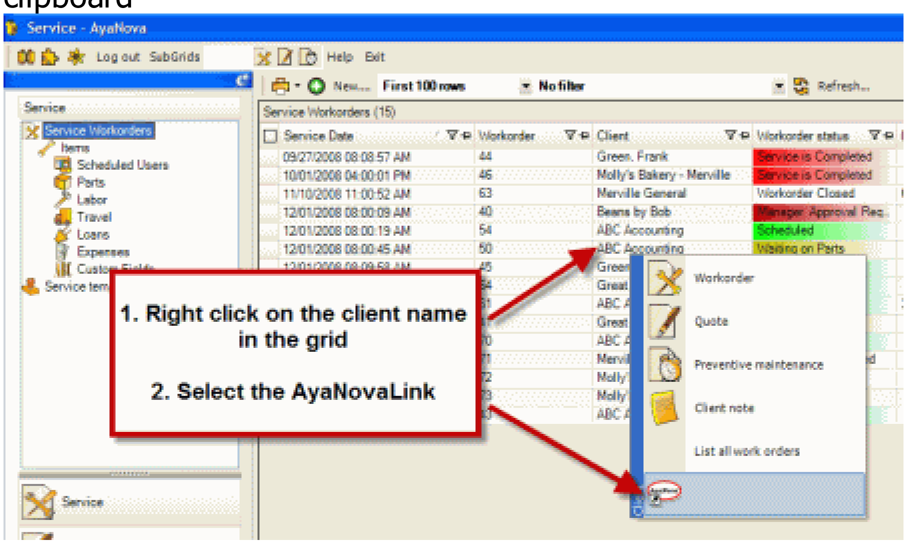


Or another example, you might always be performing work to do with a specific client or specific unit. By creating a desktop shortcut to the AyaNova client, you can easily double-click on it to open the AyaNova program bringing up that client's entry screen immediately.

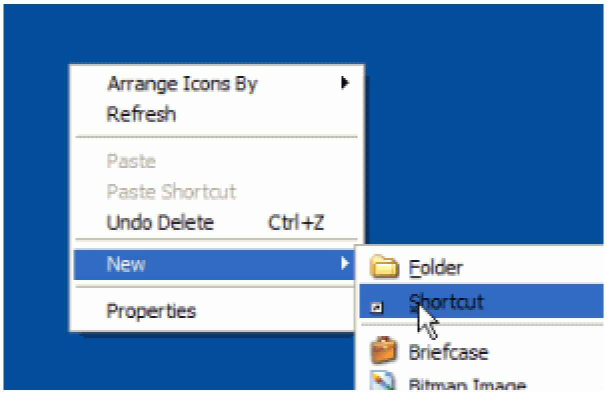
2. Create a desktop shortcut to an AyaNova Client or Unit:

1. Right-click on the Client name in any grid in the AyaNova program. This drops down a list of features you can do including the AyaNovaLink

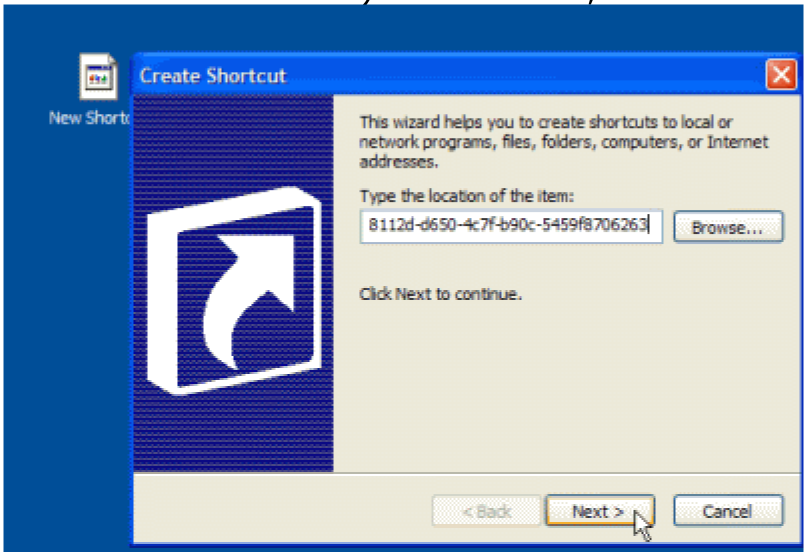
2. Click on the AyaNovaLink. This copies the internal ID needed to your clipboard



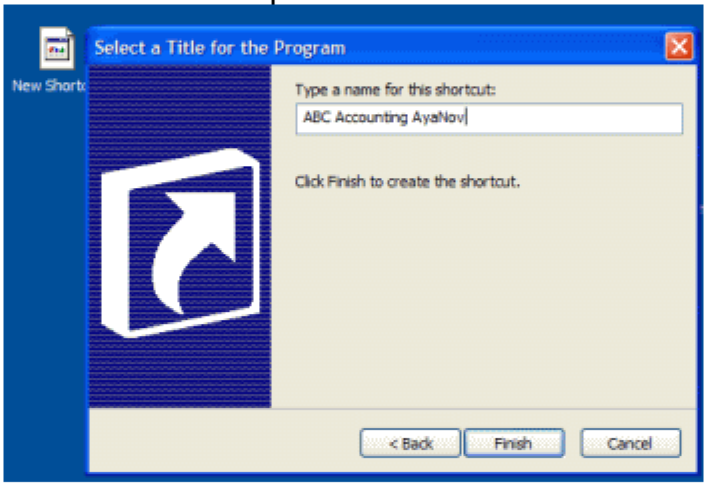
3. On your desktop, right-click and select New -> Shortcut



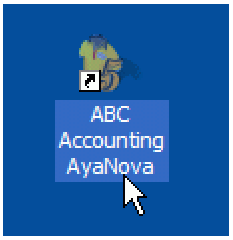
4. Press CTRL-v on your keyboard to paste in the internal ID (or right-click in that field and select Paste) as the location, and select Next



5. Enter in a descriptive name such as the Client's name and Finish



6. When you double-click on this desktop shortcut, the AyaNova login screen will appear. When you log into AyaNova, that specific AyaNova client's entry screen will automatically open.

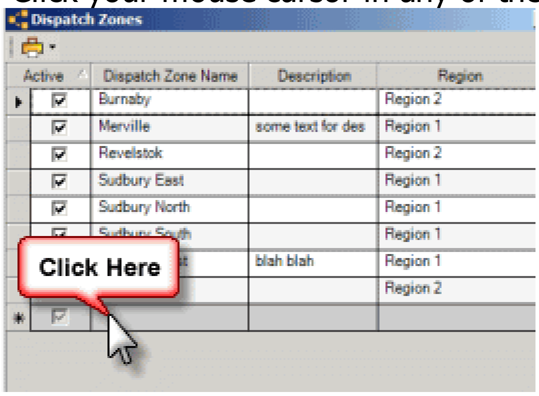

ABC
Accounting
AyaNova

5.34 SubGrids

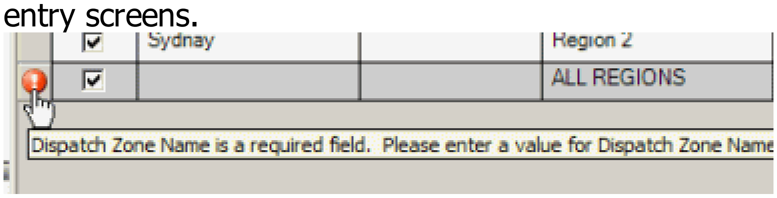
5.34.1 How to add / edit / delete / make inactive

To add new data into a subgrid table:

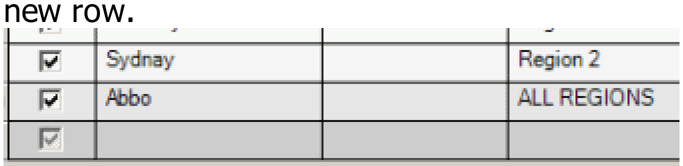
Click your mouse cursor in any of the columns in the grayed row.



This begins a new row that you can enter data in. You may also note the red exclamation mark which reminds you of required fields – in the screen shot below, Name is a required field so that the Dispatch Zone can be selected within entry screens.



As soon as you begin typing, it does so in a new row - below the text Abbo is the new row.

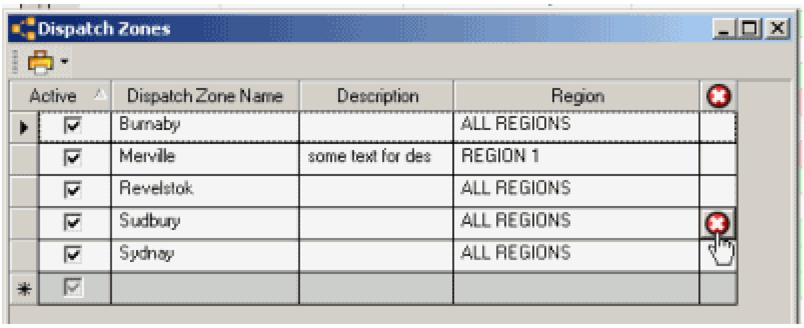


To edit an existing row of data

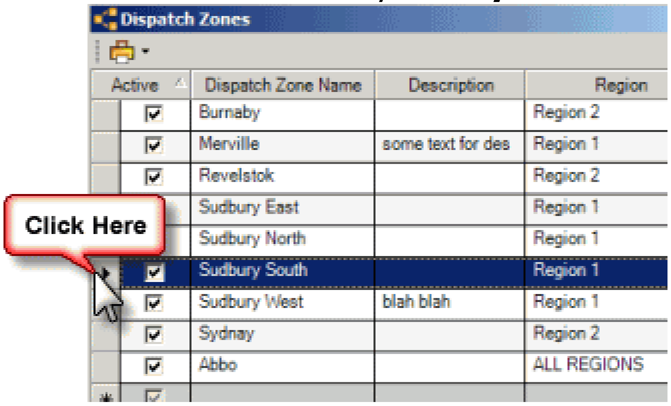
just click your mouse in the column field that you want to edit and do so.

Two ways to delete an existing row of data

1. Click on the Delete menu option for that row on the right



2. Click your mouse on the row header which will highlight the entire row then press the Delete button on your **keyboard**.



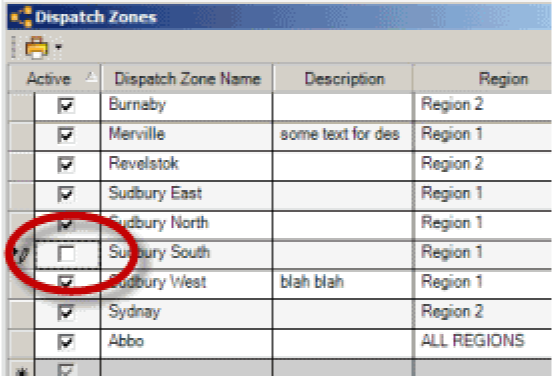
If the row of data has been linked elsewhere in the database, you will **not** be able to delete that record.

Do note that some grid tables are controlled for accountability, once a row is entered, cannot be deleted even if it appears to have not yet been selected elsewhere – such as Tax Codes, Part Warehouses. If you do not want this item selected, uncheck the **Active** field for that item.

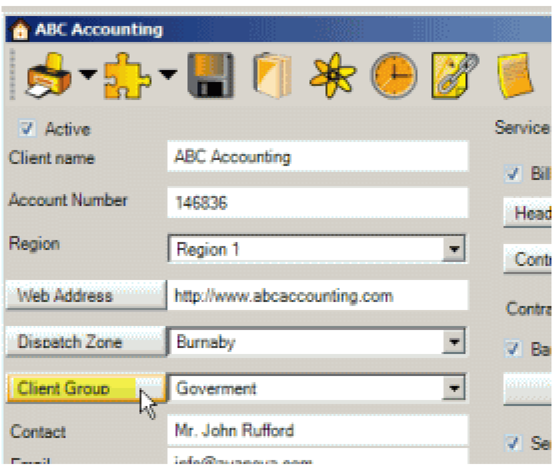
To set an existing row of data to inactive

Just uncheck the Active field for that record row, and exit out of the subgrid to save.

The screenshot below shows that the Dispatch Zone Sudbury South is inactive, and as a result will not be displayed in an selection lists elsewhere in AyaNova.



5.34.2 Client Groups



What's it for:

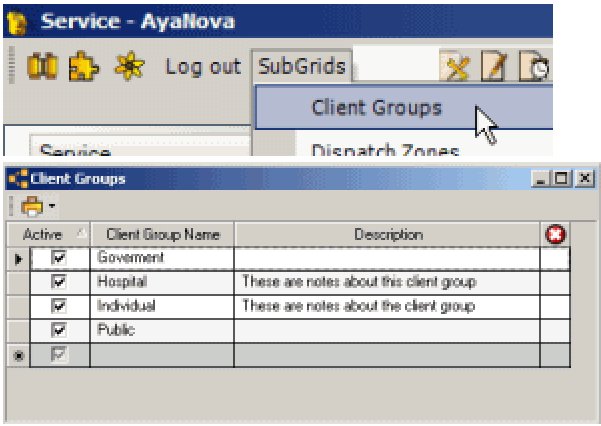
Client Groups are used to group clients together in an arbitrary manner. These are useful for filtering grids and reporting purposes.

You could also localize this subgrid to use for other grouping purposes.

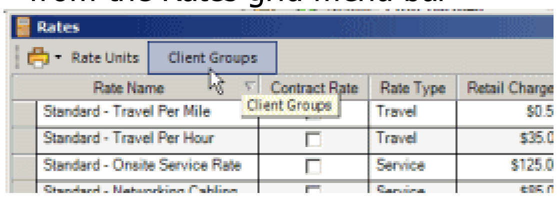
Use of Client Groups is optional.

Where to access the Client Groups subgrid:

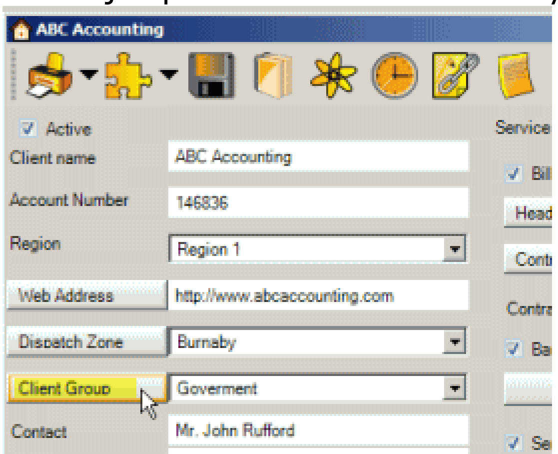
- from the menu bar SubGrids



- from the Rates grid menu bar



- from jump buttons within Client entry screen and Head Office entry screen.



Where Client Groups are selected and used:

- within Client entry screen and within Head Office entry screen
- within the Rates grid
- displayed as a column on the Clients grid, the Head Offices grid and in the the Service Workorders grids so that you can filter by it
- available in reports from the Clients grid, the Head Offices grid and Service Workorder grids.

Security Group internal object: Object.ClientGroup

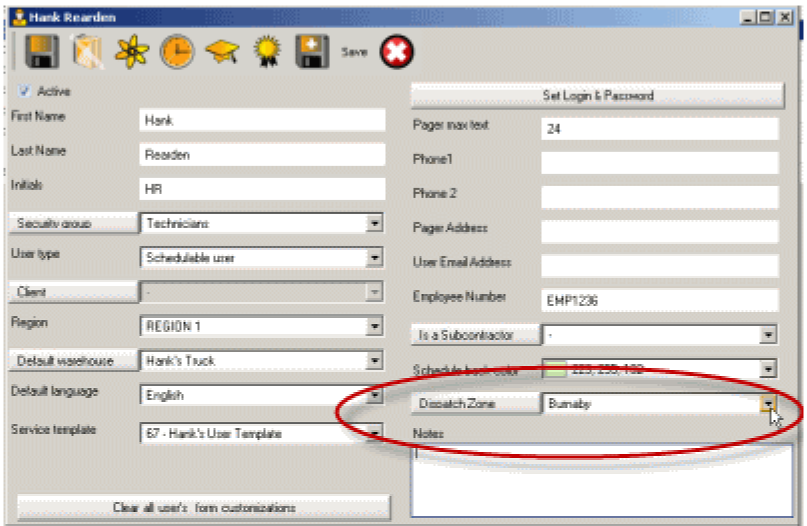
Forbidden : User of that security group can not access the Client Groups subgrid at all

Read Only : User can view the Client Groups subgrid but can not edit it.

Read/Write : User can access the Client Groups subgrid, view and edit

Read/Write/Delete : User can access the Client Groups subgrid, view and edit and delete

5.34.3 Dispatch Zones



What's it for:

Dispatch Zones suggested use is to identify clients of a geographical area, and to group schedulable users responsible for these graphical areas so that the schedulable users of that Dispatch Zone can be viewed on the Schedule screen.

For example:

- In the user entry screen, select the Dispatch Zone that schedulable user provides service for
- In the client entry screen, select the Dispatch Zone this client is located in
- Create a schedulable user group based on users of a specific Dispatch Zone
- When a client calls for service, you can view their client entry screen and identify what Dispatch Zone that client is in, and then in the Schedule screen select that Schedulable User Group to see what schedulable users are available to provide service in that dispatch zone

It is most useful for companies with a large client base that have technicians responsible for different geographical areas or groups of clients.

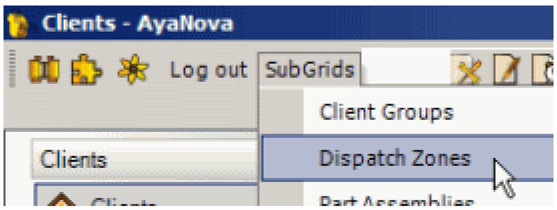
You could also [localize](#) this subgrid to use for other grouping purposes. Refer to the section on Localization for details.

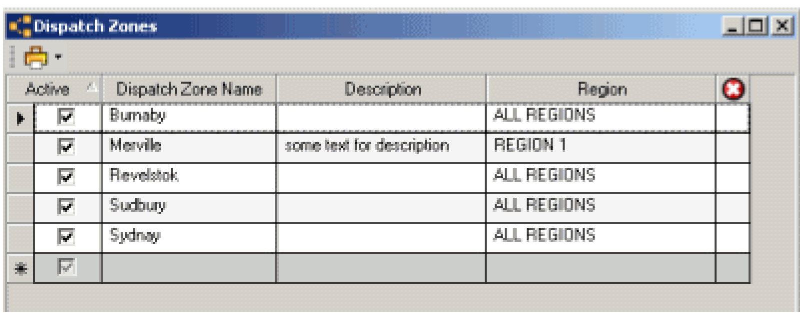
Use of Dispatch Zones is optional in AyaNova.

NOTE: Assigning a schedulable user to a Dispatch Zone does not restrict that user to only viewing data related to that Dispatch Zone. If you wish to restrict viewing of data, refer to [Regions](#).

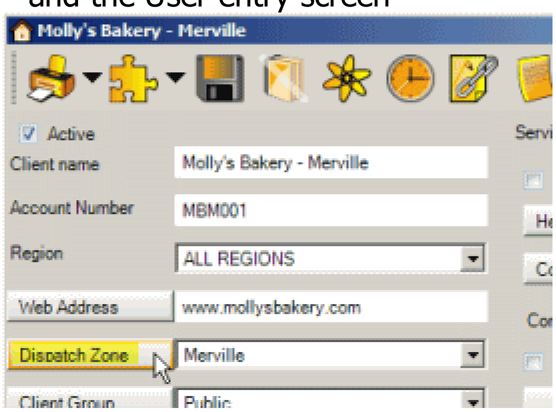
Where to access the Dispatch Zones subgrid:

- from the SubGrids menu bar





- from jump buttons within the Client entry screen, the Head Office entry screen and the User entry screen



Where selected and used:

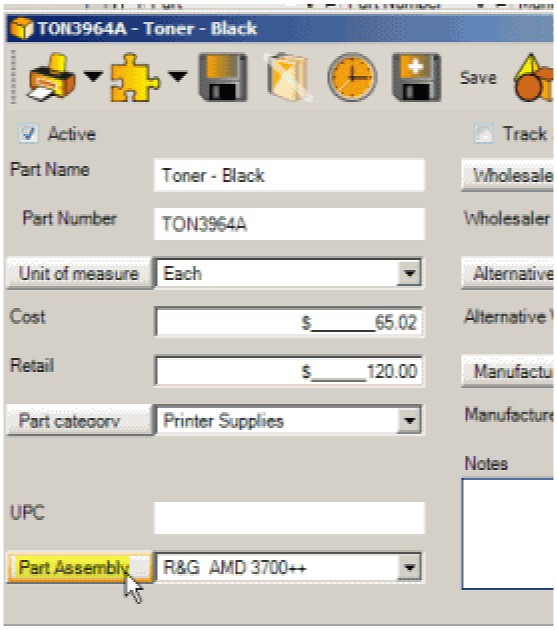
- selected within the [Client entry screen](#) and within the [User entry screen](#) if user is a Schedulable User

- within the Schedulable User Group screen
- displays as a column in the Clients grid, in the Users grid and in the Service workorder grids for you to filter by
- available in reports from the Clients grid, in the Users grid and in the Service workorder grids

You will note that the dispatch zones listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these dispatch zones. You can edit these and add additional as you like.

Security Group internal object: Object.DispatchZone
Forbidden : User of that security group can not access the Dispatch Zones subgrid at all
Read Only : User can view the Dispatch Zones subgrid but can not edit it.
Read/Write : User can access the Dispatch Zones subgrid, view and edit
Read/Write/Delete : User can access the Dispatch Zones subgrid, view and edit and delete

5.34.4 Part Assemblies



What's it for:

Part assemblies are used to group parts together for filtering, grouping and reporting purposes.

If you use Part Assemblies, you may want to set the Global Settings - part name format to display drop down selection lists based on the assembly name.

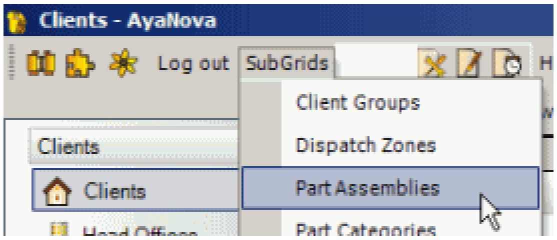
You could also localize this subgrid to use for other grouping purposes. Refer to the section on Localization for details.

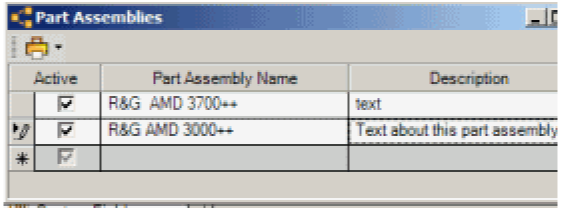
Assembly is an object that has a name and ID that parts can be assigned to, to indicate this is an assembly of those parts. A part assembly itself does not have a price as it is to group parts together for assemblies (i.e. parts of a bike) as opposed to Part Category which is to group similar parts (i.e. all bikes or all sporting equipment)

Use of Part Assemblies is optional in AyaNova.

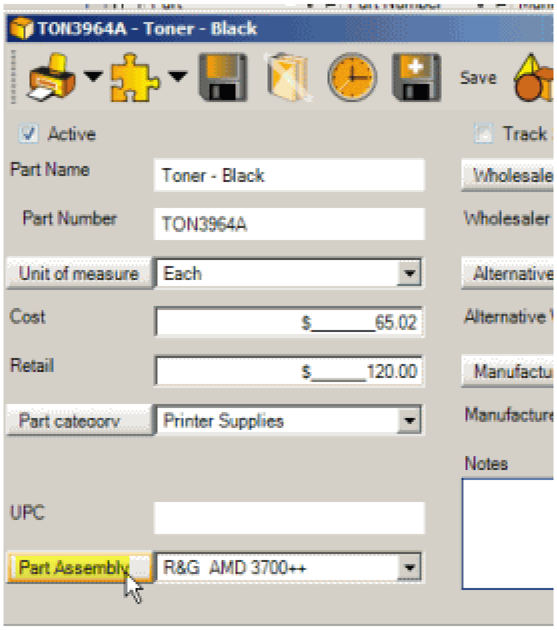
Where to access the Part Assembly subgrid:

- from the SubGrids menu bar





- from the jump button within the Part entry screen



Where selected and used:

- selected within the Part entry screen
- displays in the Part grid and in the Part Inventory grid
- displays in the Part name if set in Global Settings - part display name
- available in reports from the Parts grid

You will note that the assemblies listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these assemblies. You can edit these and add additional as you like.

Security Group internal object: Object.PartAssembly
Forbidden : User of that security group can not access the Part Assemblies subgrid at all *Read Only* : User can view the Part Assemblies subgrid but can not edit it. *Read/Write* : User can access the Part Assemblies subgrid, view and edit *Read/Write/Delete* : User can access the Part Assemblies subgrid, view and edit and delete

5.34.5 Part Categories

What's it for:

Part categories are used to group similar parts together.

An example would be to group all bike components together if you are a sporting service store.

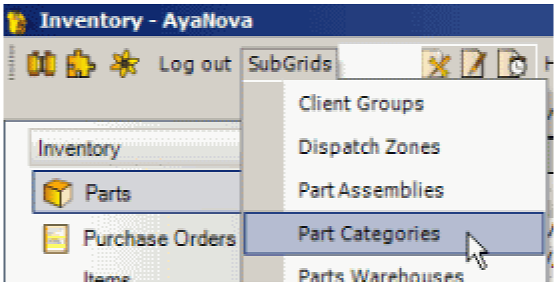
If you use Part Categories, you may want to set the Global Settings - part name format to display drop down selection lists based on the category name.

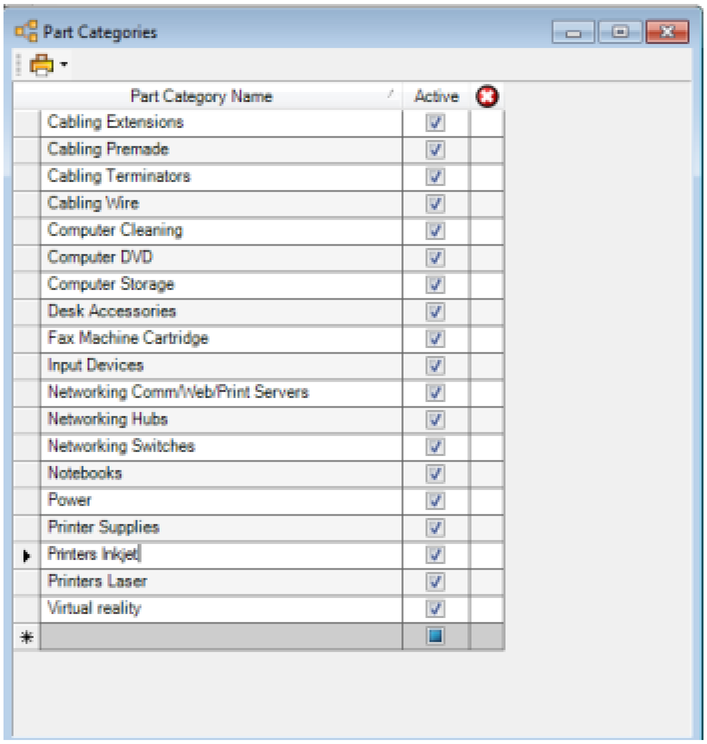
You could also localize this subgrid to use for other grouping purposes. Refer to the section on Localization for details.

Use of Part Categories is optional in AyaNova.

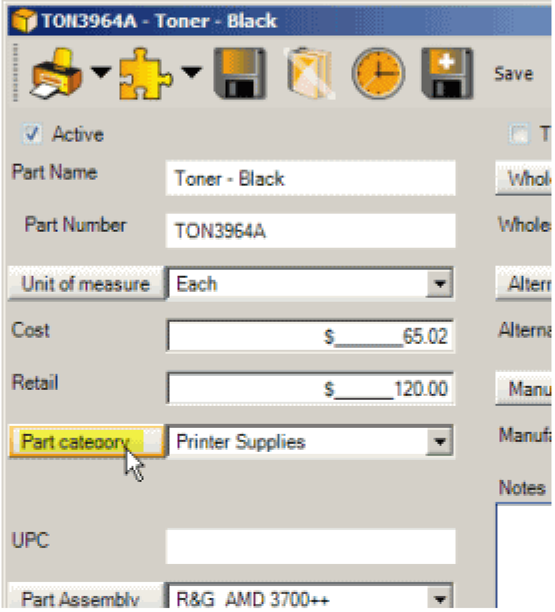
Where to access the Part Categories subgrid:

- from the SubGrids menu bar





- from the Part entry screen jump button for Part Category



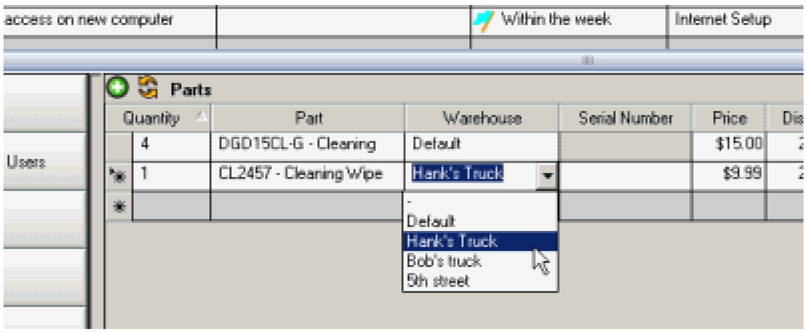
Where selected and used:

- selected within the Part entry screen
- displays as a column in the Part grid and the Part Inventory grid
- displays in the Part name if set in Global Settings - part display name
- available in reports from the Part grid

You will note that the categories listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these categories.

Security Group internal object: Object.PartCategory
Forbidden : User of that security group can not access the Part Categories subgrid at all *Read Only* : User can view the Part Categories subgrid but can not edit *Read/Write* : User can access the Part Categories subgrid, view and edit *Read/Write/Delete* : User can access the Part Categories subgrid, view and edit and delete

5.34.6 Part Warehouses



What's it for:

Warehouses can be actual buildings where stock is kept, or warehouses could even be each scheduled users "stash" of parts on hand so that inventory out of the store is tracked. How you use part warehouses is up to you.

Specifying exactly where parts are located, is useful to maintain accurate stock counts if you have multiple locations where stock is located

NOTE: AyaNova comes standard with an undeleteable warehouse named **Default**. But the Default warehouse name and description can be edited to better reflect your warehouse. For example, you might edit the name Default to Store Stock

NOTE: Part Warehouses can not be deleted once created and saved. You can set to inactive and/or rename if no longer required

NOTE: By specifying a specific Region for a part warehouse, you are able to restrict who has access to part quantities in that warehouse as only users with access to that region can select that part warehouse

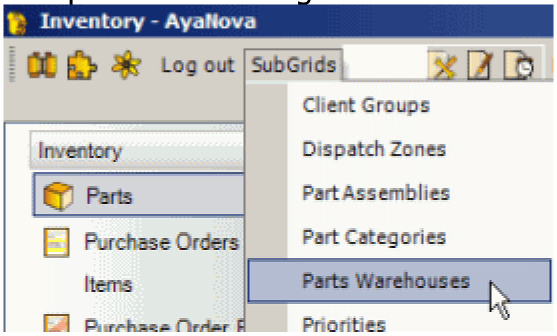
Also see: Regions

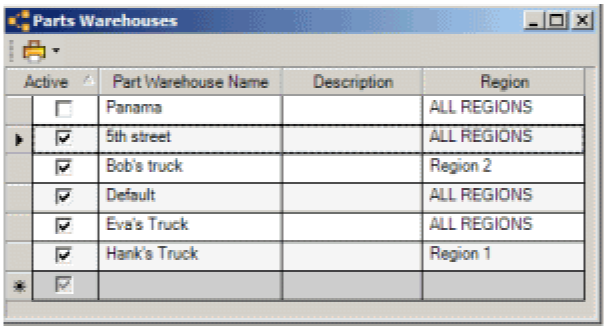
Notes about Part Warehouses:

Part warehouses **can not be deleted once created.** As soon the Part Warehouses grid is closed, all parts are updated with an OnHand amount of 0 for the newly created warehouse. Therefore no part warehouses can be deleted once created and the grid closed. You can set a Warehouse to inactive so that when a user logs in, that warehouse is not selectable in workorders, Purchase Orders or Purchase Order Receipts

How to access the Part Warehouses subgrid:

The part warehouse grid is accessed from the SubGrids menu bar





Where selected and used:

- A Part Warehouse is selected when ordering a part in Purchase Order to identify for what warehouse that part is for, a part warehouse is selected in a Purchase Order Receipt for a part to identify where the part quantity is being received to, and a part warehouse is selected in a Part Adjustment for a part to identify where you are putting that quantity of part into or taking out of

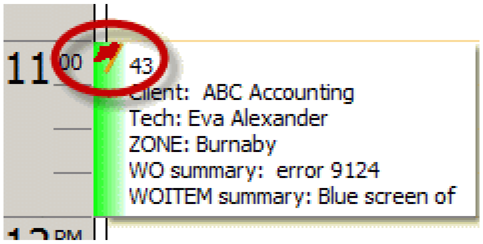
- Part Warehouse is selected within the workorder Parts section - when you select a part, select the warehouse you are taking the part out of.
- Part Warehouse is also selected within the User entry screen if the user is of type Schedulable User. Setting a default part warehouse is beneficial so that when the user is selecting parts in a workorder, it will default to that warehouse so that they user does not have to always remember to select it.

  NOTE: if a schedulable user receives an error "Key not found" when selecting the Parts sub-screen in a workorder, check to see if their default warehouse has been set as inactive. If so, select an active warehouse as their default, and have the user log back into AyaNova.

- displays as a column in the Part grid, Parts grid for Workorders, Quotes and PM's, and Part Inventory grid for filtering
- available in reports from the Part Inventory grid, in detailed report from Purchase Orders, in detailed report from Service Workorders, summary report from Parts grid of Service Workorders navigation pane

Security Group internal object: Object.PartWarehouse
Forbidden : User of that security group can not access the Part Warehouses subgrid at all
Read Only : User can view the Part Warehouses subgrid but can not edit it.
Read/Write or Read/Write/Delete : User can access the Part Warehouses subgrid, view and edit

5.34.7 Priorities



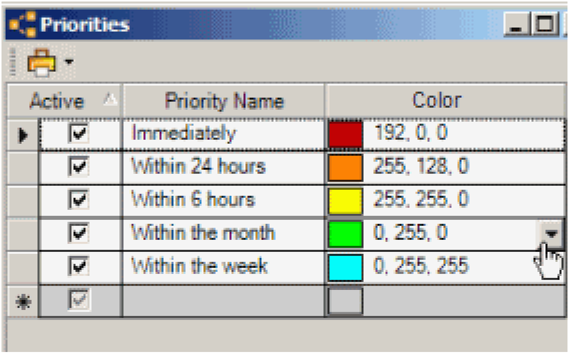
What's it for:

A priority can be used to signify how important a workorder item is, or how urgent a workorder item may be.

Use of Priorities is optional in AyaNova.

How to access the Priorities subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the Workorder Item menu options menu bar in a service workorder, a quote and in a preventive maintenance when the workorder item has the focus

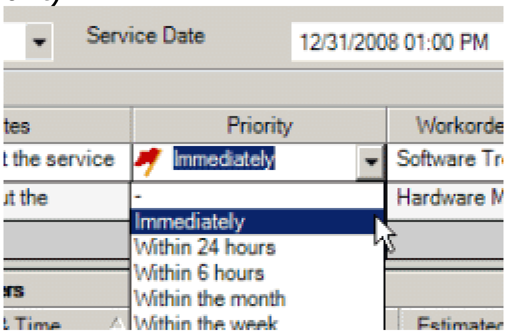


The Color column in the Priorities subgrid

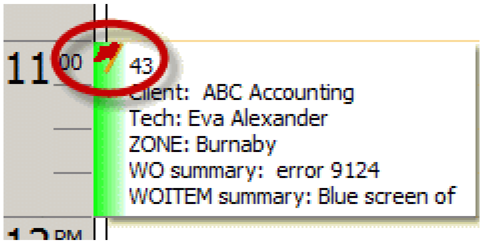
In the Priorities subgrid, the Color column is a drop down field where you select the color of the flag that a workorder item with this priority will display as when viewed on the Schedule screen.

Where selected and used:

- Priorities are selectable from the Service Workorder Items subgrid in a service workorder, a quote and in a preventive maintenance item (the Priorities listed in screenshot below are just examples, as you can create whatever priorities you want)



- Priorities will displays as a colored flag in the Schedule screen scheduled item

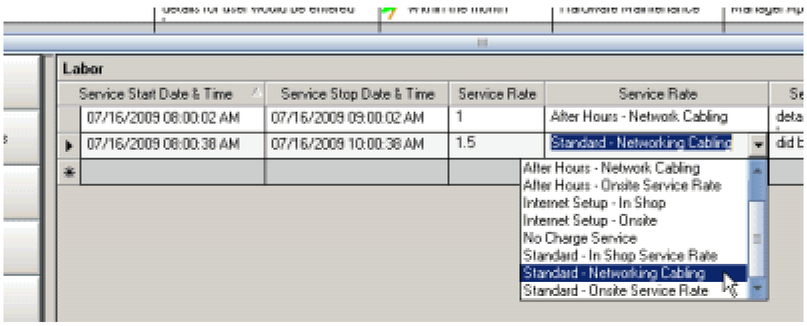


- displays as a column in the Items and below grids, Quote Items and below grids and PM Items and below grids so that you can filter by it
- available in reports from Service Workorders, Quotes and Preventive Maintenance grids and entry screens.

You will note that the priorities listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these priorities. You can edit existing which would affect all orders where this priority was previously selected; you can delete existing (if not selected within orders), and you can create new priorities for selection.

Security Group internal object: Object.Priority
Forbidden : User of that security group can not access the Priorities subgrid at all *Read Only* : User can view the Priorities subgrid but can not edit it. *Read/Write* : User can access the Priorities subgrid, view and edit *Read/Write/Delete* : User can access the Priorities subgrid, view and edit and delete

5.34.8 Rates



What's it for:

Rates are used to indicate charges on workorders to the customer and as summarized data on various reports.

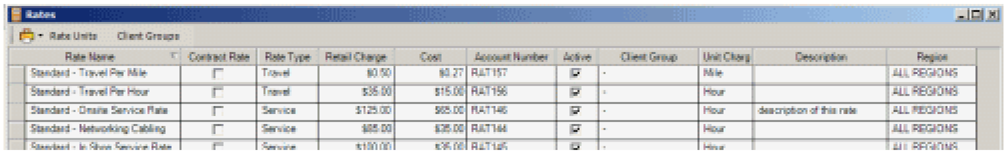
Rates are specified either for service or for travel. You can have as many rates as needed.

NOTE: Changing the rate on the rate entry / edit screen affects all work orders previously entered since they are all linked to the rates, they don't have the rates stored with the work order problem item. For this reason, if you increase or change your rates, you should create a **new** rate rather than edit an existing rate once it has been selected in existing work orders.

NOTE: If this client in addition or instead of the "regular" rates for selection has a contract or agreement to receive specific rates for certain services, it would be suggested to set up a Contract selected in that client's entry screen, so that those specific rates will also be available for selection in addition to "regular" rates. Or if this client would only ever be charged a specific rate or rates, it is suggested to assign a Contract to this client, specify Limit to Contract Rates Only and set contract rates that would be only be selectable.

How to access the Rates subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- accessed from the menu bar in a service workorder, a quote and in a preventive maintenance when the Labor or Travel subsection has the focus



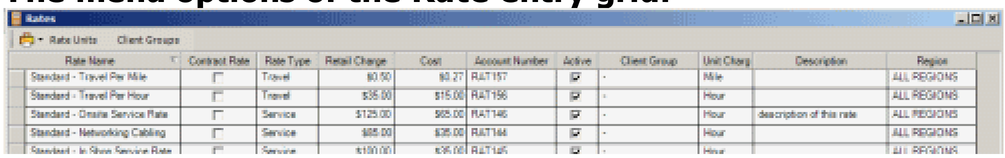
Where selected and used:

- within the workorder items sub-screen Scheduled Users, within workorder items sub-screen Labor, within workorder items sub-screen Travel
- if a client has a Contract, in that Contract's entry screen, you can set specific rates to only display for selection for this client

  If you wish only specific contract service rates to display for selection for a client's workorders, it is suggested to assign a Contract to this client, specify Limit to Contract Rates Only and set contract rates that would be selectable. Refer to the Contracts section for more information.

- displays as a column in the Scheduled Users grid, Labor grid and Travel grid so that you can filter by it
- available in detailed reports from Service Workorders, as well as from summary reports from the Labor and Travel grids

The menu options of the Rate entry grid:



Rate Units toolbar option
Select this toolbar option to open up the Rate Units entry grid such as hours, each, etc.

Client Groups toolbar option
Select this toolbar option to open up the Client Groups entry grid to view and create client groups.

The fields of the Rate entry grid:

Active column
This is a checkbox field where you indicate whether the rate is active or not. A checkmark indicates an active rate and will have this rate display in drop down selection list for the type of rate it is (unless specified as a Contract Rate – see below). An inactive is not checked, and will not display in drop down selection lists. This is typically used to set an old rate inactive when a price changes so that users will not select the old rate.

Rate Name column
This is a text field where you indicate the name of the rate that will display in the drop down selection list.

Description column
This is a text field where you may enter additional information or description for internal use for this rate. The Description field is limited to 255 characters.

Account Number column
This is a text field where you would enter the account number associated with the rate. This is useful for when printing out the completed workorder report, you can see at a glance what account number to bill out the rate at.

Contract Rate column
Check to indicate that this is a rate available only for contracts.

Rates with this selected **do not** display within the workorder screen **unless** the client has a contract with this rate specified.

Rate Type column
This is a drop down selection field where you may select the type of rate – whether it is for service or for travel. Service rates display for selection in the Scheduled User sub-screen and in the Labor sub-screen in a workorder. Travel rates display for selection in the Travel sub-screen in a workorder.

Client Group column
This is a drop down selection field where you may select the client group associated with this rate. This would be used for grouping purposes only. **NOTE:** This **does not** limit the rate to only display if the client is a member of this client group at this time.

Cost column
This is a currency field where you would enter the costs associated with the rate. This is typically used to generate profitability reports. Although the screens-shot displays a $ symbol, the currency symbol that will display on your computer will depend on the currency symbol selected within your Windows Regional Settings.

Retail Charge column
This is a currency field where you would enter the charge to the client associated with this rate based on the rate units (see below). Although the screen-shot displays a $ symbol, the currency symbol that will display on your computer will depend on the currency symbol selected within your Windows Regional Settings.

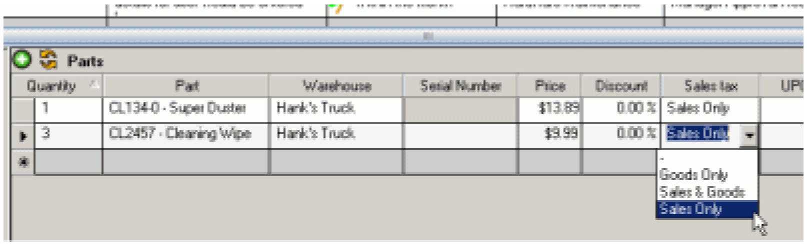
Rate Unit Charge Description column
This is a drop down selection field where you may select the units associated with the rate. For example, if you will be entering in quantity based on hours for the service rate, then select a Rate Unit Charge Description of "Hours"

Region column
If you wish to restrict the user logged into AyaNova from selecting specific rates based on the region that user is a member of, as set in their user's entry screen, select that region here. Then the user will only see rates that are for the same region and all regions.

You will note that the rates listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these rates. You can edit existing which would affect all orders where this rate was previously selected; you can delete existing (if not selected within orders), and you can create new rates for selection.

Security Group internal object: Object.Rate
Forbidden : User of that security group can not access the Rates subgrid at all
Read Only : User can view the Rates subgrid but can not edit it.
Read/Write : User can access the Rates subgrid, view and edit
Read/Write/Delete : User can access the Rates subgrid, view and edit and delete

5.34.9 Tax Codes

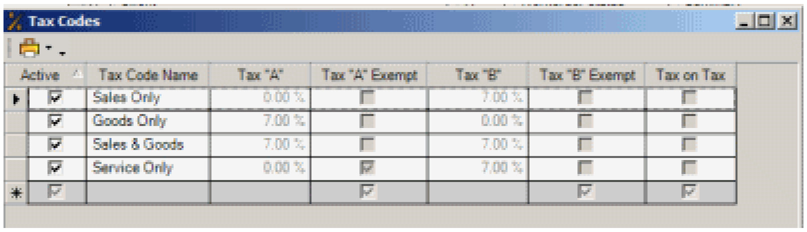


What's it for:

Tax codes are used to indicate taxes to be charged on parts and services in reports.

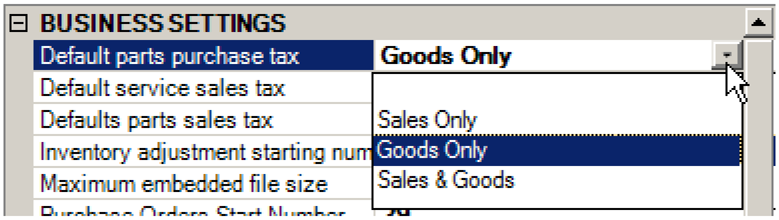
How to access the Tax Codes subgrid:

The Tax Codes grid is accessed from the SubGrids menu bar in the main navigation pane menu bar

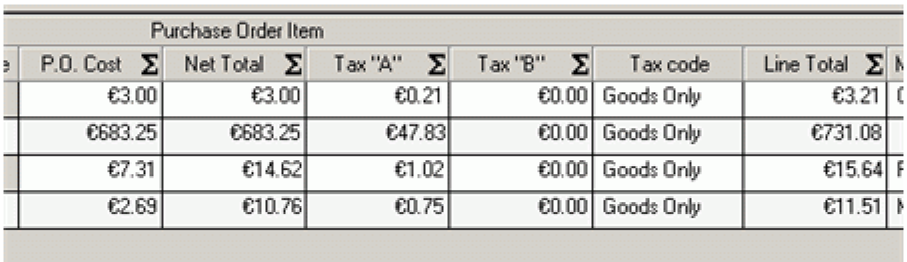


Where selected and used:

- defaults set for Default parts purchase tax, Default service sales tax and Default parts sales tax in GlobalSettings



- selected within a service workorder's Labor, Travel, Miscellaneous Expenses, and Loans
- selected within Purchase Order Items



Purchase Order Item

P.O. Cost	Net Total	Tax "A"	Tax "B"	Tax code	Line Total
€3.00	€3.00	€0.21	€0.00	Goods Only	€3.21
€683.25	€683.25	€47.83	€0.00	Goods Only	€731.08
€7.31	€14.62	€1.02	€0.00	Goods Only	€15.64
€2.69	€10.76	€0.75	€0.00	Goods Only	€11.51

- The actual tax values based on the Tax Code selected displays as columns in the Labor, Travel, Miscellaneous Expenses, and Loans grids
- Taxes are available in detailed reports from Purchase Orders, Service Workorders, and from summary reports from the Service navigation pane sub grids such as Parts, Labor, Travel, etc

Creating, editing and deleting:

- Once a tax code has been entered and the Tax Codes grid closed (which automatically saves) the tax code itself can **not** be deleted, and the tax code %'s can **not** be edited.
  - You **can** edit the name of the tax code at any time
  - You **can** set the tax code to inactive (uncheck the Active checkbox) so that the tax code can not be selected in the future
  - You can **not** edit the %'s of a saved tax code
  - You can **not** delete a saved tax code

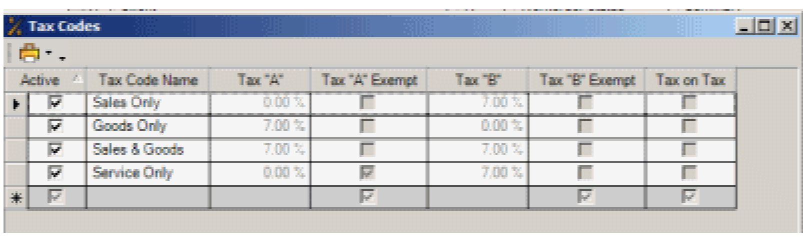
Setting a tax code to inactive:

- You must first make sure that the tax code is not selected as a default in your Global Settings.
- AyaNova has three sample tax codes pre-entered that are not deleted when you erase the sample data. If you will not use these percentages then create

your own tax codes percentages, set defaults in Global Settings, and then return to the Tax Code grid to set the tax codes to inactive that you will not use.

- You can create as many different tax codes as you need.
- You can set a default tax code for purchases of parts, for sale of parts, and for labor service charges via the Global Settings under Administration. Setting a default for these means less selection when purchasing parts or selling – but still allows you to select specific when needed.
- Use of Tax Codes is optional in AyaNova, as you can certainly just create a tax code that has 0% and set as your defaults in Global Settings, and remove taxes from showing in any report templates.

Refer to How to add/edit/delete/make inactive records in a subgrid



The columns of the Tax Code grid:

Active column
This is a checkbox field where you indicate whether the Tax Code is active or not. A checkmark indicates an active tax code and will have this tax code display in drop down selection lists. An inactive is not checked, and will not display in drop down selection lists.

Tax Code Name column
This is a text field where you indicate the name of the Tax Code that will display in drop down selection lists in Purchase Orders, a workorder item sub-screen Parts, a workorder item sub-screen Labor, and a workorder item sub-screen Travel.

Tax "A" column
Enter the tax using decimals. When you tab or click out of the field it will display in %. For example, enter in .07 and tab out. The field will automatically convert to display as 7.00%

Tax "A" Exempt column

If checkmark within the Tax "A" Exempt column, that will cause that Tax "A" to revert to 0%

Tax "B" column
Enter the tax using decimals. When you tab or click out of the field it will display in %. For example, enter in .07 and tab out. The field will automatically convert to display as 7.00%

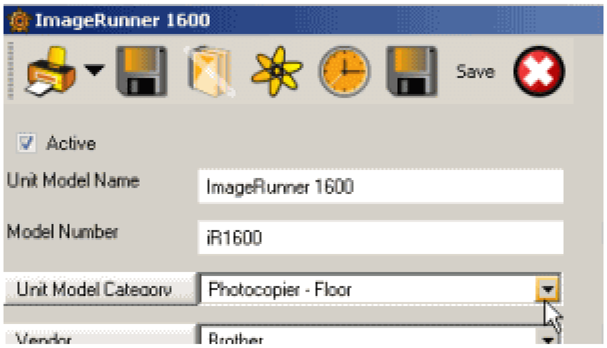
Tax "B" Exempt column
If checkmark within the Tax "B" Exempt column, that will cause that Tax "B" to revert to 0%

Tax on Tax column
Tax On Tax indicates that where in AyaNova taxes are calculated, Tax B is applied to the total of the item plus the Tax A.

For example, if you had a tax code that was 5% for Tax A and 6% for Tax B, and the product the tax was applied to was priced at $10.00, - Tax A would be $0.50 ($10.00 * 5%) and Tax B would be $0.63 (($10.00 + $0.50 Tax A) * 6% Tax B)

Security Group internal object: Object.TaxCode
Forbidden : User of that security group can not access the Tax Codes subgrid at all *Read Only* : User can view the Tax Codes subgrid but can not edit it. *Read/Write or Read/Write/Delete* : User can access the Tax Codes subgrid, view and edit.

5.34.10 Unit Model Categories



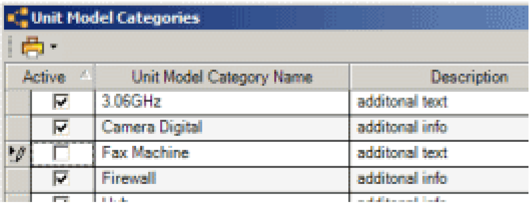
What's it for:

Unit Model Categories are used as an aid to categorize the equipment by type.

Use of Unit Model Categories is optional in AyaNova.

How to access the Unit Model Categories subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from jump button within the Unit Model entry screen



Where selected and used:

- Unit Model Categories are selected within the Unit Model entry screen
- You might use this for filtering and reporting from the Unit Model entry screen

See also:
Unit Models

5.34.11 Units of Measure

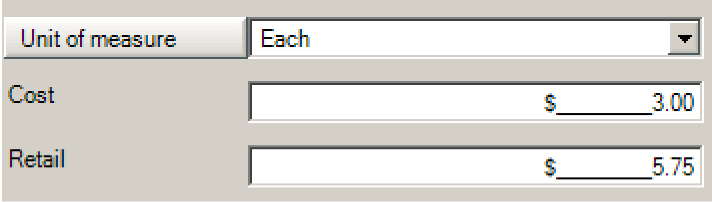
What's it for:

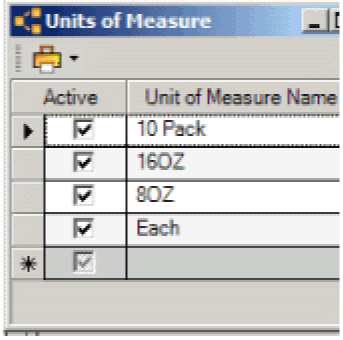
Units of Measure are used as the magnitude of the kind designated. For example, a part could be "each", "box", "case", "dozen", "gallon", "feet", "meter" etc

Use of Units of Measure is optional in AyaNova.

How to access this:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the Unit of Measure jump button within Part entry screen



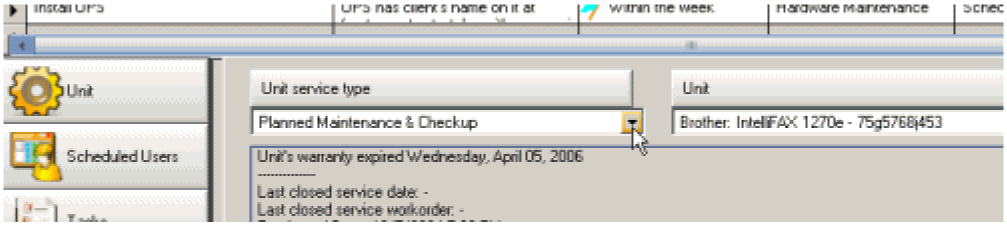


Where selected:

- Units of Measure are selected within the Part entry screen
- displays as a column in the Part grid
- in report templates from the Part grid

Security Group internal object: Object.UnitofMeasure
Forbidden : User of that security group can not access the Unit of Measure subgrid at all *Read Only* : User can view the Unit of Measure subgrid but can not edit it. *Read/Write* : User can access the Unit of Measure subgrid, view and edit *Read/Write/Delete* : User can access the Unit of Measure subgrid, view and edit and delete

5.34.12 Unit Service Types



What's it for:

Unit Service Type is to identify the service pertaining specifically to the unit.

Similar to the Workorder Item Type column in the workorder item, however that is used to identify the type of service requested to the workorder item as a whole, the Unit Service Type field is an additional service type selection specific to the Unit. You can use one or the other or both.

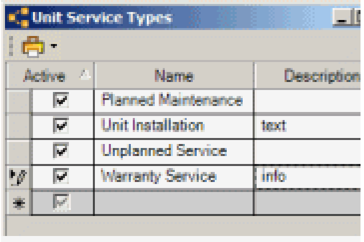
> For example, you may select Business Network Service as a Workorder Item Type in the workorder item grid, you may further identify that the Unit being selected is Warranty Service.

This is useful for filtering via the User Scheduled List and for reporting purposes to identify the types of service being performed.

Use of Unit Service Types is optional in AyaNova.

How to access the Unit Service Types subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the Unit Service Type jump button within the workorder Unit sub-screen



Where selected and used:

- unit Service Type is selected within the Service, Quote and PM workorder item sub-screen where you select the Unit
- displays as a column in the Items grid and below
- available in detailed reports from the Service Workorders, Quotes and Preventive Maintenance, as well as summary reports from the sub grids

Security Group internal object: Object.UnitServiceType
Forbidden : User of that security group can not access the Unit Service Types subgrid at all *Read Only* : User can view the Unit Service Types subgrid but can not edit it.

Read/Write : User can access the Unit Service Types subgrid, view and edit

Read/Write/Delete : User can access the Unit Service Types subgrid, view and edit and delete

5.34.13 User Certifications

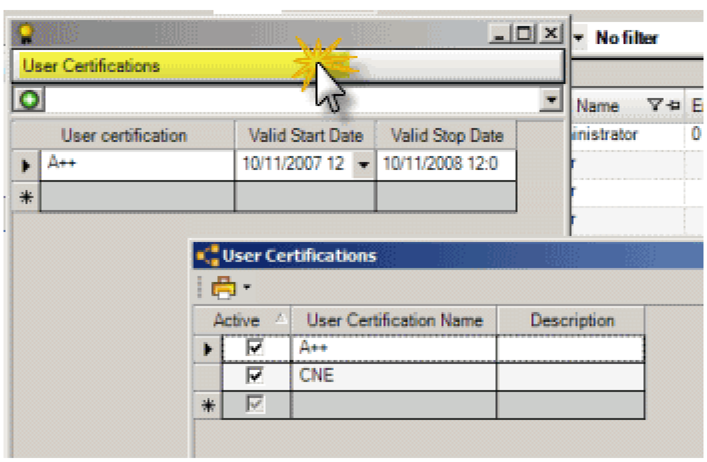
What's it for:

User Certifications identify and track possible professional certifications that a user may have that will determine if they have the abilities to perform certain service and/or be assigned to certain Schedulable User Groups.

Use of User Certifications is optional in AyaNova

How to access the User Certifications subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- accessible via the jump button within the User Certification subgrid in a User entry screen



Where selected:

- within the User entry screen
- within the Schedulable User Group entry screen for the Schedule screen

Security Group internal object: Object.UserCertification
Forbidden : User of that [security group](#) can not access the User Certifications subgrid at all *Read Only* : User can view the User Certifications subgrid but can not edit it. *Read/Write* : User can access the User Certifications subgrid, view and edit *Read/Write/Delete* : User can access the User Certifications subgrid, view and edit and delete NOTE: If a user of that security group will be assigned a User Certification, you must have **Object.UserCertificationAssigned** set to minimum Read Only. Otherwise when the user tries to log into AyaNova, will get the following error: *Error: Current user not authorized to open a UserCertificationAssigned record*

5.34.14 User Skills

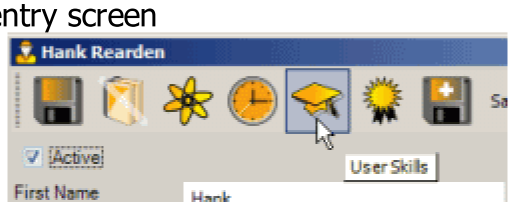
What's it for:

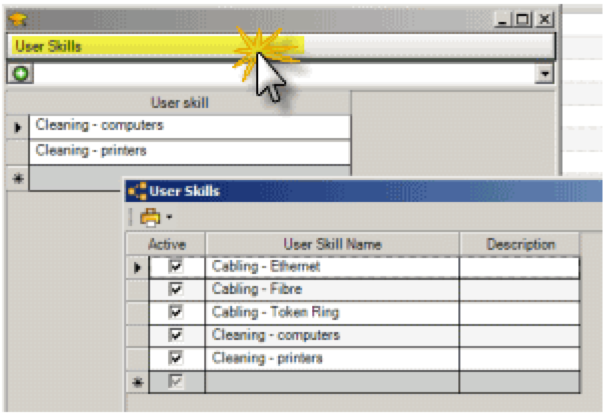
User Skills identify and track possible skills that a user may have that will determine if they have the abilities to perform certain service and/or be assigned to certain Schedulable User Groups.

Use of User Skills is optional in AyaNova.

How to access the User Skills subgrid:

- accessed from the SubGrids menu bar in the [main navigation pane menu bar](#)
- accessible via the jump button within the User Certification subgrid in a User entry screen





Where selected:

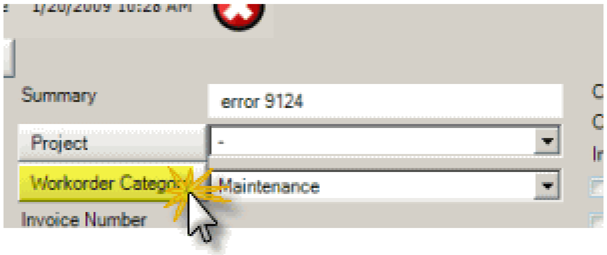
- within the User entry screen menu option

- from within the Schedulable User Group entry screen

See also:
Schedulable User Groups

Security Group internal object: Object.UserSkill
Forbidden : User of that security group can not access the User Skills subgrid at all *Read Only* : User can view the User Skills subgrid it but can not edit it. *Read/Write* : User can access the User Skills subgrid, view and edit *Read/Write/Delete* : User can access the User Skills subgrid, view and edit and delete NOTE: If a user of that security group will be assigned a User Skill, you must have **Object.UserSkillAssigned** set to minimum Read Only. Otherwise when the user tries to log into AyaNova, will get the following error: *Error: Current user not authorized to open a UserSkillAssigned record*

5.34.15 Workorder Categories



What's it for:

Workorder Categories are used to categorize the service workorder as a whole. This is useful for both filtering the Workorder grid and for generating management reports that are filtered by category. A category can be anything you want it to be.

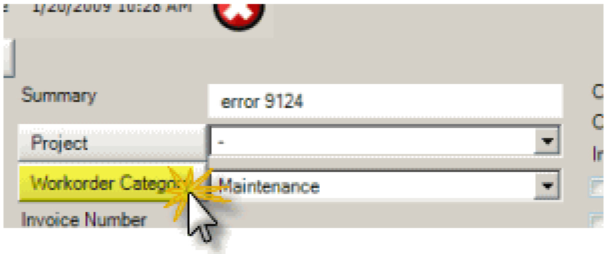
For example: AyaNova may be used by a service business with different departments who want to see management reports based on each department separately such as an Internet department, a network department, an in house repair department. Three Workorder Categories may be created - "Internet Service", "Onsite Network Service", and "In-house Service". By selecting the specific category in the workorder, it will allow you to easily filter by the category in the Service Workorder grid so that you can run reports such as how much labor hours each different department billed out this month, what the response time from creation of the workorder to completion was for each department, etc.

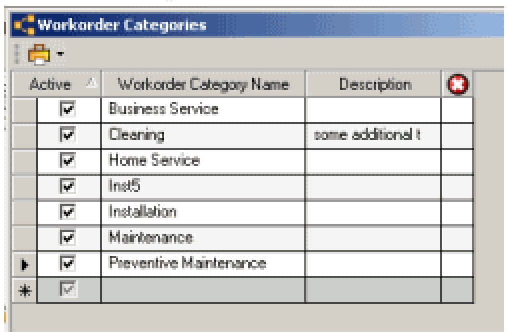
Workorder Categories are optional in AyaNova.

The sample workorder categories in the AyaNova sample database are just that - examples only. You can enter whatever workorder categories you wish.

How to access the Workorder Categories subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- via the jump button within the workorder header in a service workorder, quote or preventive maintenance item





Where selected:

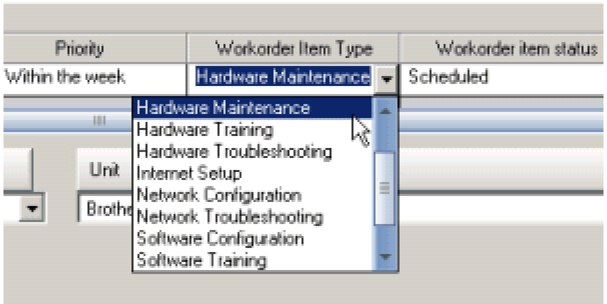
- Workorder Category is selected within the workorder header for a service workorder, quote or preventive maintenance item
  See also:
  [Workorder - order header]
- displays in the Service grids, Quote grids and PM grids.
- available from reports from Service Workorders, Quotes and Preventive Maintenance orders

You will note that the categories listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these categories. You can edit existing which would affect all orders where this category was previously selected; you can delete existing (if not selected within orders), and you can create new categories for selection.

Security Group internal object: Object.WorkorderCategory
Forbidden : User of that security group can not access the Workorder Category subgrid at all *Read Only* : User can view the Workorder Category subgrid but can not edit it. *Read/Write* : User can access the Workorder Category subgrid, view and edit

Read/Write/Delete : User can access the Workorder Category subgrid, view and edit and delete

5.34.16 Workorder Item Types



What's it for:

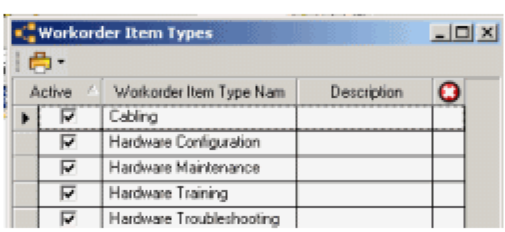
Workorder Item Types identify what type of service is being performed within the selected workorder item. This is useful for reporting and for filtering the grid view.

For example, if you run a yard and mower maintenance service business, you may want to identify lawn maintenance from yard repair like fence or gate repair. Or if you run a computer service shop, although the Workorder Category may be Networking, you may want to further distinguish the individual workorder items that are networking related even further such as Network Cabling, Network Configuration, Network Hardware, Network Software that are scheduled within the workorder item.

Workorder Item Types are optional in AyaNova

How to access Workorder Item Types subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from within the service workorder menu bar when the workorder item has the focus - Workorder Item menu options

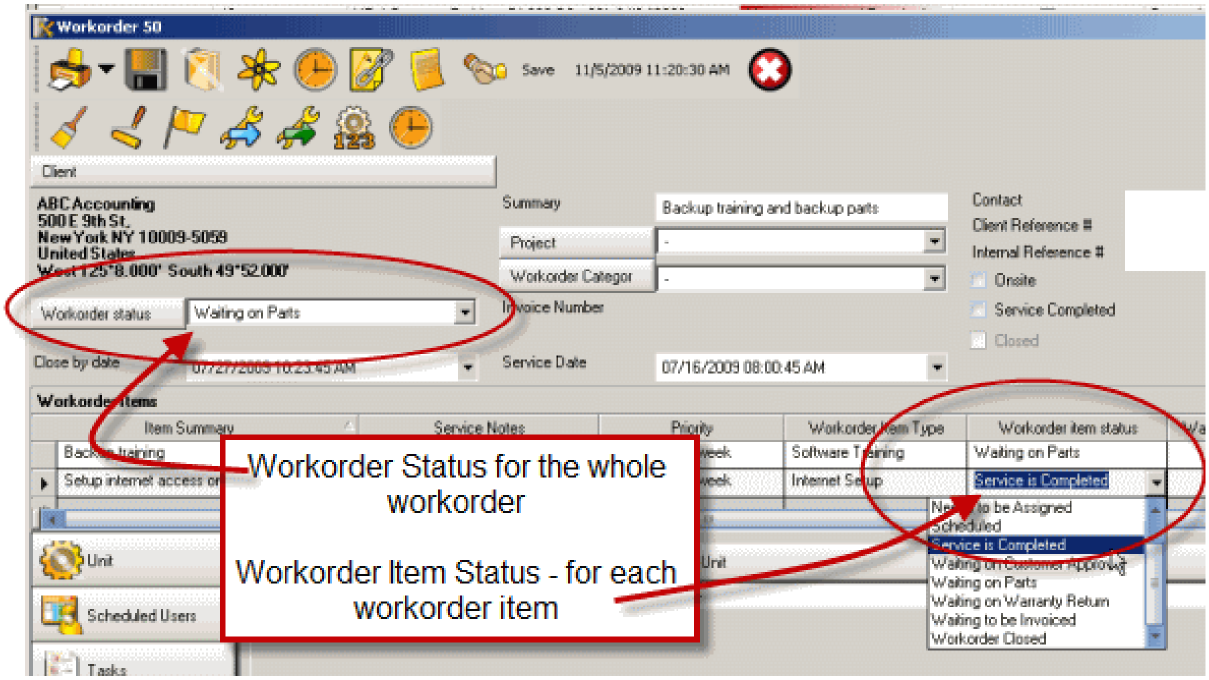


Where selected:

- From the Service Workorder Items grid in a service workorder, quote or preventive maintenance item
- available in detailed reports from Service Workorders, Quotes and PM's as well as summary reports through their sub grids

Security Group internal object: Object.WorkorderItemType
Forbidden : User of that security group can not access the Workorder Item Types subgrid at all *Read Only* : User can view the Workorder Item Types subgrid but can not edit it. *Read/Write* : User can access the Workorder Item Types subgrid, view and edit *Read/Write/Delete* : User can access the Workorder Item Types subgrid, view and edit and delete

5.34.17 Workorder Statuses



What's it for:

A Workorder Status is used to indicate the overall status of a service workorder; or if selected in a workorder item, the status of the individual workorder item.

Workorder Status in a workorder:

Setting the overall status of a service workorder in the Service Workorder header field Workorder Status allows you to easily filter on the Service grids based on that status, as well as easily see at a glance what the overall status of the workorder is.

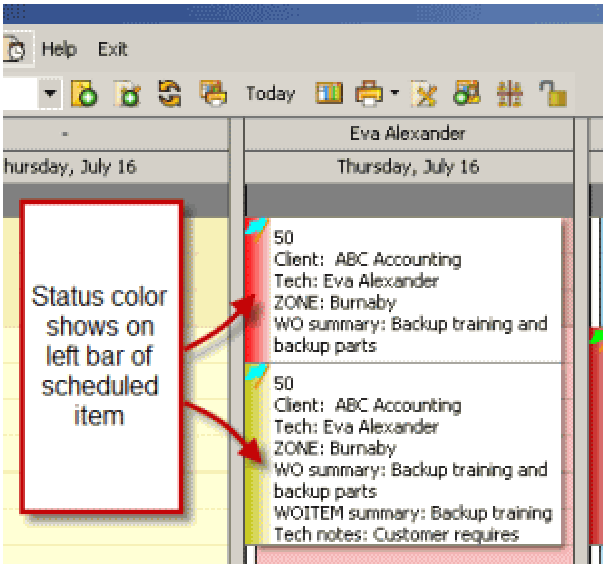
Also, combined with the Notification Subscription **Workorder – "Status" changed** the user subscribed to this can be notified when the status is set to a specific status.

Workorder Item Status in a workorder item:
Setting the workorder status of an individual workorder item in the Workorder Item Status field allows you to easily filter on the Service Workorder Items grids based on that status, as well as easily see at a glance what the status of the workorder item is.

Also, by setting the workorder status for a workorder item, the color of that workorder status is shown in the Schedule screen so that you can easily see at a glance what the status of that workorder item is.

Where selected:

- Displays in the Schedule screen schedule item as the workorder item's status bar of color on the left side



- within a service workorder within the service header and within a service workorder within the workorder item grid

Selection in Service Workorder header:

The drop down selection field in the service header is used to indicate the overall status of a service workorder. It displays on the main Service Workorder list grid view and is useful to a service manager to determine the progress of a work order as a whole.

It might also be useful to other company staff when fielding questions from customers about the progress of their work order.

Status is strictly for visual display only and does not affect the operation of the program other than in conjunction with the notification feature if enabled.

See also:
Workorder - order header

Selection in Workorder Item grid:

The drop down selection field in the workorder item grid indicates the status for the individual workorder item. Do note that only Status set for individual workorder items display an associated color when viewed via the Schedule screen.

For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item’s status.

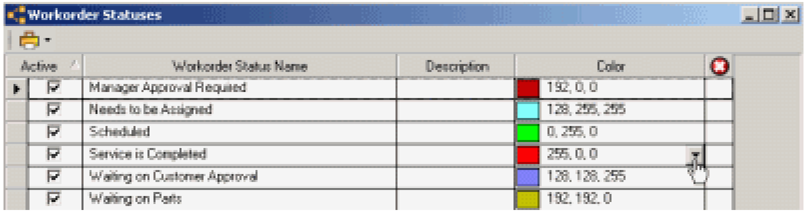
See also:
Service Workorder Items

We provide both locations to indicate status so that your organization can use what works best for your situation. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas.
For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item’s status.

- Displays as an available field in detailed reports from Service Workorders, Quotes and PM's as well as summary reports through their sub grids

How to access the Workorder Statuses subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the jump button within the service workorder header Workorder - order header
- from menu option when in Items of a workorder - Workorder Item menu options



The Color column in the Status subgrid

The Color column in the Workorder Statuses subgrid is a drop down field where you select the color that a workorder item with this status will display as when viewed on the Schedule screen.

Select the color desired by clicking on the drop-down arrow to display the color selection tabs.

Security Group internal object: Object.WorkorderStatus
Forbidden : User of that security group can not access the Workorder Status subgrid at all *Read Only* : User can view the Workorder Status subgrid but can not edit *Read/Write* : User can access the Workorder Status subgrid, view and edit *Read/Write/Delete* : User can access the Workorder Status subgrid, view and edit and delete

You will note that the statuses listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these statuses. You can edit existing which would affect all orders where this status was previously selected; you can delete existing (if not selected within orders), and you can create new statuses for selection.

How do I ...?

6 How do I ...?

6.1 Basic overview of a workorder

In this tutorial example, we will go through creating a service workorder, scheduling a tech to perform the service, entering details of the service performed, and printing out a report that can be used as an invoice to send to a client.

- Do note that this is a very basic overview only, and does not cover every field and its use, nor time saving and useful feature of the workorder entry screen.
- We always recommend that you review this Help file's entire section on Service Workorders for complete overview, suggestions on use, tips on use and more.
- NOTE: screenshots in any of these How do I...?'s tutorials may not be exactly as in your database as dependant on your data, grid layout, etc

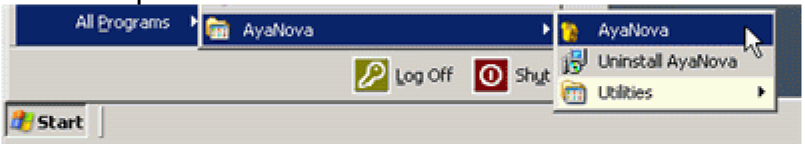
1. **Run AyaNova**
2. **Create the new service workorder for the client**
3. **Schedule your tech(s) via the workorder**
4. **Details of labor service provided entered into the workorder**
5. **Set workorder to Service Completed**
6. **Invoice the billable items to your customer**

1. Run AyaNova

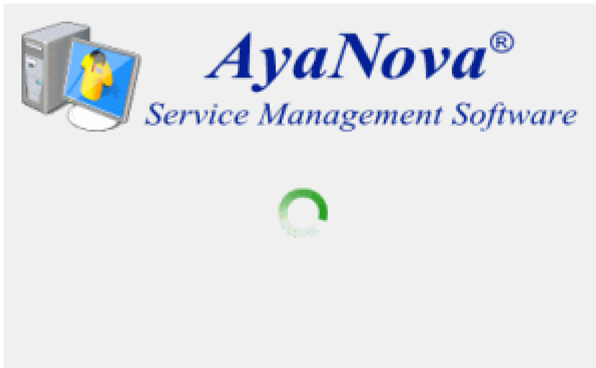
Now that you have installed the AyaNova program and its sample database (see the installation steps if needed) start the AyaNova program:

- Run AyaNova from the desktop icon

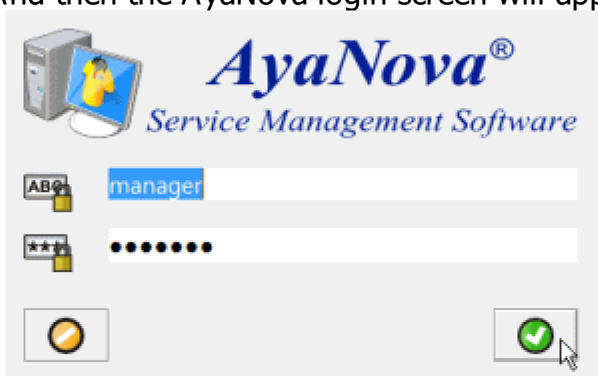
- **Or** run AyaNova from the Start -> All Programs -> AyaNova -> AyaNova menu option



When started, the AyaNova program will initially pre-load items it needs for faster access later.



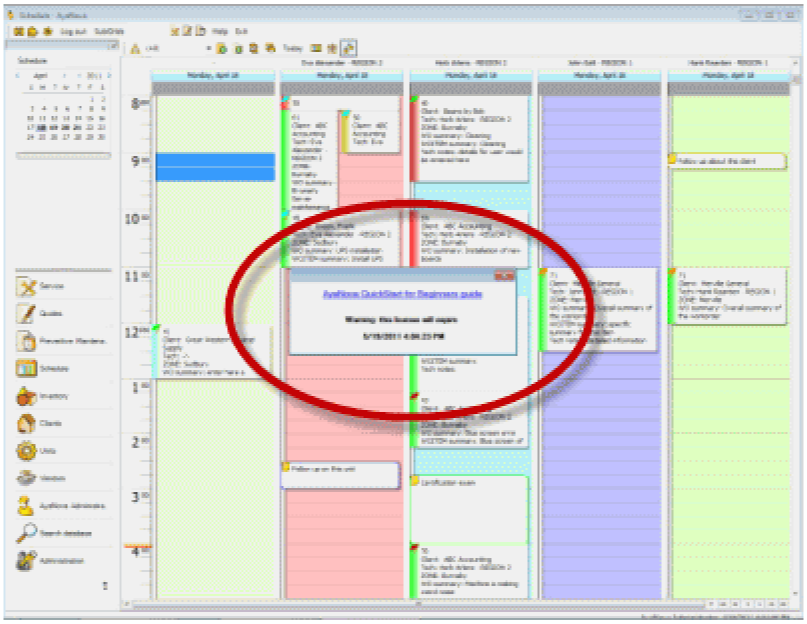
And then the AyaNova login screen will appear.



- If you have just installed AyaNova, the AyaNova Administrator username and password will be pre-entered for you just as per the screenshot above - as the AyaNova Administrator username if not yet changed is *manager* with password *letmein*
- Once AyaNova is licensed (either temporarily or with a paid for license) the username and password fields will be blank for your security
- Test logging in as other sample users - see the Sample Users and Passwords for login names and passwords.

Once you log in, the AyaNova program will load.

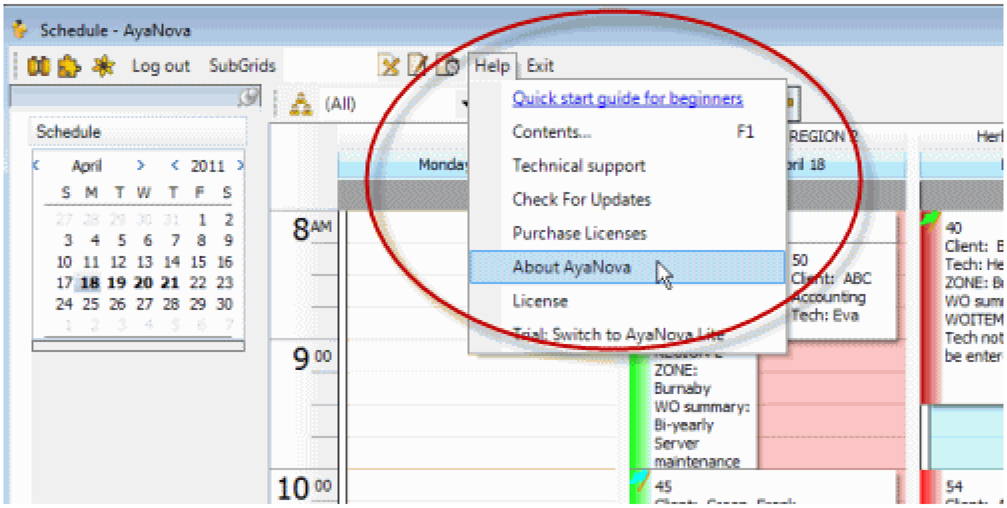
If your AyaNova is either not yet licensed or is temporarily licensed, a popup will display showing the date when your trial AyaNova will expire, and a link to get you started by providing links to tutorials and videos.



As with any screens in AyaNova, you can easily exit out by clicking on the X in the upper right-hand corner.

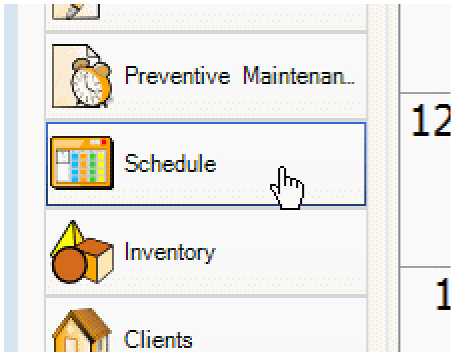
The AyaNova installation you ran installed the AyaNova program files and the AyaNova database that includes sample data.

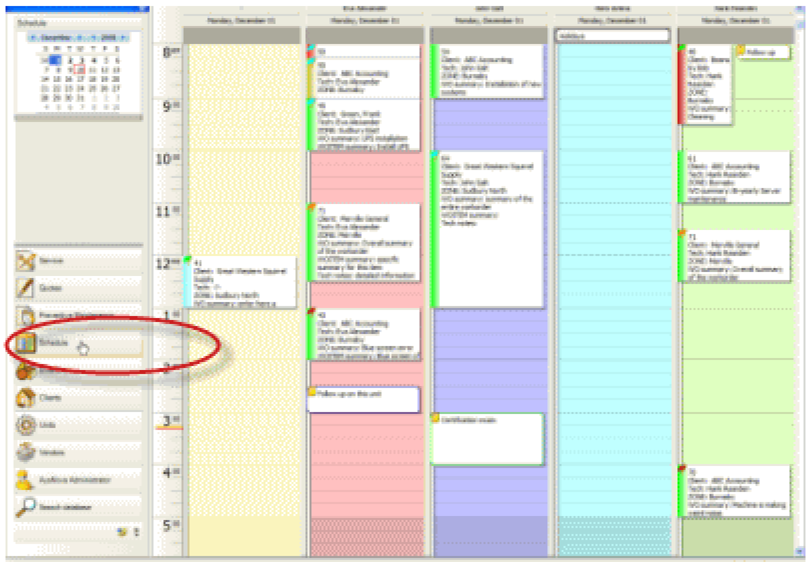
You can see whether your AyaNova is licensed or not by checking Help -> About AyaNova



When you first log into AyaNova and close the popup, AyaNova will be displaying the Dashboard from where you can quickly access service workorders and create new.

Use the Navigation Pane on the left to move to other sections of AyaNova. For example, below are screenshots showing that to view the Schedule screen you click on the Schedule navigation pane on the left.
So if you want to view the Clients grid that shows a grid listing your client records, you would click on the Clients navigation pane, and so on.

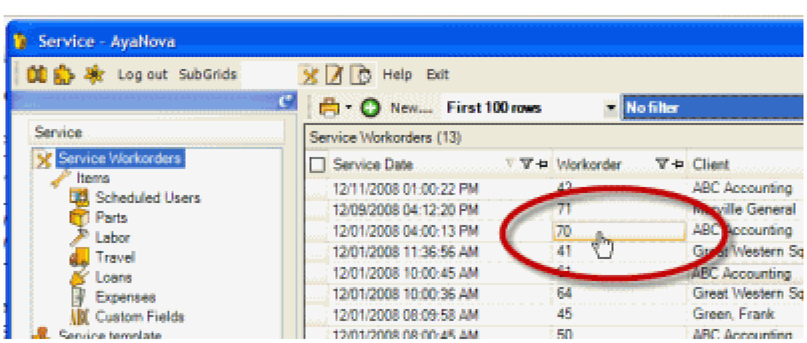




Review about customizing the Navigation Pane and more in the [Navigation Pane section of this Help documentation]

Records in AyaNova are displayed in grids.

You can easily filter any grid so that certain records only show based on criteria you set, as well as sort based on what columns are set, you can display or not display certain columns, and report from these grids.



Click on a specific record field to open that entry screen. For example, if you click on the workorder # as per the screenshot above, then Workorder #70 entry screen will open. Whereas if you clicked on the field ABC Accounting, then the client entry screen for that client would open.

See more about use of grids in the Grids section of this Help documentation

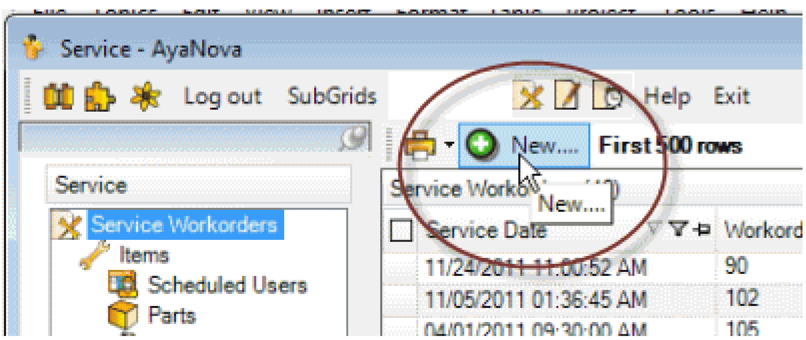
2. Create the new service workorder for the client

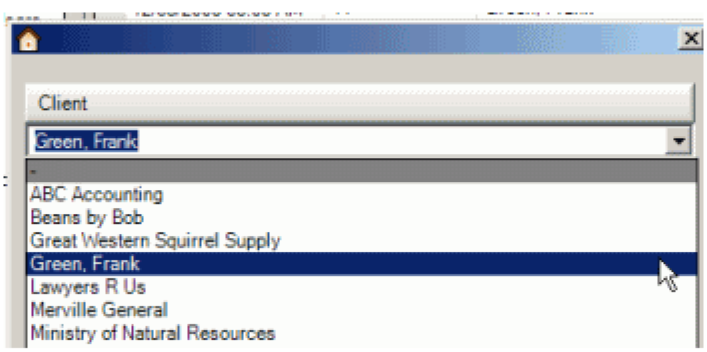
You can create a new service workorder many different ways - do check out the following as they provide many time saving steps:

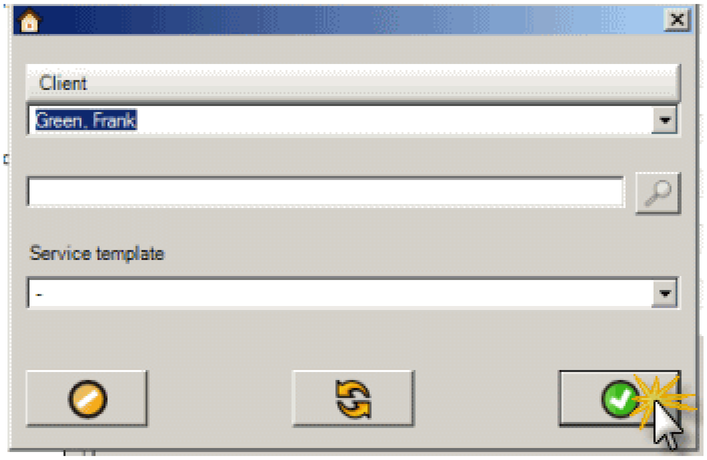
Create a new service workorder
Create new workorder for a client or unit
Create via the schedule screen

In this example, we will create a new service workorder from the Service Workorders grid:

- Click on the **Service** navigation pane to view the Service Workorders grid
- select the menu option **New...** from the Service Workorders grid
- select the sample client **Green, Frank**
- click on the OK button to create the new workorder for this client

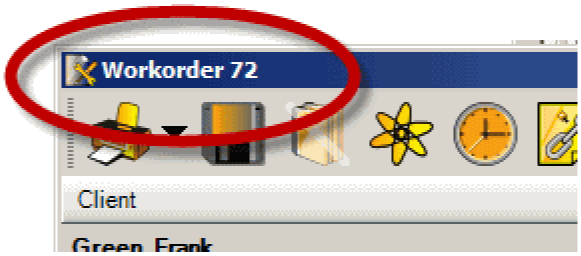






- Click on the Save menu option - note that the service workorder now has a workorder number automatically assigned to it.

Your workorder number will be +1 of the last workorder number ever created with this database.



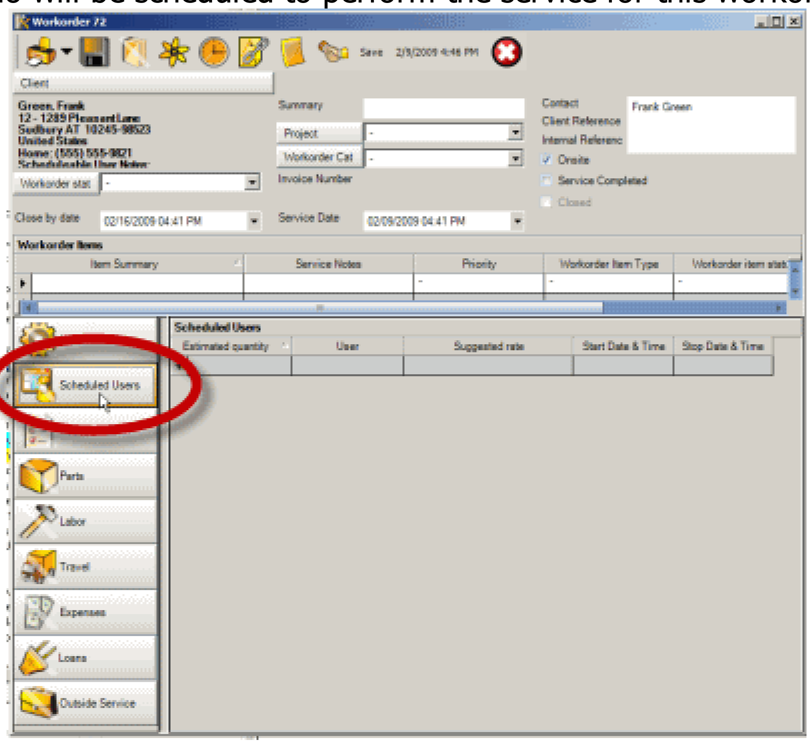
As we won't cover all the fields and selections in the various areas of the service workorder, it is recommended that you do review the Service Workorder section of this Help file

- Order header area
- Service workorder header area
- Service workorder items
- Unit
- Scheduled users
- Tasks
- Parts
- Labor
- Travel
- Loans
- Expenses

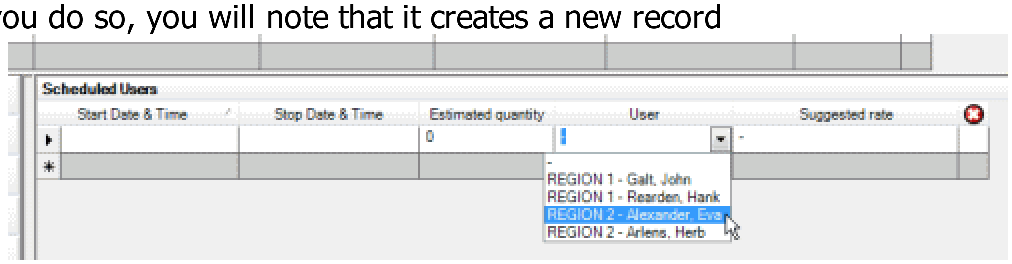
- [Outside Service]
- [Custom Fields]

3. Schedule your tech(s) via the workorder

- Select the Scheduled Users tab on the left to see and enter records about who will be scheduled to perform the service for this workorder

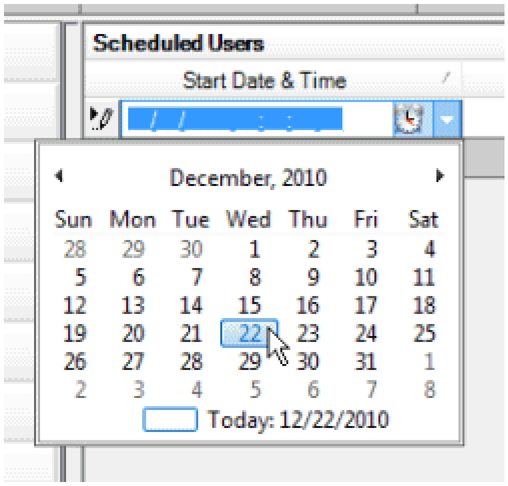


- Create a new Scheduled User record by using your mouse to click within the grey record field of User to drop down and select the user **Eva** - as soon as you do so, you will note that it creates a new record



The format that your schedulable users display in depends on the Global Settings for [User Display Format].

- Drop down the Start Date & Time and select today's date

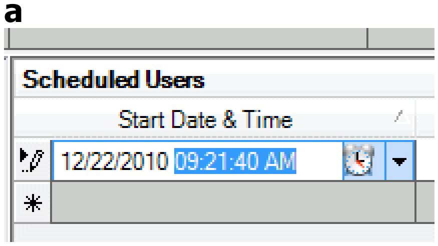


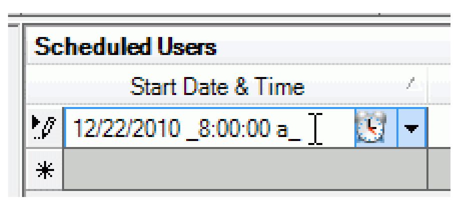
If you select today's date, the time will default to the actual time it is right now.
If you select a date not today, the time will default to either 12:00AM or whatever pre-set time you have set in your Global Settings for Scheduled Default Time

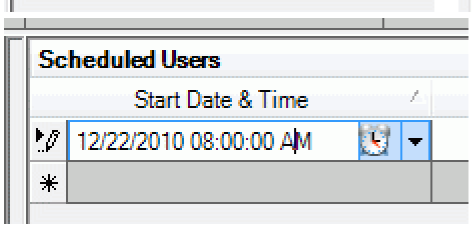
- How time displays (i.e. with or without seconds, etc) depends on your Windows settings. See Currency, Date & Time Display
- Refer to the section on entering time

To edit, use your mouse to highlight the time and enter in the time you want **or** click on the clock and use your mouse to select a time option.

For example if you want it to be 08:00 AM - highlight and type in **080000 a**

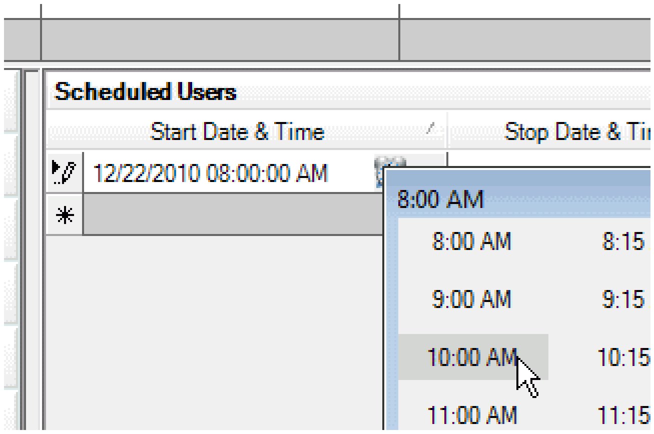


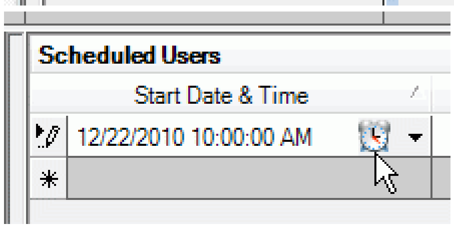




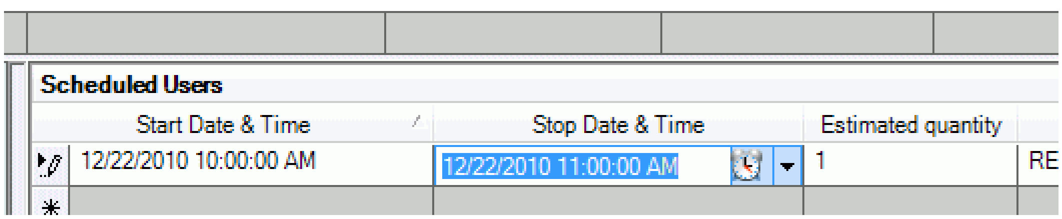
OR

Use your mouse to click on the clock icon and select a time from the options





and then **tab** to the next field for it to update the Stop Date & Time field automatically.

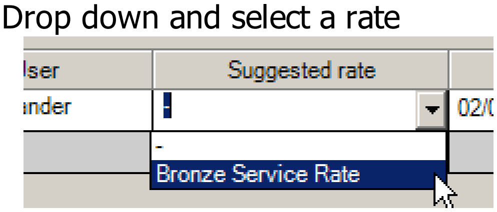


Note how AyaNova will automatically enters in a date and time for you in the Stop Date & Time if there was nothing entered there before as a time saving feature.

How many minutes it enters the Stop Date & Time are dependant on what you have configured in the Global Settings - **Scheduled / Labor Default Minutes** setting

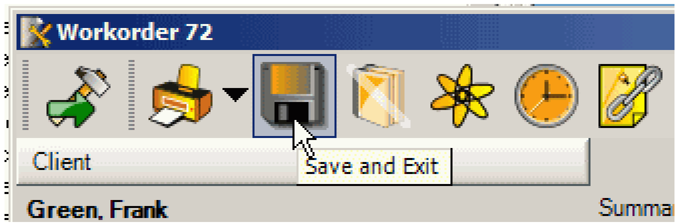
Also too that the **Estimated Qty** will automatically fill in for you based on the difference between the Start Date & Time, and the Stop Date & Time

- Drop down and select a rate

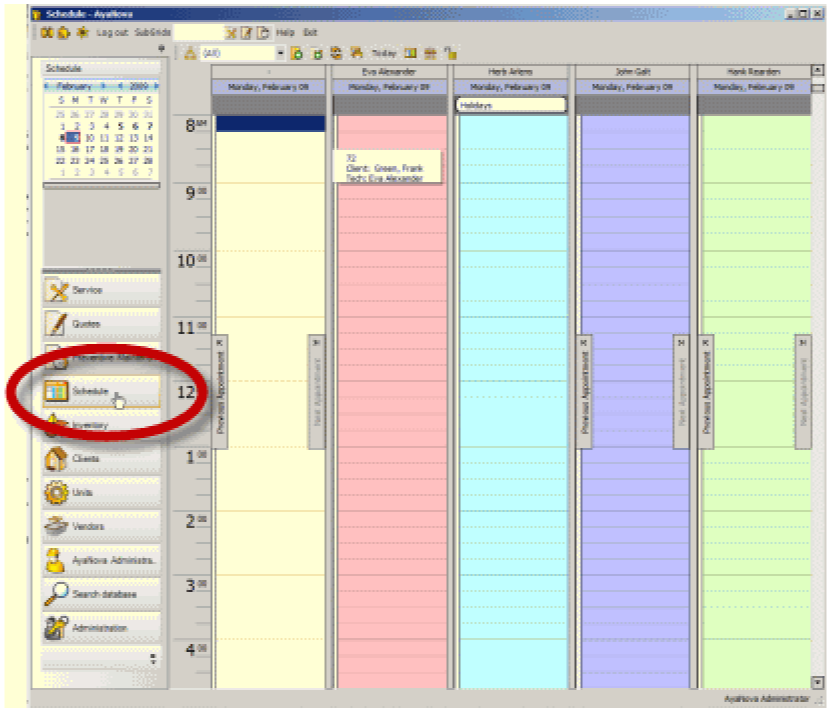


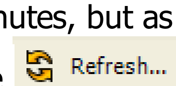
In our sample data the client Green, Frank has a contract that limits him to only specific rates.

- Save & Exit out of this service workorder



- Now view the Schedule screen.

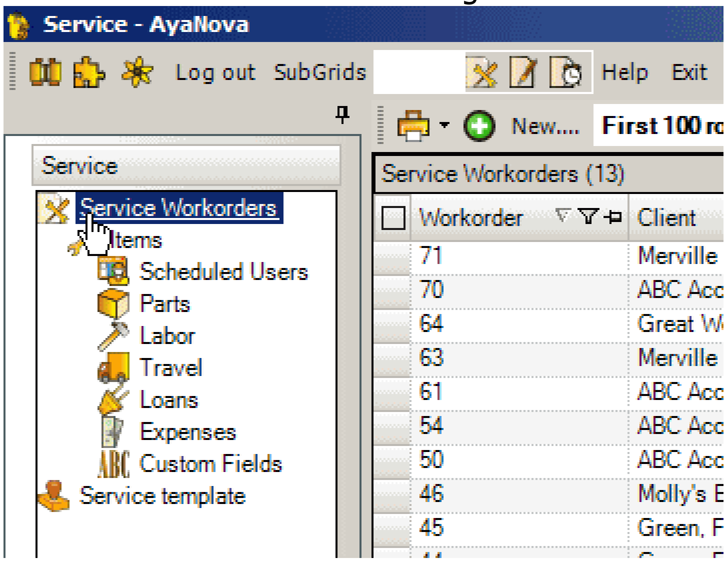


- AyaNova automatically refreshes your grids every 5 minutes, but as we just saved and we want to see this workorder item, click the  Refresh menu option

- You will now see that your scheduled workorder item for Eva is showing for today

See also:
Date & Time Selection
Scheduled Users subsection of the order entry screen
Global Settings - Scheduled Users / Labor Default Minutes
Schedule screen
How do I schedule a user for a new workorder item via the Schedule screen?

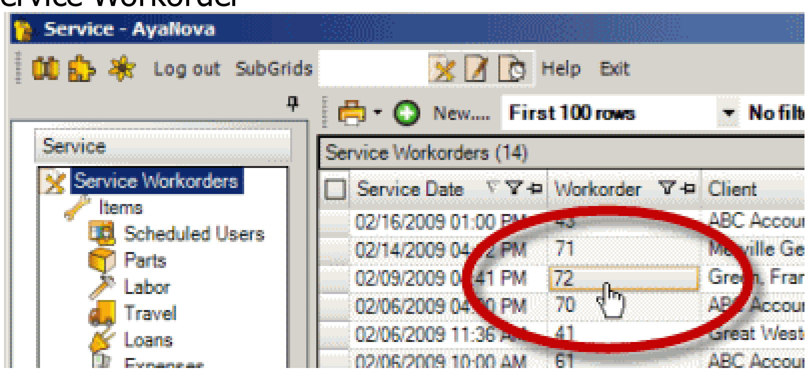
- Return to the Service Workorders grid



4. Details of labor service provided entered into the workorder

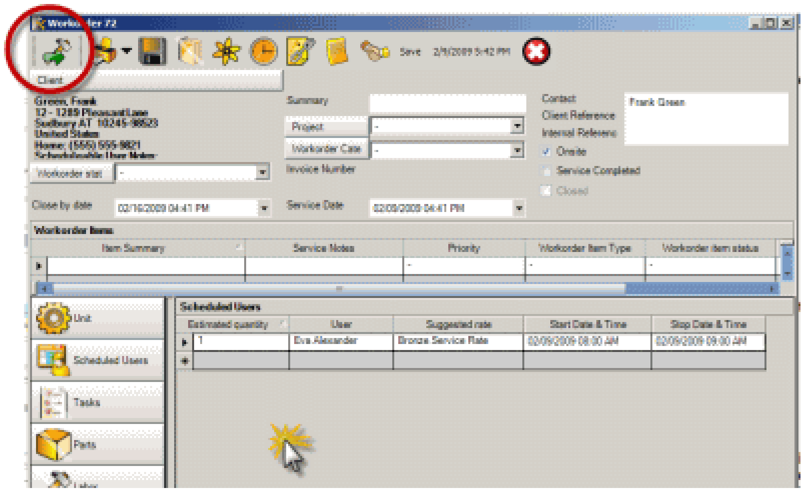
- We are going to assume for the purposes of this tutorial, that the service has now been performed.

- Open the workorder again by clicking on the workorder number in the Service Workorder



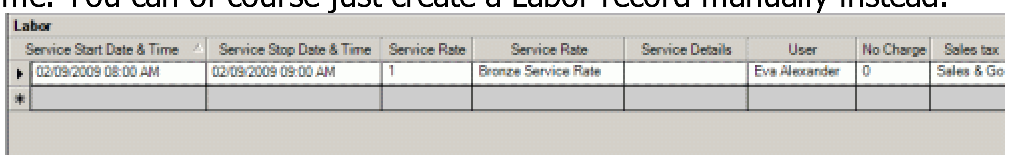
- Select the Scheduled Users subsection again in the workorder entry screen

- Click within the Scheduled Users grid section - you will note when you do so that a new menu option **Convert Scheduled User To Labor** appears at the top



- Select this menu option  **Convert Scheduled User To Labor**

- When you do so, a new Labor record is automatically created based on those settings you had for the Scheduled User record. This saves you entry time. You can of course just create a Labor record manually instead.



- In the Service Details enter details about the service performed such as the text "*specific details about the service performed so that have a history to refer to* " and tab off.

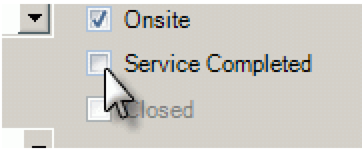
See also:
[Convert scheduled items to labor easily]
[Labor] subsection of the order entry screen
[Labor Banked Service]
[Date & Time Selection]
[Global Settings] - Default Service Sales Tax

5. Set workorder to Service Completed

- For the purposes of this tutorial, we are going to assume that is all we want to enter in this workorder
- Of course, you can enter a lot more details including parts, travel, additional workorder items etc
- As we won't cover all the fields and selections in the various areas of the service workorder, it is recommended that you do review the Service Workorder section of this Help file

- Order header area
- Service workorder header area
- Service workorder items
- Unit
- Scheduled users
- Tasks
- Parts
- Labor
- Travel
- Loans
- Expenses
- Outside Service
- Custom Fields

- Check-mark the Service Completed check box



- Once set to Service Completed, then the **Invoice:** field is now editable. All other fields other than the **Workorder Status** and **Closed** are no longer editable as it is assumed at this point if you have completed the workorder, you will no longer edit it.

6. Invoice the billable items to your customer

- You will note that the only fields that are now editable are **Invoice Number, Workorder Status, Service is Completed, and Closed.**

  When a workorder is check-marked Service Completed, this sets the workorder so that it can not be accidentally edited - because you have said it is completed, and therefore should not be edited or changed. If you have to edit a field that is not one of those four stated above, you need to un-check-mark Service Completed

- At this point in this example, you want to invoice your customer so that you get paid for the work performed.

A. If using the optional add-on QBI QuickBooks accounting software interface:
B. If using the optional add-on PTI Peachtree accounting software interface:
C. If not using QBI or PTI but another accounting program:

D. If not using QBI, PTI or any other accounting program:

A. If using the optional add-on QBI QuickBooks accounting software interface:

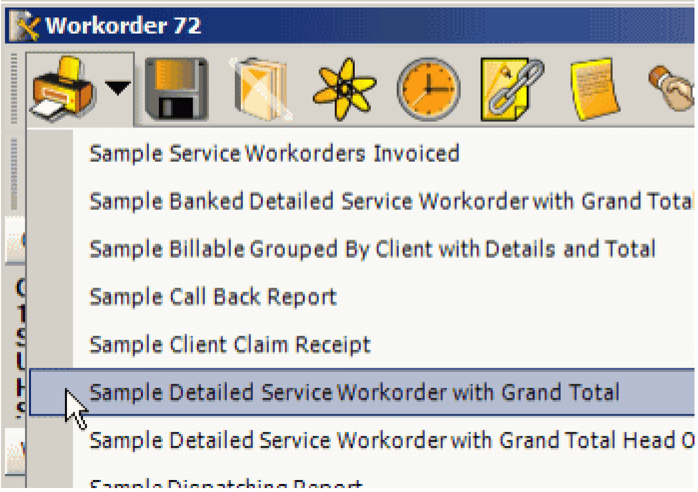
Use QBI to invoice out the workorders billable items, the QuickBooks invoice number is automatically entered in the Invoice Number field, and the workorder is automatically Closed (if selected to do so in QBI Preferences) and the Workorder Status set to that in your Global Settings for Workorder Closed Status.

B. If using the optional add-on PTI Peachtree accounting software interface:

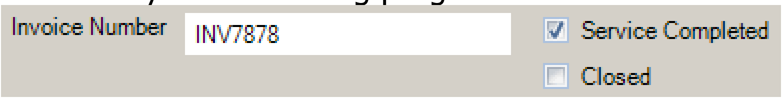
Use PTI to invoice out the workorders billable items, the Peachtree invoice number is automatically entered in the Invoice Number field, and the workorder is automatically Closed (if selected to do so in PTI Preferences) and the Workorder Status set to that in your Global Settings for Workorder Closed Status.

C. If not using QBI or PTI but another accounting program:

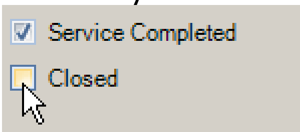
Print out for example the **Sample Detailed Completed Service Workorder with Grand Total report** for this workorder so that you can refer to the print out when invoicing the billable items. And include the AyaNova print out with your invoice you send to the customer so that they can see details of the work performed.



Then manually enter the invoice number from your accounting program into the **Invoice Number** field so that you can cross reference to the invoice in your accounting program.



When the customer pays the invoice, at that time check-mark the Closed field in AyaNova for this workorder.



D. If <u>not</u> using QBI, PTI or any other accounting program:

Print off for example the Sample Detailed Service Workorder with Grand Total to provide to the client as an invoice.

All report templates can be further customized including adding your own logo

Change the Workorder Status to a status that you have created perhaps called "Invoiced - waiting on payment" so that you can easily see at a glance that you are waiting to be paid, as well as filter the grid on this status so that you can easily see at a glance which workorder's payment are still outstanding

You can create as many different Workorder Statuses as you want!

And check the Service Completed checkbox so that the workorder is not accidentally further edited (as you have sent the invoice in to the client, so you won't want any changes made)

When payment is received from the customer, to track your $ amount received from the client, you could enter into the Invoice field the $ amount that you received

If entered as a number, even though this is a "text" field, not a currency, you could use in reports summing up totals and more!

And change the Workorder Status to a status called "Invoiced - Payment Received" so that you can easily filter and see at a glance that payment has been received for this workorder

And checkmark the Closed checkbox to close the workorder.

Iif you ever need to unClose, just log in as the AyaNova Administrator to do so

- Do note that this was a very basic overview only, and does not cover every field and its use, nor time saving and useful feature of the workorder entry screen.

- It is recommended that you review this Help file's entire section on Service Workorders for complete overview , suggestions on use, tips on use and more.

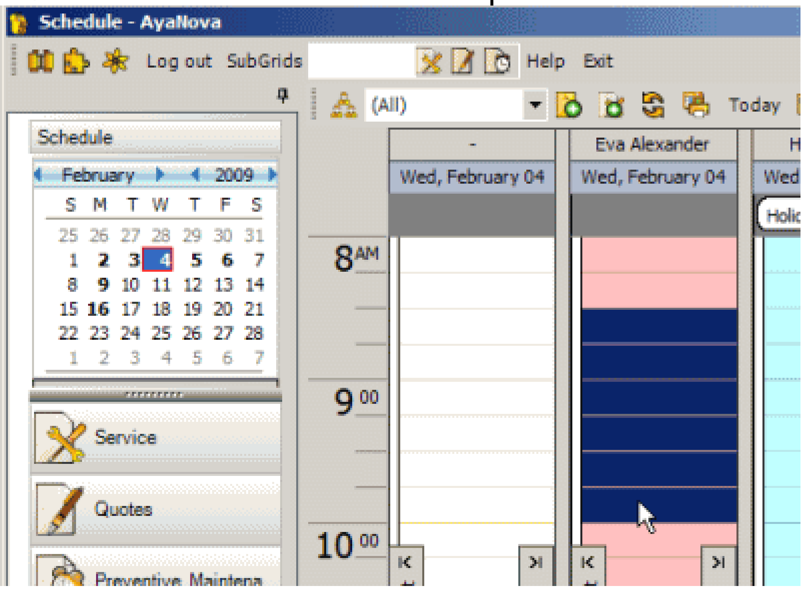
6.2 Schedule user for new workorder item via the Schedule Screen

You can schedule a user for a new service workorder via the Service Workorder entry screen's Scheduled Users subsection, or even easier, do so via the graphical Schedule screen selecting the time range on a specific date.

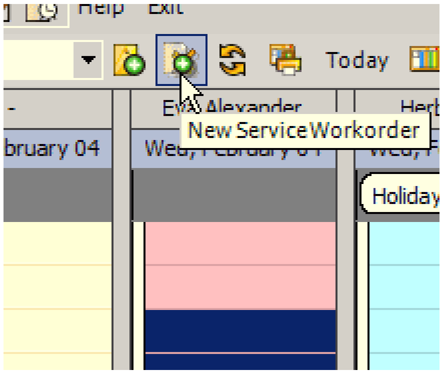
In this tutorial example, we will go over the basic steps of scheduling a user for a service workorder item via the Schedule screen.

- It is highly recommended that you review this Help file's entire section on Service Workorders and Schedule Screen for complete overview , suggestions on use, tips on use and more.

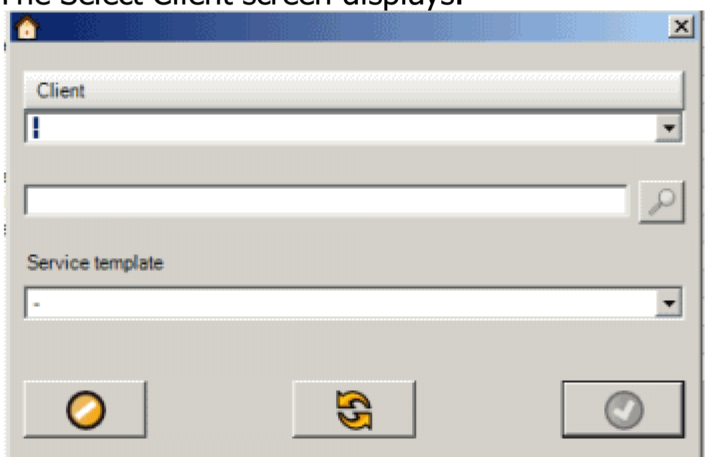
1. View the Schedule screen, and select a time frame for the user that you wished scheduled.
   - Using your mouse, click on the starting time and drag your mouse down to highlight the total time you wish to schedule this user (you can always edit the time if you need to later)
   - In the example screen shot below we had clicked on the date Feb 4 to display the single day view for (All) users, and selected a start time of 8:30AM to 10:00AM for the sample schedulable user Eva



2. With that time selected, click on the New Service Workorder button on the toolbar. If you do not select a date, or date and time frame prior to selecting, AyaNova will not know what day or time range to schedule for.

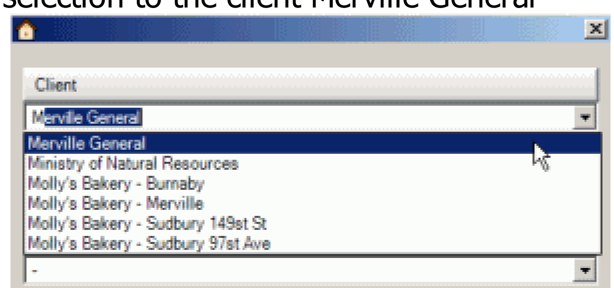


3. The Select Client screen displays.



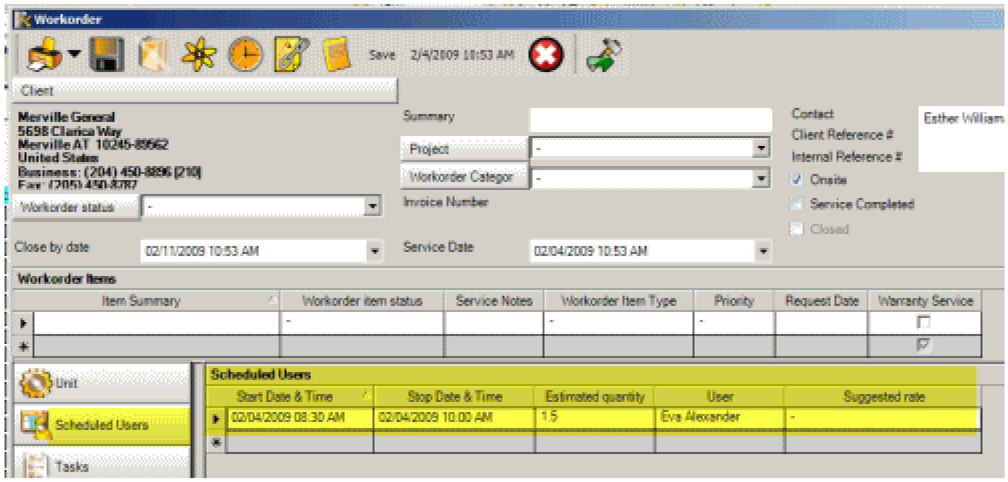
4. You can either use your mouse to drop down the list of clients and scroll to the client name or you can begin typing in the clients name to “jump” to that client in the list.

5. Type in the letter “m” (without the quotation marks) which will “jump” the selection to the client Merville General



6. We won't select a service template in this tutorial.
7. As this is the client we want, hit the ENTER key on your keyboard (or use the mouse to select the OK  button)

8. A new service workorder will appear for that selected client, with the selected time frame and date for that user in the Scheduled Users sub-screen of the workorder item.

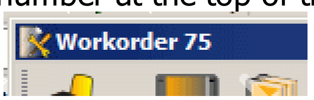


9. Enter in details of the workorder item such as entering a Workorder Summary and selecting Workorder Status; in the workorder item the Priority, Workorder Type and Workorder Item Summary and Service Notes; and in the Scheduled Users enter in the suggested rate (it will have pre-entered the Start and Stop Date for you and the Estimated Time)

10. Save workorder by selecting 

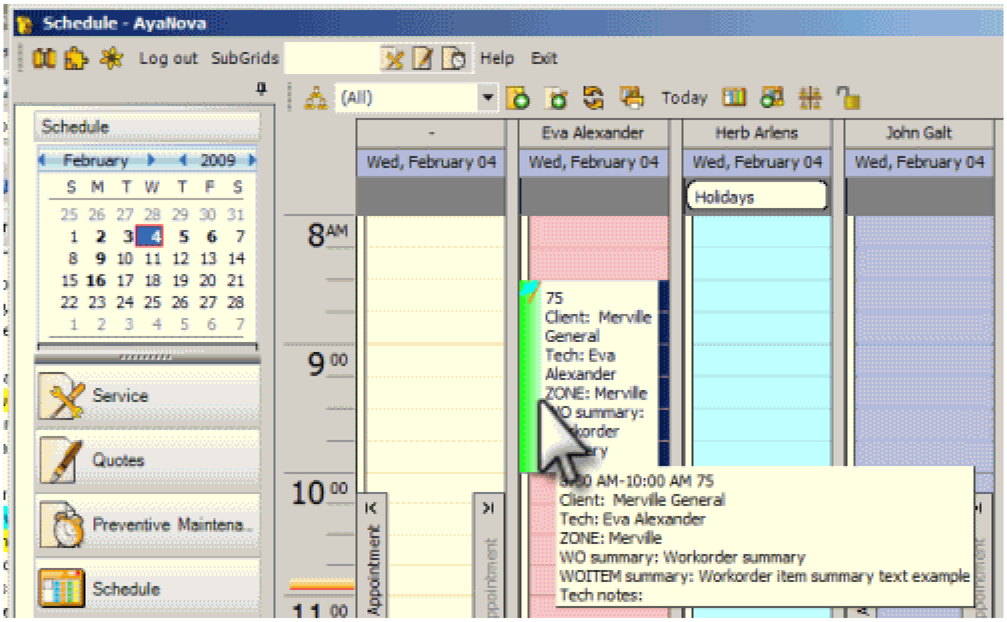
from the menu bar at the top

11. Now that the workorder has been saved at least once, note the workorder number at the top of the workorder screen now



12. Close the workorder by selecting Save & Exit, or the X in the upper right hand corner of the workorder entry screen.

13. This returns you to the Schedule screen where the workorder item now displays. Hover your mouse over and you can see what displays as a quick view.



See also:
[How do I edit what pops up on Schedule screen for a workorder item?]

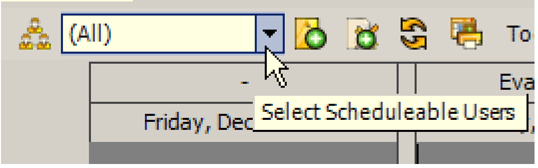
6.3 Schedule user for an existing workorder item via the Schedule Screen

You can schedule a user for an existing service workorder via the Service Workorder entry screen, or even easier, do so via the graphical Schedule screen selecting the time range on a specific date along with the existing workorder item.

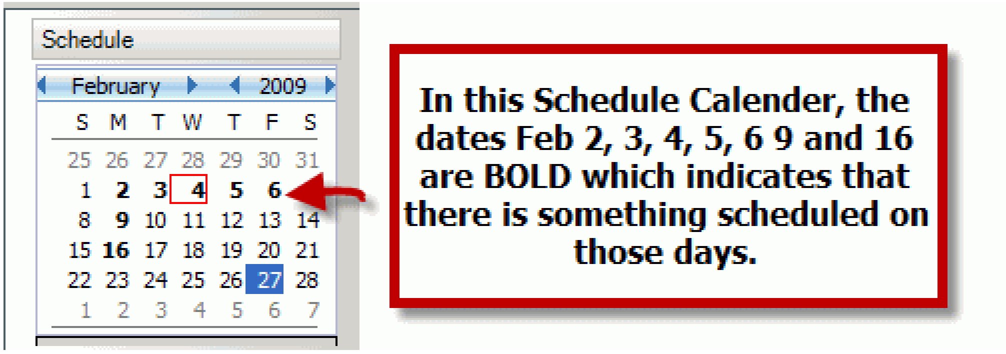
- An example of why you might use this feature is you may have scheduled one user to perform service for a workorder item, and now you need to schedule a second user for that same workorder item to help.

In this tutorial example, we will go over the basic steps of scheduling a user for an existing service workorder item via the Schedule screen.

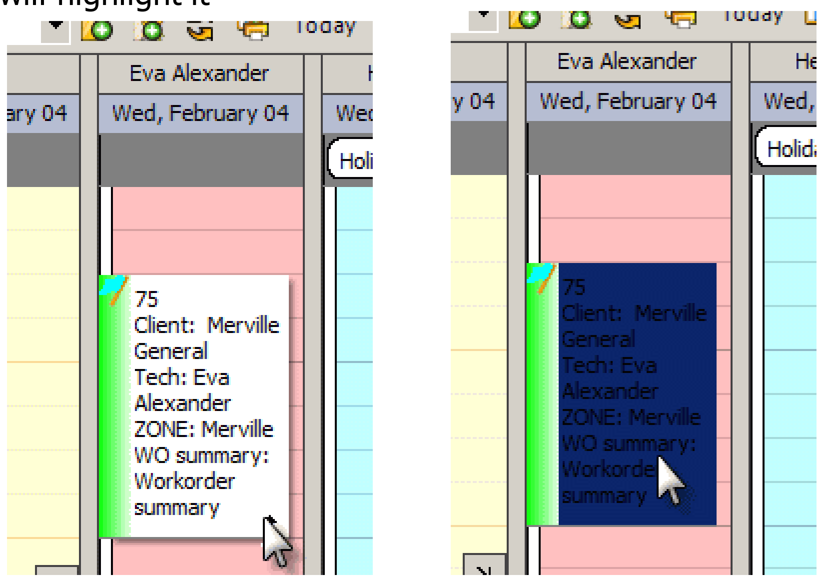
- It is highly recommended that you review this Help file's entire section on Service Workorders and Schedule Screen for complete overview , suggestions on use, tips on use and more.
- Note: if you receive a message such as "Error: user is not authorized to change this object as is currently Read-only" when attempting to add to an existing workorder, this may be because the service workorder itself is set to Service Completed (so can not be edited) OR may be because the username you are logged in under does not have security group rights to edit.

1. View the Schedule screen
2. Select a Schedulable User Group that is made up of more than one schedulable user (technicians) such as [Eva & John] or (ALL)


3. In the Date Navigator, select the date of the previous tutorial where we created a new workorder item for a schedulable user.
4. Note that a date is bold if there are existing scheduled items within it for the selected users.



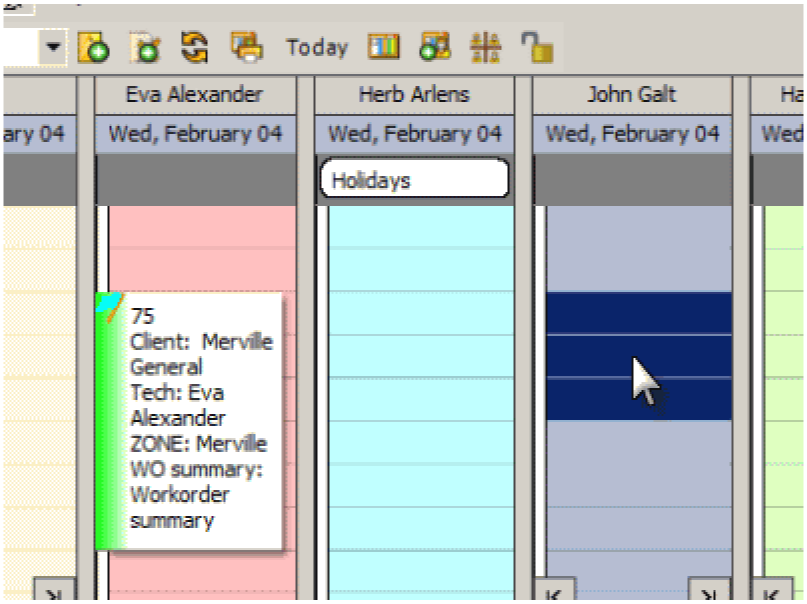
5. Using your mouse, click once on the existing scheduled workorder item which will highlight it



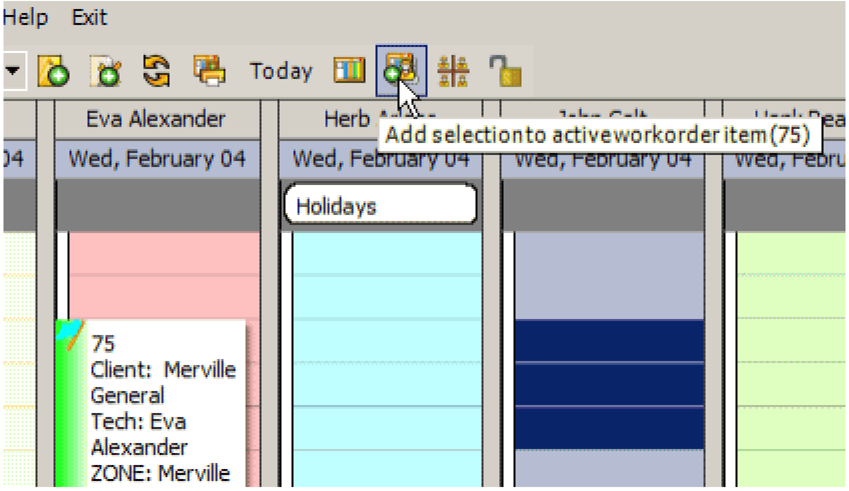
6. This makes this workorder item the “active” workorder item.

7. This workorder item will remain the “active” even if you click elsewhere, as long as you do not select another workorder item or Schedule Marker.

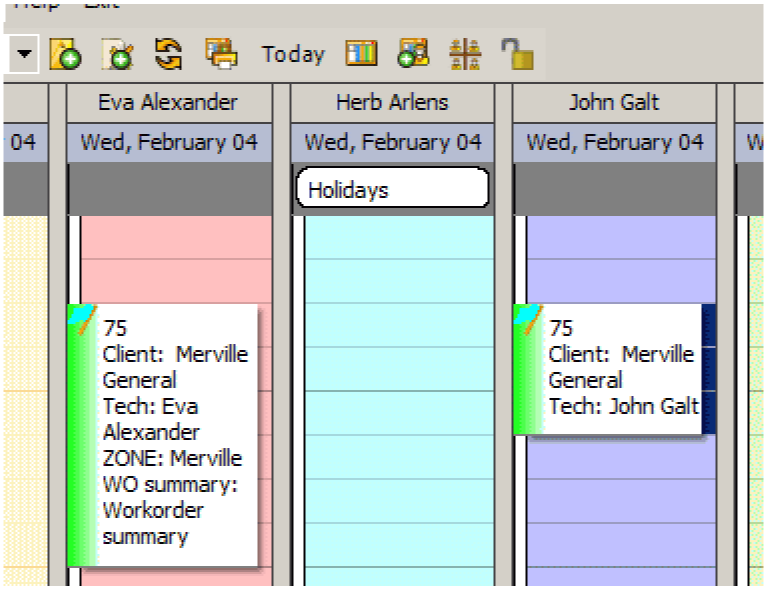
8. Select a time range for the other user by using your mouse to click at the start time and drag to the end time (you can always edit the start and stop time later if needed)



9. Using your mouse, select the Add Selection To Active Workorder Item toolbar item

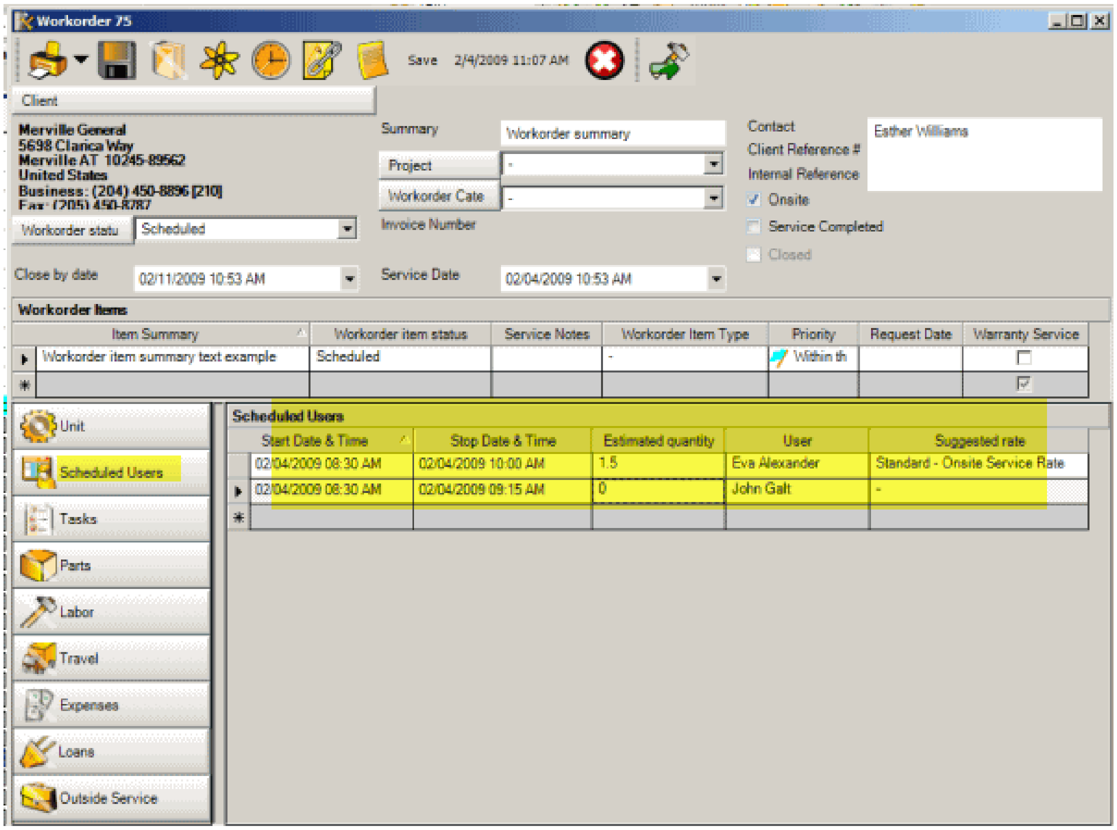


10. Note that time selection now displays the same workorder item information but for the schedulable user John



11.Double-click on the workorder item to open it

12. This opens the workorder item Scheduled Users sub-screen where you can see that **both** schedulable users are selected for this same workorder item.



6.4 Quickly find workorders for a client or a unit

The tutorial example steps below would be similar whether quickly finding workorders for a client or for a unit.

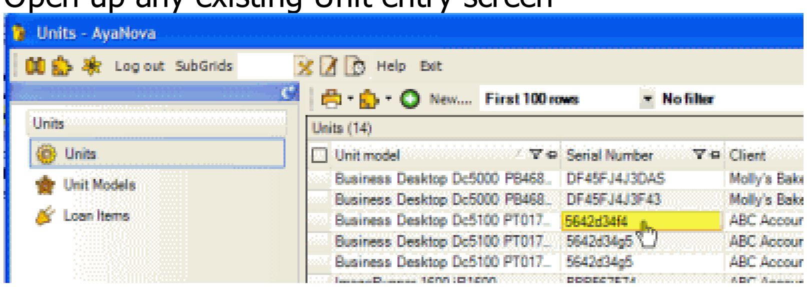
An example of why you might use this feature is let's say you receive a unit to perform service on, and you want to quickly see if there has been any other service performed for it.

There are three ways you could quickly see if there had been previous service performed on this unit:

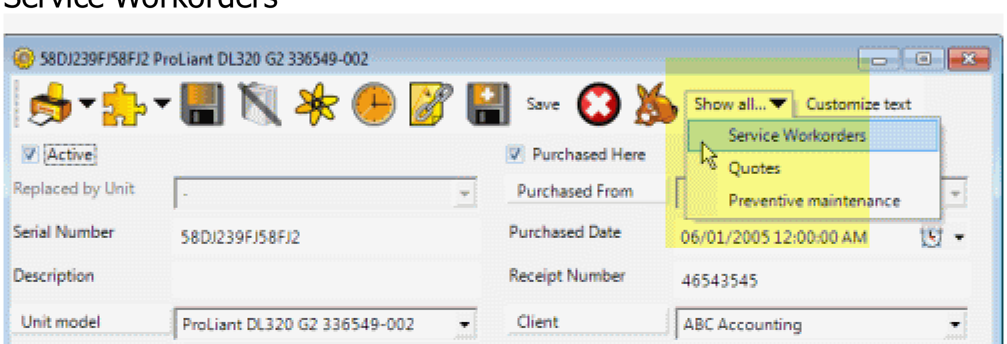
1. Select the Show all... menu option in the unit's entry screen
2. Use the List All Workorders feature on the unit's serial number or client name in any grid
3. Use the Search Database combined with List All Workorders feature
4. Use the filter feature in the Service navigation pane grids

1. Select the Show all... menu option in the unit's entry screen

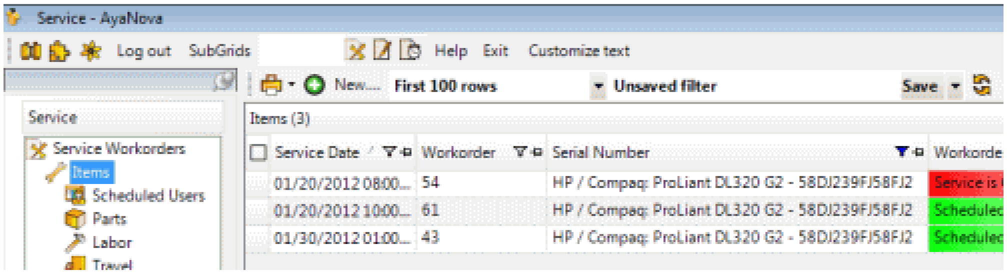
Open up any existing Unit entry screen



From the unit's entry screen, select the Show all... menu option and click Service Workorders



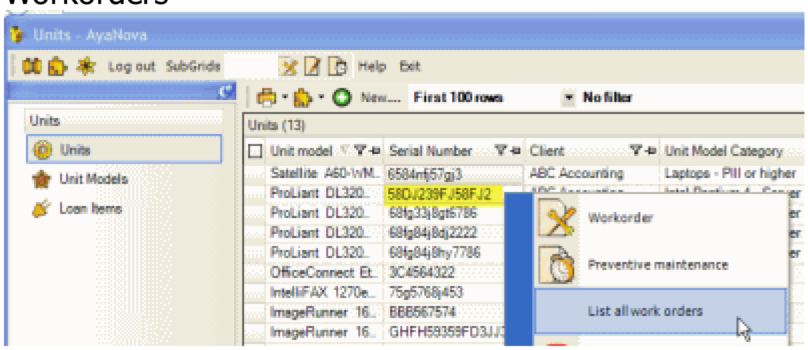
AyaNova will automatically move you to the Service Workorder Items grid, where will automatically filter the Items grid of the Service navigation pane to display only workorder records where this unit was selected.



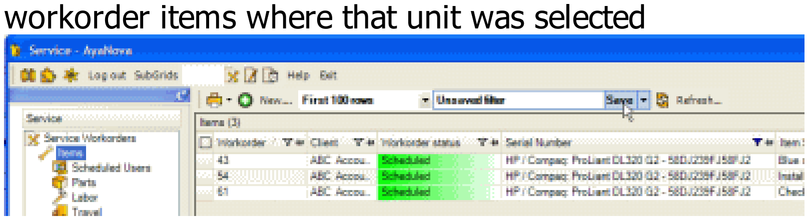
Refer to the [Filter Drop list]() for details on saving filters, editing existing saved filters, and resetting back to No Filter

2. Use the [List All Workorders]() feature on the unit's serial number or client name that owns the unit in any grid

A. From any grid where that unit is showing in a field in a unit's Serial Number column, right-click on the serial number and select List All Workorders



B. AyaNova will move you automatically to the Items grid listing all workorder items where that unit was selected

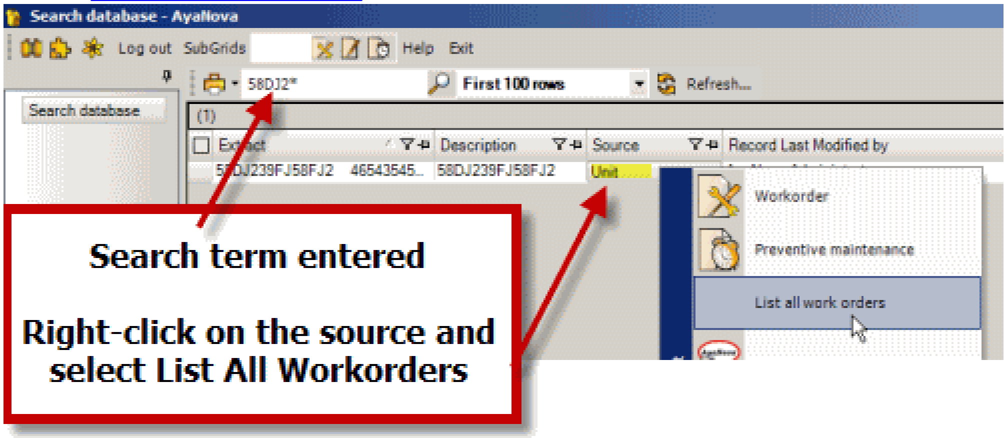


See also: [Using the Filter Drop List]()

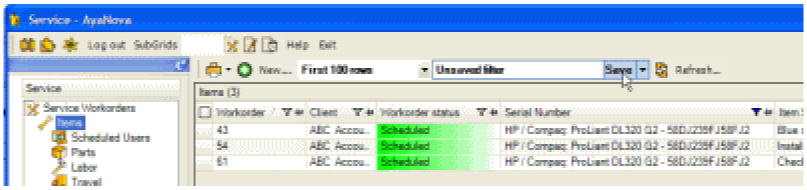
3. Use the [Search Database]() combined with List All Workorders feature

A. Enter the serial number into the Search field (if you don't know the entire serial number, use the wild card * as in the screenshot below)

B. Right-click on the Source which is Unit for the unit record you want and select List All Workorders



C. AyaNova will move you automatically to the Items grid listing all workorder items where that unit was selected

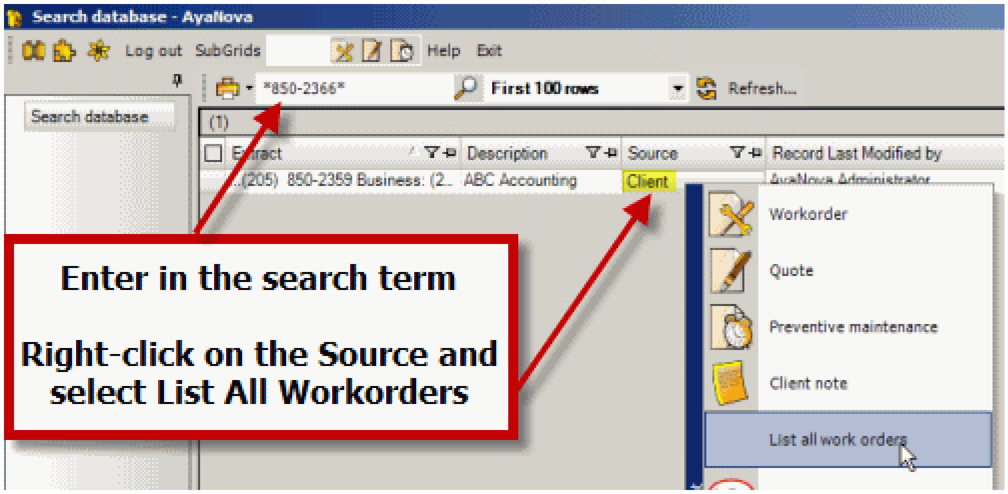


See also: Using the Filter Drop List

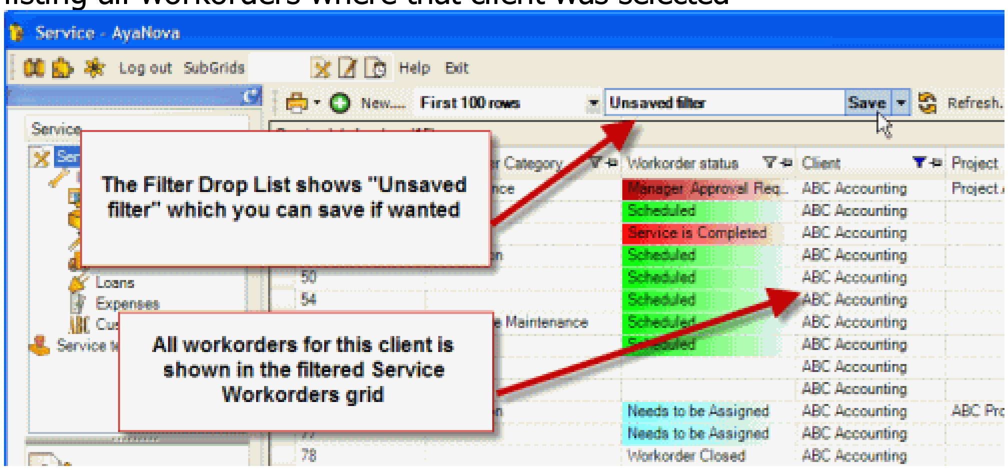
Or a client calls and has a question about previous service but doesn't know the workorder number and you want to quickly bring up all workorders for the client: use the Search Database -> List All Workorders where you enter in the client's name (or other text that displays in their client entry screen like their phone number), or right-click on the client's name in the Client column in any grid where that column is available; or use the filter on the Client column in any of the Service Workorders navigation pane grids.

D. Enter the client's phone number into the Search Database

E. Right-click on the Source which is Client for the client record you want and select List All Workorders



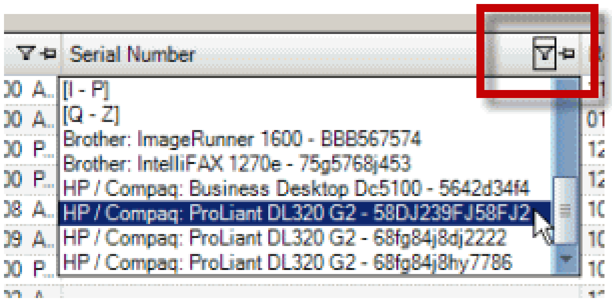
F. AyaNova will move you automatically to the [Service Workorders grid](#) listing all workorders where that client was selected

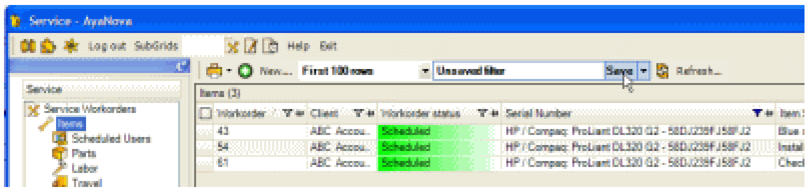


See also: [Using the Filter Drop List](#)

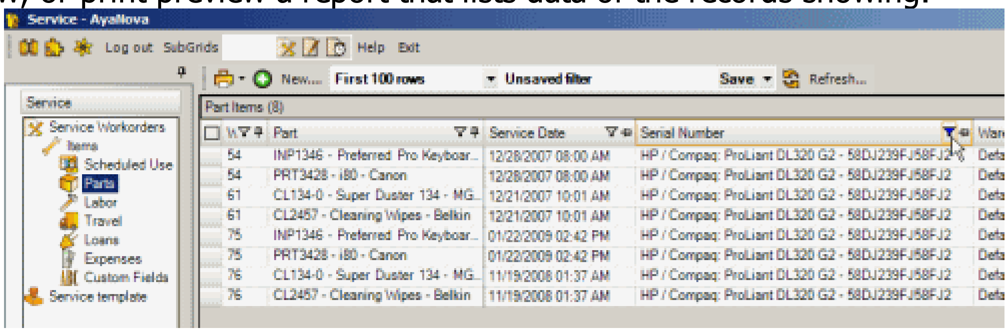
4. Use the [filter](#) feature in the Service navigation pane grids

A. [Filter](#) on the Serial Number column in the Items grid in the Service Navigation pane selecting the specific unit by its serial number which will bring up all workorder items where this unit has been selected. You can then either open up each workorder to view, or print preview a report that lists data of the records showing





B. [Filter](#) on any of the other sub section grids in the Service Navigation pane - for example, you want to quickly see what parts have all been used in service for this unit and get it's part profit/loss, so filter on the Unit's Serial Number column in the Parts grid. You can then either open up each workorder to view, or print preview a report that lists data of the records showing.

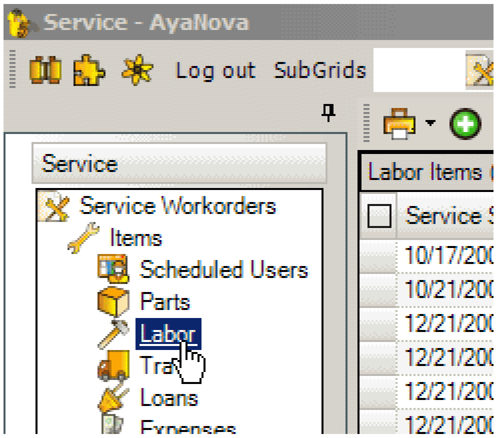


See also: [Using the Filter Drop List](#)

6.5 Filter a grid and print a report for the records that show

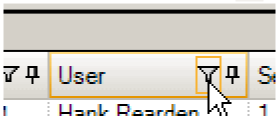
In this tutorial example, we want to print a report showing information for only the sample user Eva Alexander for labor performed this month.

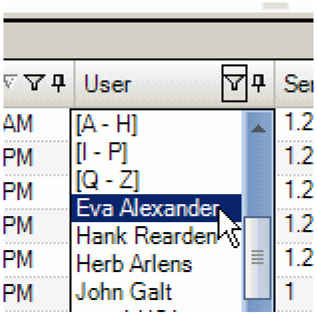
1. Move to the Service navigation pane and select the Labor grid

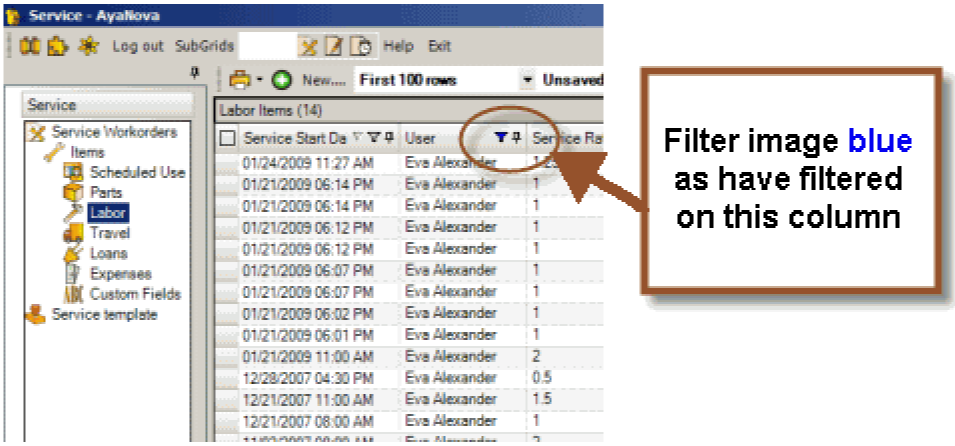


2. First we want to filter the grid to display only the records where the sample user Eva is selected in a Labor record.

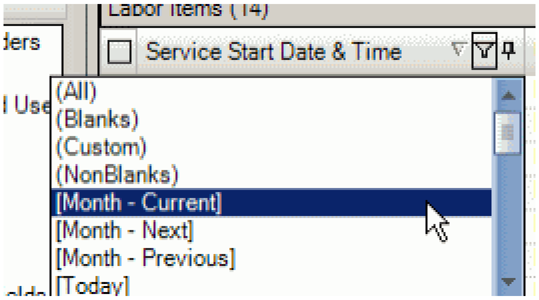
3. Select the filter icon  on the column **User** to drop down the filter settings and select the user Eva Alexander - only records where Eva was selected as the user that performed the labor will now display.







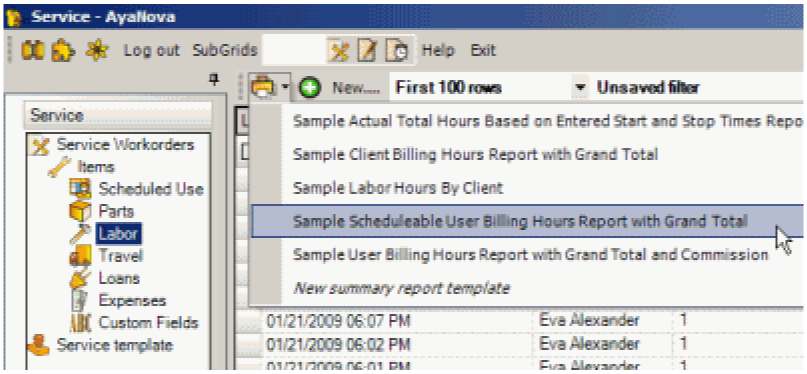
4. Now we will filter the **Service Start Date & Time** column to display only records for the present month. There are a number of pre-set filters available for dates.



5. The grid will now display Labor items for this user Eva that occurred this current month.

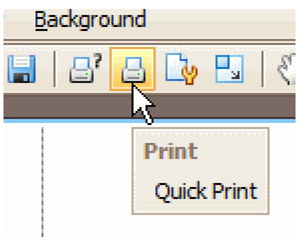
6. You could [save this filter](), or continue to edit or revert back to No Filter – up to you.

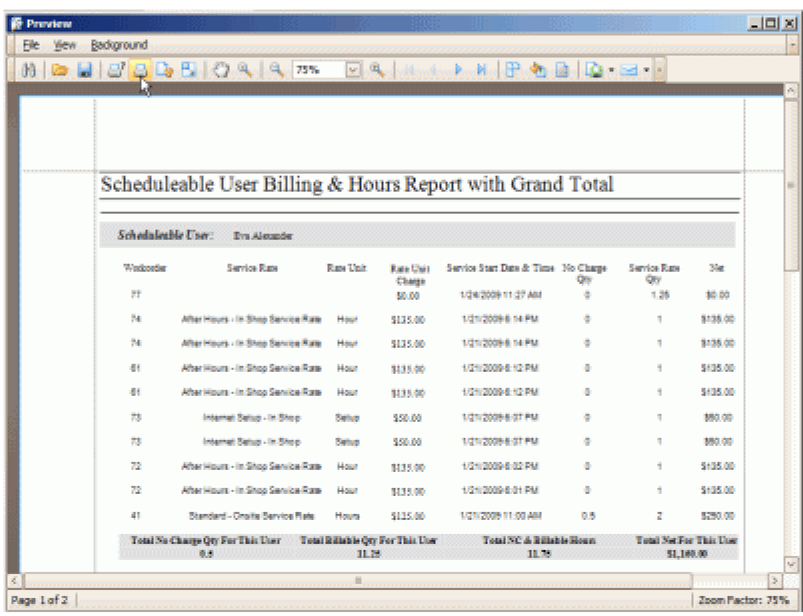
7. Now that the grid is displaying the data we wish to report off of, select the report template Sample Schedulable User Billing Report with Grand Total (your list of sample report templates may be different)



8. The Print Preview screen displays showing you want the report will look like

9. Select the Quick Print icon on the toolbar to print directly to your default Windows printer





10. Close the Print Preview window which returns you to the grid.

See also:
[Using the Filter Drop List]
[Filtering a grid]

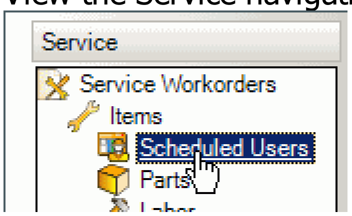
6.6 Create a custom filter

In some cases, you may want to filter what displays on the grid based more than one criteria to the same column.

An example of why you might use this feature is you may want to see all records between two **specific** dates of the Scheduled Users Start Date & Time column, so that you can print out a report on scheduled users during a specific time frame. (note that there are already built in convenience filters for preset time spans such as "this month")

Below is a tutorial example of performing a custom filter on the **Start Date & Time** column in the Scheduled Users grid, so that we display only records within a specific date range.

1) View the Service navigation bar and select to view the Scheduled Users grid



2) Move the **Start Date & Time** column to the position where the grid will sort by it if not already there - this is just so you can easily see the column

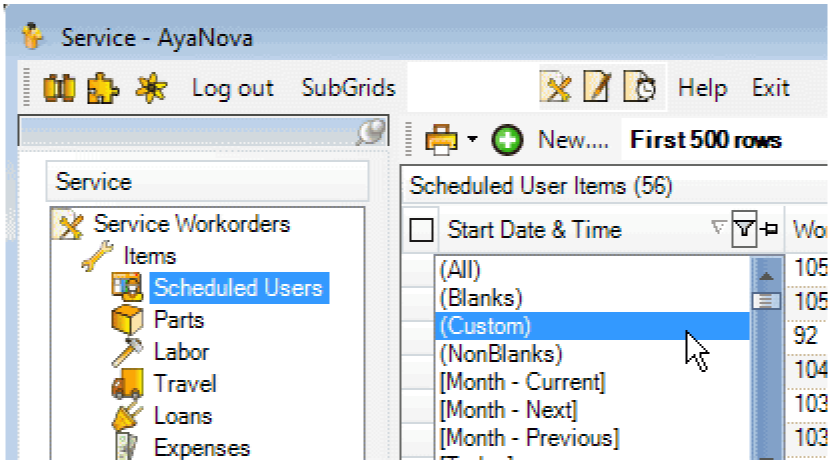
   a) See the Moving and sorting columns in a grid and the Pinning a column sections of this Help file for examples

   b) You can use your mouse, click and drag the Start Date & Time column to the far left, or select the  of the Start Date & Time column to pin it which automatically moves it to the left..

   c) Note how the Start Date & Time column now has a  to indicate this is the column to be sorted by as it is the first column on the grid

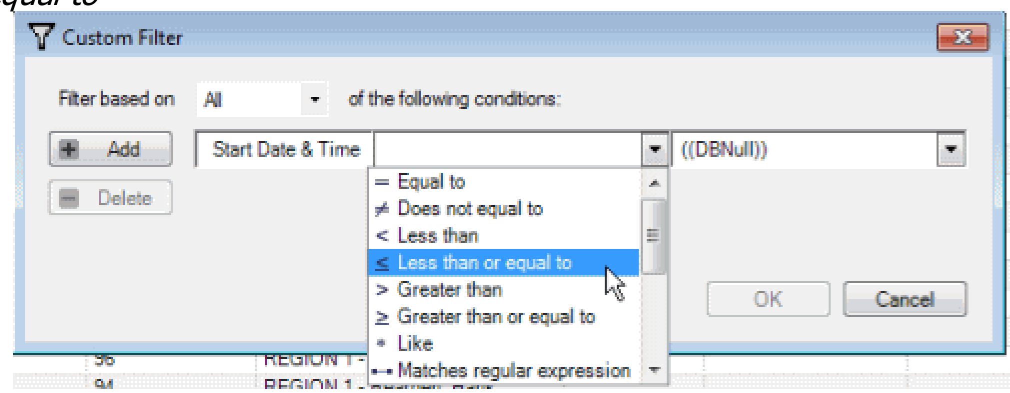
3) We will create a custom filter on the Start Date & Time to display only scheduled user items for a specific date range.

   a) Select the filter image  on the Start Date & Time column to drop down the list of filter options and select *(Custom)*

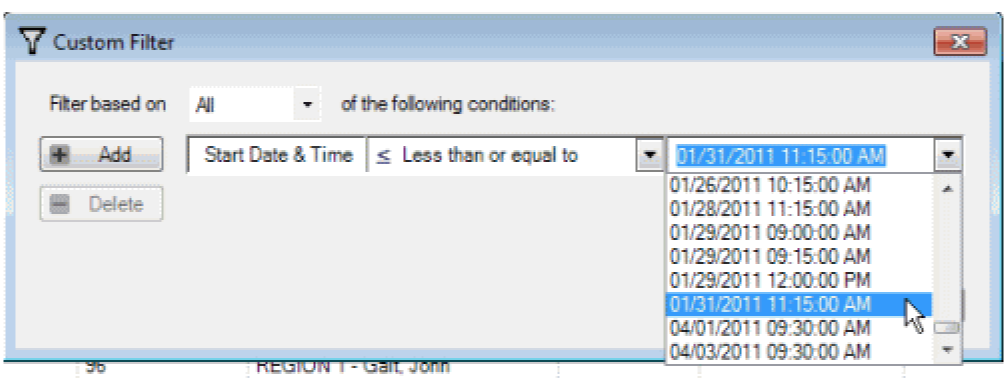


b) Using the (Custom) filter we will create two queries in the custom filter – one to bring back all records less than an existing Start Date & Time, and one to bring back all records greater than an existing Start Date & Time - so that only the records with the dates in-between display

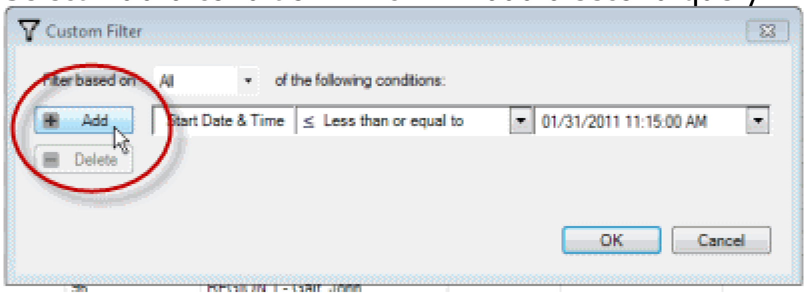
c) For this Start Date & Time column, select the condition of *Less than or equal to*



d) And select an actual Start Date & Time that is the farthest date you want the range to be (i.e. the latest date)

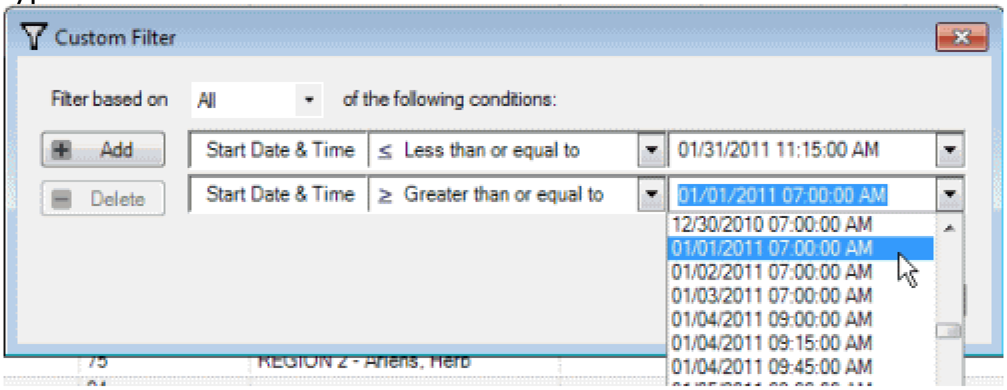


e) Select **Add** a condition which will add a second query



f) In the second query, select **Operator** of ≥ *Greater than or equal to* and drop down the **Operand** and select an actual Start Date & Time of a scheduled user item that is the oldest date you want the range to be

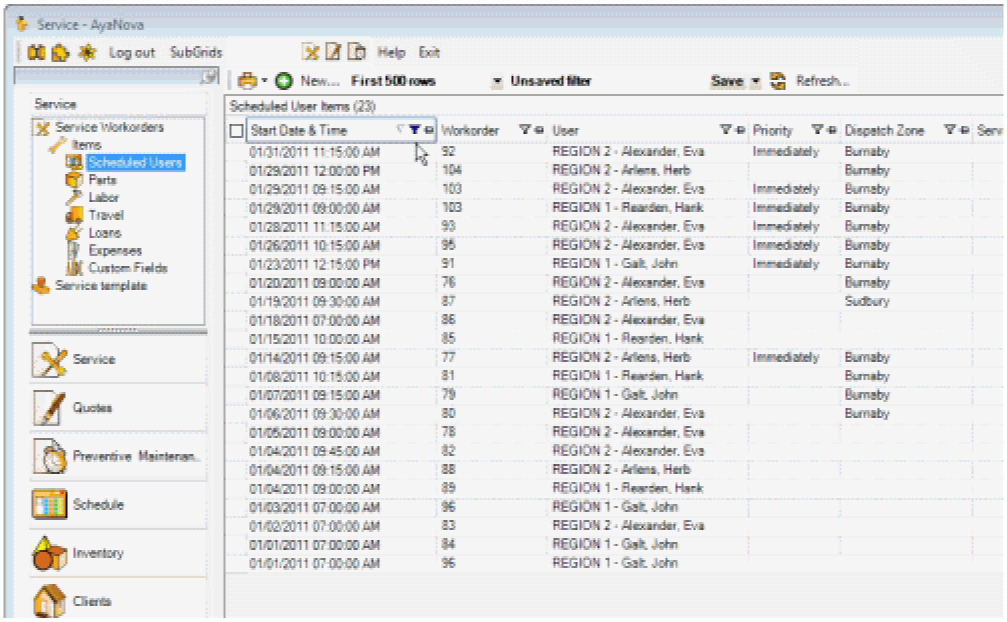
g) Remember, you have to **select an actual** Start Date & Time – do **not** type in a date and time.



h) Select OK

4) Note how the Start Date & Time column filter in this grid is now colored  which indicates this column is now filtered

5) And note how only records within that date range you selected are now showing in this grid.



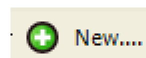
6) You can also have additional filters on other columns at the same time in this grid.

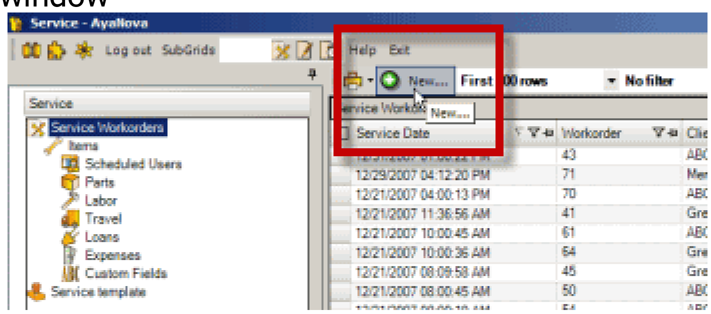
See also:
Using the Filter Drop List
Filtering a grid

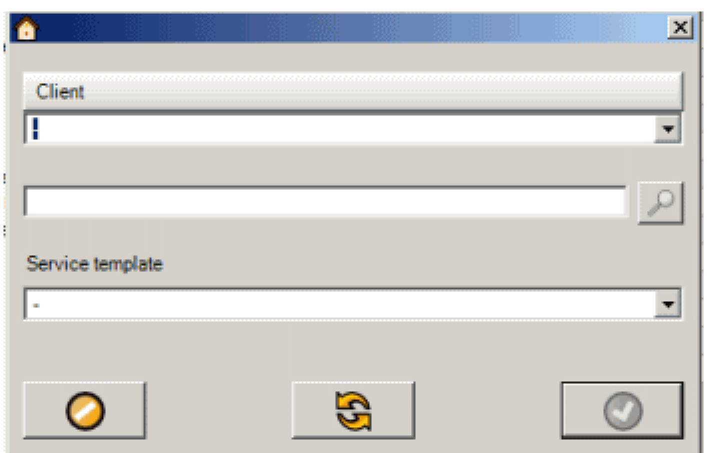
6.7 Create new workorder with client not yet entered

In this tutorial example, we will go over the initial steps of creating a new workorder, and what to do if the client is not yet entered into AyaNova. As you can enter a lot of data "on the fly" with AyaNova, this is easily accomplished.

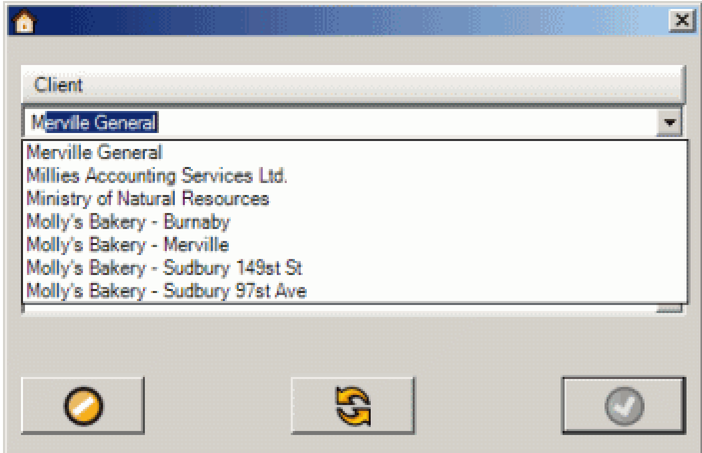
- Do note that this is an overview only, and does not cover every time saving and useful feature of the workorder entry screen. Do review this Help file's entire section on Service Workorders for complete overview and suggestions on use.

1. A client calls and would like work performed. You are not sure if they are an existing client or not.
2. There are a number of ways you can create a new workorder for a client
3. In this example, we will select the grid menu option New... 

from the Service Workorder grid which opens the client and template section window




4. Start typing in the name of the client in the Client field - for example, if the client's company name is Millie's , type the letter "m" - note how the list jumps to displaying all clients that company name begins with the letter "m"



5. In our example, Millie's is not yet a client entered in AyaNova

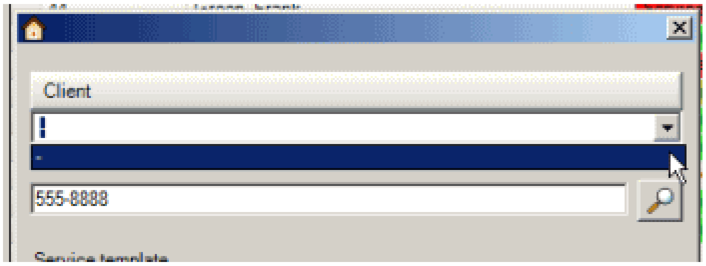
6. So, we click on the Refresh button  to put the client selection screen back to nothing selected

7. Just in case the company name was entered as something else, we will use the [Client Finder]() feature to enter in some text that would have been entered if the company was entered - for example, the company phone number.

   In the Client Finder field, enter in for example the phone number 555-8888 and select to see if it returns any clients.

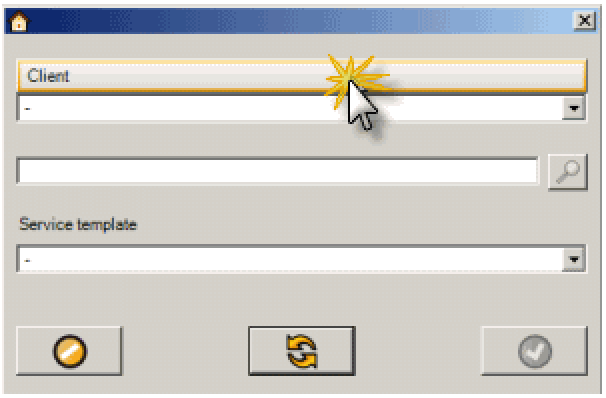
   If you drop down the list of clients, you will see that no clients have this phone number listed anywhere.

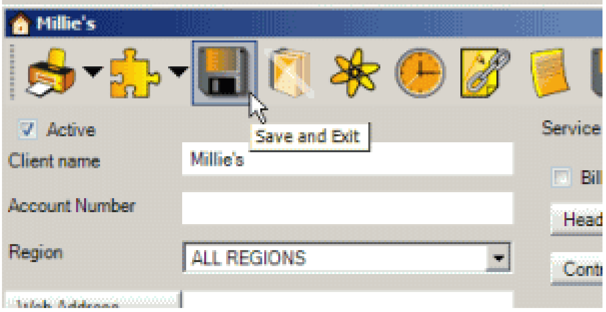
   Click on the Refresh button  to put the client selection screen back to nothing selected

8. As the client is not yet entered into AyaNova, you can quickly enter in at minimum its company name so that you can create a workorder for it.

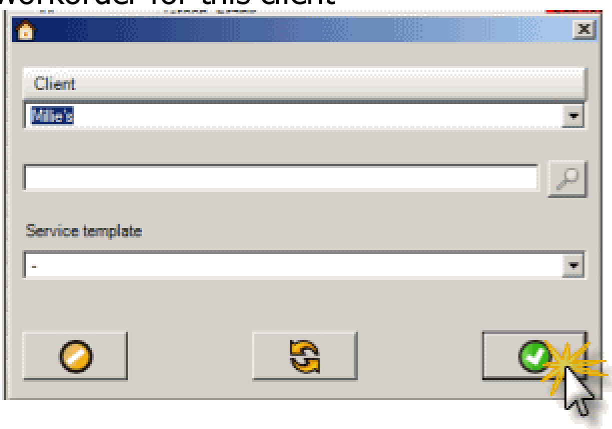
   Click on the Client jump button which will open a new empty client entry screen



   You can enter as many details of the client at this point as you want - enter just the client name and Save & Exit, or go ahead and get all of the information such as address etc. You can always come back later to complete entry as the name is the only required field.

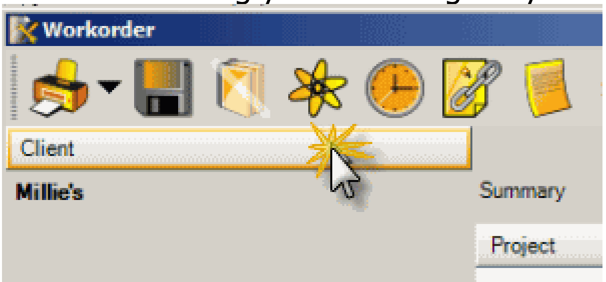


9. The client we just created is already pre-selected for us when we Save & Exited out of that client entry screen so click on the OK button to create the workorder for this client

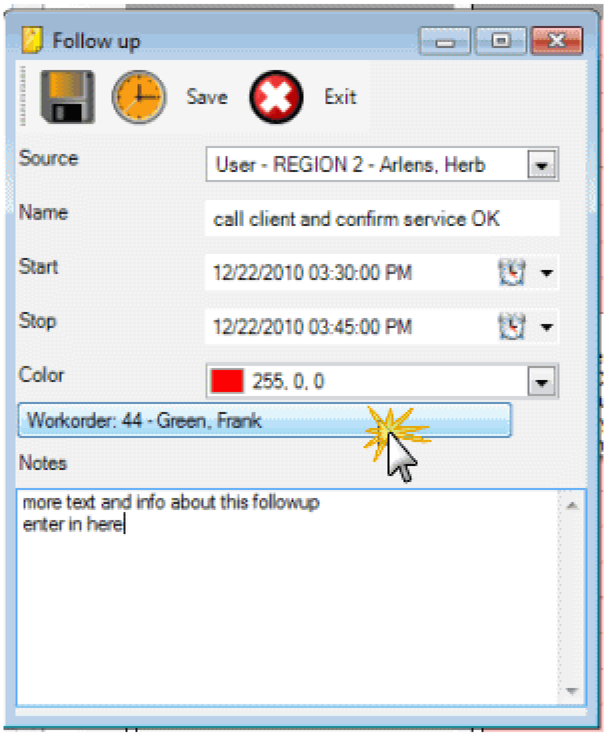


10. Now the new workorder opens, and we can enter details as needed. Refer to the Service Workorder section of this Help file for details

11. Also note that you can add client information such as address, phone number, etc via the Client jump button in the workorder - you do not have to close the workorder to do so. It is suggested that you save the workorder in between as saving your work regularly is always recommended.



6.8 Create and view Follow Up in a workorder

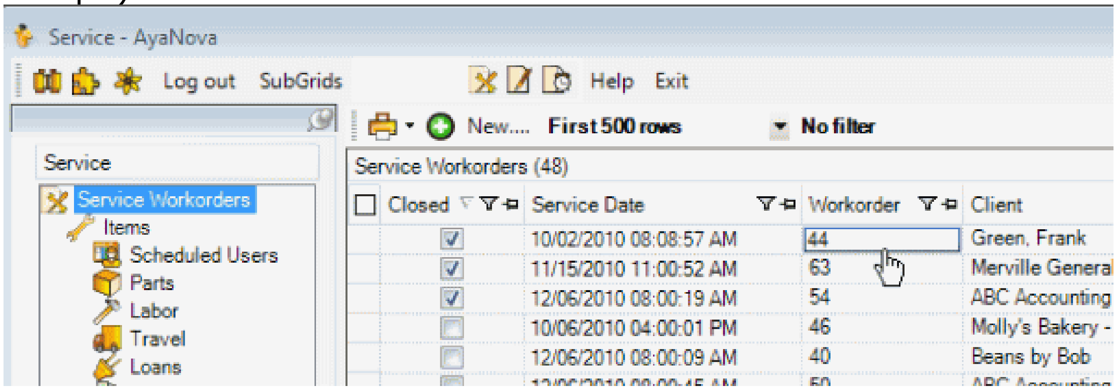


A Follow Up is actually a Schedule Marker with the additional feature of providing a jump button to open the specific workorder (or quote or preventive maintenance order, client, head office, contract, or unit) that the Follow Up is referring to.

- Just like a Schedule Marker, the Follow Up will display on the graphical Schedule screen as a reminder to you.
- Also you can subscribe to be notified before the Schedule Marker/Follow Up is about due via subscribing to the Notification Subscription **Schedule Marker – event imminent**
- A service workorder (or quote or preventive maintenance order, client, head office, contract, or unit) can have as many Follow Up's as desired, you are not limited to just one.
- A Follow Up can be created at any time during the life of a service workorder - it can even be created when the service workorder is check-marked Closed.
- An example of Follow Up use, is that you want your schedulable user to be reminded to contact a client at a certain date after work has been performed to confirm all work is still satisfactory and to see if there is additional service that may be needed to be performed. This is a way to confirm that your customers are happy attracting more business.

In this tutorial we will go over creating a Follow Up for a schedulable user for a specific workorder

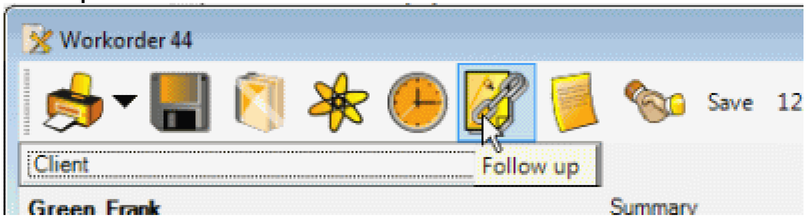
1. Open an existing Closed sample workorder (do note that you can create a Follow Up for an open workorder as well as for a Closed workorder - this is just an example)



See also:

[Filtering a grid](#)
[Moving and sorting columns in a grid](#)
[Pinning a column](#)

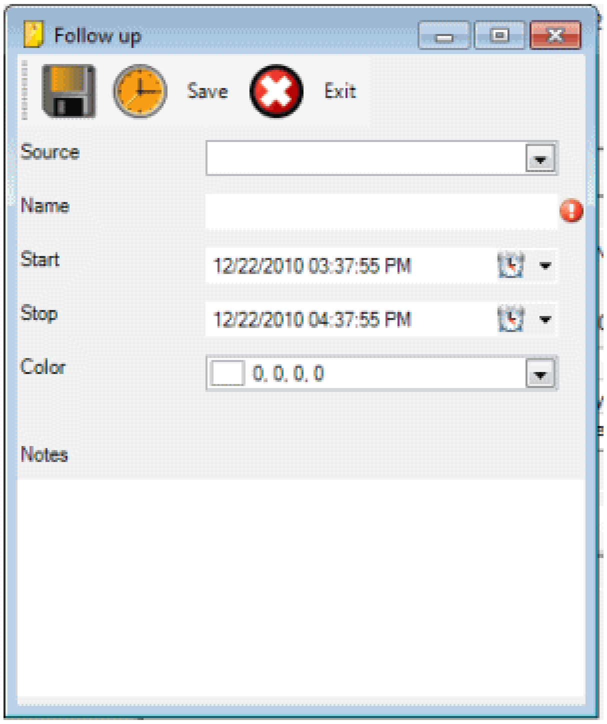
2. Select the workorder menu option **Follow up**  which will open up the Follow Up selection window for this workorder.



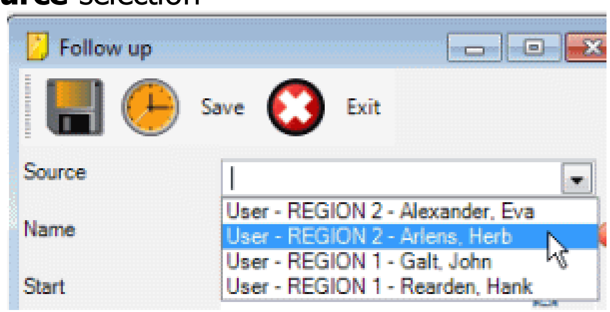
If there are no existing Follow Up's for this workorder, nothing will show in the selection by default. If there was one or more Follow Up's for this workorder, the first Follow Up by alphabetical order based on the name will display by default.

3. Click on the  to create a new Follow Up for this workorder

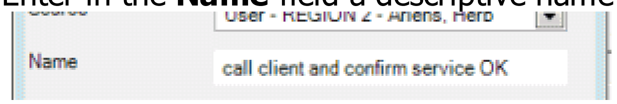
5. The Follow Up creation window displays - note looks just the same as a Schedule Marker



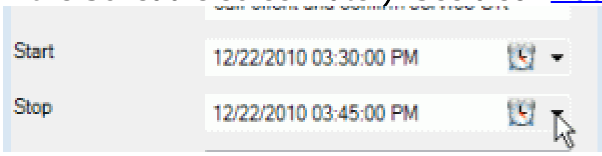
6. Select the specific schedulable user you want to create this Follow Up for in the **Source** selection



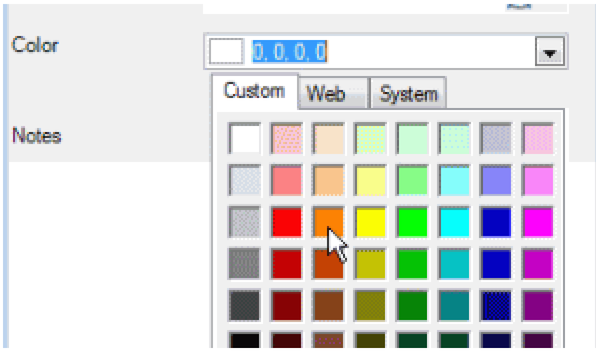
7. Enter in the **Name** field a descriptive name for what this Follow Up is about



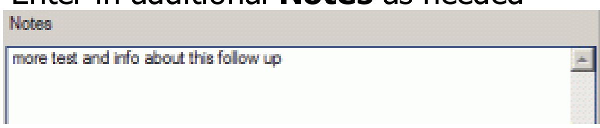
8. The **Start** defaults to today's date and time, and the **Stop** to an hour later. Edit as needed. (make a note to yourself the date you enter so that we can review it on the Schedule screen later). See also: Date & Time Selection

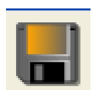


9. Select a **Color** if desired which borders the Follow Up when viewing on the Schedule screen

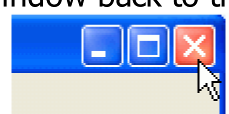


10. Enter in additional **Notes** as needed



11. Select Save & Exit  to return to the Follow Up selection window

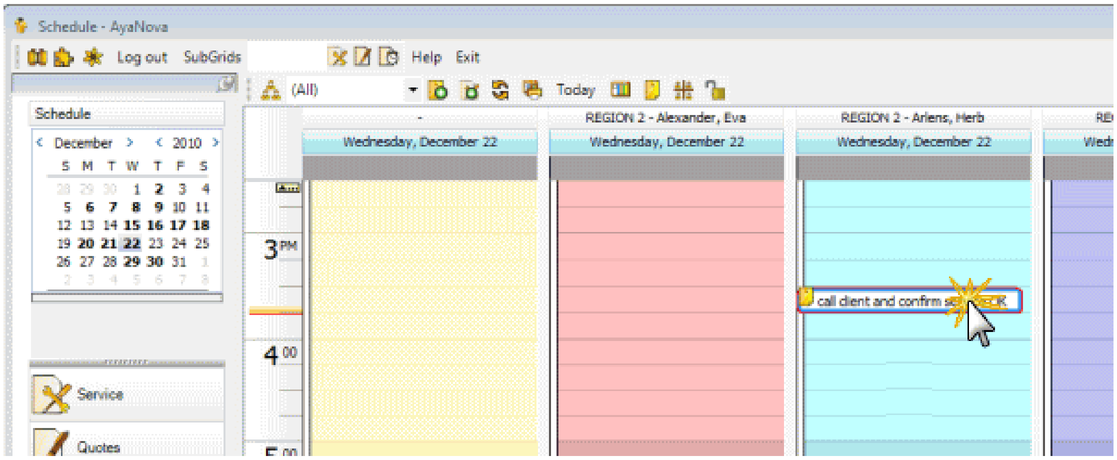
12. If you want to view the Follow Up from this window, select it from the list of Follow Ups for this workorder and click on the  to open it.

13. To exit out of the selection window back to the workorder, select  or the X in the upper right-hand corner 

14. Now lets exit out of this workorder, and view the Follow Up on the Schedule screen

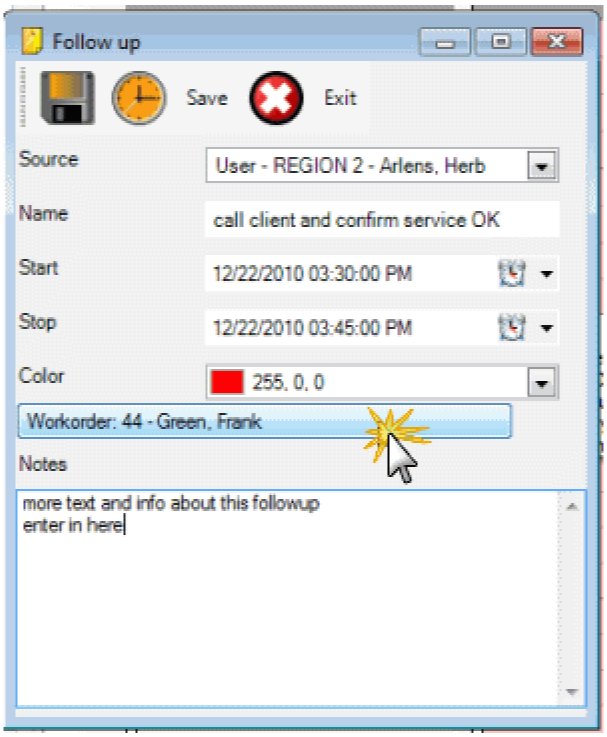
15. On the Schedule screen, first select Refresh  AyaNova will automatically refresh all grids and your Schedule screen every 5 minutes, and you can also select Refresh from the grid menu.

On the left, select the date of the Follow up (in our example screenshot below, we selected December 22nd which results in the schedule items for that date for all users showing on the right)



16. Double-click on it to open

17. Note how the Follow Up as a jump button that if you click on will open the workorder it was created from.



NOTE: The schedulable user could subscribe to be notified when a Schedule Marker is imminent. As a Follow Up is in essence a Schedule Marker, the schedulable user can be notified via memo, popup, external email or external pager just before the Follow Up is due.

See also:
Notification Subscriptions

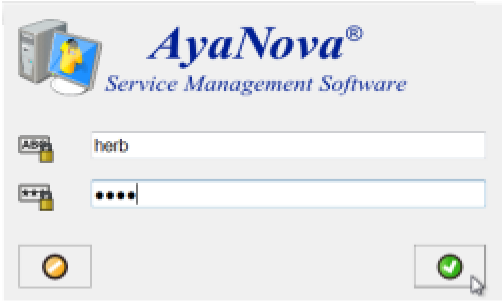
6.9 Filter my user's Schedule Markers grid to display specific records

This tutorial example will show various examples of filtering to display specific schedule marker records for the logged in Scheduleable User in their own Schedule Markers grid.

Also check out the Administration navigation pane Schedule Markers grid.

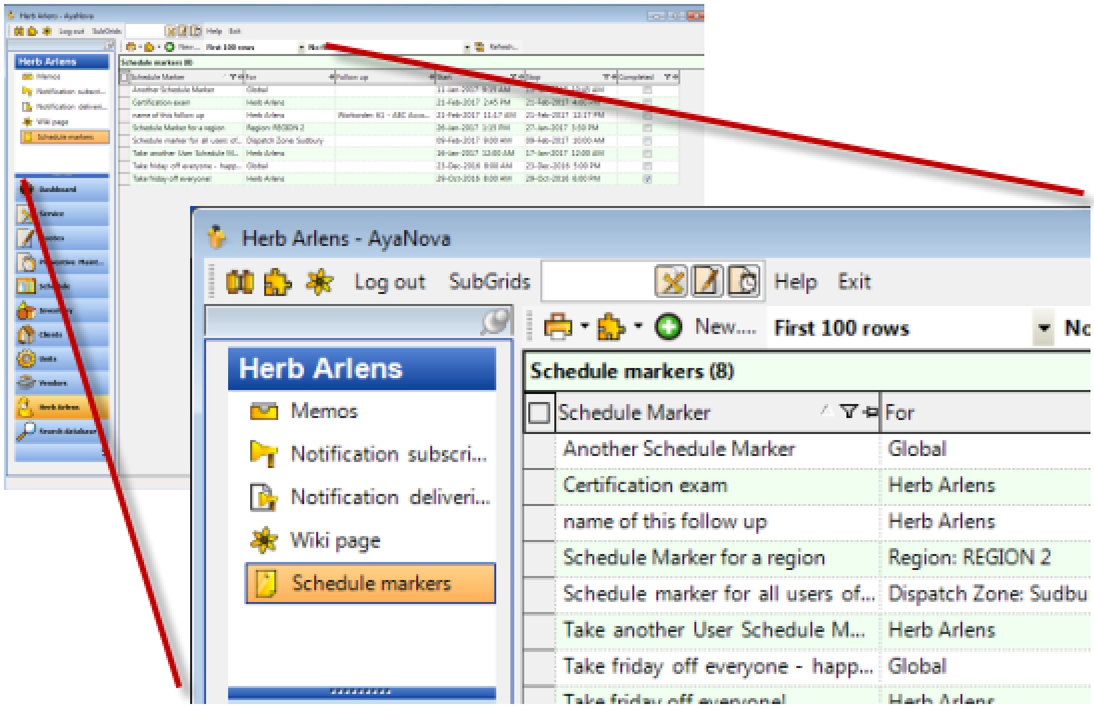
The term "Schedule Markers" is used interchangeably for schedule markers and follow ups.

1. In this tutorial example, we will log in as the sample user herb (the sample user test is set to User Type of Scheduleable user)



2. Move to the Schedule Markers grid in Herb's user navigation pane

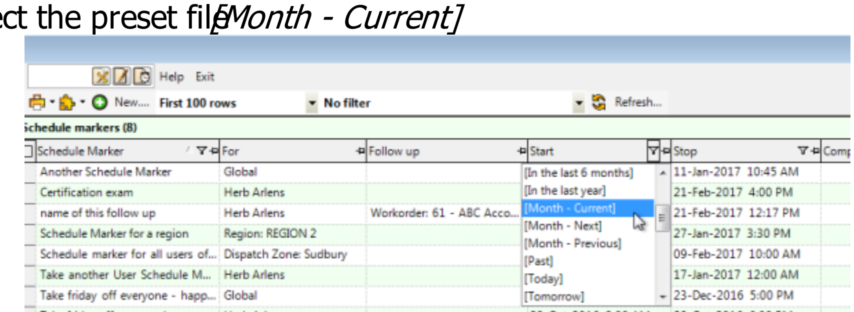
Your screen may look different as depends on your data. You may have more or less records showing, as well as different records showing.



3. Filter based on the date:

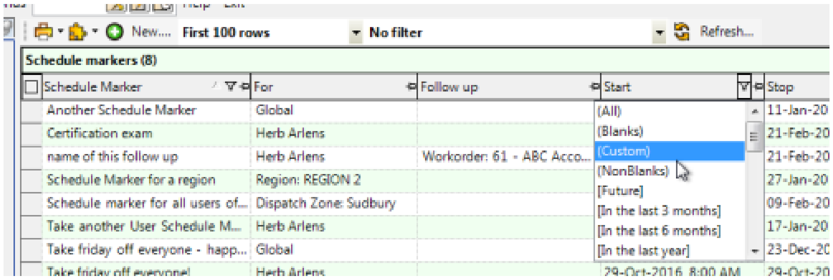
   Let's say that you want to display all schedule markers that have a Start Date of this month:

   1. Drop down the filter on the Start column
   2. Select the preset fil*[Month - Current]*

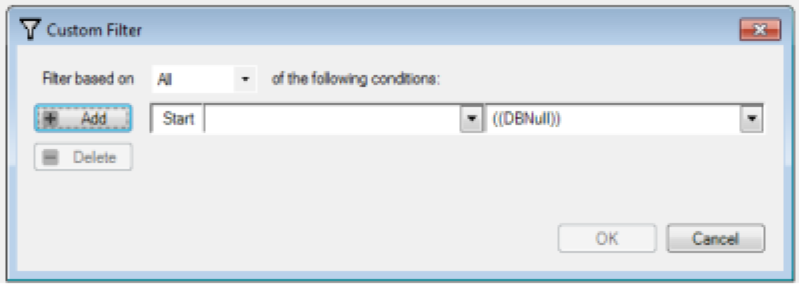
      i. 

   Let's say you want to display all schedule markers that have a Start Date between Jan 1 last year and Dec 31:

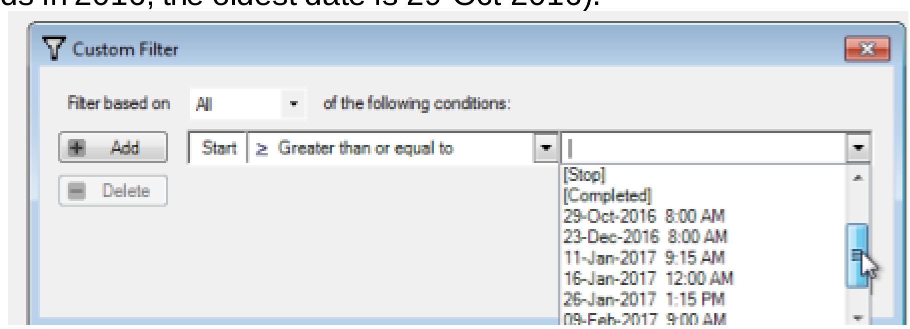
   1. Drop down the filter on the Start column
   2. Select the preset fil*[Custom]*

i. 

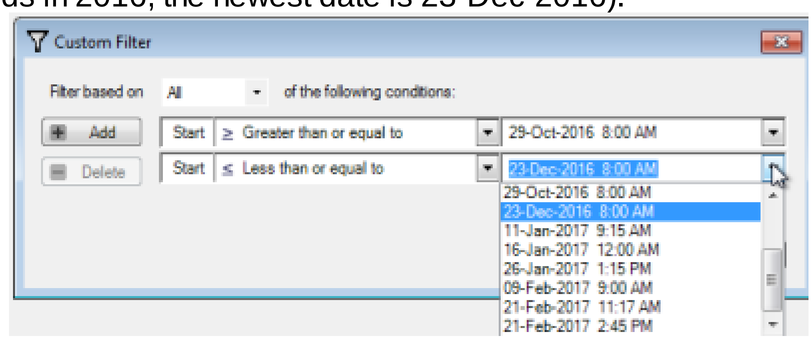
3. The Custom Filter displays - you can also tell this custom filter is for the *Start* column, as that column is listed right in the Custom Filter

i. 

4. For the oldest date, select *Greater than or equal to*, and select the oldest available date to that range you want (in our example below, as we want all records in 2016, the oldest date is 29-Oct-2016).

i. 

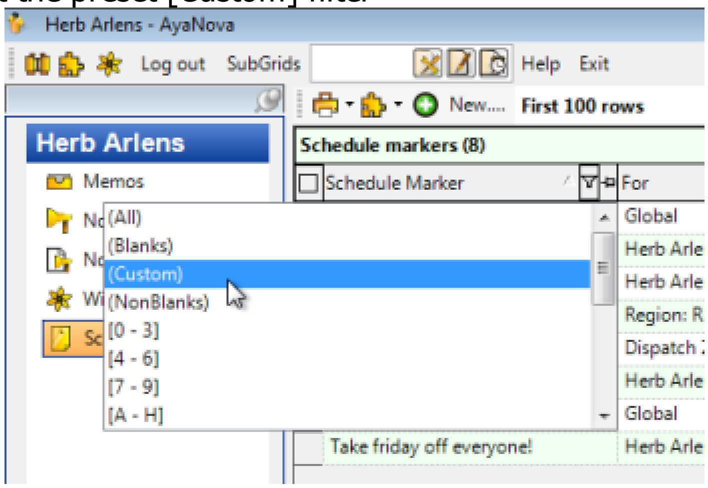
5. For the latest date, select *Less than or equal to*, and select the newest available date of that range you want (in our example below, as we want all records in 2016, the newest date is 23-Dec-2016).

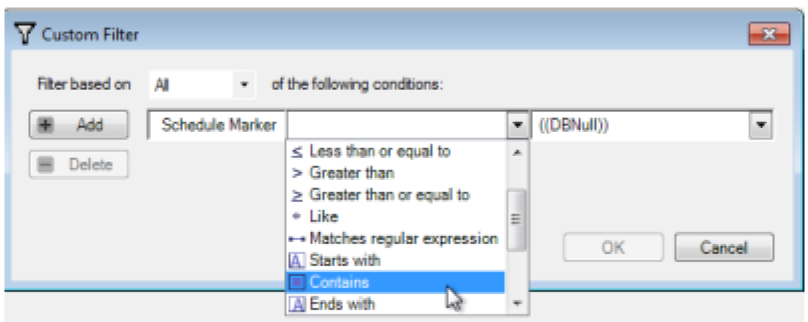
i. 

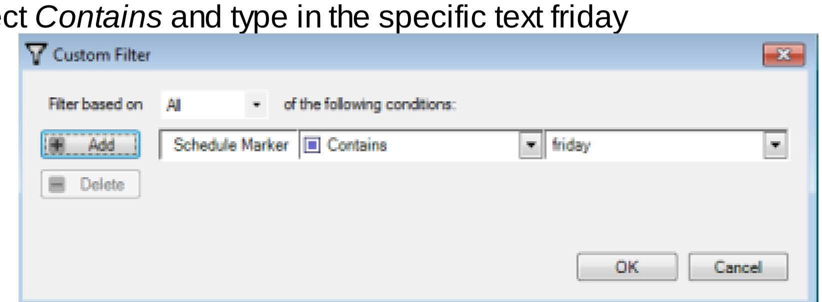
6. OK to apply, and your grid will now display with the records that match that custom filter

4. Filter based on text in Name:

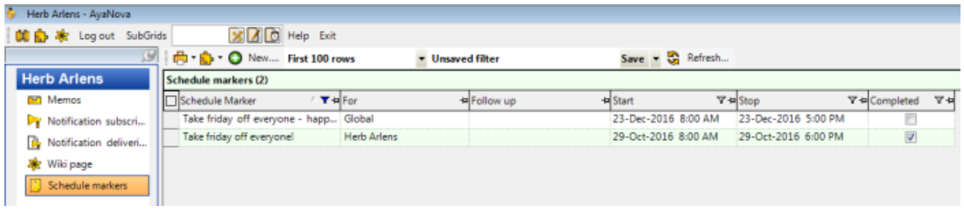
Let's say you want to display all schedule markers that have the text "friday" in its Name.

1. Drop down the filter on the Schedule Marker column (as this column equates to the Name of the schedule marker)
2. Select the preset [Custom] filter
   i. 

3. The Custom filter screen displays - you can also tell this custom filter is for the *Schedule Marker* column, as that column is listed right in the Custom Filter
   i. 

4. Select *Contains* and type in the specific text friday
   i. 

5. OK to apply, and your grid will now display with the records that match that custom filter

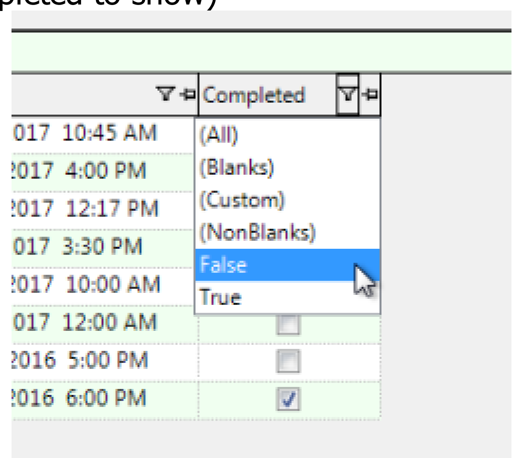
i. 

NOTE TOO: You could also use the [Search Database](#) feature to search for text.

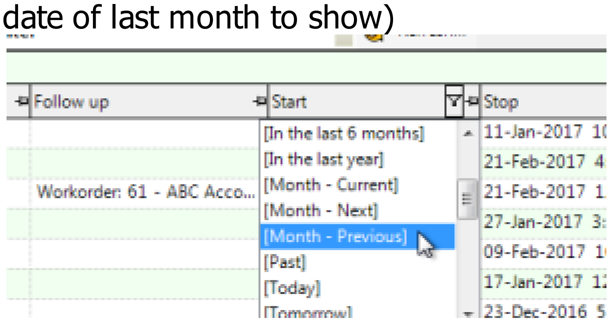
5. Combination filter example:

   Let's say you want to display all schedule markers that are **not** completed the previous month, in case you missed any and did not set to Completed.
   In this example, we will filter on the Completed column AND on the Start column.

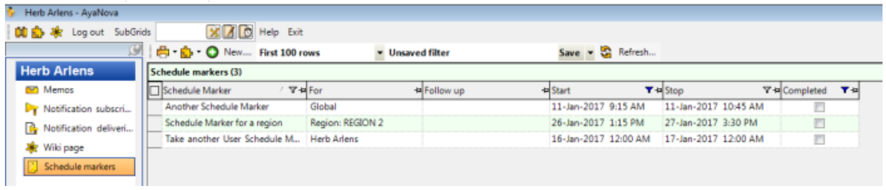
   1. Drop down the filter on the Completed column
   2. Select [False] (as we only want Schedule Markers that are not checkmarked Completed to show)

      i. 

   3. Drop down the filter on the Start column
   4. Select [Month - Previous] (as we only want Schedule Markers that have a Start date of last month to show)

      i. 

   5. Your grid will now display records that match the multiple filters you set.

i. 

You can combine sort, filter, pin, and custom sort too!
We encourage you to review our other tutorials and Feature Details on these too.

NOTE: When your database is automatically updated with 7.5, all Schedule Markers with a start date of before the date/time you perform the update are set to Completed.

NOTE: The "For" column and the "Follow Up" column are not sortable and not filterable. The data in these two columns are dynamically filled after the query has been processed as they can represent multiple types of objects, and as such because are dynamic, are not sortable nor filterable.

6.10 Move a workorder item from one workorder to another

In some instances you may want to close or invoice out a workorder, but in a case where the workorder has multiple workorder items, some of the workorder items may not yet be completed.

Or you as a service manager determine that different users have created multiple workorders for the same client that should all be on the same workorder.

The ability to move workorder items from one service workorder to another service workorder for the same client is provided to address these scenarios.

Workorder items can only be moved under the following circumstances:

1. **Neither** the source or destination workorder can be checkmarked **Service Completed** nor **Closed**.
2. The workorder where the workorder item is being moved from **has more than one workorder item and has been saved.**
3. The workorder being moved to **is the same client**
4. The user logged in must be a member of a security group that has **full Read/Write/Delete rights** to **all** workorder objects (i.e. Object.WorkorderService, Object.WorkorderItem, Object.WorkorderItemUnit, etc)

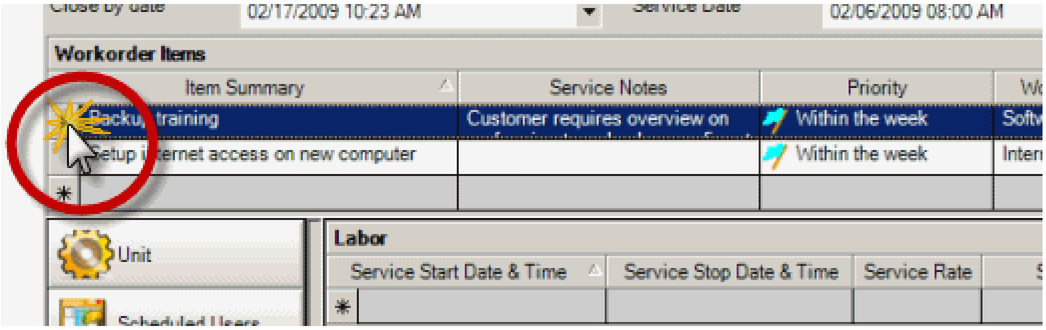
1. Log in as a user that has **full Read/Write/Delete rights** to **all** workorder objects - such as the AyaNova Administrator user, or the test user, or a user that you yourself have created that has full Read/Write/Delete rights to all workorder objects.

2. Now make a new workorder. This workorder will be the "destination" for the workorder item we want to move.

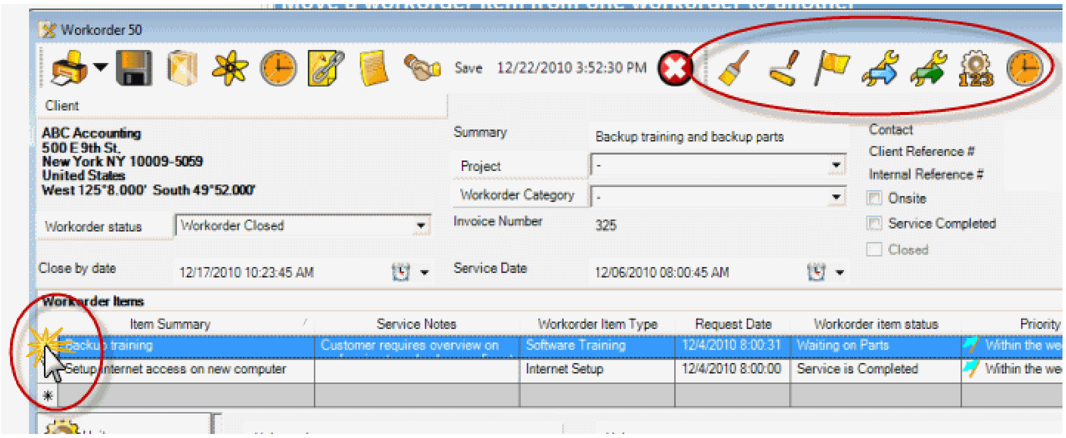
   1. Create a new workorder for the client ABC Accounting by selecting New… from the Service grid
   2. Select the client ABC Accounting
   3. Save the workorder and note its workorder number
   4. Exit out of the workorder

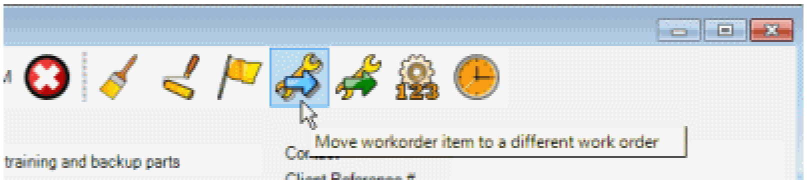
3. Open a different Service Workorder of ABC Accounting's that has multiple workorder items and is NOT checkmarked Closed or Service Completed - for example Workorder number 50. This will be our source workorder.

4. With the source service work order #50 opened, select the workorder item grid row with the summary of Backup Training as this is the workorder item that has not yet been serviced. You can easily see which workorder items have labor entered by clicking on each row and seeing that the Labor navigation icon does **not** have a diagonal line through it meaning labor has been entered.



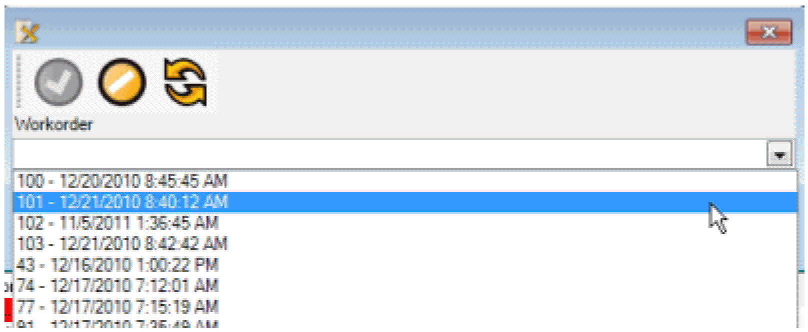
5. Now that you have selected the workorder item, the menu bar at the top of the workorder has additional menu items. Click on the  to begin the process to move this workorder item to another workorder.





6. Clicking on the menu item Move workorder item opens up the Workorder Selection screen.

7. Drop down the selection arrow to display a list of destination workorders that are for this same client, and select the OK button. Open workorders and quotes for this client will display. Only workorders that are not yet set to Service Completed nor set to Closed will display.



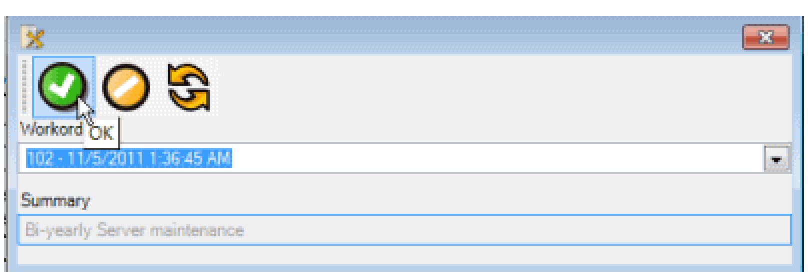
8. If the workorder / quote you want to move the item to does not display yet, select the Refresh button to refresh the list. As per above, only workorders that are not yet set to Service Completed or set to Closed will display.

9. If the list still does not display the workorder you wanted, that would mean either one of the following is the cause

    a. Source Workorder is **not** for the same client as intended destination workorder

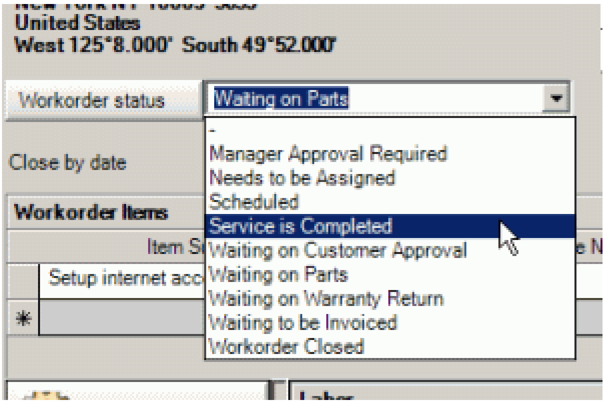
    b. Intended destination Workorder has been set to Service Completed or Closed

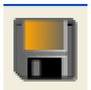
10. Select the destination service workorder that you had created in Step 1 and click on the OK button to accept.



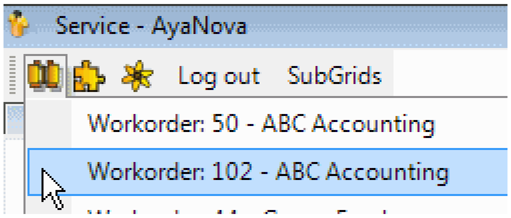
11. Note that the workorder item is no longer in this source workorder

12. Change the service workorder status to Service is Completed as now all workorder items in this workorder are complete and it can be closed and billed out, as there are no longer any outstanding workorder items in this workorder.



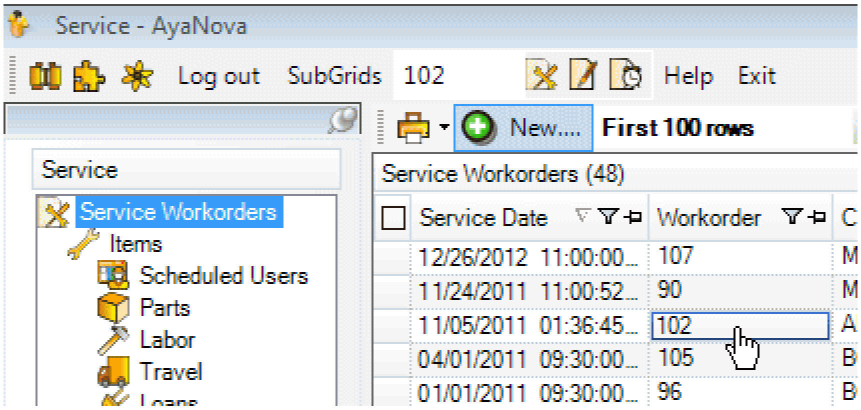
13. Save & Exit  out of this workorder

14. Open the destination workorder that you had created in step 1. In the screenshot below, we did this by the  [Recent.... menu option](#).

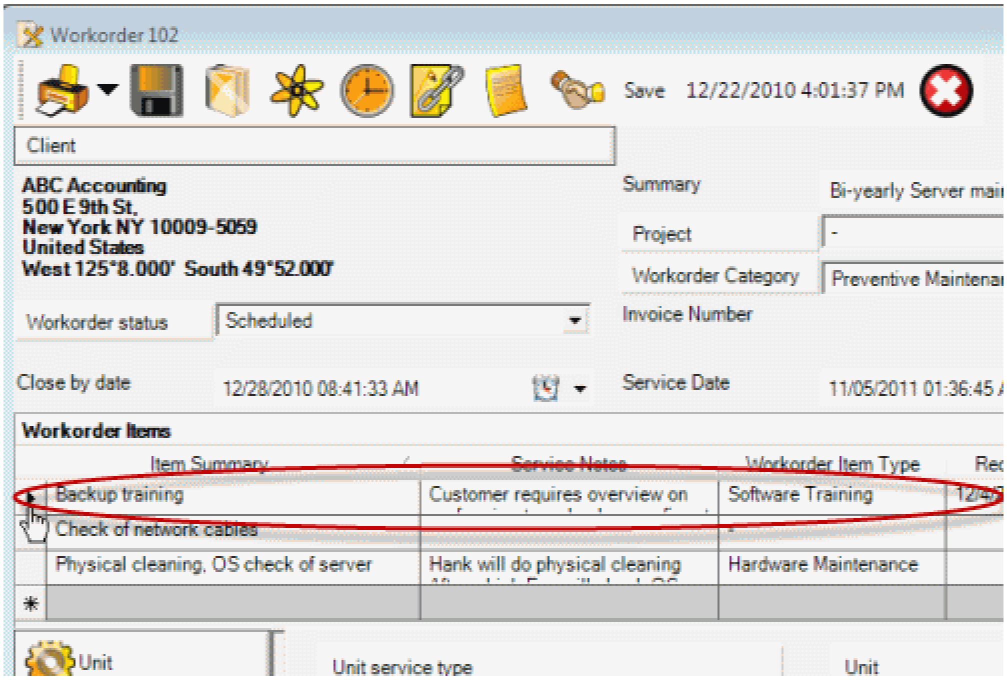


Or you can open it via the [Direct Open feature on the main menu](#)

Or open the destination workorder by selecting the workorder # in the grid



15. You will now see that the workorder item now displays in the destination workorder.



Note that if the Schedulable User, Rate, Unit, or other selectable items are no longer active or available, that they will not be moved over to the new service work order item.

When moving a workorder item from one workorder item to another, make sure that neither workorder is opened by any other users at the same time.

6.11 Generate a service workorder from a quote

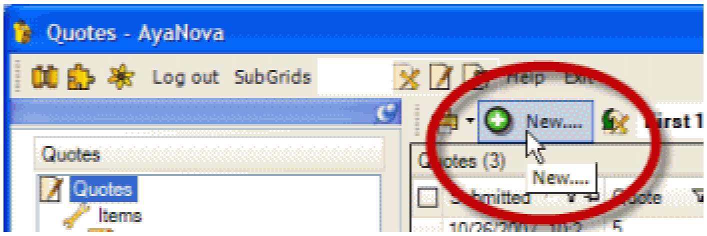
There are two major steps to generate a service workorder from a quote:

1. Create and save the quote
2. Select the quote in the Quotes grid and click on the menu option to *Generate Service Workorder from this Quote*

In this tutorial example, we will go through some of the fields in a quote, and then generating a service workorder from that quote which saves you time by ensuring minimal double entry and that what is entered in the quote is also entered into the service workorder.

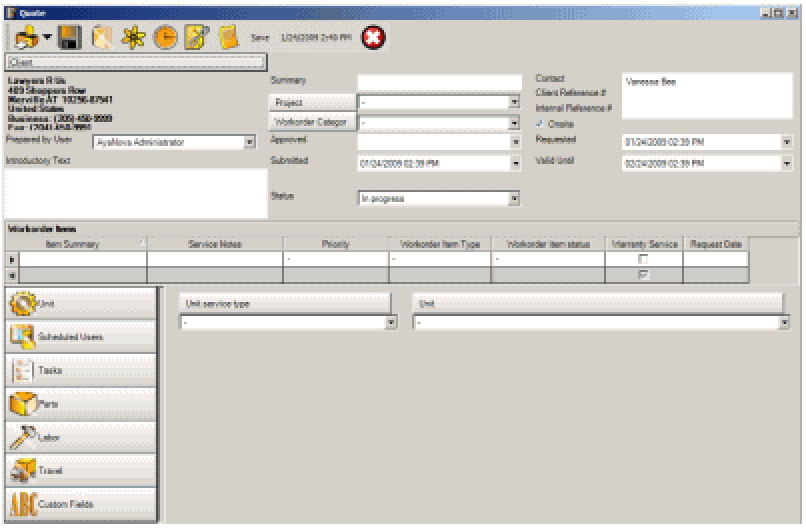
- It is highly recommended that you review this Help file's entire section on Quotes and Service Workorders for complete overview , suggestions on use, tips on use and more.

1. Move to the Quotes navigation pane and select to create a **New..** quote



2. Select the sample client **Lawyers R Us** in the client selection window and  select to create

3. The new Quote will display



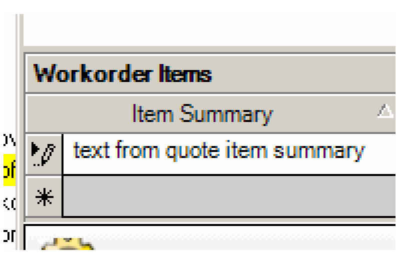
Note:

- A quote number is not given to this quote until the quote has been saved at least once
- **Prepared By User** defaults to the logged in user
- **Submitted** date defaults to today's date and time
- **Requested** date defaults to today's date and time
- **Valid Until** date defaults to a month from today's date
- You can edit any of these as needed other than the quote number, but for the purpose of this tutorial, these are appropriate right now.

4. The Quote screen provides a number of places to enter descriptive information that you can have display or not display on the actual printed quote that you provide the client. For example, you may use the Introductory Text for information that would print specifically on a quote that would not be transferred to the service workorder if accepted; text typed in the Summary field would be transferred to the service workorder.

5. Any data entered or selected within the workorder item grid or sub-screens is transferred to the service workorder when it is created

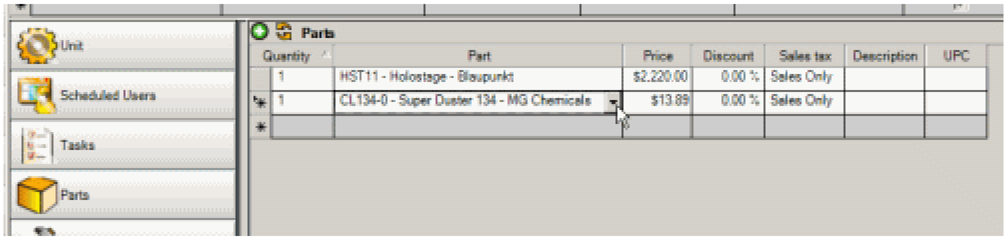
6. Enter in text into the **Workorder Item Summary** field of the workorder items grid so you can see how it is transferred automatically when the service workorder is created.



7. Select the **Parts** sub-subsection of the workorder item.

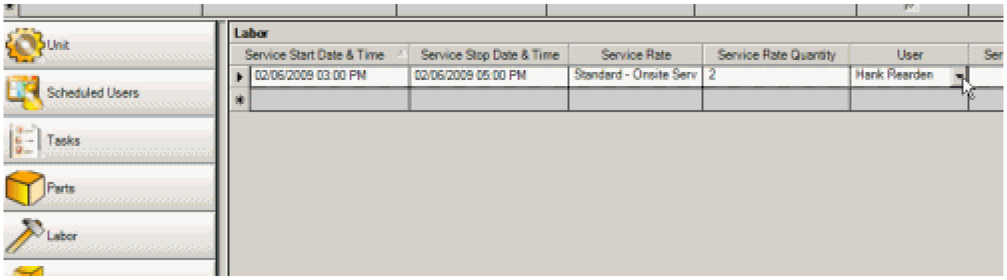
   You will note that Serial Numbers and Part Warehouses are not selectable in a quote Parts – this is because a quote does not affect inventory.

   - Select the sample part HST11 and enter a quantity of 1
   - Select the part CL134-0 and enter a quantity of 1



8. Select the **Labor** sub-subsection of the workorder item. And create a new Labor record by selecting a schedulable user, Start Date & Time, and Stop Date & Time, Quantity and Rate.

   See also: Date & Time Selection Labor subsection



9. Save the quote via the 

Save menu option at the top of the quote

10. Now that you have saved this quote, you can select to print a report such as the **Sample Detailed Quote** report template from the menu  **Print** drop down selection (your list of report templates may differ).

    See also:
    Printing
    Report Template Designer

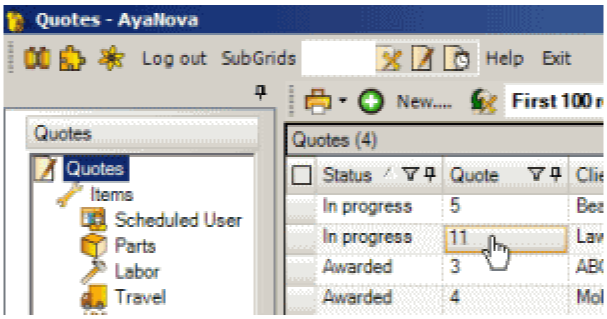
11. **Save & Exit** the quote itself

12. This returns us to the Quotes grid.

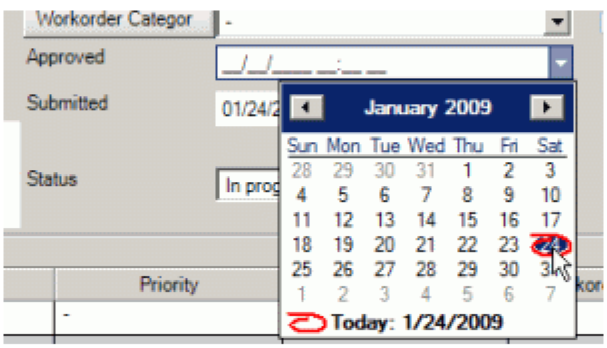
13. Now let’s assume that the client has accepted the quote.

14. In our example, as we want to track the status of a quote and when accepted, we will enter this information into the quote before converting to a service workorder

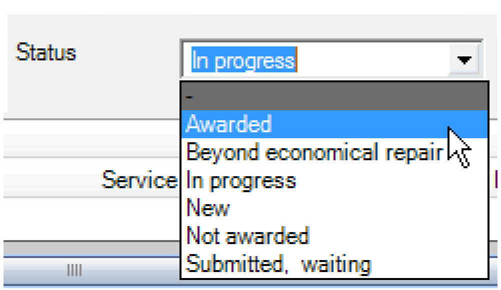
15. Open the quote created previously by selecting the quote number in the Quotes grid (your quote number may be different of course than the screen shot below)

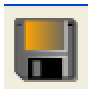


16. Select today's date within the **Approved** field so that you can mark when it was approved.

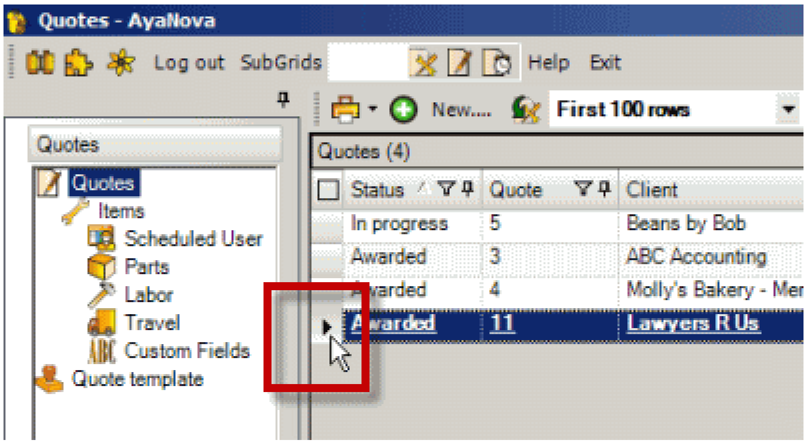


17. Change the **Status** of the quote from ***In progress*** to ***Awarded*** . so that we can easily filter the grid by the Status to see what quotes are set to what status.

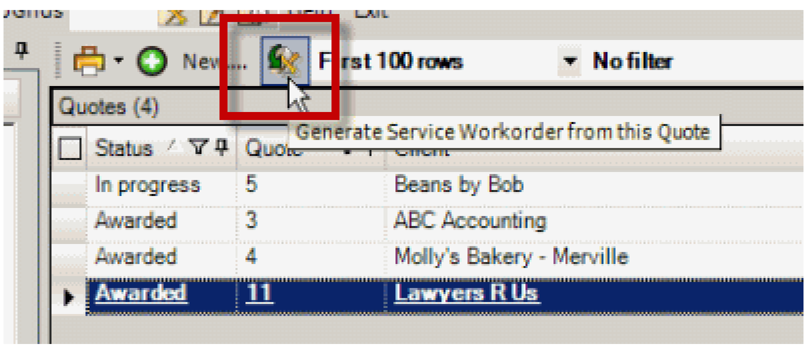


18. Save & Exit  out of the quote which returns you to the Quotes grid

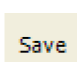
19. Click on the row header to select this quote - note how everything shows underlined to indicate it is selected.



20. With this quote identified as the one we wish to convert (note the arrow on the row header), select the menu option **Generate Service Workorder From this Quote**



21. A new service workorder will open with the appropriate fields filled in from the quote.

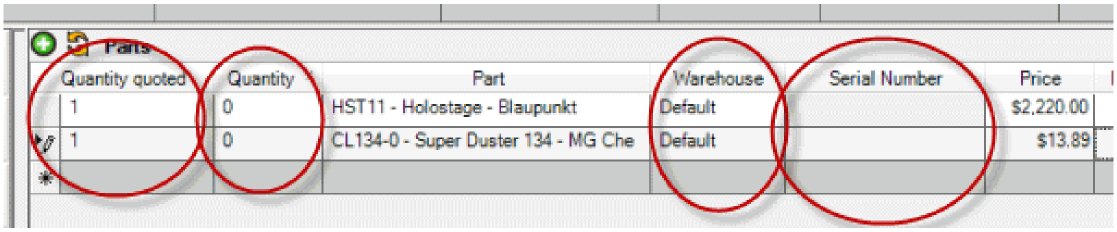
22. Select the 

Save menu option to generate a workorder number for this workorder.

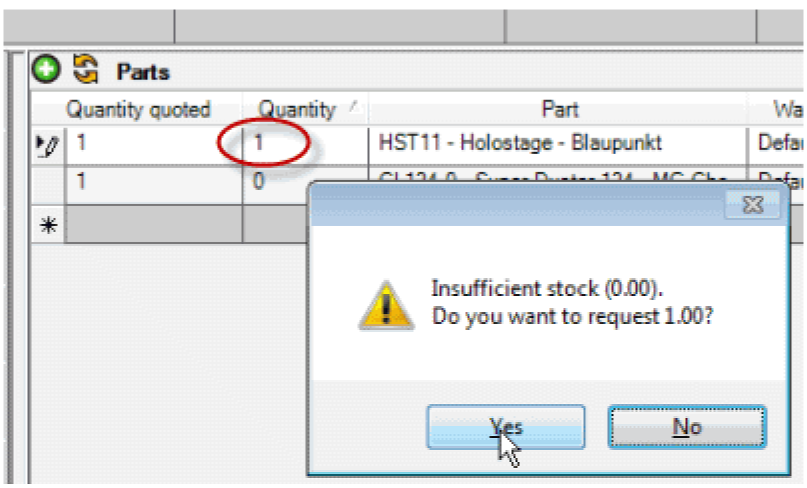
23. Open the Parts sub-screen for this service workorder

24. You will note the following because each of these need your selection (Warehouse, Quantity, and Serial Number if applicable):

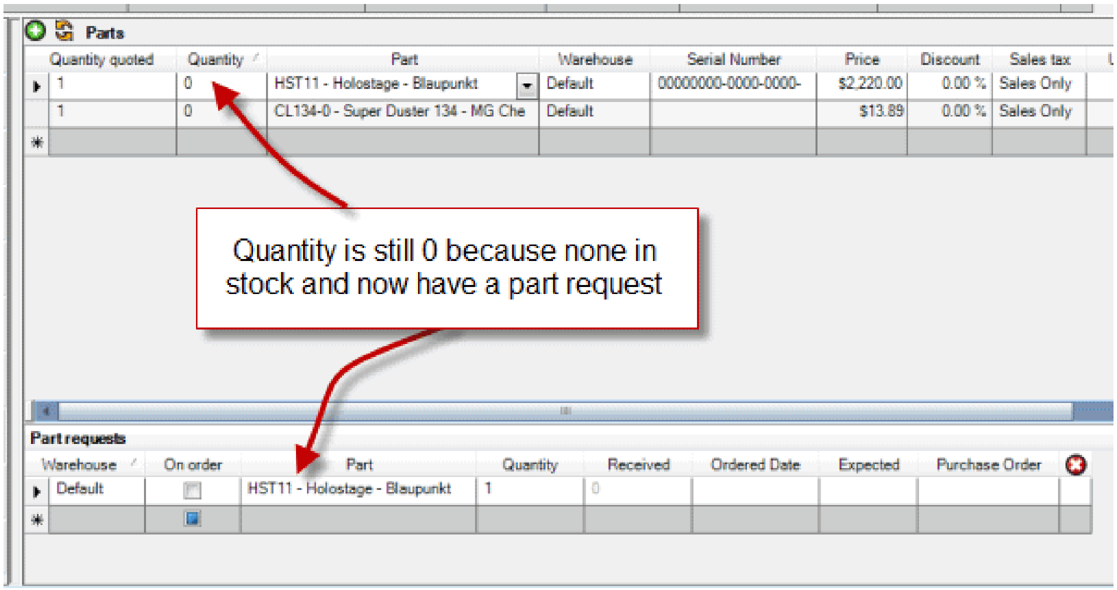
- There is a **Quantity Quoted** of 1 for each of the parts – but an actual **Quantity** is not set.
- The Warehouse selected is the **default** warehouse
- **Serial number** if applicable is not selected as there is no actual Quantity set



25. If you had different warehouses and the part is coming from a specific warehouse, you would select the warehouse first for the first part
26. Then enter in the quantity of 1 under the Quantity column for part HST11 and tab off
27. If the part is not in stock for that warehouse, AyaNova advises you so, and asks if you wish to request stock. Select Yes.



Note how the Part Request now shows below the Parts, and the quantity still shows 0 for the actual part because you don't actually have it yet in stock so you won't select it until it has been ordered and received.

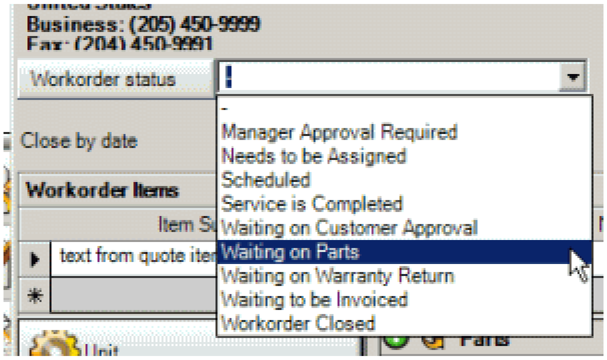


See also: Part Requests

28. Lets do the same for the other part – enter a quantity of 1. If the part quantity is in stock, it won't ask if you want to request it.

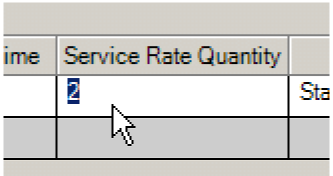
29. The Part Request in this workorder will show in the Part Requests grid so that purchasing can easily see what parts are requested and not yet ordered.

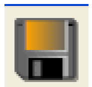
30. We will edit the Status of this entire workorder as well for grid display by selecting the sample Workorder Status **Waiting on Parts**



31. As we entered the Labor to obtain the billable hours for when this was a quote, we will see that Labor is already entered in this workorder.

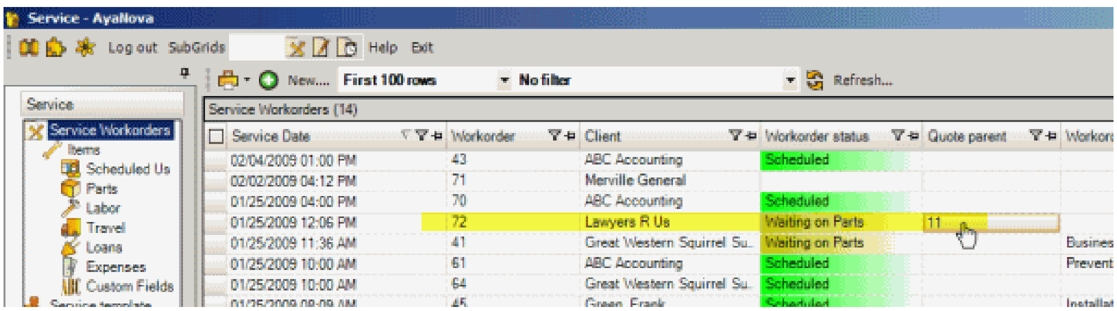
- In the workorder's Labor subsection, you may want to edit so that there is a quantity of 0 for hours at this time just so billable hours for this schedulable user is not affected.



32. Save & Exit  the service workorder

33. Move to the Service navigation pane, and open the Service Workorders grid

34. Scroll so you can view the column Quote Parent. You will note that the quote number that this workorder was created via displays in the Quote Parent column for this workorder. If this column is not showing it may be set to not display.



35. Now that the workorder is created, you can schedule user(s), enter details of the service performed when done, etc.

Congratulations on completing this tutorial. In this tutorial we learned how to create a quote, and converted this quote to a service workorder.

See also:
Quotes
Service Workorder - Parts
Part Requests
Purchase Order menu options - Part Requests List
How do i create a Purchase Order based on Part Requests?

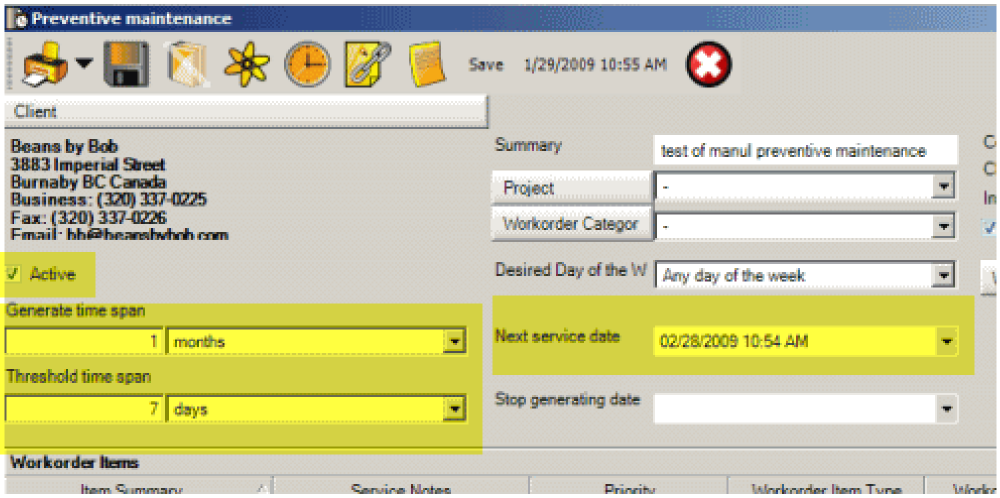
6.12 Manually generate a service workorder from a preventive maintenance

In this tutorial example, we will go through a very basic work-flow of creating a Preventive Maintenance order, and then manually generating a service workorder from that PM.

Usually you would allow AyaNova to automatically generate the service workorder for you based on its settings for automatic generation, but perhaps you want the service workorder generated earlier so that it is showing scheduled on the Schedule screen for the schedulable user of that generated service workorder.

- It is highly recommended that you review this Help file's entire section on Preventive Maintenance and Service Workorders for complete overview , suggestions on use, tips on use and more.

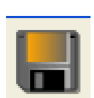
1. Create a new preventive maintenance order for the client ABC Accounting
   - Refer to the many different ways to create a PM
2. As per the PM entry screen details on its fields, enter in the following PM specific required fields
   - **Active** - this must be check-marked for this PM to be able to have a service workorder generated from it
   - **Generate Time Span** - this field is where you dictate how often the service date is repeated. For example, if you wished to have this preventive maintenance item repeated every month, you would enter in the number 1 and select months
   - **Threshold Time Span** - this is where you dictate how far in advance of the service date you wish the workorder to be generated. For example, if you wished to have this preventive maintenance create a new service workorder 7 days in advance of the Service Date, you would enter in the number 7 and select days.
   -
   - **Next Service Date** - this is where you indicate the date against which the other fields refer to when to generate and how far in advance to generate. For example, put in a date three weeks from now.



- NOTE: With the above field settings if left to automatically generate a service workorder, this PM will automatically generate a service workorder on Feb 21th - as that is 7 days (as per the Threshold Time Span) before the Next Service Date. And then this PM will automatically update its Next Service Date to a month later (as per the Generate Time Span) so that it is ready for the next time it is to be generated from.

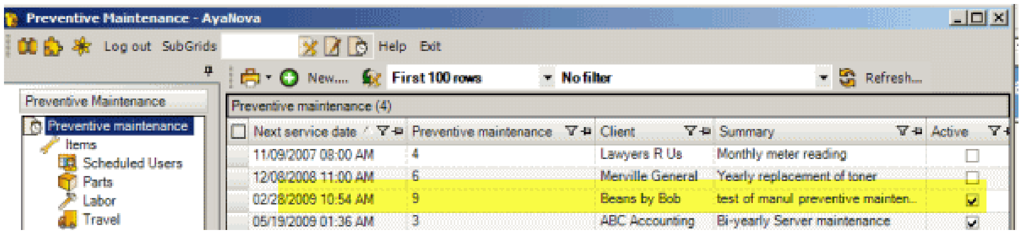
3. You can create more than one workorder item, select a unit for each workorder item, schedule users for each workorder item, etc, and this data will be copied to the service workorder that is generated. We will not cover that in this PM tutorial.

   As the PM's workorder items, Scheduled Users subsection, Labor subsection etc all are the same as a Service Workorder, refer to the Service Workorder section on these:
   - Service workorder items
   - Unit
   - Scheduled users
   - Tasks
   - Parts
   - Labor
   - Travel
   - Loans
   - Expenses
   - Outside Service
   - Custom Fields

4. Save and exit  out of the PM

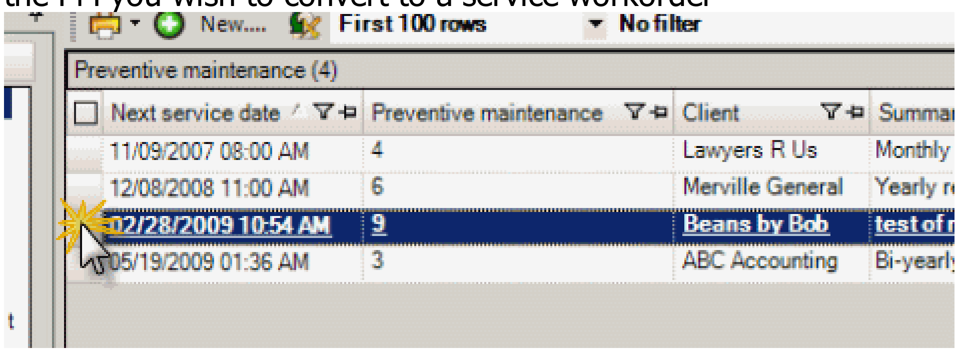
5. From the PM grid you can now see this newly created PM - such as its Next Service Date, etc. Press the Refresh 

menu option on the PM grid if not there.

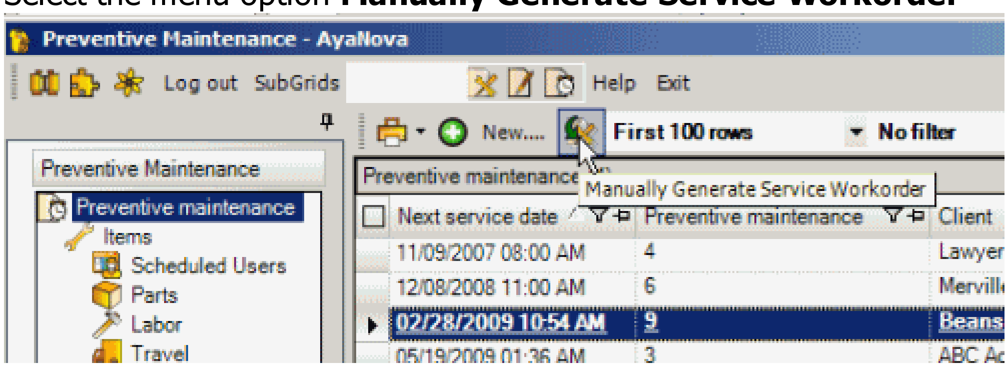


6. **To manually generate a service workorder from a PM**, do the following:

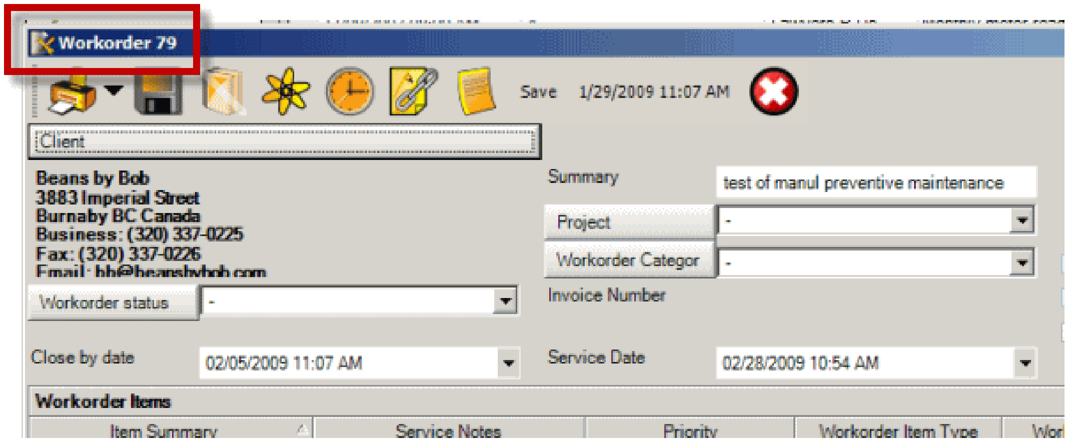
    - From the [Preventive Maintenance grid](), use the row selector to select the PM you wish to convert to a service workorder

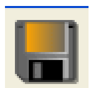


    - Select the menu option **Manually Generate Service Workorder**

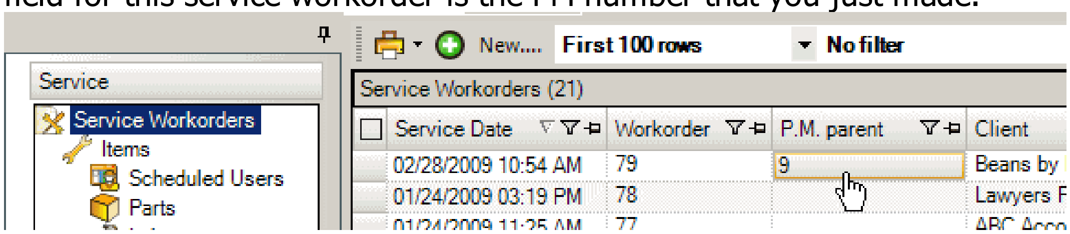


7. The Service Workorder generated will now open, so that you can edit anything if needed. Note the workorder # at the top.

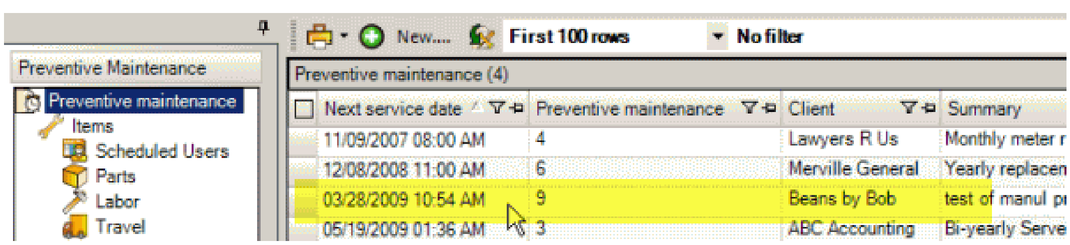


8. Save & Exit  out of the Service Workorder.

9. If you view the Service Workorder grid, you will see that the P.M. Parent field for this service workorder is the PM number that you just made.



10. View the Preventive Maintenance grid. You will note that the Next Service Date has automatically advanced for this PM based on the Generate Time Span settings - i.e. it will now be a month later than what was initially set in the Next Service Date as a service workorder was generated so the PM moves to the next instance.



NOTE: If an exception occurs when the PM source workorder is attempted to be saved after the service wo is generated, then AyaNova will automatically delete the service wo just created, generate an error message and will send to the administrator account via memo. This prevents infinite workorders being generated as well as advises the AyaNova Administrator account of an issue.

6.13 Automatically generate a service workorder from a preventive maintenance

In this tutorial example, we will go through a very basic work-flow of creating a Preventive Maintenance order, and then having the AyaNova Generator automatically generate a service workorder from that PM the next day.

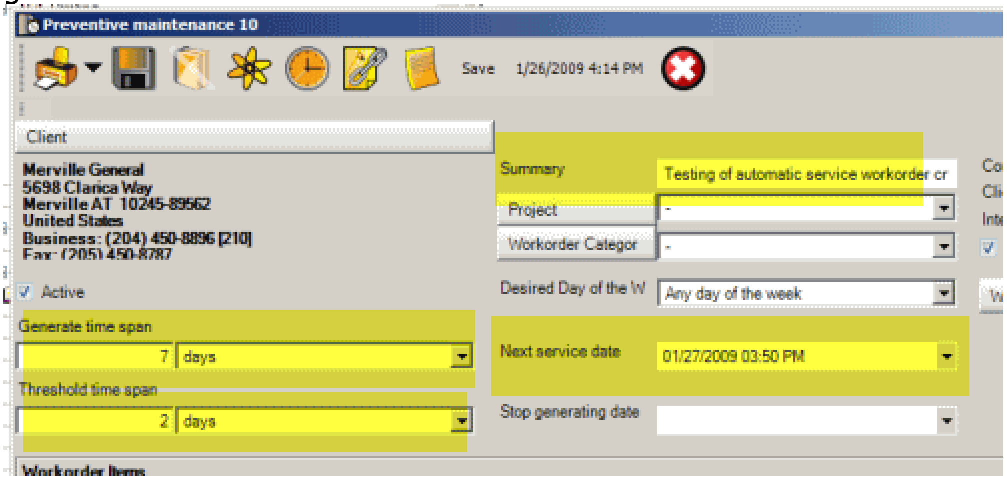
Today we will make the PM, and then tomorrow you will check and confirm that the service workorder was automatically generated from the PM.

- It is highly recommended that you review this Help file's entire section on Preventive Maintenance and Service Workorders for complete overview , suggestions on use, tips on use and more.

Today - make the PM

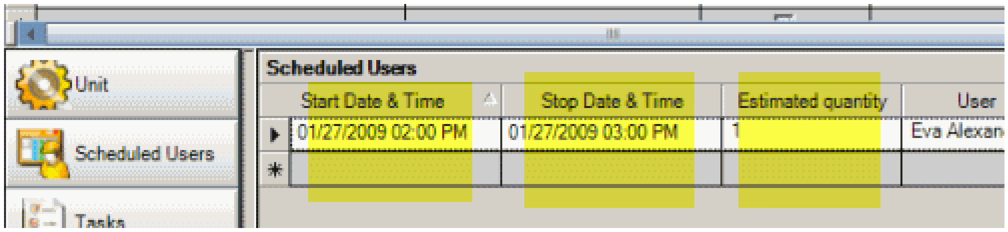
1. Create a new preventive maintenance order for the client Merville General
   - Refer to the many different ways to create a PM
2. Enter in the following text into the Summary field at the top - **`Testing of automatic service workorder creation from PM`**
3. As per the PM entry screen details on its fields, enter in the following PM specific required fields
   - **Active** - this must be check-marked for this PM to be able to have a service workorder generated from it
   - **Generate Time Span** - this field is where you dictate how often the service date is repeated - enter **7 days**
   - **Threshold Time Span** - this is where you dictate how far in advance of the service date you wish the workorder to be generated - enter **2 days**
   - **Next Service Date** - this is where you indicate the date against which the other fields refer to when to generate and how far in advance to generate - select **tomorrows date**

- With the above field settings, this PM will automatically generate a service workorder 2 days before its Next Service Date, and then this PM will automatically update its Next Service Date to 7 days later (as per the Generate Time Span) so that it is ready for the next time it is to be generated from.

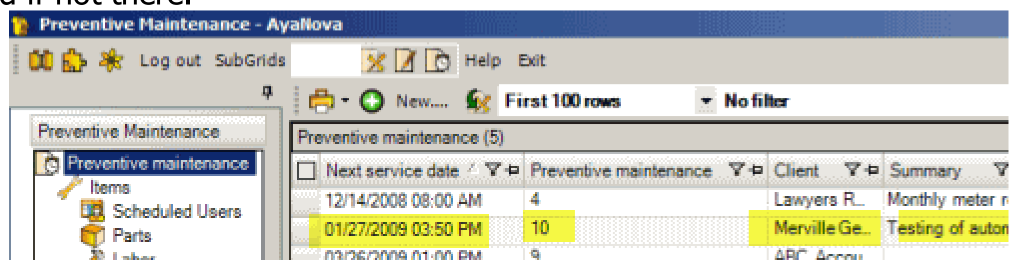


4. You can create more than one workorder item, select a unit for each workorder item, schedule users for each workorder item, etc, and this data will be copied to the service workorder that is generated. As the PM's workorder items, Scheduled Users subsection, Labor subsection etc all are the same as a Service Workorder, refer to the Service Workorder section on these:
   - Service workorder items
   - Unit
   - Scheduled users
   - Tasks
   - Parts
   - Labor
   - Travel
   - Loans
   - Expenses
   - Outside Service
   - Custom Fields

5. Create a Scheduled User record selecting a Start Date & Time that has a different time than that of the Next Service Date, even a different date. Enter in a Stop Date & Time an hour later, etc.



6. Select the Save Save menu option. Note the PM #. Exit out of the PM entry screen.
7. From the PM grid you can now see this newly created PM - such as its Next Service Date, etc. Press the Refresh... Refresh menu option on the PM grid if not there.

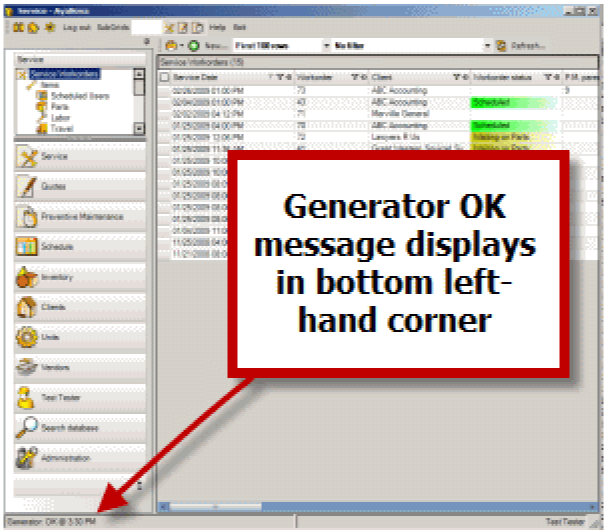


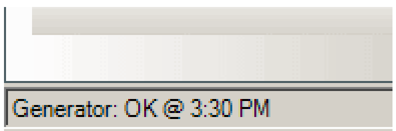
Tomorrow - AyaNova will, via its Generator, automatically generate a workorder for you because of the PM settings you made:

1. The next day, confirm that the Generator is running successfully depending on what configuration of AyaNova you have:

   A. Default single computer installation

   - In its default stand-alone single computer use, no additional configuration is needed to have the Generator run except that:
     - you **must** be logged into AyaNova as a user other then the AyaNova Administrator.
     - the user you are logged into AyaNova as must be a member of a security group that has minimum Read/Write rights to Object.Workorder and Object.WorkorderPreventiveMaintainance and Object.WorkorderService
   - When you log into AyaNova that is in the default stand-alone single computer configuration, you can see that the Generator is running successfully via the message in the bottom left-hand corner

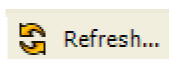




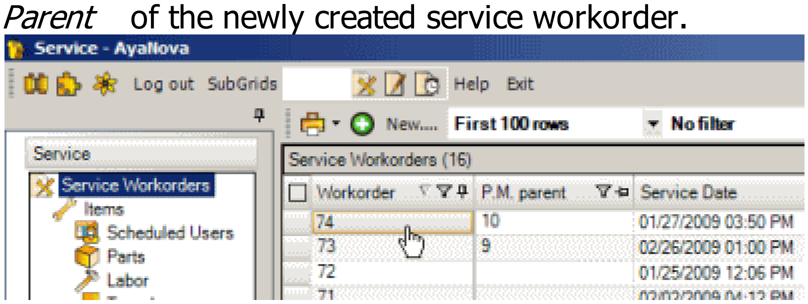
B. Network configuration

- The network Generator must be installed, configured and confirmed running correctly as per the network Generator installation steps

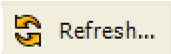
2. Now that it is the next day, log into AyaNova and view the Service Workorders grid.

- Press the Refresh 

menu option just to make sure you are viewing the latest created workorders
- Pin the *Workorder #* column in the Service Workorder grid, and sort it so that the last created workorder is listed first at the top of the list.
- Now pin the column *P.M. Parent* so that it is the second column listed
- You will see that the P.M. # that you made yesterday is listed as the *P.M. Parent* of the newly created service workorder.

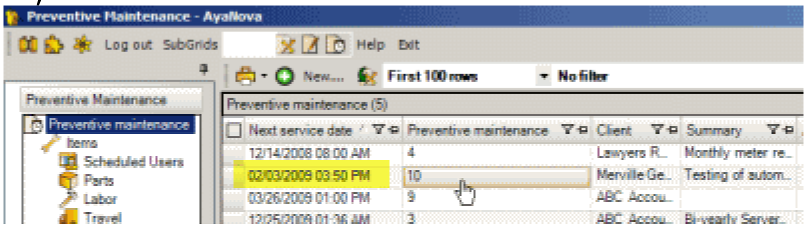


3. Open up this workorder and observe that its Service Date is what was set when you created the PM yesterday, and its other fields are also set appropriately.

4. Now view the Preventive Maintenance grid. Press the Refresh 

menu option just to make sure you are viewing the latest created/edited preventive maintenance orders.

5. In this grid, you will note that the Next Service Date of the PM you created yesterday has now changed to a week from now - it is no longer today's date because a service workorder has been generated from this PM, so this PM is then updated for the next date it is to generate a service workorder for, which is a week from now.



6. Open up this Preventive Maintenance and check the Scheduled User record - note it too has been updated the same amount as that of the Next Service Date - it too has been updated to be 7 days more than what it was before because that is what your Generate Time Span was set for.

Congratulations on completing this tutorial. In this tutorial we learned how to create a PM, and automatically generate a service workorder from this PM.

"When" a Service Workorders will be created for actual PM's that you make, will of course depend on what you set in each PM's Generate Time Span, Threshold Time Span and Next Service Date.

NOTE: If an exception occurs when the PM source workorder is attempted to be saved after the service wo is generated, then AyaNova will automatically delete the service wo just created, generate an error message and will send to the administrator account via memo. This prevents infinite workorders being generated as well as advises the AyaNova Administrator account of an issue.

6.14 Create a new schedulable user

This tutorial will go through how to create a new schedulable user

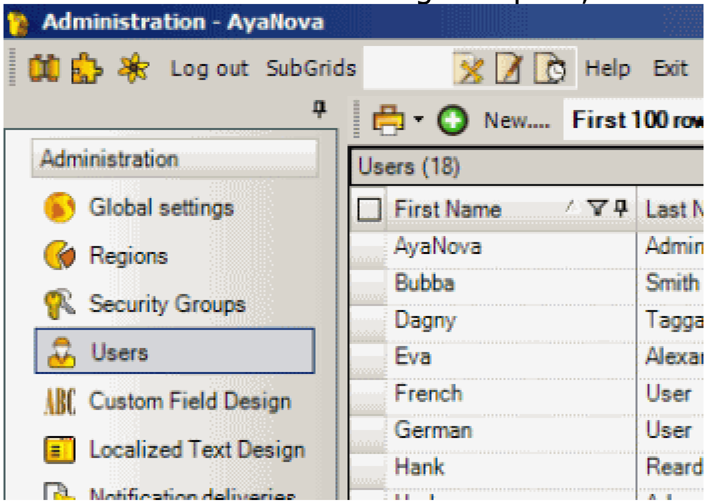
NOTE: The AyaNova sample data when you first install AyaNova includes licensing for up to 5 scheduleable resources and all optional add-ons, for 45 days from date of install.
The sample data includes 4 (four) technicians already using up four of the available 5 (five) scheduleable resources licenses. Try the steps below to test out creating a new user that is set to User Type of Scheduleable User.

- It is highly recommended that you review this Help file's entire section on Security Groups and Users for complete overview , suggestions on use, tips on use and more.
- **NOTE:** If using Regions, do note that users can only view data that is assigned to the same region as theirs. So if you created a workorder and assigned a schedulable user to that workorder, but that client is of one region and the schedulable user is of another, be aware that the schedulable user will not see that scheduled workorder when they log into AyaNova.

Steps to create a new schedulable user

1. Log into AyaNova as the AyaNova Administrator or a user that is of user type AyaNova Administrator (such as the test user if using the sample data)

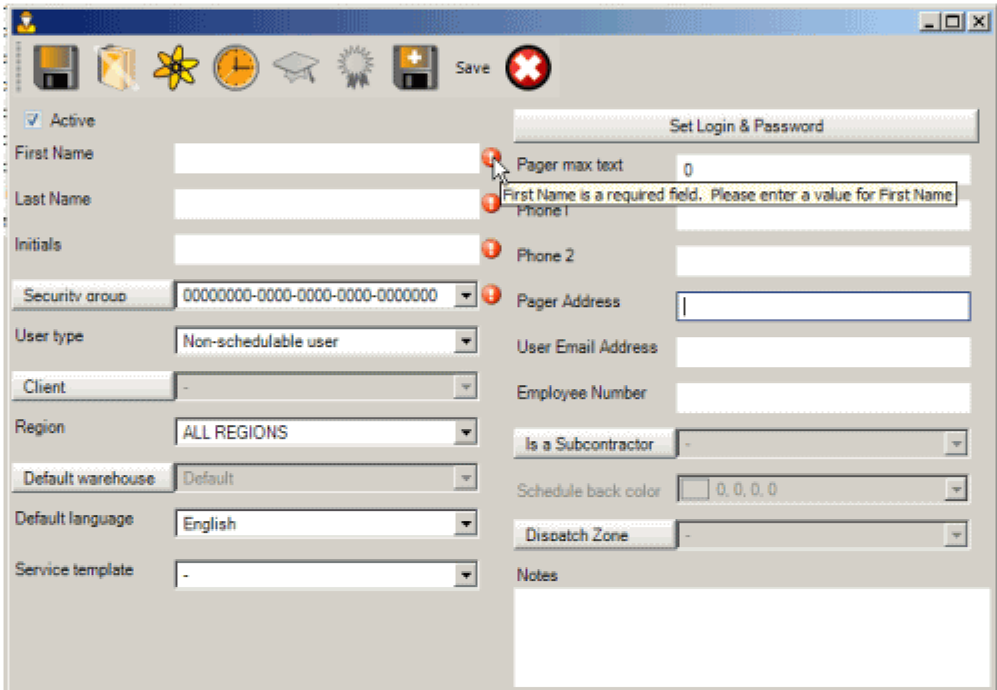
2. Select the Administration navigation pane, and view the Users grid



3. Click on the 

New... grid menu option to create a new user which will open a empty new user entry screen

4. You will note on first opening of the empty new user entry screen, that some fields have a red exclamation mark - these indicate fields that are required and can not be left unset.



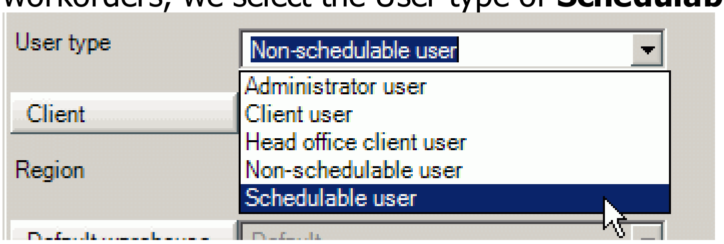
5. Enter the schedulable user's first name as **Billy**

6. Enter the schedulable user's last name as **Ploughman**

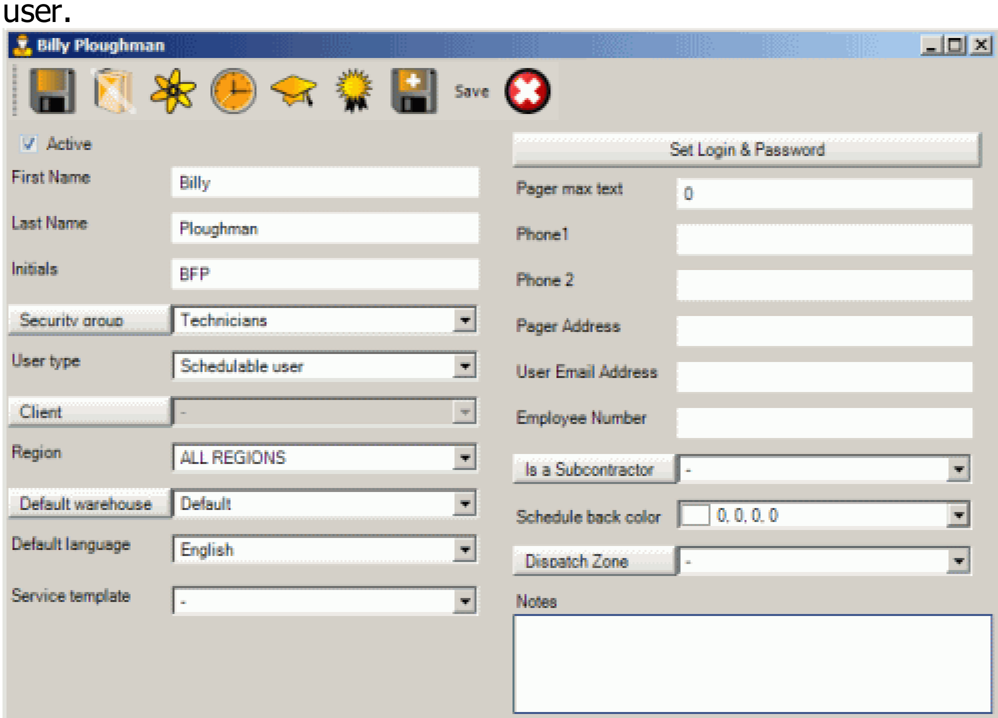
7. Enter the initials as **BFP**

8. Select the Security Group of **Technicians**

9. As we want to be able to schedule this user and assign him to service workorders, we select the User type of **Schedulable user**



10. Now if we tab off, other fields become editable because this is a schedulable user.



11. If you select the default **Region**, then this user has access to all data regardless of what region the data is assigned to. If you select a specific region, then this user is restricted to only viewing data available for that region. Refer to the Regions section for more details.

12. You can assign a **Default Warehouse** to save this user entry and selection time and ensure they use the correct warehouse by default.

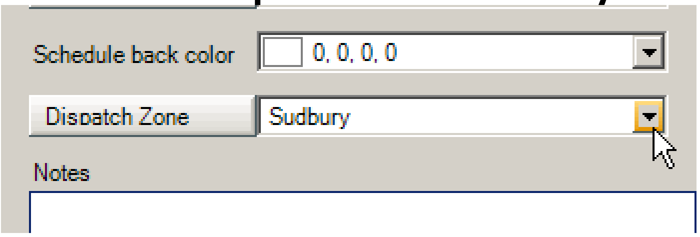
Make sure that the if you have specified a specific region for this user, that the Default Warehouse you have selected is also set for that same region otherwise this user won't be able to access it.

13. By default, the **Default Language** set in Global Settings will be pre-selected for you.

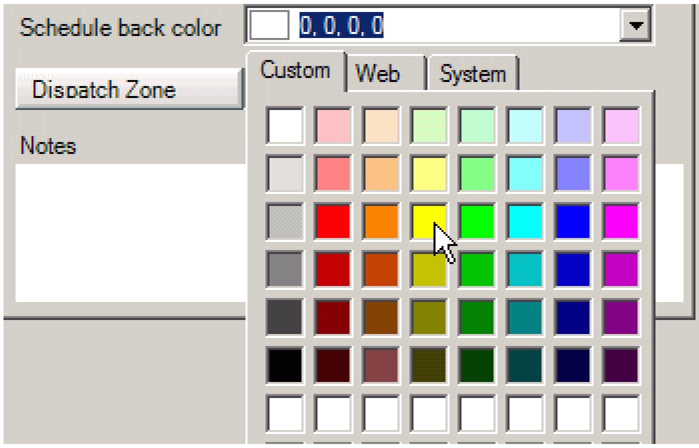
The Default Language is where you set what locale this user will use. Localization affects what text labels in AyaNova are displayed. Refer to the Localized Text Designer for more details.

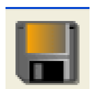
14. If you select a specific **Service Template** for this user - when this user is logged in and creates a new workorder for any client, it will default to pre-selecting that service template to save that user time.

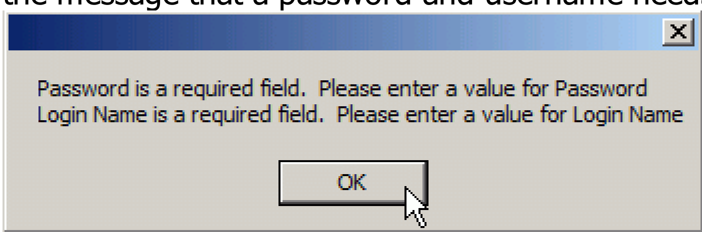
15. Select the **Dispatch Zone** of **Sudbury** for this example schedulable user



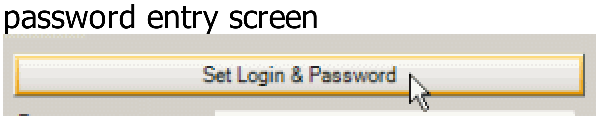
16. When viewing the Schedule screen, what color you set for Schedule Back Color for this schedulable user's workorder items will have this back color for easy viewing. See the Schedule section for more details about the Schedule screen.

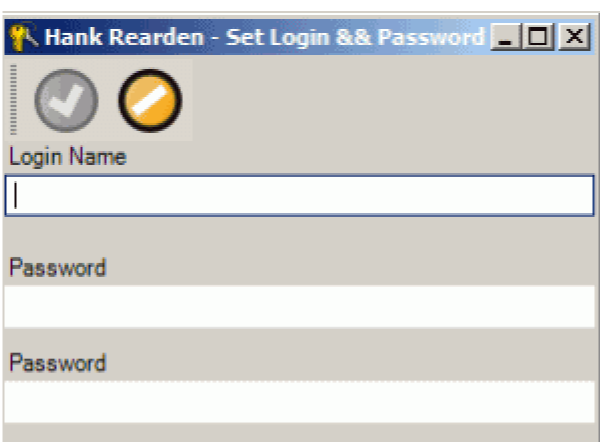


17. Click on the  Save & Exit menu option - you will note that you receive the message that a password and username needs to be set for this user.



18. Select the **Set Login & Password** which will open the username and password entry screen



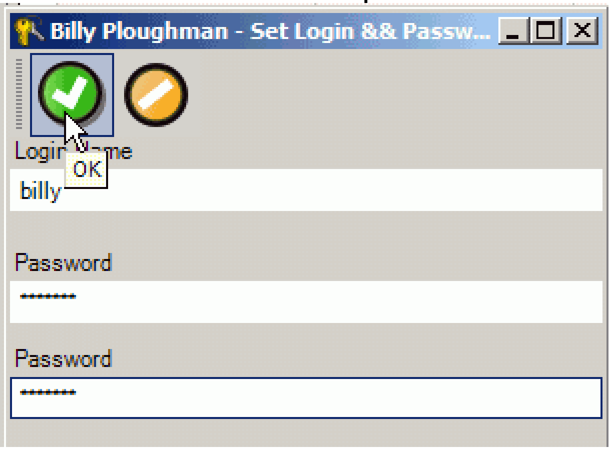


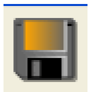
19. Enter in the login name for this user as billy

20. Enter in the password for this user as billy01

21. Re-enter the password again to confirm. If you do not enter the password identically twice the OK button will not be available.

22. Select the OK menu option to save and return to the user entry screen



23. Click on the  Save & Exit menu option.

You have now created a new schedulable user. This user will now show in the Schedule screen, and can be selected in service workorders.

6.15 Create a security group to limit what features a user has rights to

This tutorial will go through how to create a new security group to limit access to features for users that are a member of that security group

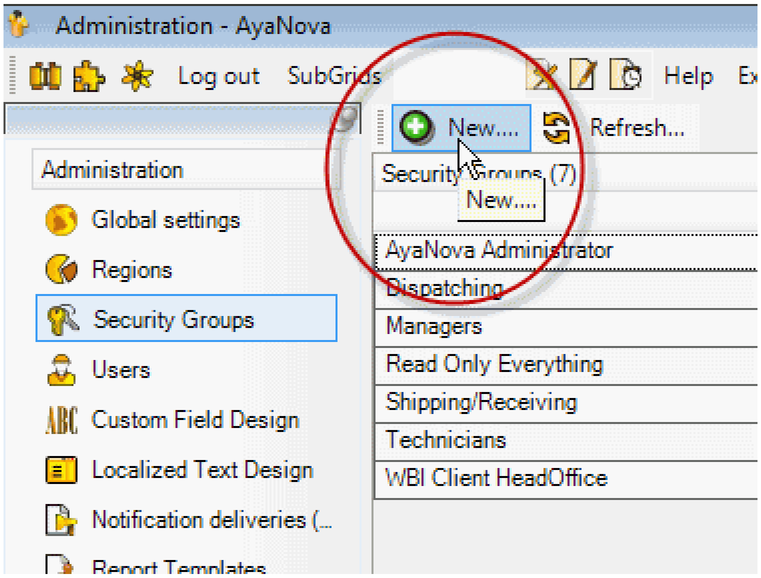
- It is highly recommended that you review this Help file's entire section on Security Groups and Users for complete overview , suggestions on use, tips on use and more.

Steps to create a new security group

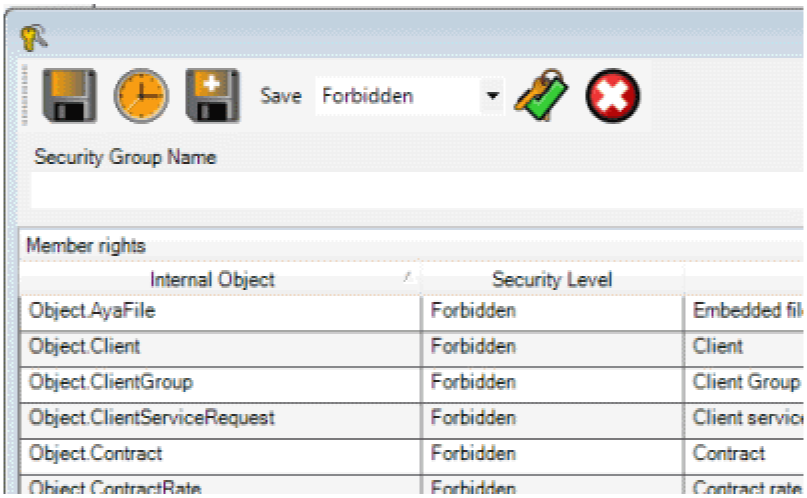
1. Log into AyaNova as the AyaNova Administrator or a user that is of user type AyaNova Administrator (such as the test user if using the sample data)

2. Select the Administration navigation pane, and view the Security Groups grid

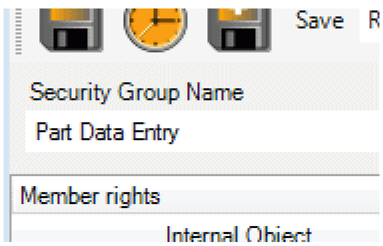
3. Create a **New**.. security group



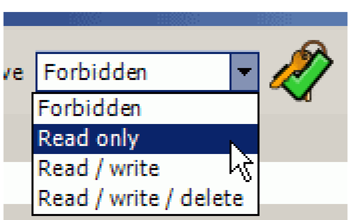
4. The new security group entry screen opens with all objects initially set to Forbidden



5. Enter in the name you want this security group set to (name it so it is easy to select in a user entry screen)



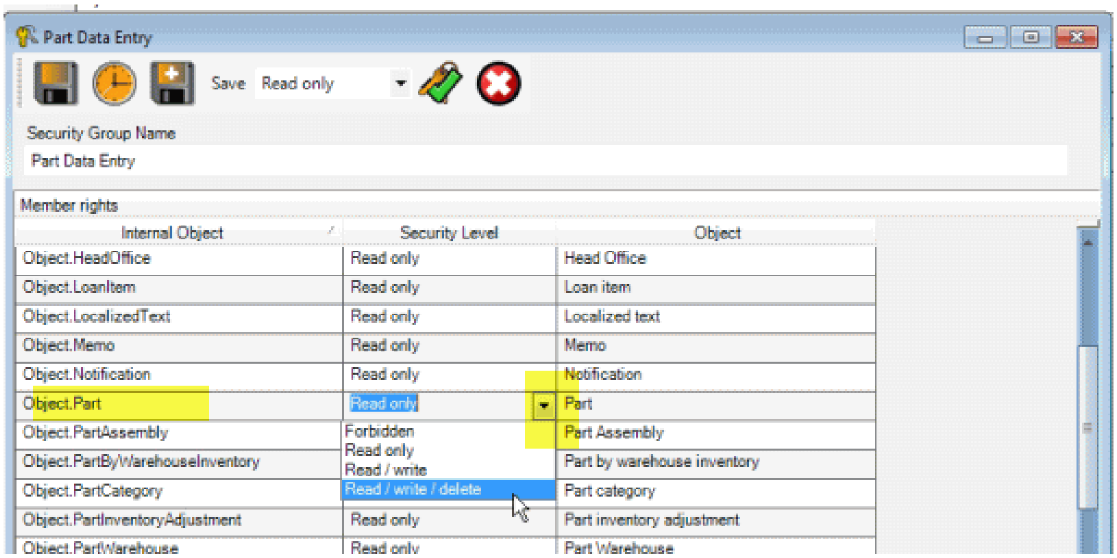
6. If you want all objects or the majority of objects set to a certain right such as Read Only, use the menu option **Set all Security Levels to selected Level** to automatically set this by drop down the list, select the right and than click on the menu option 



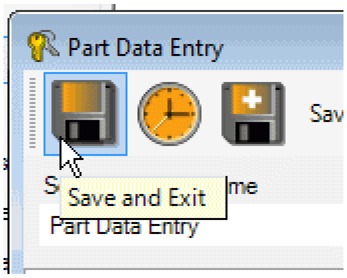
7. The section **Security Group objects identified** identifies what each Object listed sets rights for - so if not sure, do check that out.

In this example we want users of this security group to be able to view most everything, but only be able to actually enter in new parts.

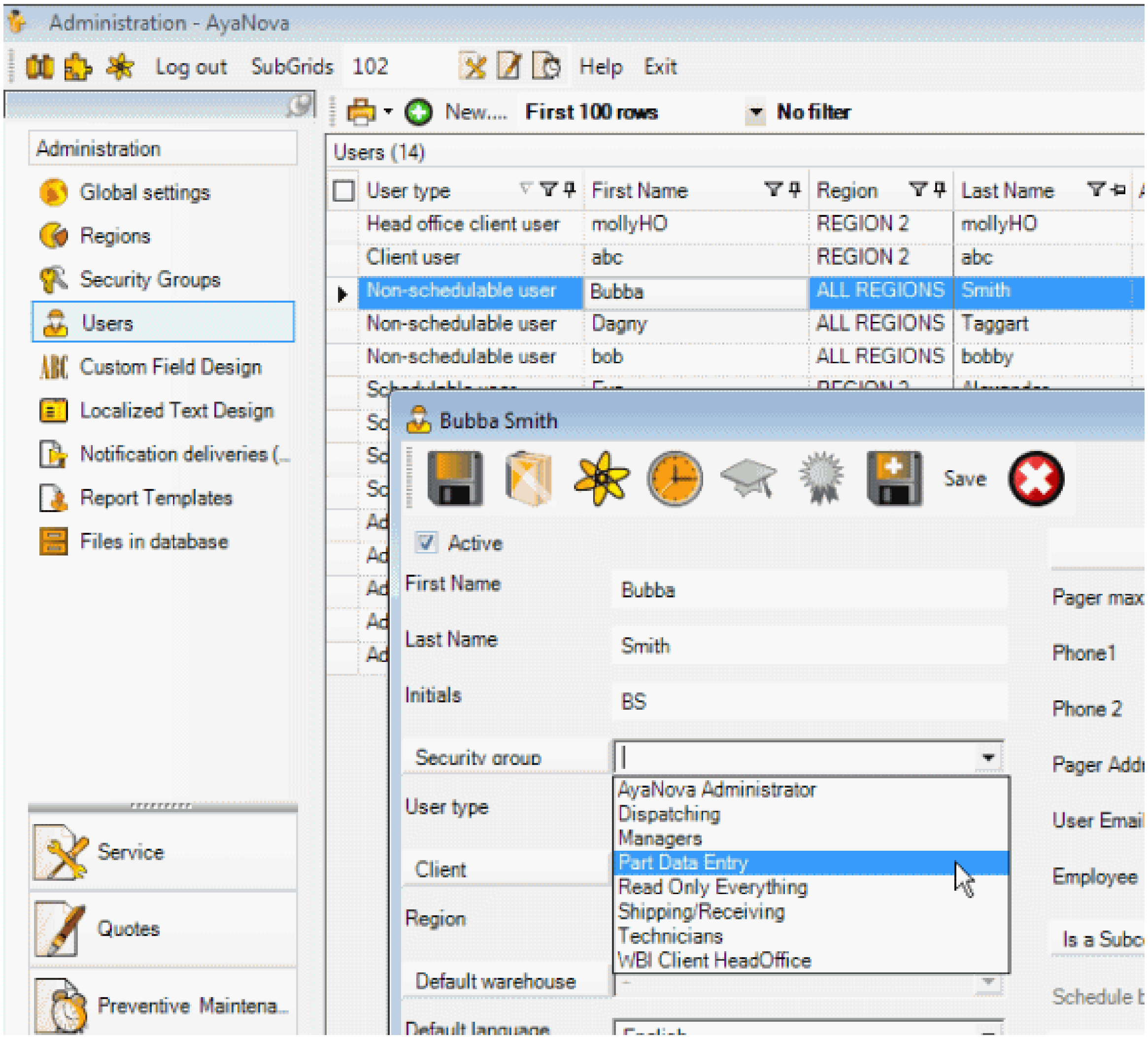
So we find the Object.Part and set it to Read/Write/Delete (so the user can also delete if needed)



8. Save the security group. If the security group you have just created does not yet show in the Security Group grid, select Refresh  to display the latest.

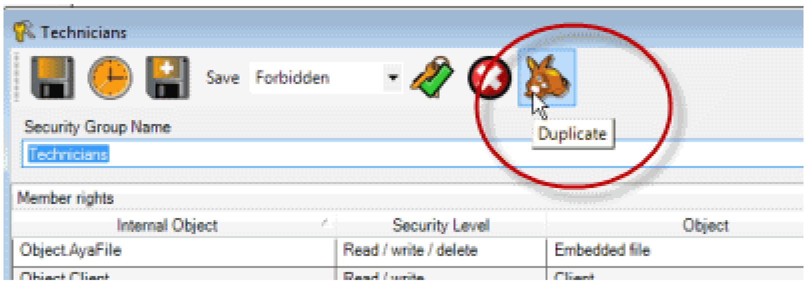


9. In the user's entry screen, select this security group.

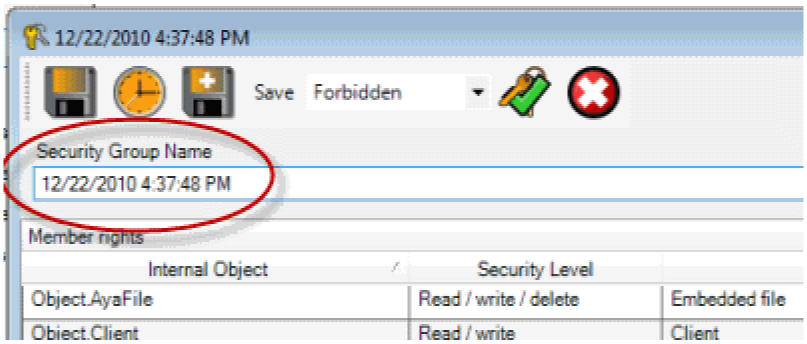


10. Now the next time that user logs in, this security group's rights will take effect.

If instead, you have an existing security group that you want to make a copy of because it has only a few Objects that need to be set to a different right, you can open that group and select the **Duplicate** menu option



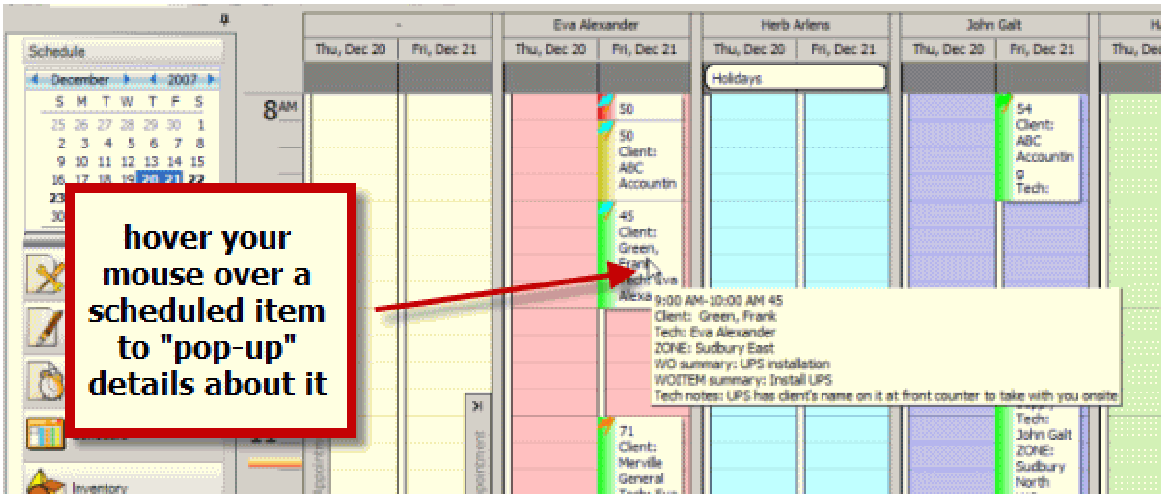
A new security group entry screen is opened for you with the Name showing today's date and time, which you edit with the Name you want this new security group to be set to.



Edit the rights of the Internal Objects needed, save and than set for the users needed.

6.16 Edit what pops up on Schedule screen for workorder item

A workorder summary is displayed when you mouse over a workorder item in the Schedule screen and will display within the schedule as space permits



- You can edit what displays in this area via the [Global Settings] under the Administration navigation pane [Workorder Item Summary Template tags] section.

- In the above screenshot, the Workorder Item Summary popup for the Schedule screen presently displays:

  start and stop time workorder number
  Client: client's name
  Tech: scheduled user
  ZONE: dispatch zone
  WO summary: workorder summary
  WOITEM summary: workorder item summary
  Tech notes: service notes

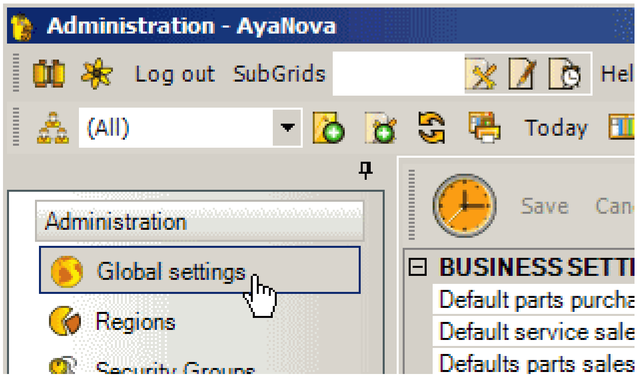
  - NOTE: the start and stop time displays by default where appropriate.

An example of how to edit what pops up:

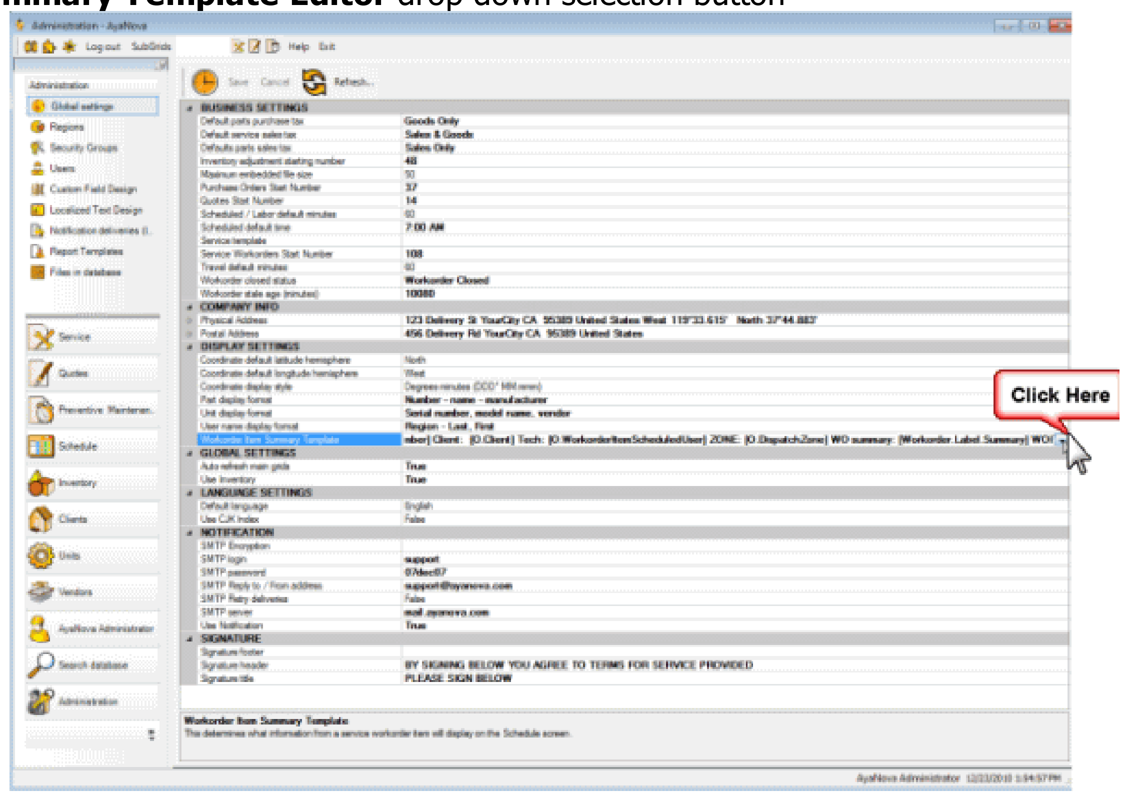
1. Hover your mouse over a scheduled workorder item in the Schedule screen so that you can see what is presently displaying.

2. Now let's edit the template for the workorder item summary so it displays differently.

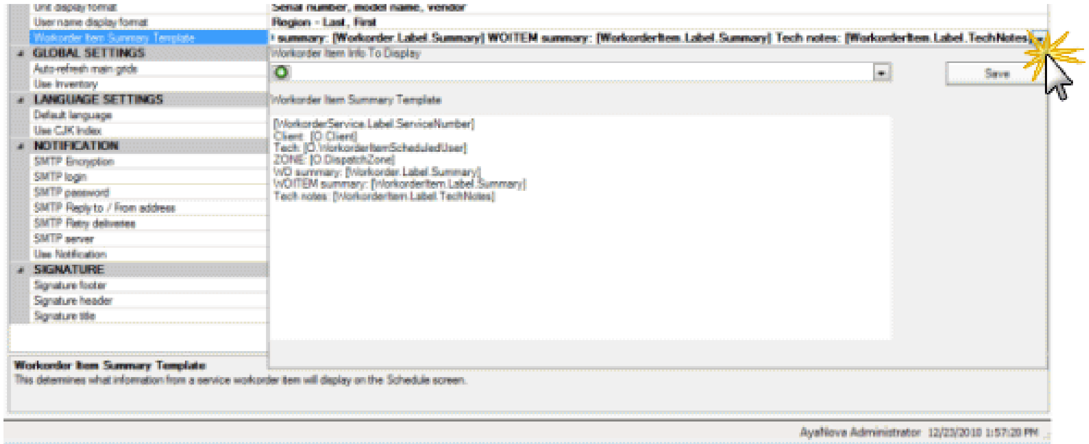
- Move to the Administration pane by clicking on the Administration icon on the navigation pane, and select **Global Settings**



3. Within the Global Settings screen on the right, select the **Workorder Item Summary Template Editor** drop down selection button



4. The Template Editor screen drops down

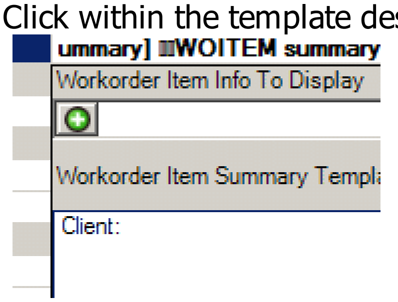


5. Highlight the existing text in the Workorder Item Summary Template design field and delete so you can start from scratch.

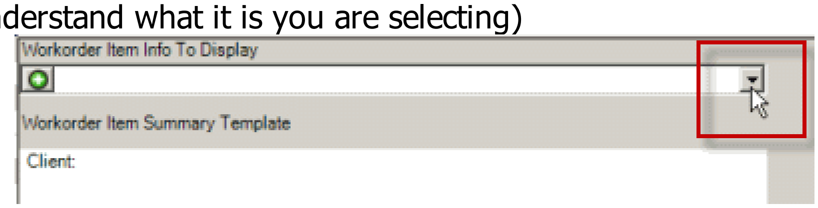
6. Any text will display as entered. Any tags selected from the "workorder item info to display" list will be substituted automatically on display.

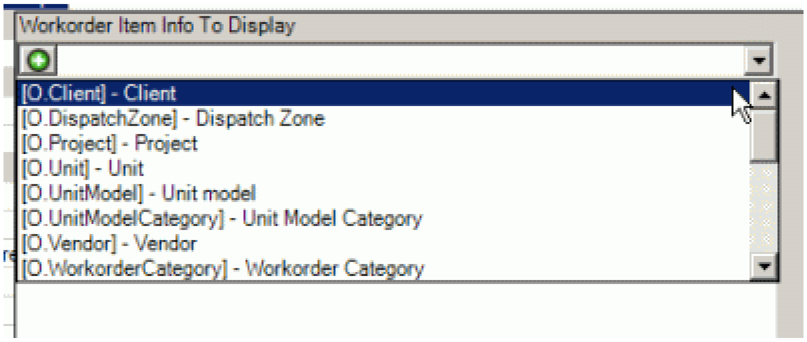
NOTE: There is a maximum of 500 characters (including spaces and returns) that can be entered in this field.

7. Click within the template design field and type **Client:** and a space

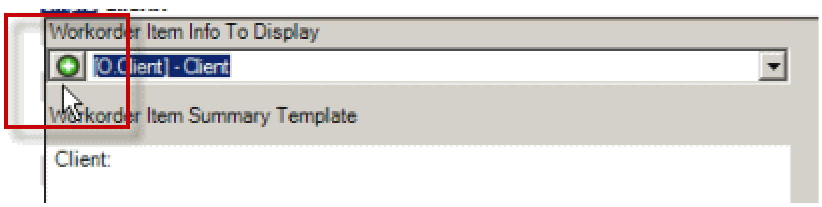


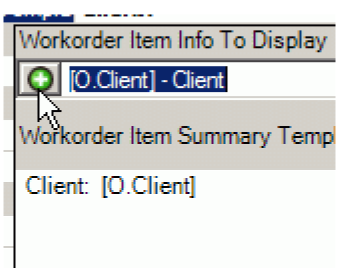
8. Select the Workorder Item Info To Display drop down selection and select the tag **[O.Client] - Client** (any info in the [ ] brackets is internal for AyaNova to understand what it is you are selecting)



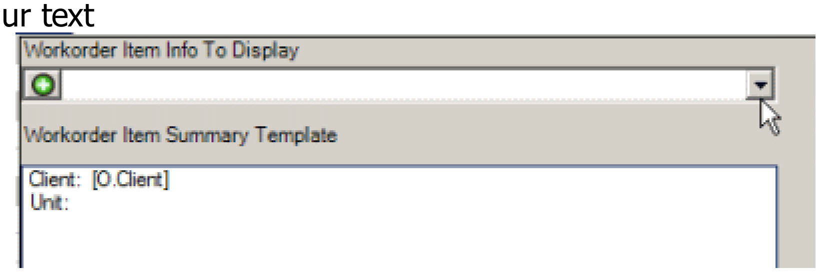


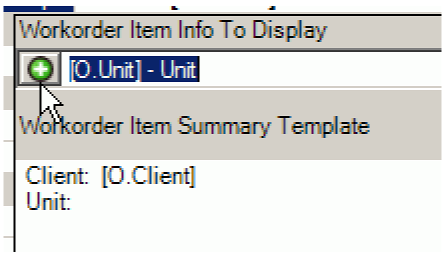
9. Click on the Add button to the left to add this selection into the template design field and see how it adds that datafield into the template





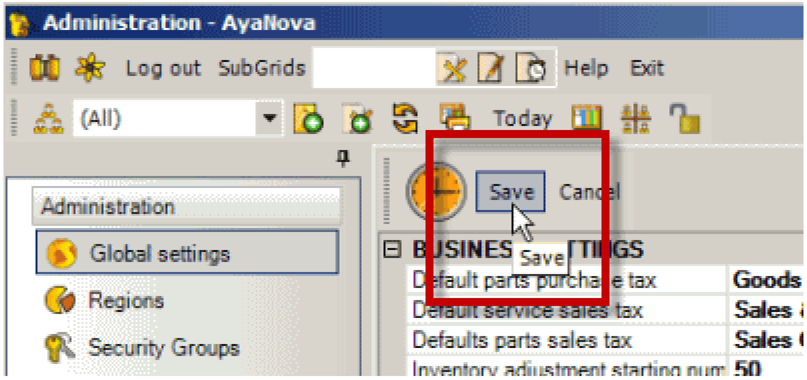
10. In the template section press the Enter key on your keyboard so that you move to the next line, and type on the next lines **Unit:** and then drop down the list of tags again and select the **[O.Unit] - Unit** and add it so that it is listed after your text





11. Click on Save button to close and save the Template Editor

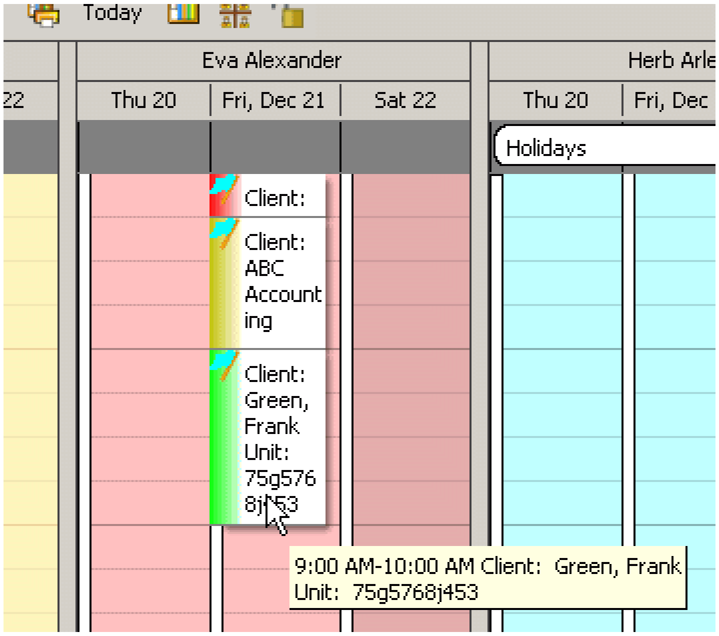
12. Tab off the field you were editing, and then click on the Save button on the Global Settings menu toolbar



13. Exit out of AyaNova, and log back in (when making a change in Global Settings, you **need** to save and exit completely and log back in for the change to take effect for you).

14. Now lets take a look at what the new Workorder Summary looks like from the Schedule screen

- Move to the Schedule screen
- Select to Refresh  so that any changes made are shown
- Hover your mouse over the same workorder item that you did previously
- You will see that it now will display as you have designed - in this example, just the client and the unit.



We encourage you to edit the Workorder Summary Template to display what is needed on the available datafields.
The default Workorder Summary Template is (in case you want to copy, paste, save, to go back to what it was originally)

[WorkorderService.Label.ServiceNumber]
Client: [O.Client]
Tech: [O.WorkorderItemScheduledUser]
ZONE: [O.DispatchZone]
WO summary: [Workorder.Label.Summary]
WOITEM summary: [WorkorderItem.Label.Summary]
Tech notes: [WorkorderItem.Label.TechNotes]

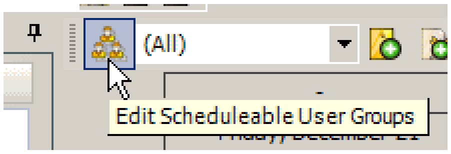
6.17 Create a Schedule User Group

This tutorial will go through creating a Schedulable User Group of all schedulable users that can provide a particular service based on their Region so that only those users show on the Schedule screen.

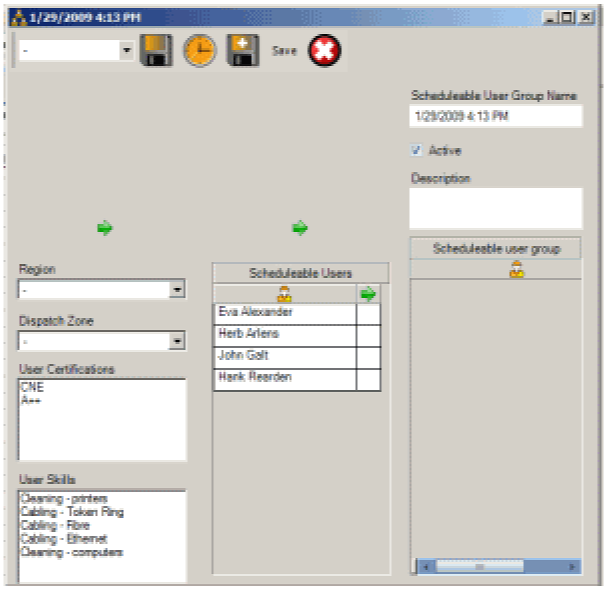
- This is useful if you wish to display the schedules of only users from a specific region so that you can quickly schedule for clients from that same region.
  - You might also create a Schedulable User Group based on the User Skills users have - so that the dispatcher can quickly select that Schedulable User Group to see the schedule for those users that have those skills and are capable of providing the service needed (either by their area, their expertise, etc) to determine who should be assigned to provide service.
  - You might also create a Schedulable User Group based on the User Certifications users have - so that the dispatcher can quickly select that Schedulable User Group to see the schedule for those users that have that certification.
  - You might also create a Schedulable User Group based on the Dispatch Zone users are a member of - so that the dispatcher can quickly select that Schedulable User Group to see the schedule for those users of that dispatch zone.
  - Review the section on Schedulable User Group before proceeding

Steps to create a new Schedulable User Group

1. View the Schedule screen
2. Have (All) selected as the Schedulable User Group, and then select the **Edit Schedulable User Groups** menu option



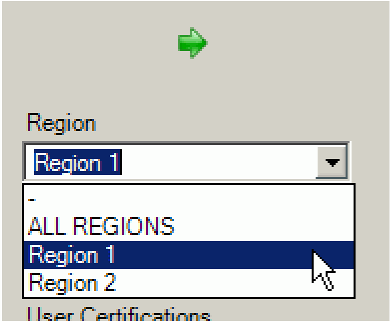
3. This will open the Schedulable User Group creation screen.



4. Note that the Schedulable Group description and grid of users in the group are empty denoting that this is a new empty record, and that the Schedulable User Group Name has defaulted to today's date and time, which can of course should be edited appropriately.

5. Start on the left

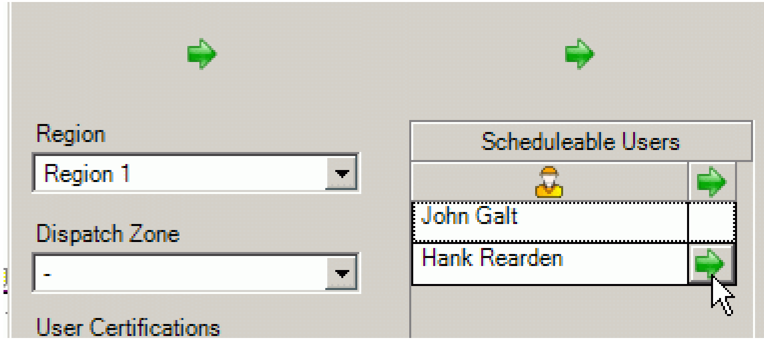
6. Select a specific Region other than All Regions to display all schedulable users for this region.



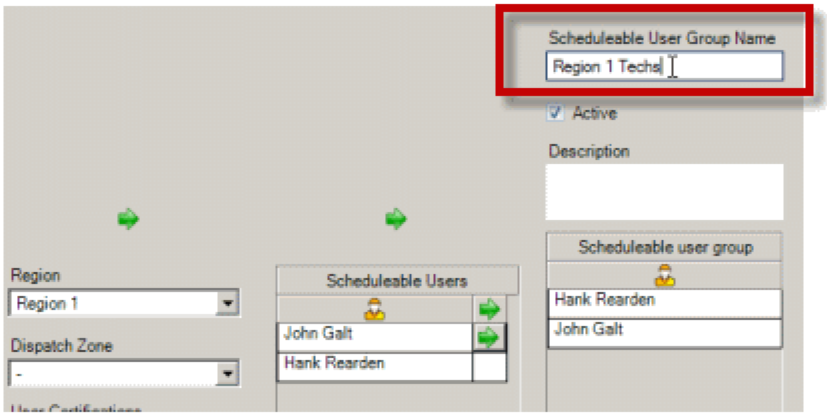
7. As all schedulable users that are assigned to this region will now only display, we will now assign those to our list

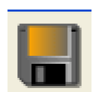
   - You can instead select a specific Dispatch Zone, and/or a specific Skill, and/or a specific Certification if you want your Schedulable User Group based on these.

8. Select the to the right of each name to transfer into the list

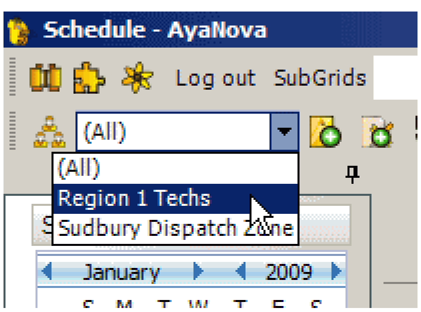


9. Let's edit the name of this list so it makes sense for drop down selection

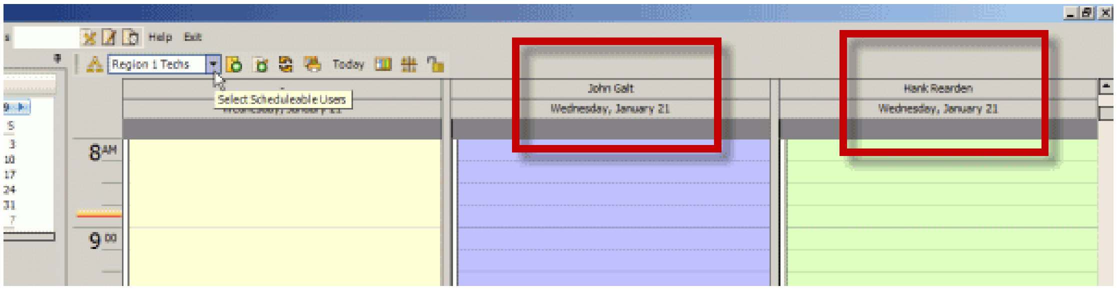


10. Select the menu option Save & Exit  to return to the Schedule screen

11. Drop down the schedulable user list selection and select this group we just made



12. You will note that the users we added to this group are the only schedulable users displaying, plus the "unassigned" column so that you can easily see what workorder items still need to be assigned, and can drag from the unassigned to one of the schedulable users.


Help Exit
Region 1 Techs
Select Scheduleable Users
Today
John Galt
Wednesday, January 21
Hank Rearden
Wednesday, January 21
8 AM
9 00

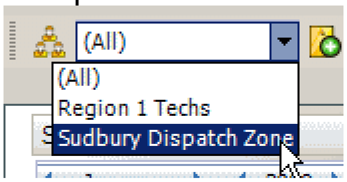
6.18 Edit a Scheduleable User Group

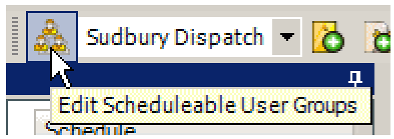
This tutorial will go through how to edit an existing [Schedulable User Group]

- **An example of why you might use this feature is** you may want to edit an existing Schedulable User Group to update schedulable users that should be part of this Schedulable User Group.
- NOTE: this tutorial's screenshots rely on that you have already performed steps of the [How do I create a new schedulable user?]

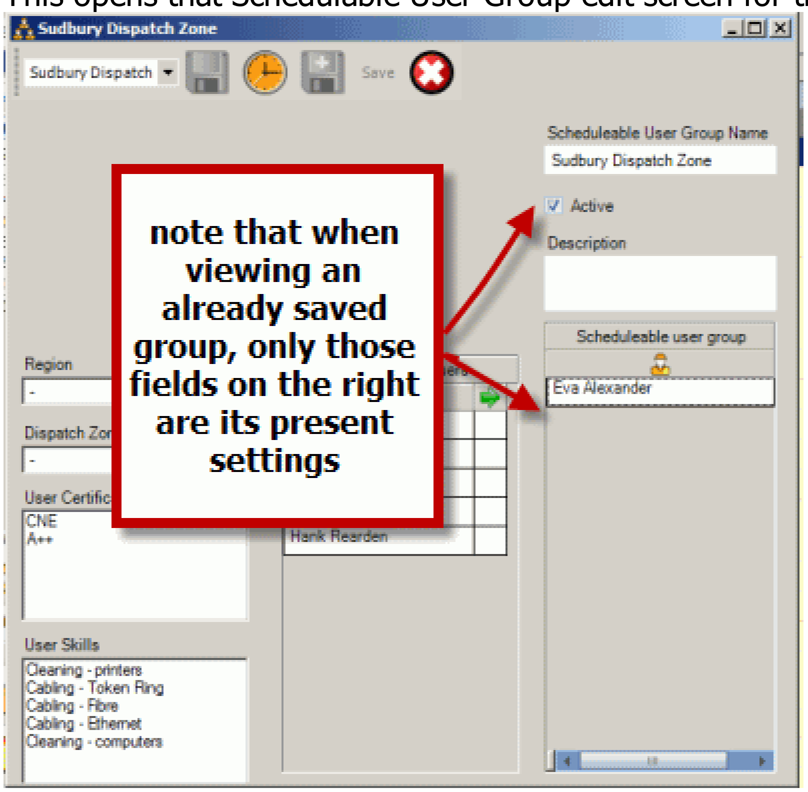
Steps to edit an existing Schedulable User Group

1. Select the Schedulable User Group and then select the Edit Schedulable User Group icon on the toolbar



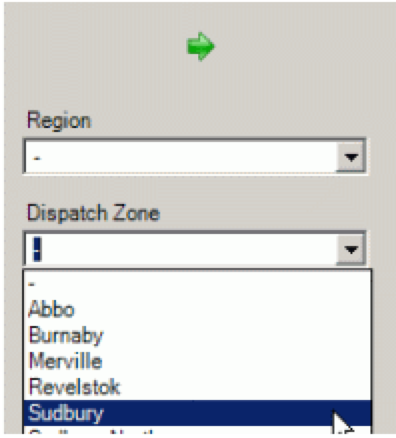


2. This opens that Schedulable User Group edit screen for the selected group

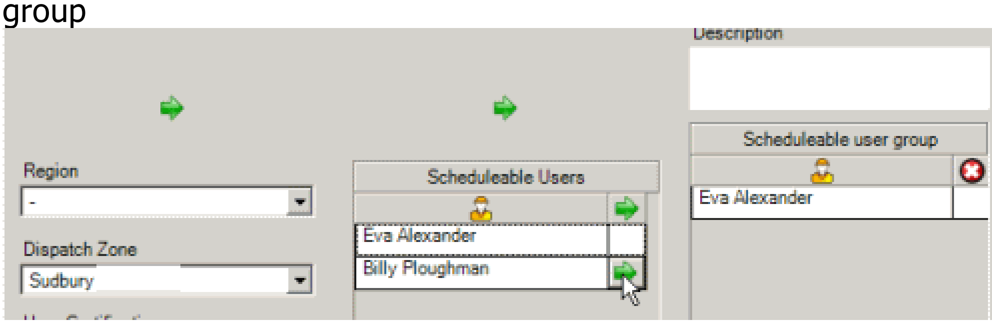


3. Make changes as needed - in our example in these screenshots, we want to add any additional users that are now set for the Dispatch Zone

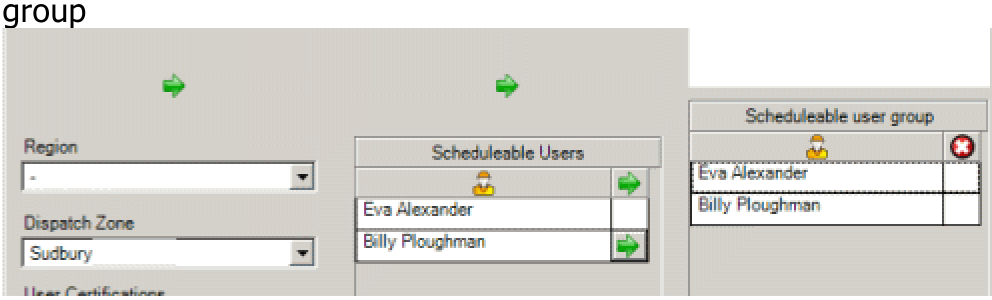
   - so in our database we first selected the Dispatch Zone *Sudbury*

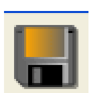
     

   - we see that Billy Ploughman is a user that is set for the Dispatch Zone *Sudbury* but isn't yet added as shown in the far right Schedulable user group

   - so we add him and now he does show in the far right Schedulable user group

4. Select the Save & Exit  menu option on the toolbar to save any changes.

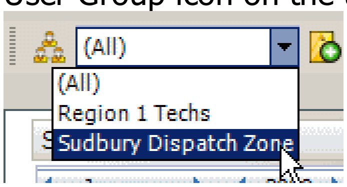
6.19 Delete a Schedulable User Group

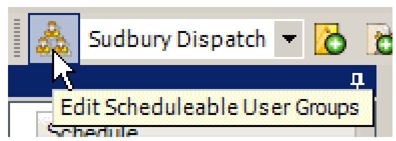
This tutorial will go through deleting a Schedulable User Group

- For example, you may no longer need a certain Schedulable User Group selection.

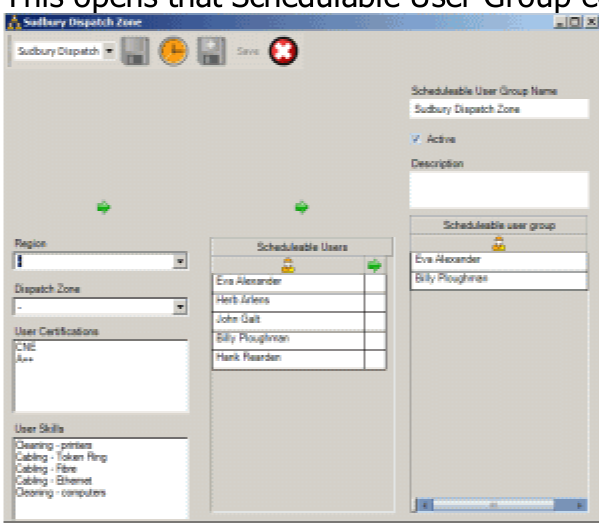
Steps to delete an existing Schedulable User Group

1. Select the actual Schedulable User Group and then select the Edit Schedulable User Group icon on the toolbar



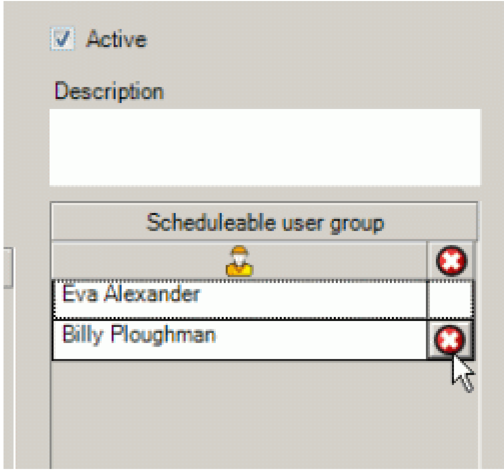


2. This opens that Schedulable User Group edit screen for the selected group

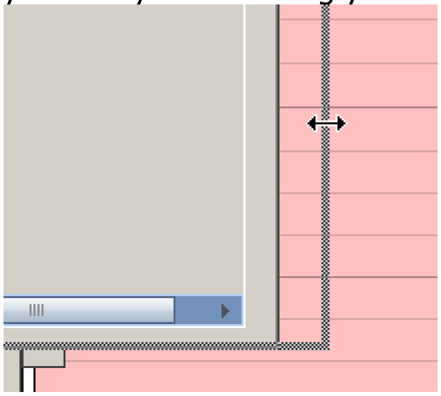


3. Now if you immediately click on the Delete menu option, you will get an error "This object can not be deleted because it is linked to one or more related objects" **because you have not yet** removed the selected users in the Schedulable user group

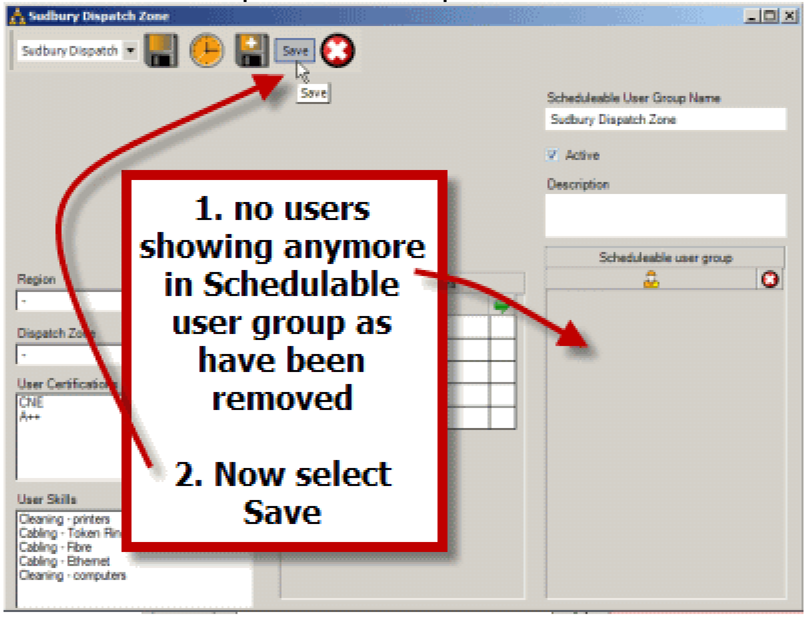
4. First you need to delete the users in the Schedulable user group



- If you do not see the Delete buttons for each selected user, just widen your entry screen using your mouse to click and drag it sideways

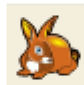


5. Now that there are no selected users in the Schedulable user group, click on the Save menu option at the top



6. Now select the Delete menu option to delete this Schedulable User Group.

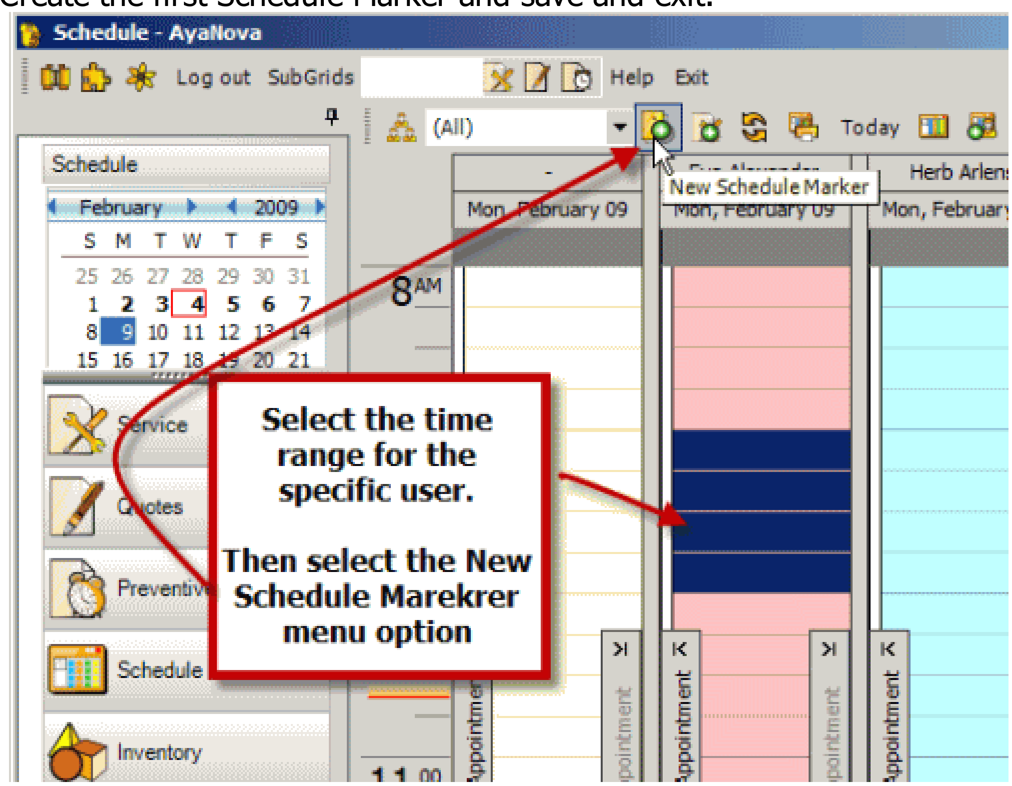
6.20 Duplicate a Schedule Marker

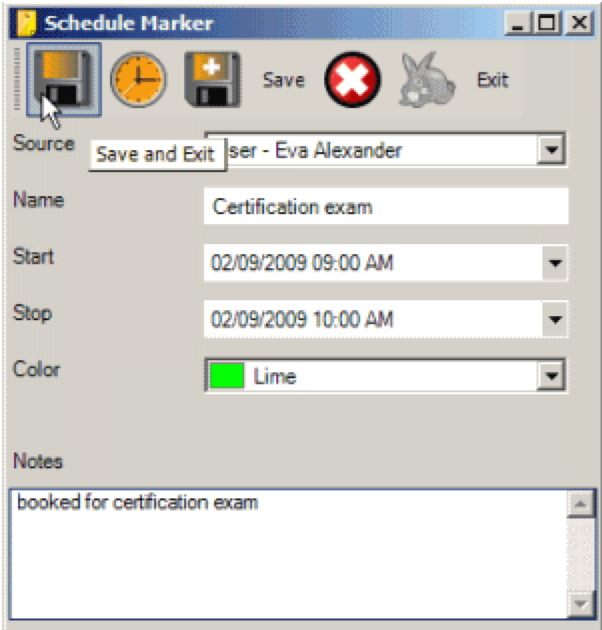
The Duplicate menu option  allows you to make a duplicate of the existing object to help cut down on double entry. You can duplicate a part, duplicate a unit, duplicate a client, duplicate a security group and/or duplicate a schedule marker.

In this tutorial example, we will go over the initial steps of creating a schedule marker and then duplicating it.

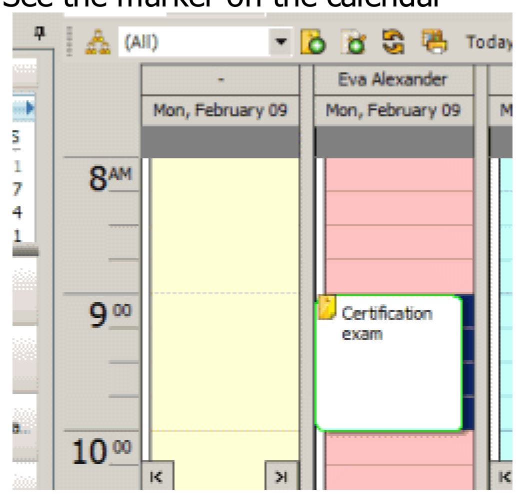
- Let's say that a schedulable user has four exams happening over the next couple of weeks for their certification and they want to enter in a marker to display regarding this so that the dispatcher knows not to schedule service in these time periods for the user.
- Each exam is going to occur on the first Tuesday of each week for the next five weeks.
- Rather than having to make four separate [Schedule Markers]() and re-enter all the information for each, you can duplicate (copy) a Schedule Marker.

1. Create the first Schedule Marker and save and exit.



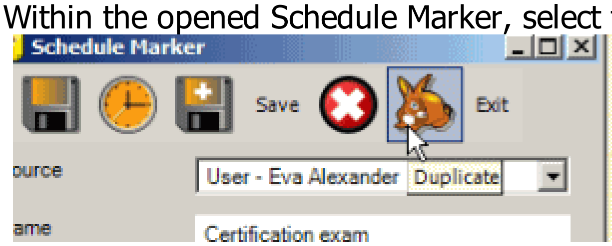


2. See the marker on the calendar

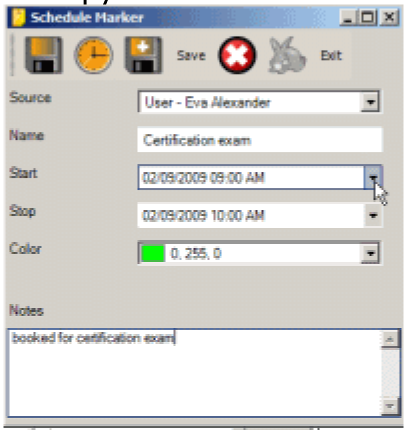


3. Now open that Schedule Marker (either double-click on it, or select it and then select the Edit Schedule Marker menu option)

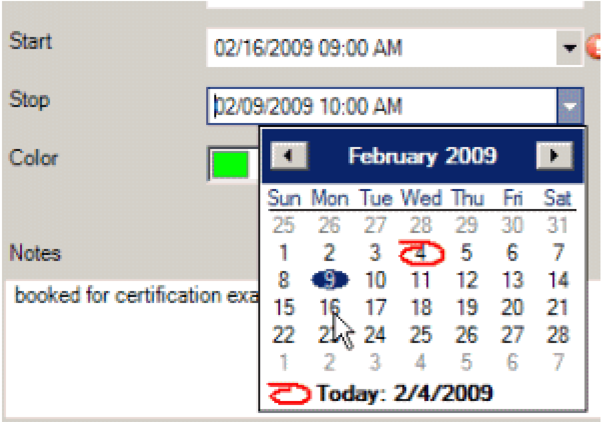
4. Within the opened Schedule Marker, select the menu item Duplicate 



5. This will cause the first schedule marker to close, and an exact copy is now displaying. Note that the Duplicate button is now grayed also indicative that it is a new copy.

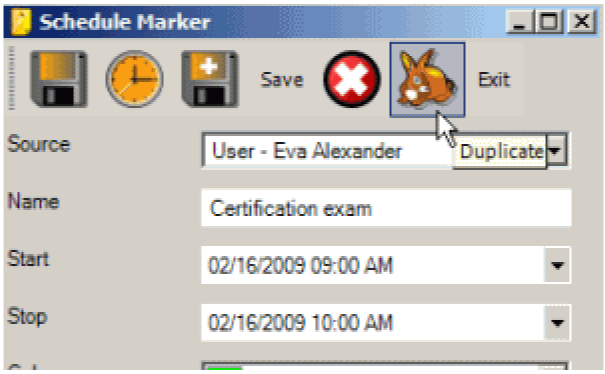


6. Edit the **Start Date Time** to the new date and time, and the edit the **Stop Date Time**.



8. Now select the Save button

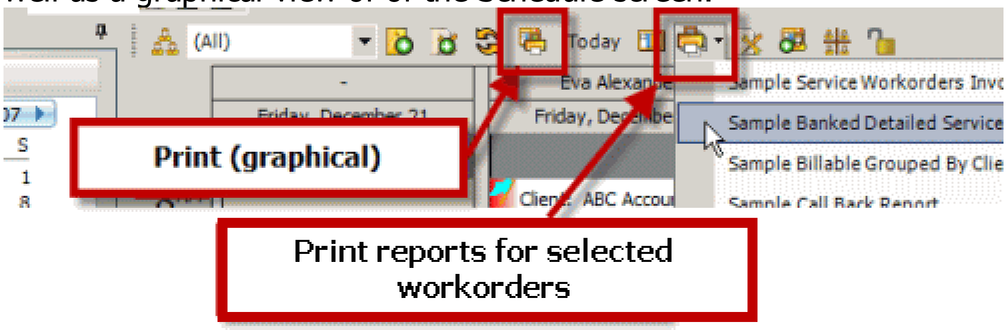
9. See how the Duplicate menu option now shows again, so that you can continue to create duplicates as needed.



NOTE: you could also have just selected the Save button when you first created the Schedule Marker, so that you could duplicate without having to open it again.

6.21 Print out a graphical day view of the Schedule

You can print standard workorder reports from the graphical Schedule screen, as well as a graphical view of of the Schedule screen.

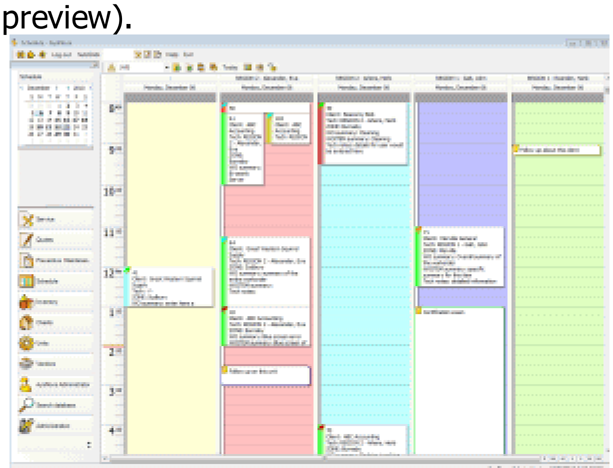


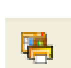
Some people prefer a graphical printout rather than a printed list so that they can see at a glance when their time is booked throughout the day.

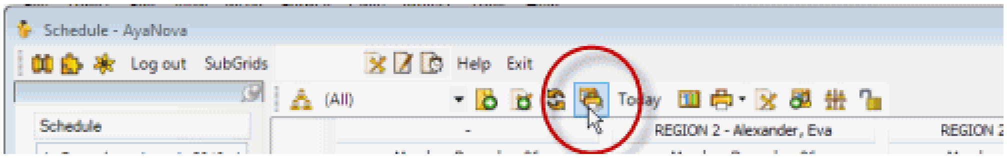
In this tutorial example, we will go over the basic steps of printing out a graphical day view of the schedule for a single schedulable user.

- It is highly recommended that you review this Help file's entire section on the Schedule Screen and Printing for complete overview , suggestions on use, tips on use and more.

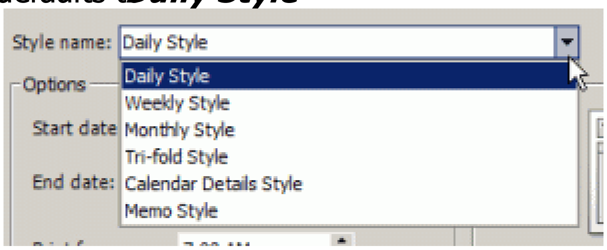
1. View a specific date on the Schedule screen that has a number of scheduled items for schedulable users (so you have something to show in the print preview).



2. Select the  Print graphical menu option in the Schedule screen and the **Page Setup** screen displays



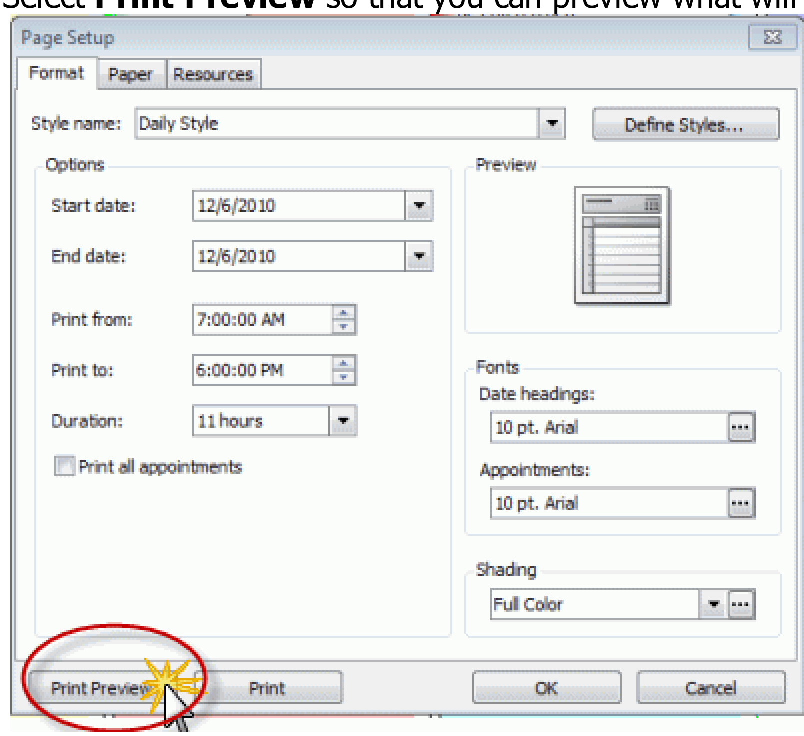
3. As you are viewing a single day on the Schedule screen, the **Style Type:** defaults to ***Daily Style***



4. The **Start Date** and **End Date** will default to the same date you are viewing on the Schedule screen.

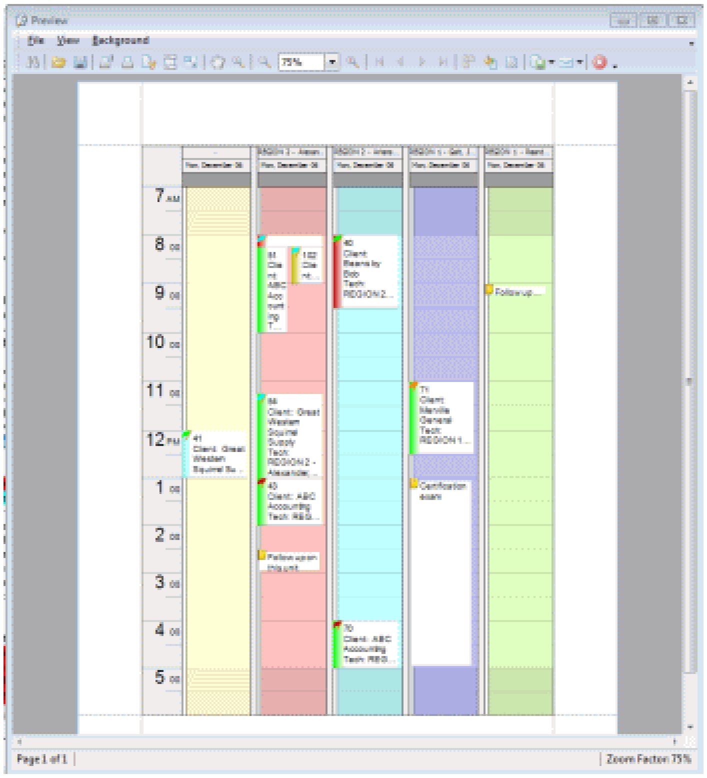
5. The Page Setup defaults the **Print From:** as 7:00AM and the **Print to:** as 6:00PM. You can edit this if you want. In this example, we will leave as is.

6. Select **Print Preview** so that you can preview what will print out



7. The Print Preview shows what will print. By default it will display the schedulable users presently showing on your Schedule screen. For example

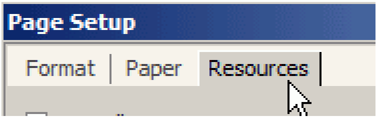
below, all schedulable users from the trial data are showing in the Schedule screen so all show on the Print Preview.



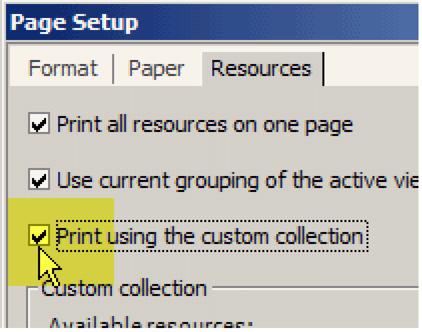
8. Exit out of the Print Preview

9. Let's say we want to print out a graphical view for a specific schedulable user. You can either select a Schedulable User Group of the specific user you want to print for or select the specific user in the **Resources** tab

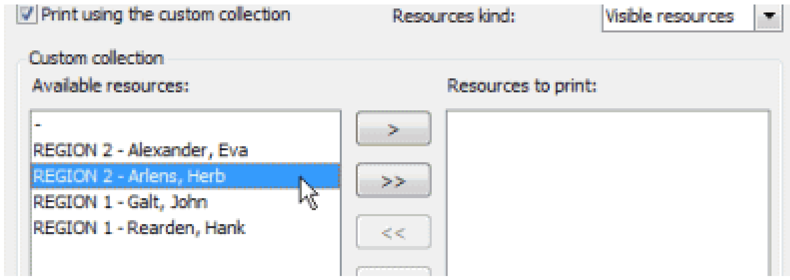
10. Select the **Resources** tab

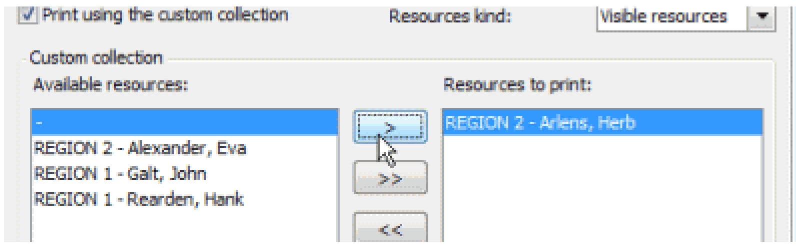


11. Place a check mark in the **Print using the custom collection**. Note how the list of schedulable users now becomes active for selection.



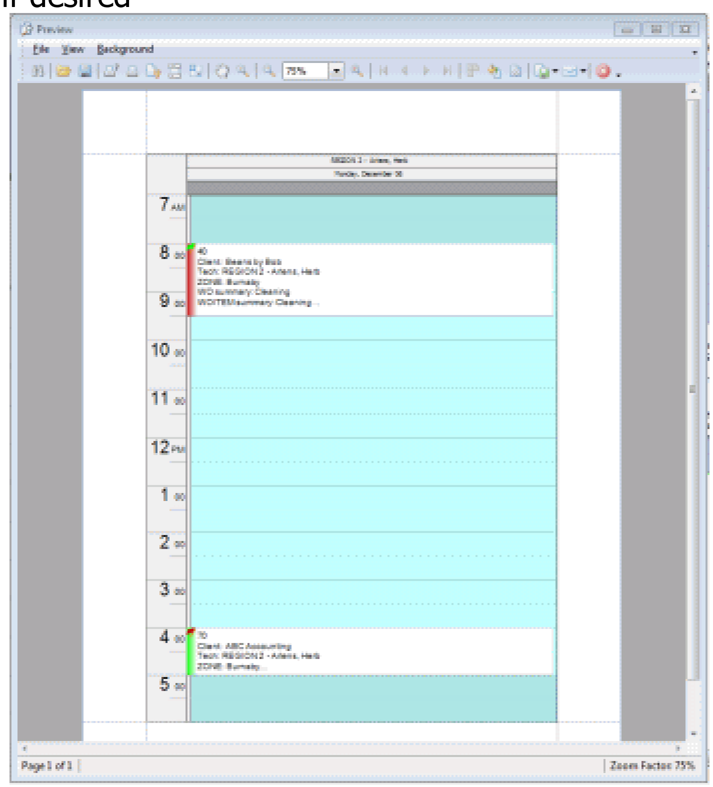
12. Select a specific schedulable user - in our example screenshot we selected Herb Arlens





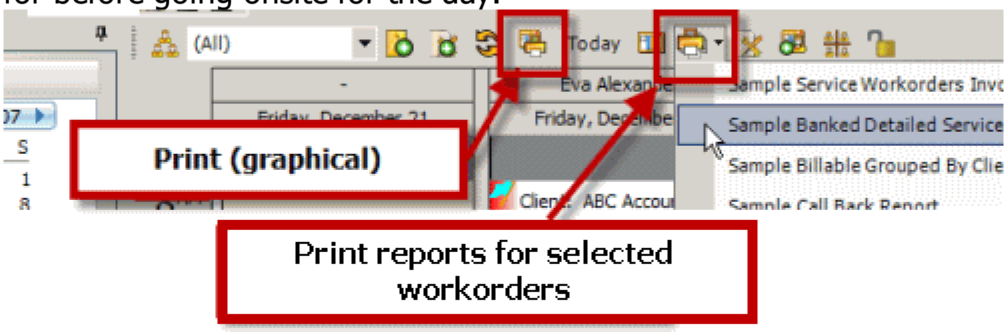
13. Select **Print Preview**

14. The Print Preview showing just the one schedulable user now displays. Print if desired



6.22 Print out dispatches for myself from the Schedule screen

You can print service workorder related reports from the Service navigation pane grids, as well as print from the Schedule screen. For example, a technician might want to print off the Dispatch Reports for each workorder he is performing service for before going onsite for the day.

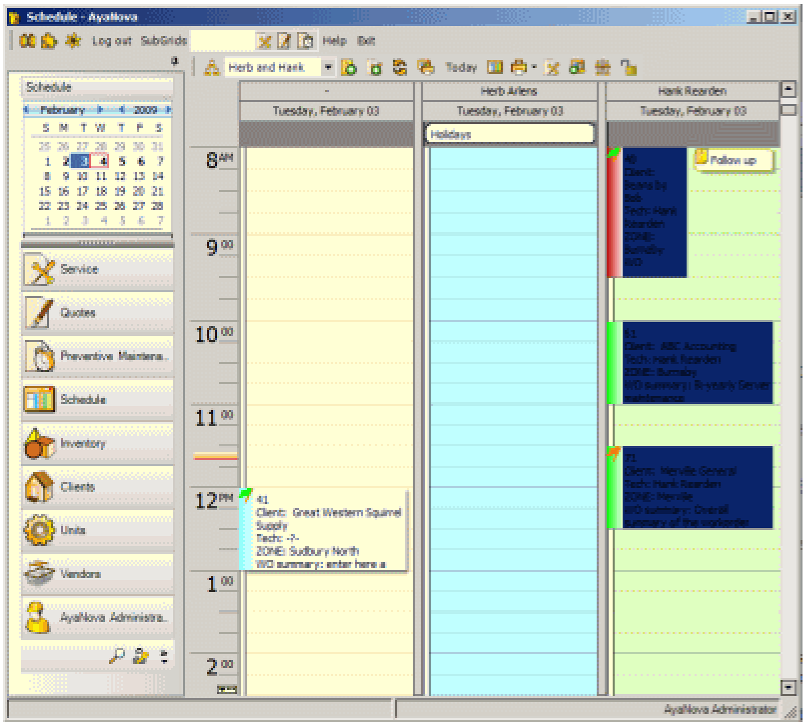


In this tutorial example, we will go over the basic steps of printing out the Sample Dispatching Reports for all workorder items of a single schedulable user via the Schedule screen.

- It is highly recommended that you review this Help file's entire section on the Schedule Screen and Printing for complete overview , suggestions on use, tips on use and more.

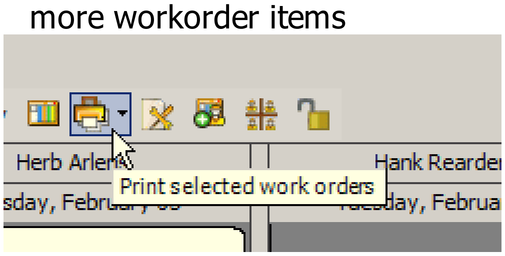
- **NOTE:** If using Regions, do note that users can only view data that is assigned to the same region as theirs. So if you created a workorder and assigned a schedulable user to that workorder, but that client is of one region and the schedulable user is of another, be aware that the schedulable user will not see that scheduled workorder when they log into AyaNova.

1. View the Schedule screen
    - Do note that when logged into AyaNova as a schedulable user such as the sample user Hank or the sample user Herb, your schedulable user name by default shows in the Schedulable User Group selection in brackets
2. Hold the CTRL key on your keyboard and use your mouse to click on each of the workorder items for Hank that you want a dispatch report printed for. You can tell that they are selected because they will be highlighted as shown in the screenshot below we have selected three scheduled workorder items for Hank

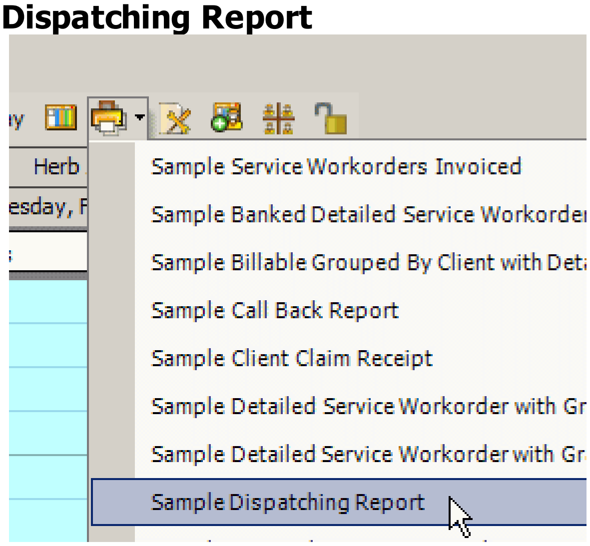


3. Now select the drop down menu option **Print** selected work orders

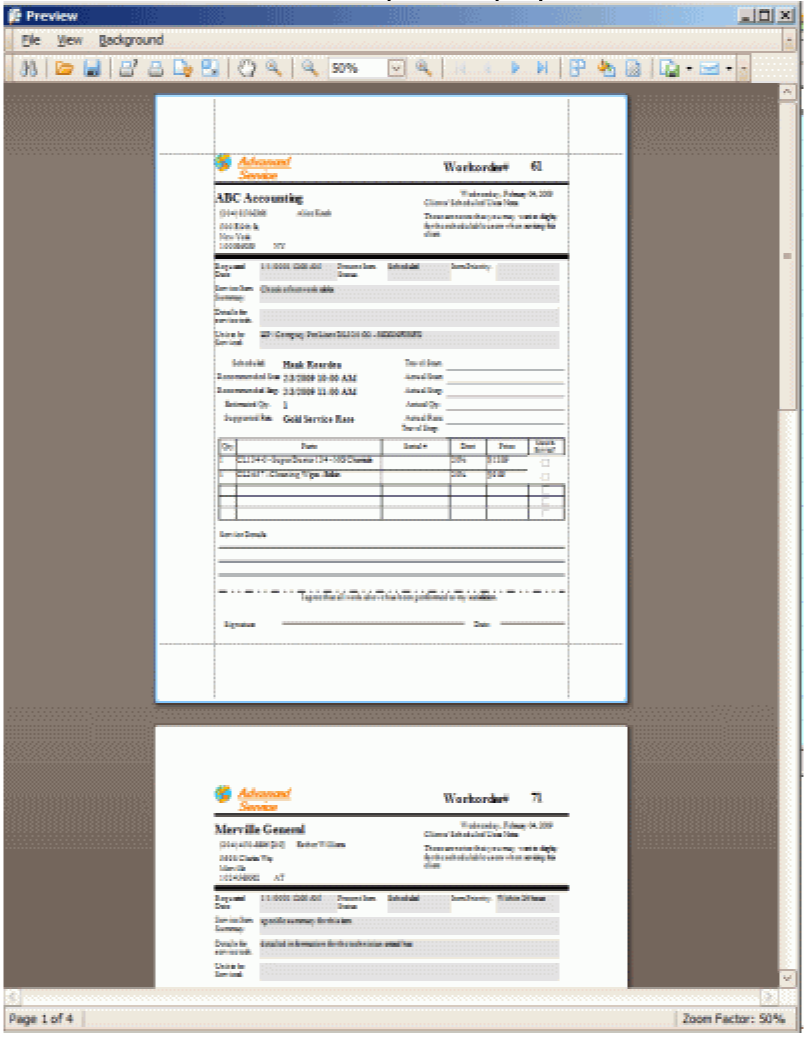
- Do note that this menu option only appears once you have selected one or more workorder items



4. Select the report you want to print - in this tutorial, we will pick the **Sample Dispatching Report**



5. The Print Preview of the report displays. Print as desired



6.23 Turn off inventory

There are many benefits to using inventory:

- Ability to track whether parts are used in service, to be ordered, or on order via purchase order.
- Able to maintain an accurate count of inventory – too much in stock ties up collateral, too little results in customers waiting and service unable to be performed and possibly lost sales
- Good inventory control is essential to properly running a business. AyaNova makes inventory control easy for you to track, print out reports and always be aware of your stock levels.
- Assign inventory and track inventory flow with multiple warehouses
- Able to request parts to be ordered via workorders

But you might want to turn off the inventory feature of AyaNova because:

- You are using QuickBooks or Peachtree or another accounting program and do not want to track inventory in AyaNova, only select parts in workorders.

- Or you do not want to track On Hand amounts, purchase orders etc

NOTE: If you turn off inventory -> then enter a quantity of parts in workorders -> and then turn inventory back on; what will happen is that the on-hand amounts will be out of synch as inventory is not tracked when it is turned off.

  - If you did turn off inventory -> then enter a quantity of parts in workorders -> and then turn inventory back on, you may need to make Inventory Adjustment entries to adjust for the inconsistencies of parts entered in workorders where inventory tracking was not in use.

How to turn inventory off

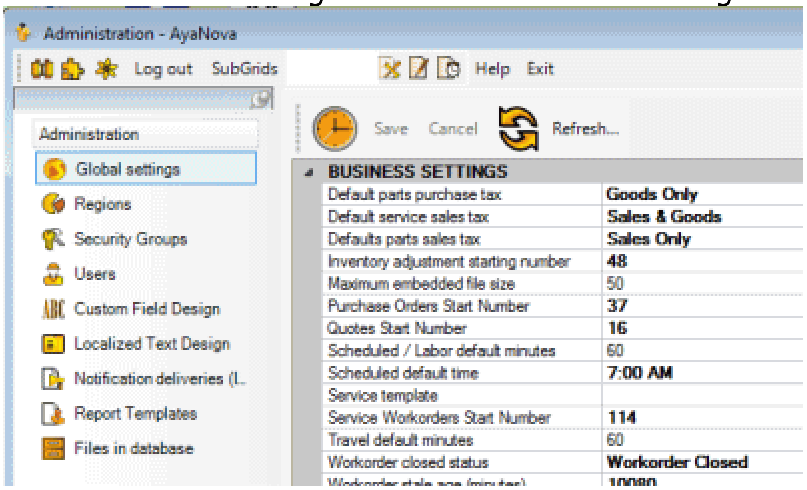
1. Make sure you have read the above before continuing and understand that when you turn off inventory, if, for some reason in the future you turn inventory back on, that any on hand amounts will be out of synch, and you will need to make Inventory Adjustment entries to adjust for the inconsistencies of parts entered in workorders where inventory tracking was not in use.

2. Have all users out of AyaNova, and any optional AyaNova programs shut off

- Global Settings affect each user when they log **into** the AyaNova program. Edited Global Settings won't be in effect for an AyaNova user until after that user exits out and logs back in.

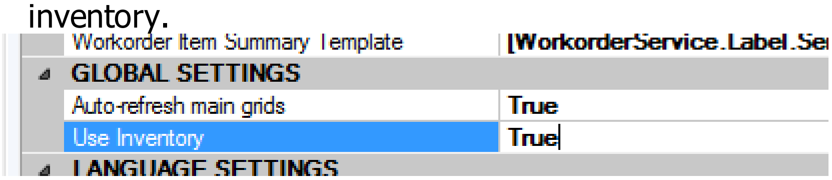
3. Log into AyaNova as the AyaNova Administrator

4. View the Global Settings in the Administration navigation pane



5. Set the **Use Inventory** to **False**

- If set to TRUE, able to use Purchase Orders, Receipts, view Inventory Status, make Inventory Adjustments, and request order of Parts within service workorders.
- If set to FALSE, only able to enter Parts, and select Parts without affecting inventory.



6. Save and Exit out of AyaNova

7. You can now restart any optional add-ons (WBI, Generator, etc) and allow users to log back in

8. Note that although Use Inventory is set to False, you can still create parts, and select parts within workorders without tracking of inventory (on hand amounts, etc)

See also:
Global Settings

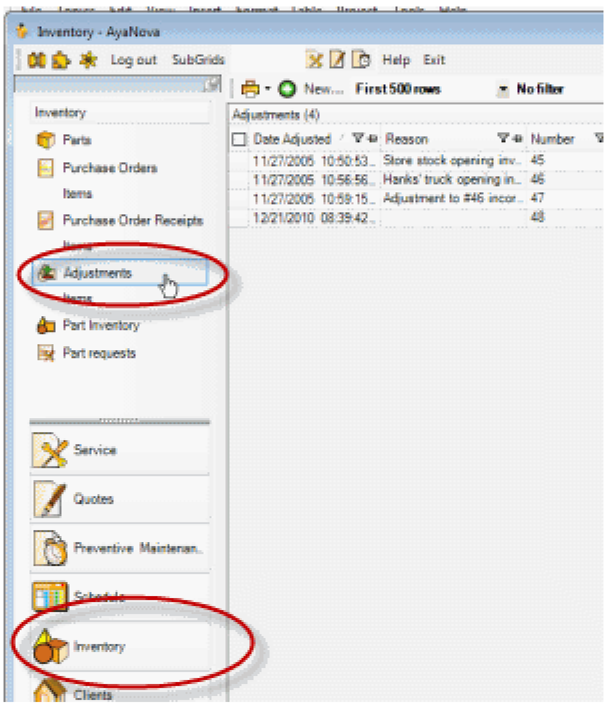
6.24 Enter opening inventory

Enter opening inventory by [Inventory Adjustments](#).

The following tutorial example is on entering in part inventory adjustments - in other words, entering in stock so that part quantity can be selected from warehouses in workorder entry screens.

1. Log into AyaNova as a user that has rights to Parts and Part Inventory (i.e. log in as the AyaNova Administrator)

2. Move to the Inventory navigation pane and open the [Inventory Adjustments](#) grid

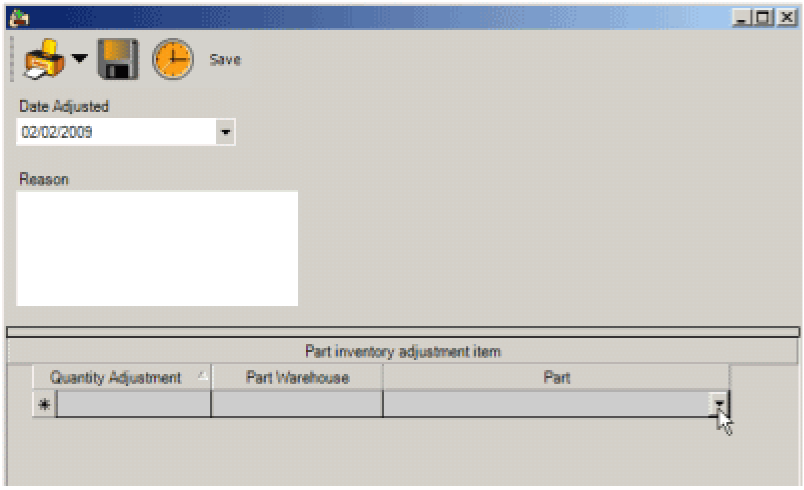


3. Create a new Inventory Adjustment via the menu option New... 

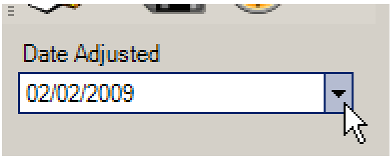
at the top of the grid

4. You will note that the inventory adjustment entry screen title bar does not show an Inventory Number – it will not until the inventory adjustment is

saved. Once an Inventory Adjustment is saved, it can not be edited or additional items added.



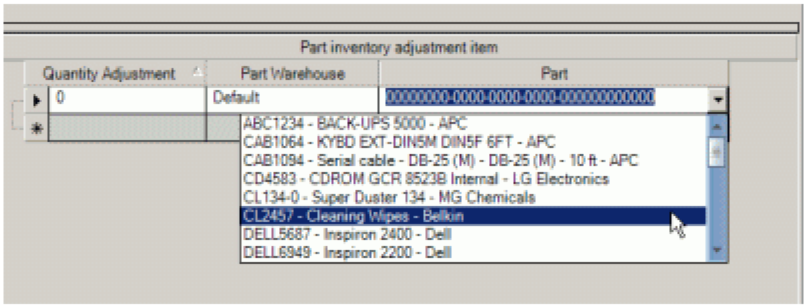
5. The Date Adjusted defaults to today's date. As we are entering an adjustment that we do wish to reflect today's date, we will leave it at this.



6. Enter in the reason for the inventory adjustment of 5th Street Opening Inventory. As an inventory adjustment can be for many reasons, identifying it here will provide information for others and reporting purposes.

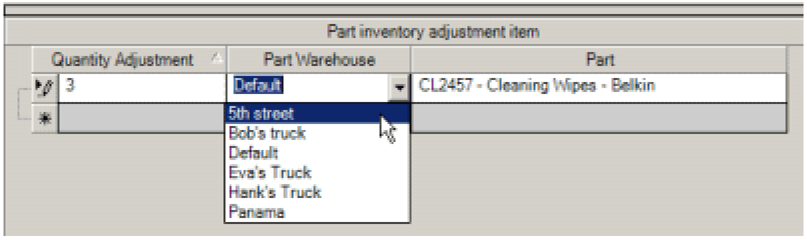
7. Now we will enter in the parts and quantity for the 5th Street warehouse

8. Select the part CL2457



9. Enter the Quantity Adjustment of 3. If a positive number, this “adds” to inventory. If we were to enter in a negative number such as -3, this “removes” from inventory.

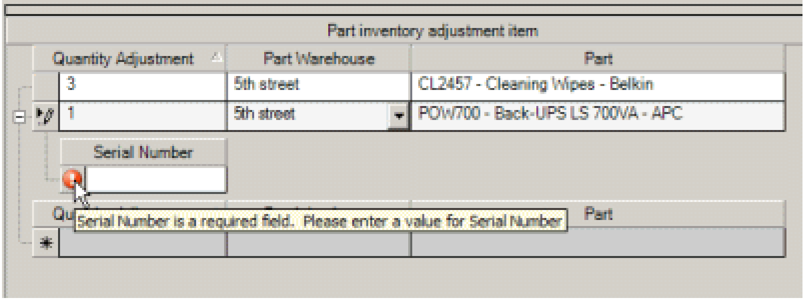
10. You will note that the warehouse selection for the part defaults to the Default warehouse. In this example, we want this inventory adjustment for the warehouse 5th Street, so we need to select that warehouse.



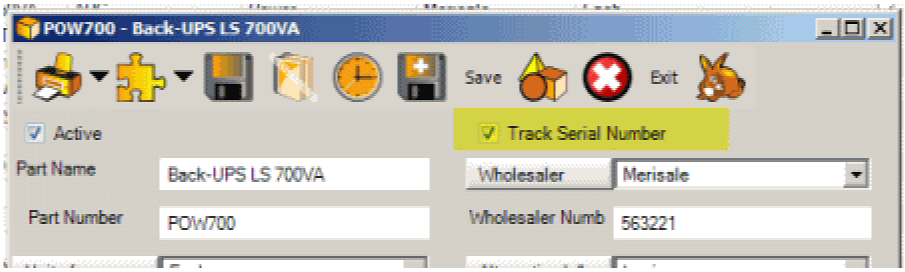
11. Select another part to make an adjustment for - select the part POW700

12. Select the warehouse 5th Street

13. Enter a quantity of 1 and press Tab on your keyboard, or use your mouse to click in another field



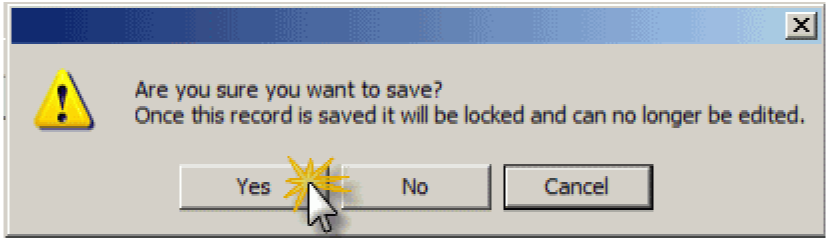
14. Note that a sub-row appears for this part's serial number. This is because this part POW700 is set to track serial number in its part entry screen as shown below.



15. Enter in the serial number APC676767

16. Save & Exit from the menu options to close out of the Inventory Adjustment entry screen

17. Select YES to confirm saving and having read the message



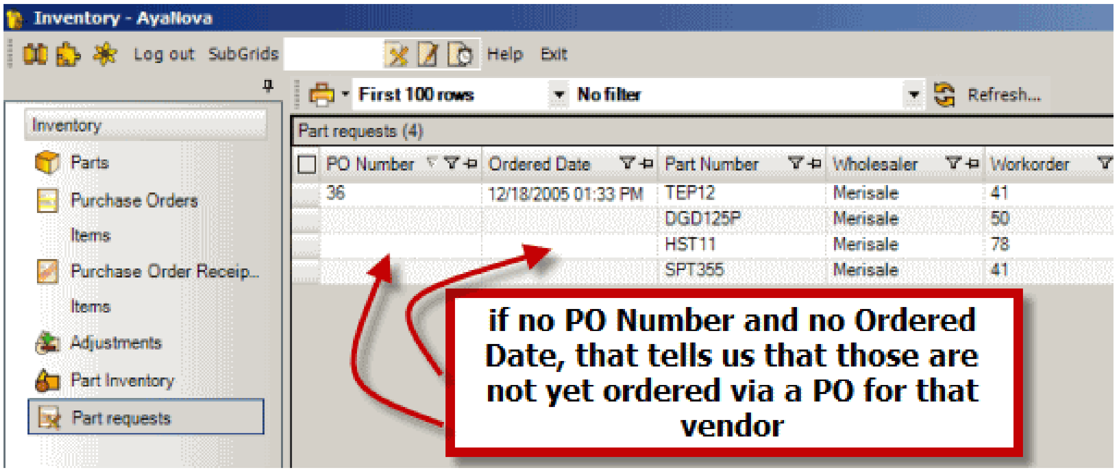
18. The inventory adjustment record will display in the Inventory Adjustment grid and if you view the Part Inventory grid you will now see that the quantities you put into inventory now show as On Hand

6.25 Create a Purchase Order based on Part Requests

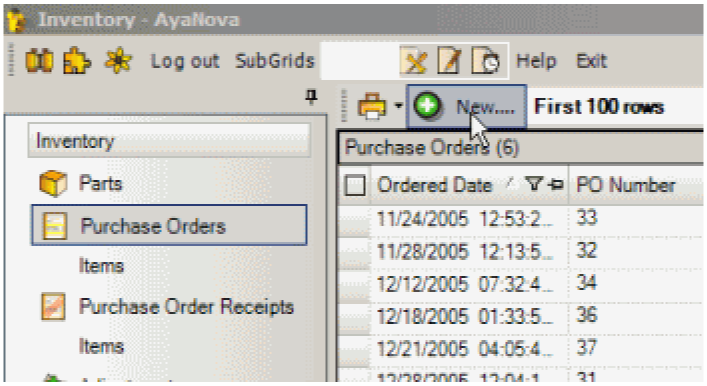
In this tutorial example, we will go over the basic steps creating a Purchase Order based on Part Requests made via service workorders

- It is highly recommended that you review this Help file's entire section on Purchase Orders and the Inventory section for complete overview , suggestions on use, tips on use and more.
- This tutorial builds on a prior tutorial: How do I generate a service workorder from a quote? as that tutorial makes a part request for the service workorder.

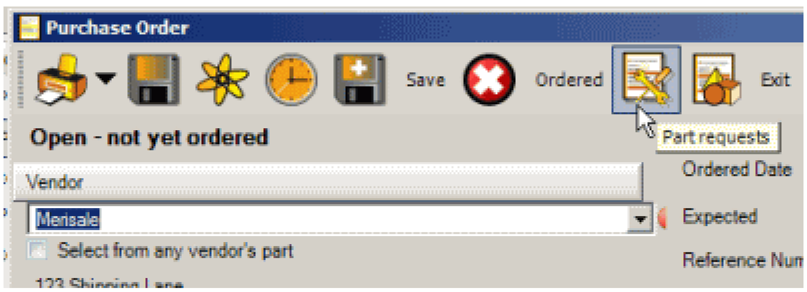
1. Open the Inventory navigation pane and select the Part Requests grid.
2. As we can see in the sample data, there are parts that have been requested for workorders that have not yet been ordered. We also see that in this instance the wholesaler to order from is Merisale (if no part requests display, perform the How do I generate a service workorder from a quote? tutorial and see Part Requests)



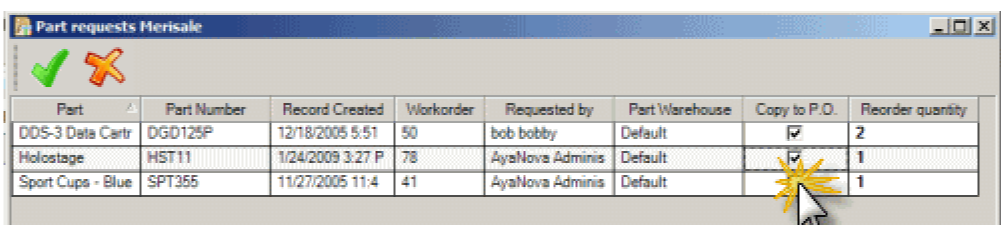
3. Move to the Purchase Orders grid
4. Select the grid menu option New...  which will open a new Purchase Order entry screen

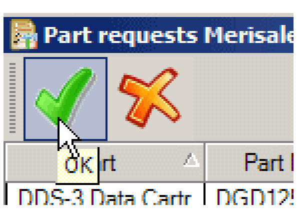


5. Select the vendor Merisale
6. Select the Part Requests List menu option

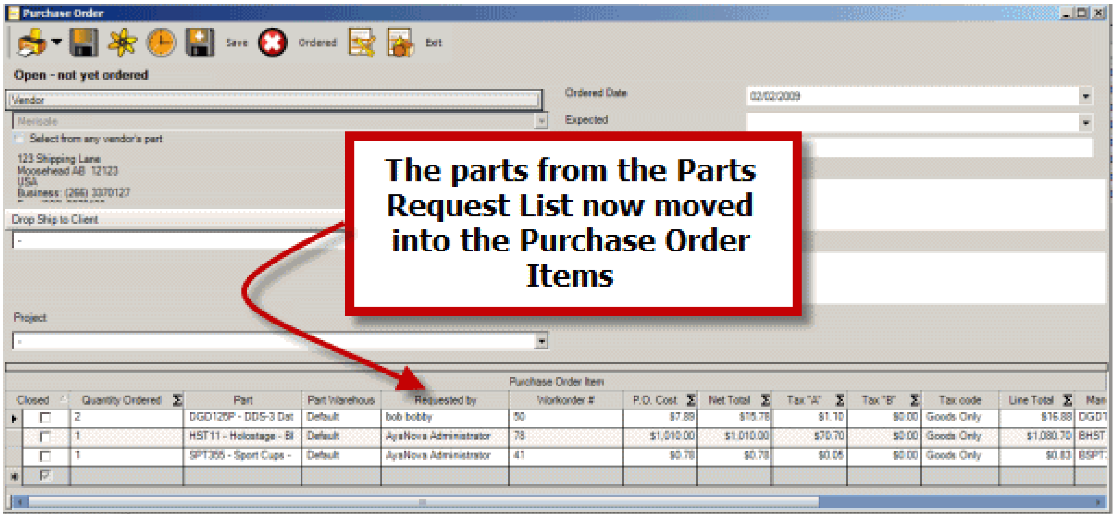


7. Place a checkmark for all parts requests that we do want to order (in this tutorial we want the part request we made via that How do I above), and then OK to accept





The purchase order items are updated automatically with each selected part and quantity, the warehouse, as well as via what workorder and requested by what user.



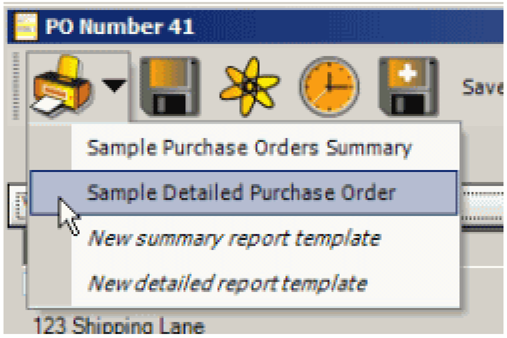
8. You could also enter additional items to be ordered onto the purchase order, as well as determine if items need to be ordered to meet the Restock Level, but will not in this tutorial.

9. Note if you attempt to print this purchase order – nothing will show on the report – because the purchase order record has not yet been saved – as shown by no purchase order number in the title bar. It is also always recommended to always select Save Save before you select to print so any recent changes or data additions also display.

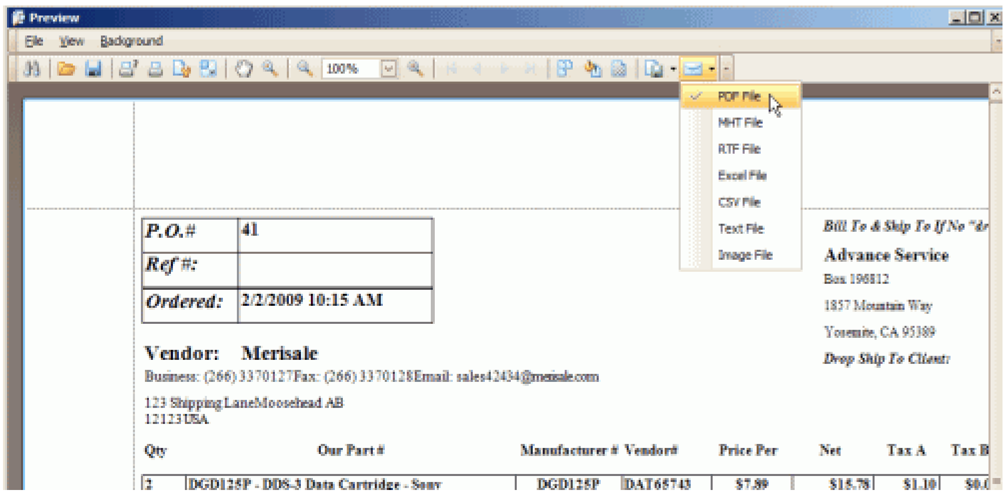
10. Save Save the purchase order - note it now shows a PO Number at the top of the PO entry screen.

11. In our fictional company, the procedure is that a copy of the PO is emailed to the vendor, they reply with confirmation of the order, a reference number and an ETA data or any changes such as price, etc. So we do not place the PO on order until after we have received this, as the Purchase Order Items can not be edited once the PO is placed On Order, only the purchase order entry screen fields are editable once placed On Order. Do review the [different statuses of the PO] and what is editable once set.

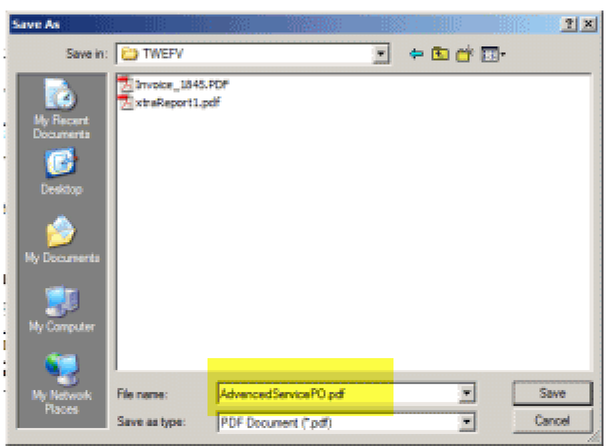
12. Select Print, and select the Sample Detailed Purchase Order report template (do note that you may have additional or different report templates listed here depending if you have imported additional and/or have customized the existing sample)



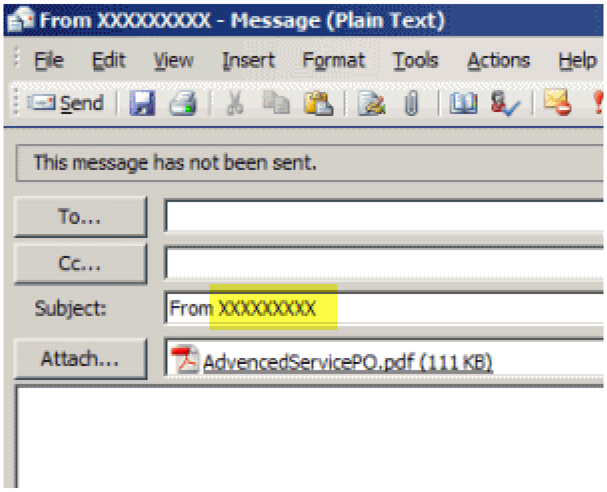
13. Within the Print Preview screen, select the Email menu option and select PDF



14. Rename the file that will be attached so that it is descriptive for the vendor



15. Select Save and your default email program on your computer will now automatically open with the file attached



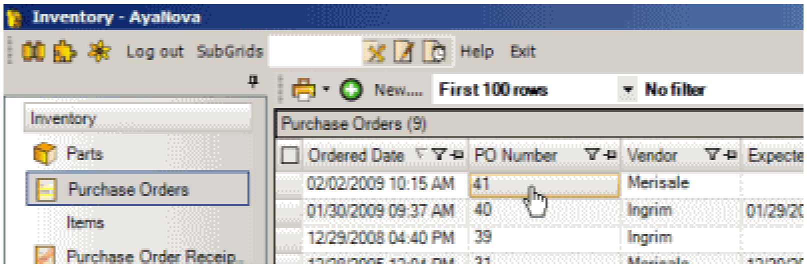
16. The subject line is automatically entered as From (username), where (username) is your computer logged in name. You of course can edit as needed, and enter in additional text in the message and the vendor's email address. At this time, AyaNova does not pre-enter in the vendor email address.

17. We are returned to the Print Preview window of this report. Exit.

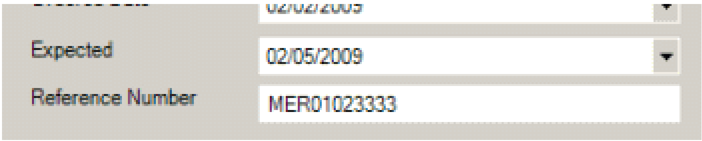
18. We will now exit out of the purchase order which will return us to the Purchase Order grid.

19. In this tutorial example, we have received order confirmation from our vendor, received vendor reference #, received an ETA date, and have received a change of cost for a part that we should change in the PO.

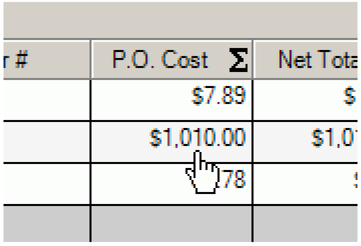
20. Open the purchase order that was previously created by selecting the purchase order number in the Purchase Order grid (your purchase order number may be different of course)

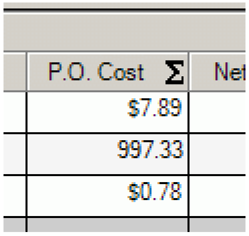


21. The vendor gave us an ETA of 3 days from now and a reference number of MER01023333 which we will now enter into this PO.

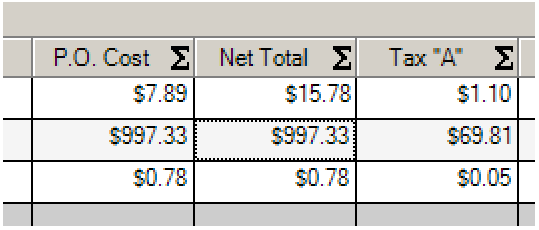


22. Now we need to change the part cost for the part HST11 from $1010.00 to $997.33

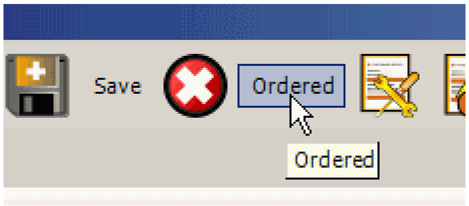




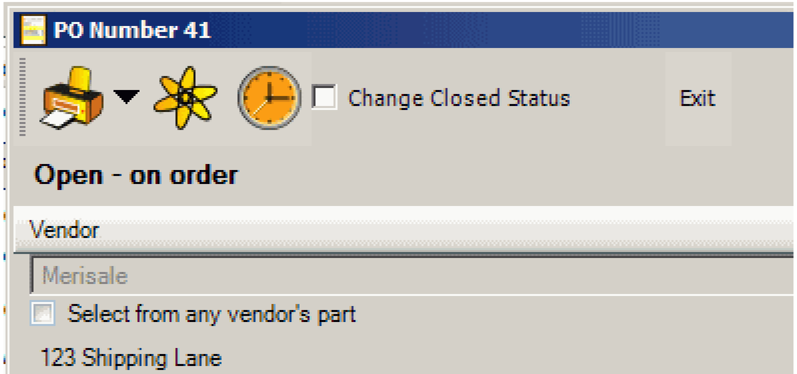
Note when you tab off editing the cost, the other fields for taxes and Net automatically update themselves.



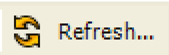
23. Now that everything is finished and no more changes will be done on this PO, we will select the menu option Ordered to change the purchase order status, and prevent any further editing of the purchase order.



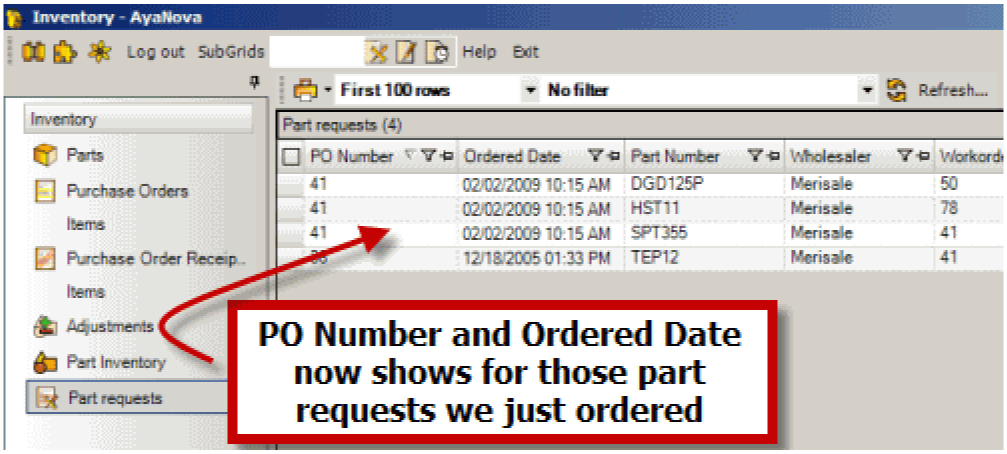
Note now how the status is now **Open - on order;** that the Purchase Order Items are now no longer editable, neither is the Vendor selection.



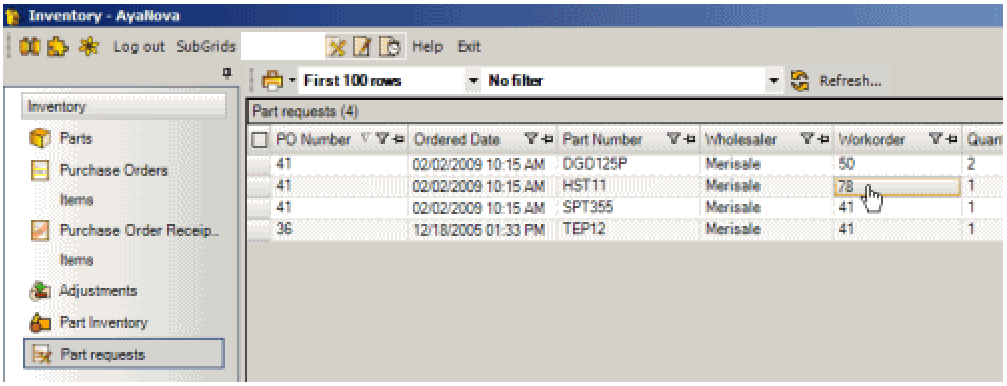
24. We will now **Exit** out of the purchase order and accept save of any changes.

25. Open the [Parts Requests]() grid and **Refresh** 

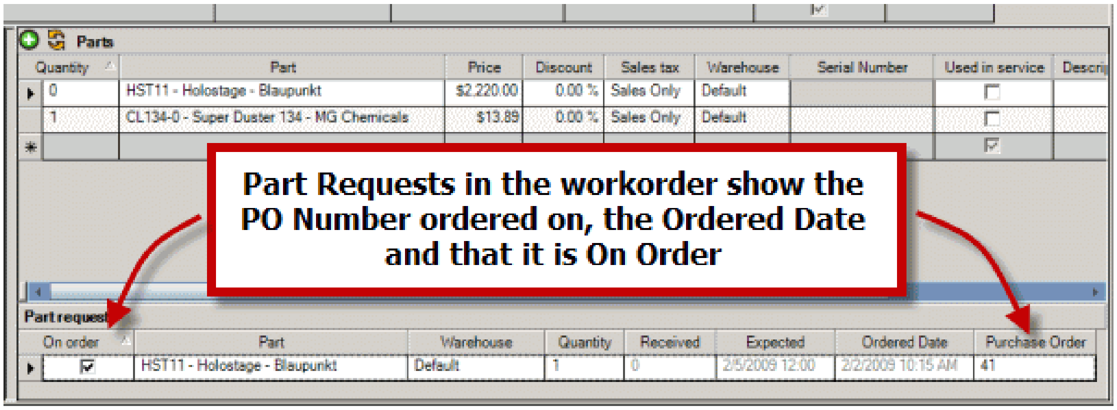
26. We now see that those part requests now display with an ordered date, an ETA date and a PO number to signify that they have been ordered.



27. Select the service workorder number of one of the service workorder requests we just ordered for, and open the Parts sub-screen in the service workorder



28. So we see that the On Order is check-marked, the Ordered date is displaying, the ETA date is displaying and the quantity ordered is displaying.



A service workorder is only updated that a part has been ordered for a part request only after the purchase order has been saved **and** placed in an ordered state, it is possible that multiple users may create multiple PO's for the same part request. For this reason, only one user should be responsible for placing PO's for part requests at any one time.

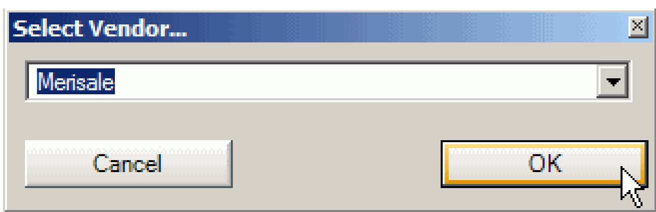
6.26 Receive a Purchase Order

In this tutorial example, we will go over the basic steps creating a Purchase Order Receipt to receive parts into inventory from a Purchase Order

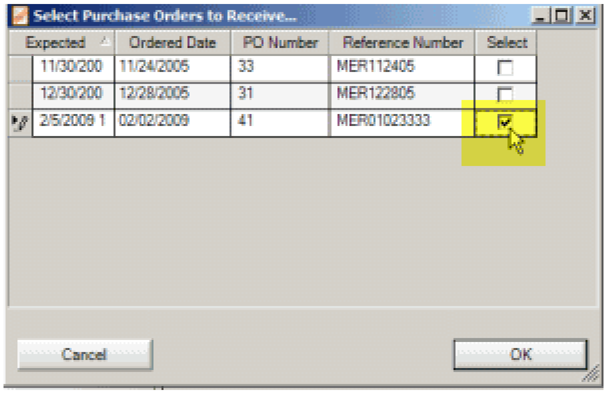
- It is highly recommended that you review this Help file's entire section on Purchase Order Receipts and the Inventory section for complete overview , suggestions on use, tips on use and more.
- This tutorial is dependant on that you have performed the How do I create a Purchase Order based on Part Requests? as that tutorial makes a part request for the service workorder.

1. Open the Inventory navigation pane, open the Purchase Order Receipts grid and select 

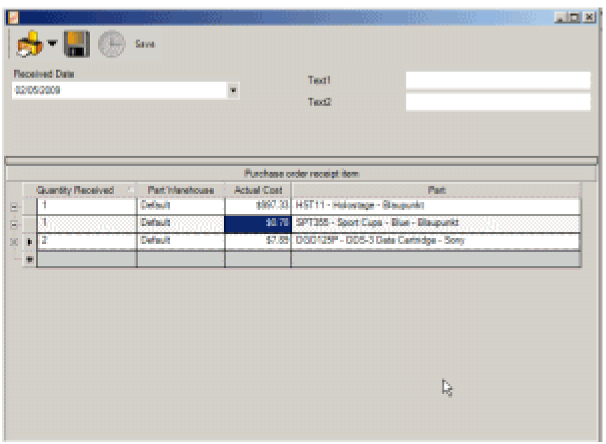
New… from the grid menu
2. Only vendors with outstanding purchase orders will display in the selection list. With the sample data, select the vendor Merisale



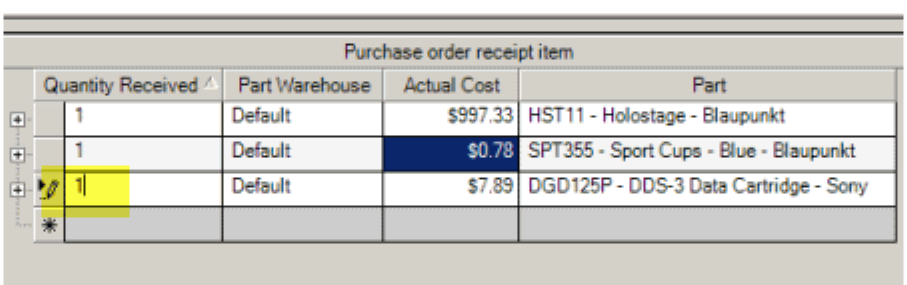
3. A list of outstanding purchase orders to receive against displays – select the purchase order that you created in the Purchase Order tutorial by placing a checkmark in the Select column for that purchase order number, and then click on the OK button
   a. Do note that you can select multiple purchase orders to receive against at one time – for the sake of this tutorial; we will receive only against one.
   b. Do note that your list of displayed purchase orders may be different than the screenshot due to different sample data



This will open a [Purchase Order Receipt entry screen](#) for the PO's selected

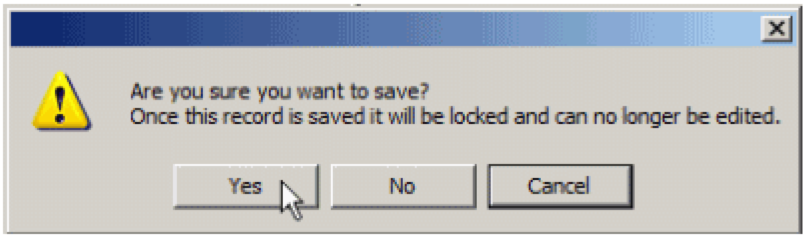


4. The Received Date will default to today's date. We will leave it at this date
5. In our tutorial, we will assume that only 1 of the DGD125P Data Cartridges arrived so we must edit what we actually received, and the other items did fully arrive.
   a. Edit the quantity for the DGD125P Data Cartridges to 1

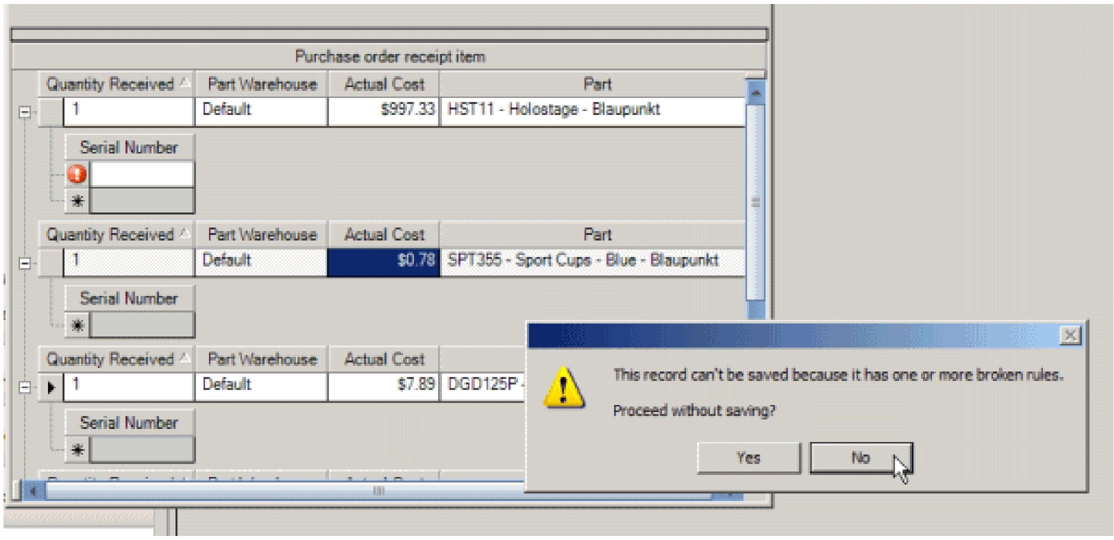


6. Select the Save & Exit menu option

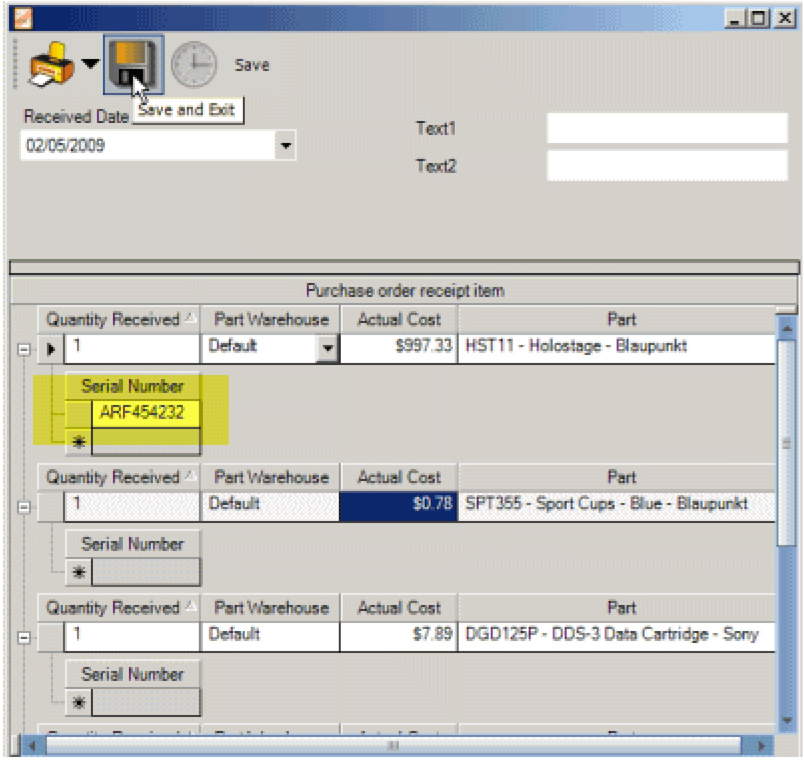
7. AyaNova checks to confirm we really want to save and exit, as the receipt can not be edited once it has been saved and exited out of.

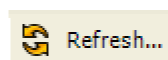


8. Now in this tutorial we receive a message advising us that there is an issue, and the PO Receipt can not be received. You can see in the screenshot, that there is a red exclamation mark on one of the received parts because it is a serialized part, and needs to have the serial number entered before the PO Receipt can be saved and closed



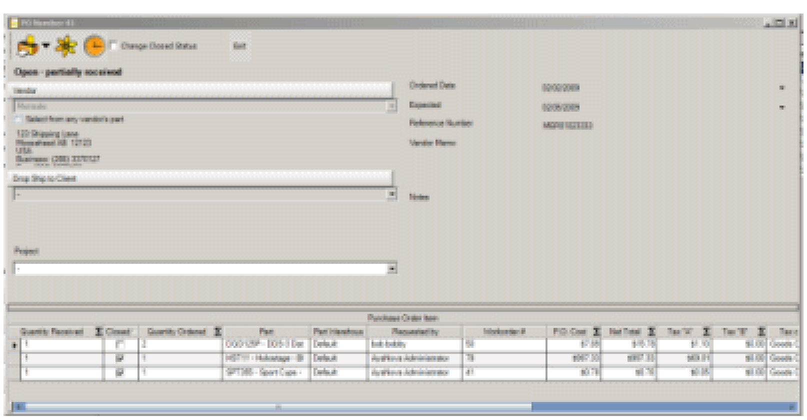
9. Select No to the message, and enter a serial number for the serialized part that is being received, and then **Save & Exit**



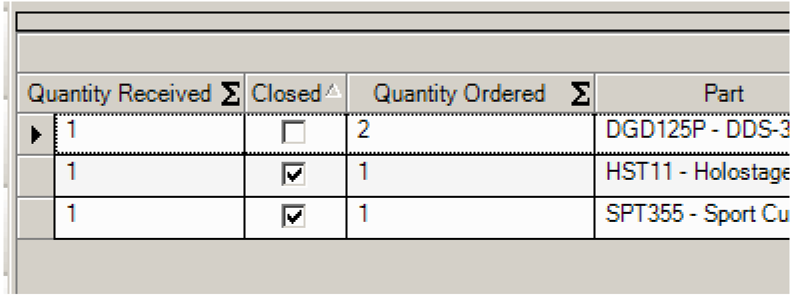
10. View the [Purchase Orders grid](), select Refresh  to refresh the grid (or *if more than 5 minutes has past since you saved and exited out of that PO Receipt, AyaNova will automatically refresh it for you*) and open the Purchase Order # that we just received against

11. The Purchase Order has now changed in a number of ways:

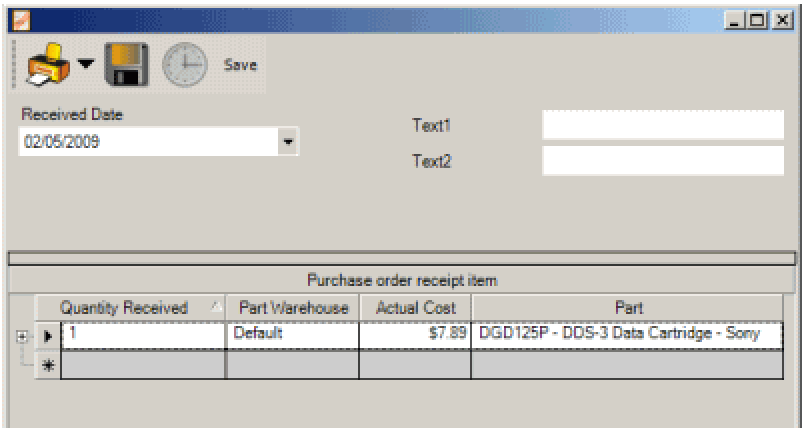
12. You will now see that the status of the purchase order has been changed to Open – Partially Received; and that a column Quantity Received shows the amounts received to date.



- The status is now Open – Partially Received
- The PO header fields such as Notes, Memo, etc are no longer editable
- There is now a new column that displays called **Quantity Received** so that you can see how many received against how many ordered, and a column called Closed so that you can see if all of the quantity ordered has been received closing the PO



13. Exit out of this purchase order.
14. We will now assume in this tutorial that the vendor has shipped the rest of the order, and now we wish to receive it.
15. Return to the [Purchase Orders Receipts grid](#).
16. Create a new purchase order receipt for Merisale
17. You will note that the same purchase order number still shows for selection as it has not yet been fully received, and/or closed.
18. Checkmark Select for the same purchase order number and select OK to bring up a new Purchase Order Receipt

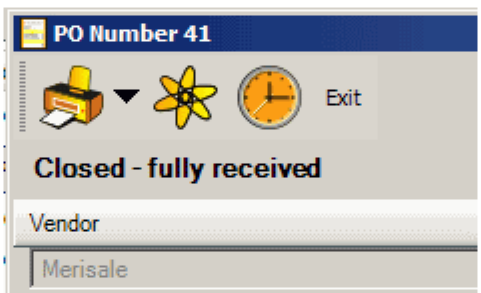


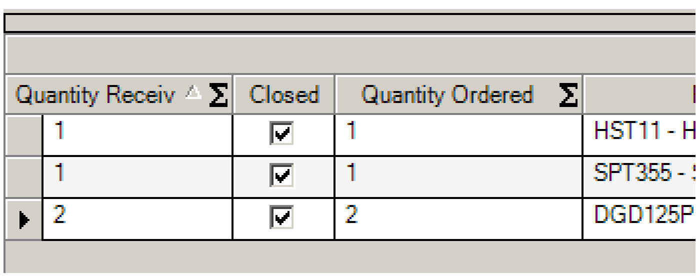
- You will note that the purchase order receipt items are only for the item still outstanding, and only for the outstanding quantity.

19. We will now select the Save & Exit menu option, and confirm that yes we do want to save and exit.

20. View the **Purchase Orders** grid, and open the purchase order we just received against.

21. You will note that the status for the purchase order is now Closed – Fully Received and that the Quantity Received equals that ordered.



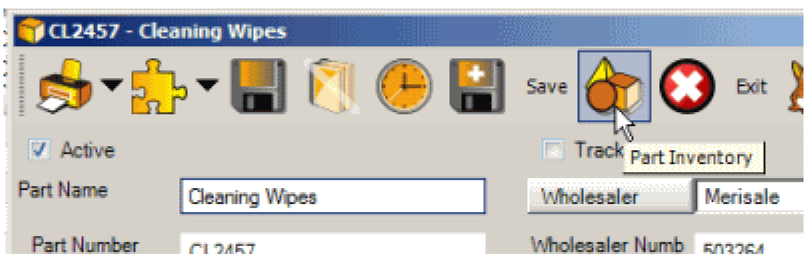


6.27 Create a Purchase Order based on Restock Level for Parts for that Vendor

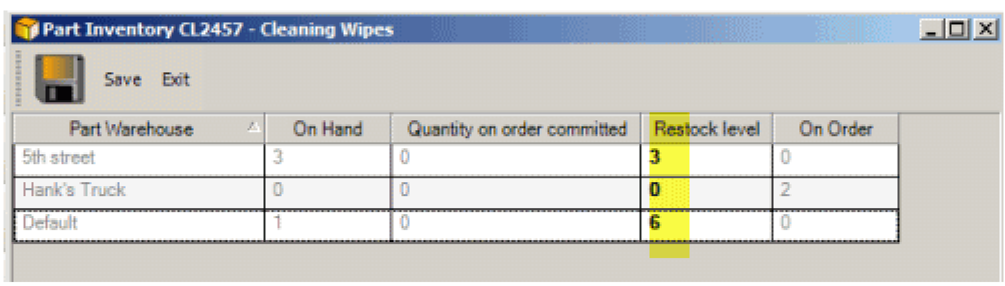
In this tutorial example, we will go over the basic steps creating a Purchase Order based on Restock Levels set in each Part's entry screen

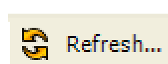
- It is highly recommended that you review this Help file's entire section on Purchase Orders and the Inventory section for complete overview , suggestions on use, tips on use and more.

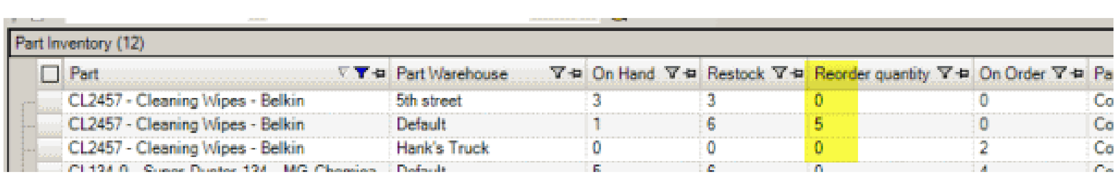
1. Open up a Part entry screen, and select the Inventory menu option in that part's entry screen



2. You will note that the Restock Level fields are the only editable fields in this subgrid, and are where you identify the quantity that should be in stock for this part for that warehouse.



3. View the Part Inventory grid and Refresh  if you have just made any changes (*AyaNova will automatically refresh every 5 minutes*). The column **Reorder Quantity** identifies the amount of stock that would need to be ordered for that part to bring it up to the Restock Level

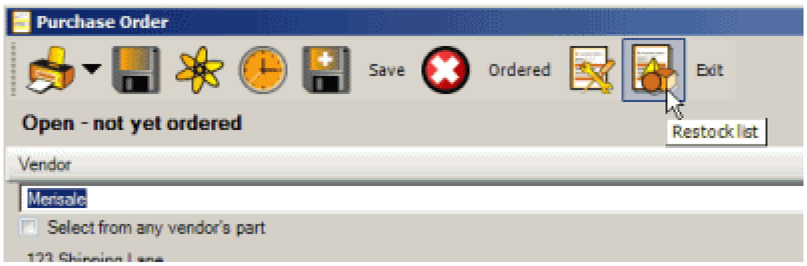


4. Open the Inventory navigation pane, move to the [Purchase Orders grid](#) and select the menu option 

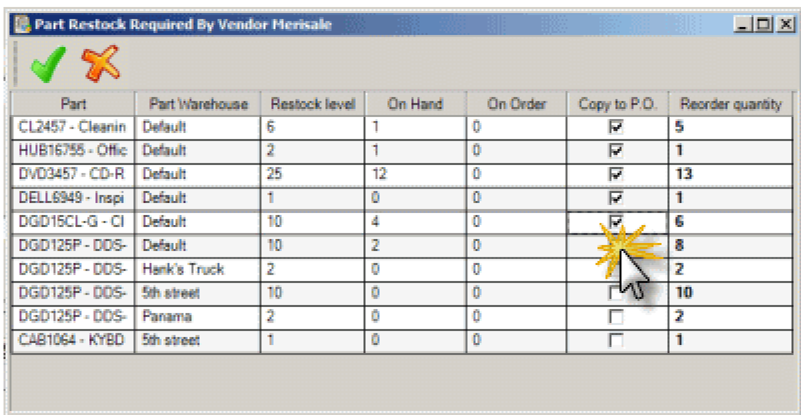
New…

5. In the [Purchase Order entry screen](#), select the vendor Merisale first as need to identify for the list what vendor we are referring to

6. Select the [menu option Restock List](#)



Note: Your view may not be the same as this screenshot due to differences in your sample data



Part	Part Warehouse	Restock level	On Hand	On Order	Copy to P.O.	Reorder quantity
CL2457 - Cleanin	Default	6	1	0		5
HUB16755 - Offic	Default	2	1	0		1
DVD3457 - CD-R	Default	25	12	0		13
DELL6949 - Inspi	Default	1	0	0		1
DGD15CL-G - Cl	Default	10	4	0		6
DGD125P - DDS-	Default	10	2	0		8
DGD125P - DDS-	Hank's Truck	2	0	0		2
DGD125P - DDS-	5th street	10	0	0		10
DGD125P - DDS-	Panama	2	0	0		2
CAB1064 - KYBD	5th street	1	0	0		1

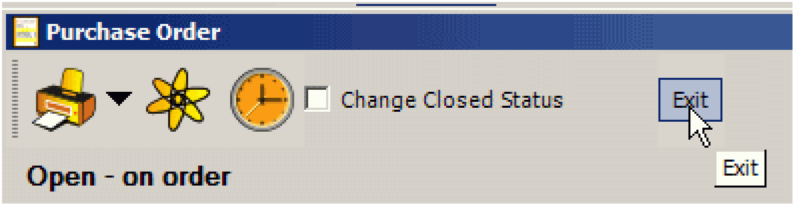
7. Checkmark Copy to PO for all warehouses showing parts DDS-3 Data Cartridge and Cleaning Tape.

8. Select the menu option OK to input these into as purchase order items

9. In this example, we already know the Expected date (ETA) and have a reference number from the vendor for the order, so we will enter in an Expected date 4 days from now, and a reference # of MER99092006

10. Now that everything is completed, we will place the purchase order in the status Ordered. Select the menu option **Ordered**.

11. We will now Exit from the purchase order which returns us to the Purchase Order grid

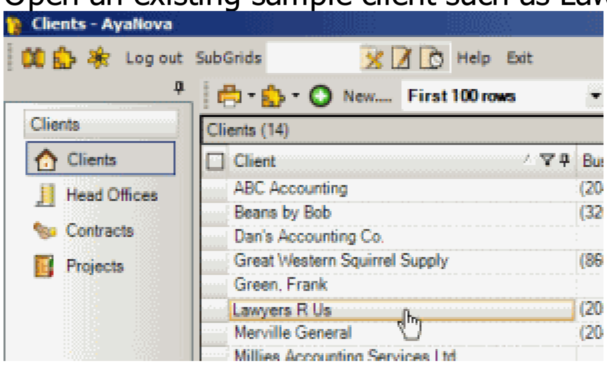


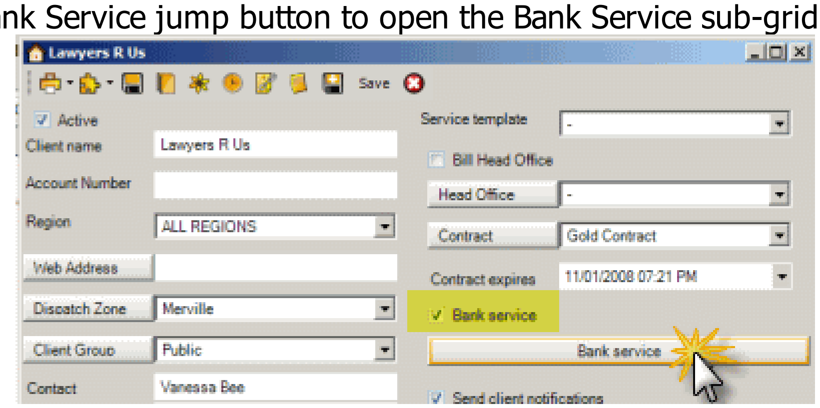
12. Now you would receive into inventory via a Purchase Order Receipt. We won't cover those steps in this tutorial, but it is very similar to that of the [How do I receive a Purchase Order?]

6.28 Enter a manual Banked Service

In this tutorial example, we will go over the basic steps applying a manual Banked Service amount to a client.

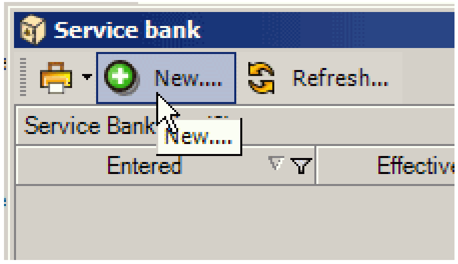
- **An example of why you might use this feature is** a client has pre-paid for service, you want to note that in AyaNova, so that you can apply labor charges from workorders against this pre-paid service.
- It is highly recommended that you review this Help file's entire section on Service Workorders, Labor and the Banked Service section for complete overview , suggestions on use, tips on use and more.

1. Open an existing sample client such as Lawyers R US


2. Check-mark the Banked Service box if not yet already done, and select the Bank Service jump button to open the Bank Service sub-grid


3. Select the New... menu option 

to open up a new banked service entry screen

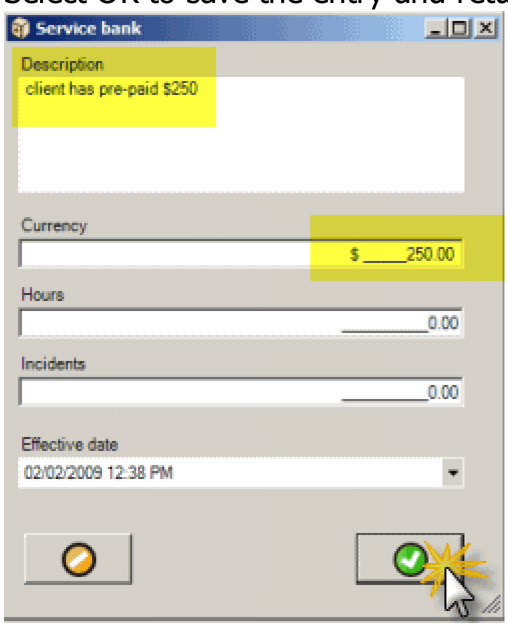


- Enter in the Description which is usually why you are entering it. It may be to make an adjustment; it may be to enter in a pre-paid dollar amount, etc. In our tutorial, it will be because the client has pre-paid $250.00

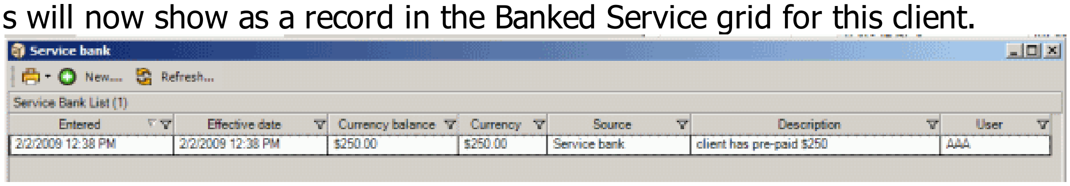
- Enter in 250 in the Currency field

- Do note that the field Effective Date is for informational and reporting purposes only - edit to a specific date if needed.

- Select OK to save the entry and return to the Bank Service grid.



4. This will now show as a record in the Banked Service grid for this client.



- Note that the **Currency Balance** column will show the remaining balance
- Records once entered in Banked Service are not editable for control and accountability purposes. If a mistake is made and saved in entry you would need to make a new entry with a minus amount to adjust.

- The screenshot above may not show exactly as your Banked Service grid, as it depends on what columns you have set to show.

5. Close the Service Bank grid.

6. Close the Client entry screen – you will note that if you had selected the menu option Exit or the X in the upper right-hand corner of the user entry screen, that AyaNova will ask "Do you want to save changes?". This is because Banked Service is a part of the client, and you have edited the client even though it was a sub-screen.

7. Be sure to click on Yes to save your entry in the Bank Service grid.

8. Now labor entered in the Labor grid in a service workorder can be applied against banked service for this client.

9. Perform the How do I apply labor against Banked Service automatically via a Service Workorder?

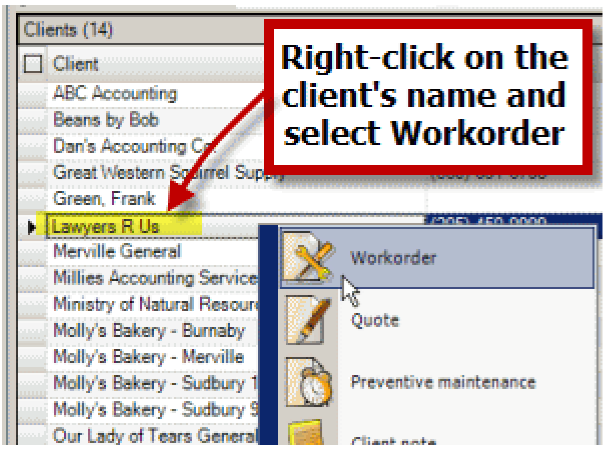
See also:
Banked Service
How do I Apply Labor against Banked Service automatically via a Service Workorder?

6.29 Apply Labor against Banked Service automatically via a Service Workorder

In this tutorial example, we will go over the basic steps creating applying labor charges against Banked Service automatically via a service workorder.

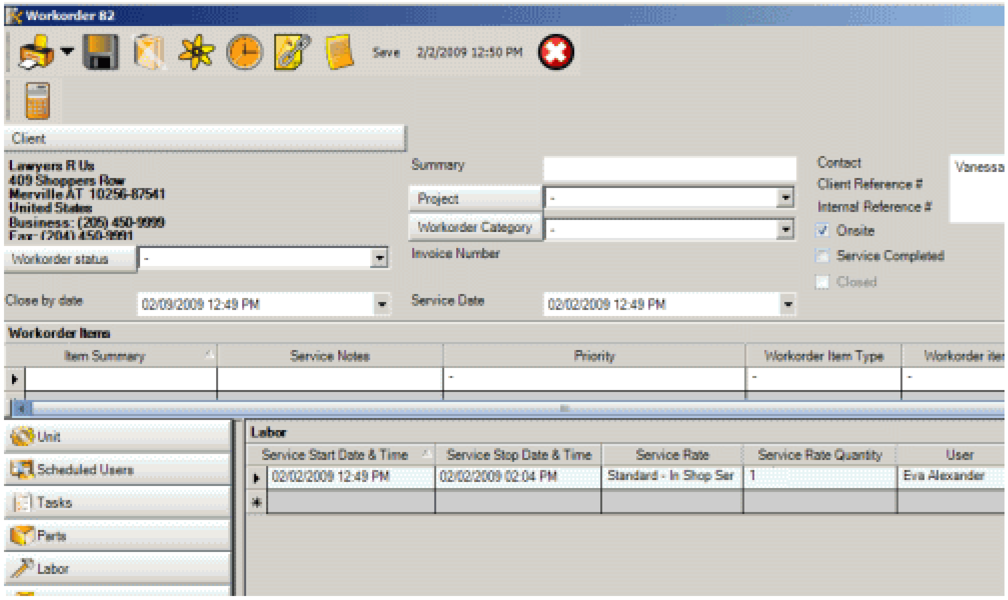
- It is highly recommended that you review this Help file's entire section on Service Workorders, Labor and the Banked Service section for complete overview , suggestions on use, tips on use and more.

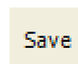
1. Create a workorder for the same client you entered the manual Banked Service pre-paid amount in the previous How do I entry a manual Banked Service? tutorial by right-clicking on that client's name in a grid



2. Select the Labor sub-section if not already showing, and create a Labor record

    1. Select a Service Start Date/Time
    2. Tab and the Stop Date/Time will automatically be filled in for you along with the billable quantity in the Service Rate Quantity field (you can of course edit this, we are just walking through an example here)
    3. Select a Service Rate
    4. And select a schedulable user
    5. Enter in text into the Service Details field if desired

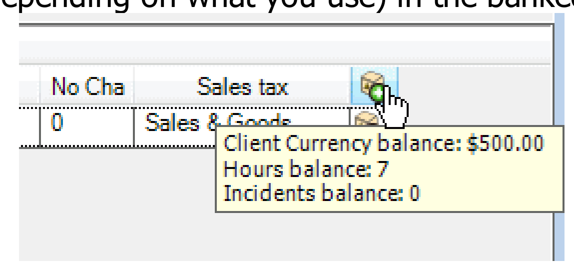


4. Save the workorder by selecting the Save 

menu option at the top of the workorder entry screen. If you do not save, you won't be able to do the next step.

3. You will see that the Labor subgrid now has a Banked Service icon at the far right - which means that this client has Banked Service enabled.

4. Hover your mouse over the Banked Service column at the top of the Labor grid records, and it will display what the balance is for currency, hours and incidents at the time that workorder was first opened. By doing this, you confirm **before** you continue that there is sufficient funds/hours/incidents (depending on what you use) in the banked service **before** applying.

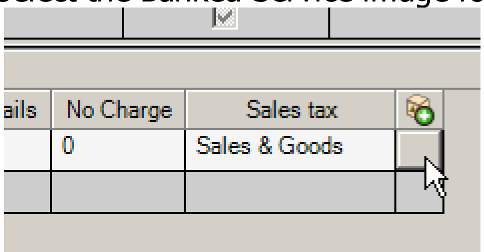


The screenshot above shows that at this time this workorder was opened the balance for currency was $500.00

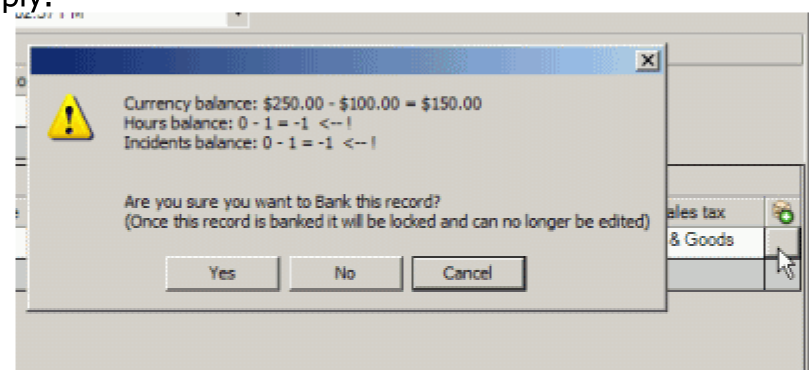
In our fictional sample company, all pre-payments by clients are entered as currencies, we disregard referring to hours and incidents. Its up to you which you wish to use.

If of course, you just enter pre-payments of hours - then disregard the amounts for currency and incidents. Ditto if you enter pre-payments in currency - then disregard the amounts for hours and incidents.

5. Select the Banked Service image for your labor item record

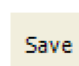


6. AyaNova will ask you to confirm you want to apply this to this client's banked service and also popup what the ending balances will be **if you did** apply.



In our screenshot above, the beginning Currency balance was $250.00, and the service rate and quantity applied would subtract $100.00, so the balance **will be** $150.00 if we select Yes to bank this record

7. Select **Yes**

8. Now save the workorder again via the menu option 

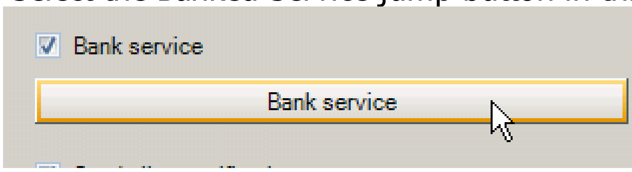
at the top of the workorder entry screen.

9. As you have now applied that labor record to Banked Service, note that the labor record is no longer editable.

- refer to the section at the bottom of this How do I... about deleting a labor record and it automatically applying that deletion against the banked service amount

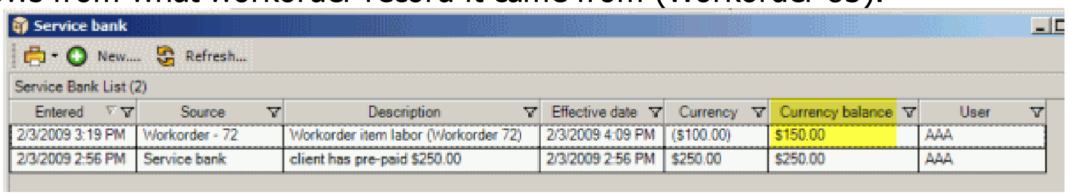
10. Select the Client jump button

11. Select the Banked Service jump button in this client's entry screen



12. See that the labor record applied against banked service shows as a record here.

And it subtracts the dollar amount of labor hours against the currency balance ($125.00 is in brackets to indicate a negative amount applied), as well as shows from what workorder record it came from (Workorder 83).



Entered	Source	Description	Effective date	Currency	Currency balance	User
2/3/2009 3:19 PM	Workorder - 72	Workorder item labor (Workorder 72)	2/3/2009 4:09 PM	($100.00)	$150.00	AAA
2/3/2009 2:56 PM	Service bank	client has pre-paid $250.00	2/3/2009 2:56 PM	$250.00	$250.00	AAA

13. Exit out of this Banked Service grid and this client's entry screen which returns you to the workorder.

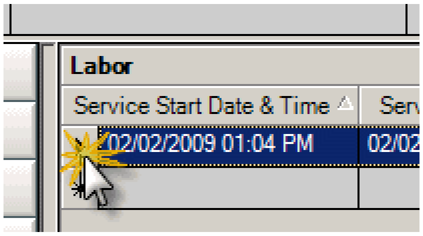
14. Save and exit out of the workorder.

Additional information on Banked Service:

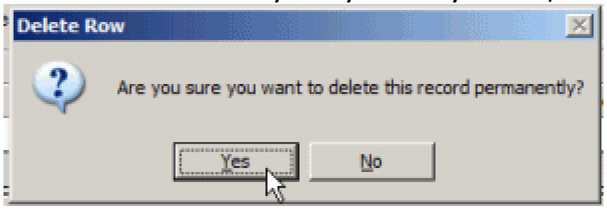
Deleting a labor record that has been banked against Banked Service:

Lets say you after you applied a labor record to Banked Service and had saved; you realized it should not have been applied. You will need to delete the labor record which will automatically enter an adjusting entry into Banked Service for you.

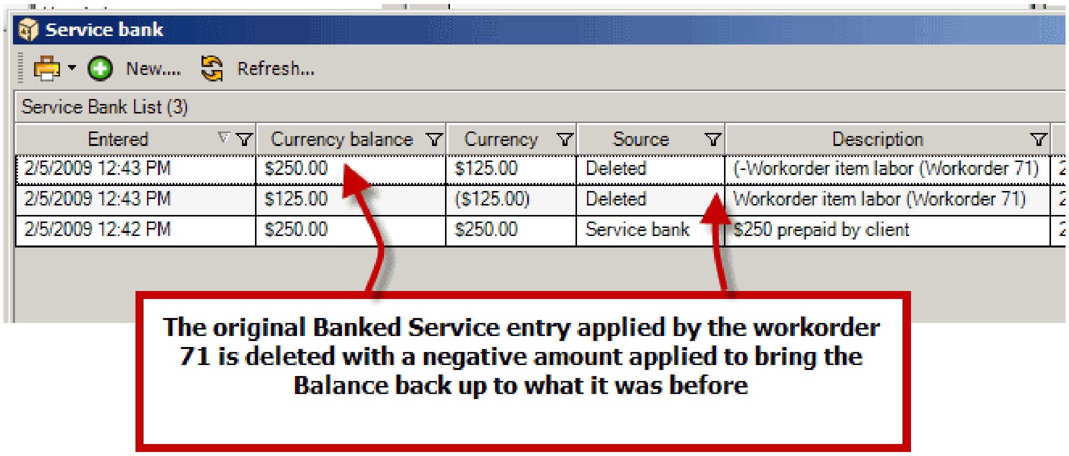
- Select the labor record by clicking on the row header



- Select **Delete** key on your keyboard, and Yes to the clarification.



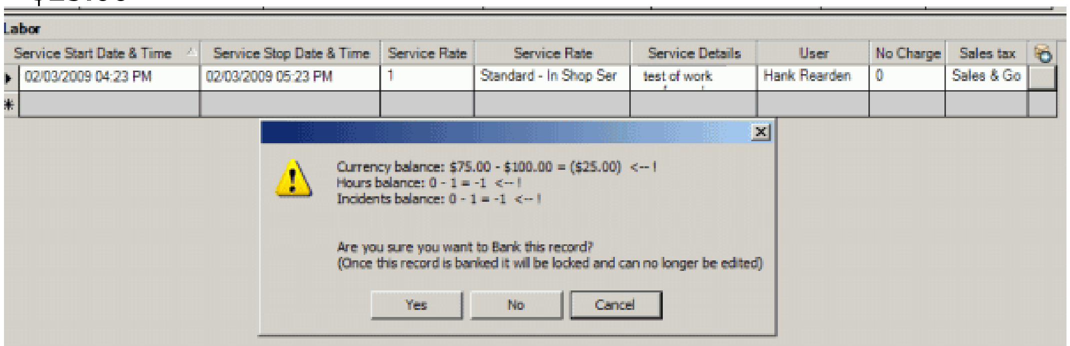
- Save the workorder (changes are not applied until the workorder has been saved)
- Now view Banked Service grid for this client
- You will see that a new record has been made that is now showing in the Banked Service grid that shows the previous amount returned to the Currency balance, and that also explains that the labor record has been deleted.



To prevent Banked Service going into the "negative":

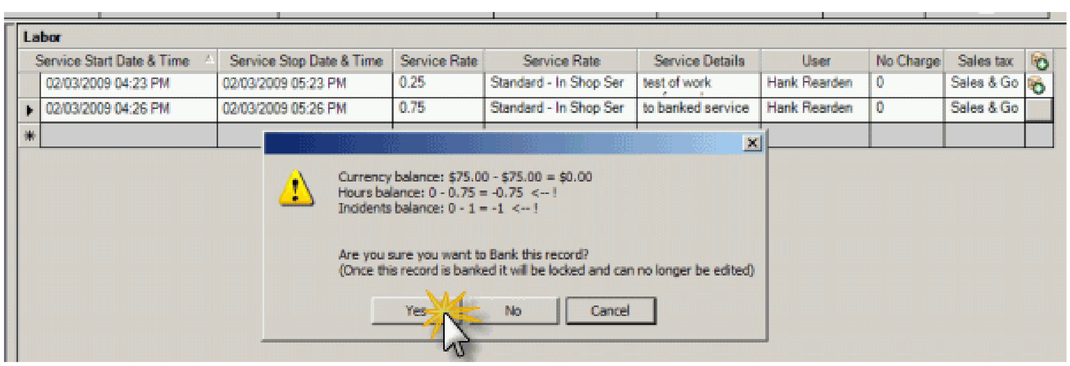
Let's say that when you go to apply the banked service, and it pops up what the balance will be **if** you do apply, and you realize it will go into a negative amount for what you are tracking (either currency, or hours, or incidents).

- In the screenshot below, we track currency with Banked Service and can see if applied would put the currency amount into a negative amount by $25.00



- If this is the case, it is suggested that you **cancel** out of applying this labor record to Banked Service
- Then it is suggested that you make a new labor entry for the Service Rate Quantity that can be applied that would bring the balance close to or to 0 for what you are tracking (either currency, or hours, or incidents); Save; and then apply that new labor record to Banked Service.
  - In our example, this new labor entry is for a quantity of .75 as that will then use up the remaining Banked Service balance without going into the negative.
- And then edit the Service Rate Quantity in the original labor entry so that it is the remainder of the Quantity and bill that out as normal to your client.

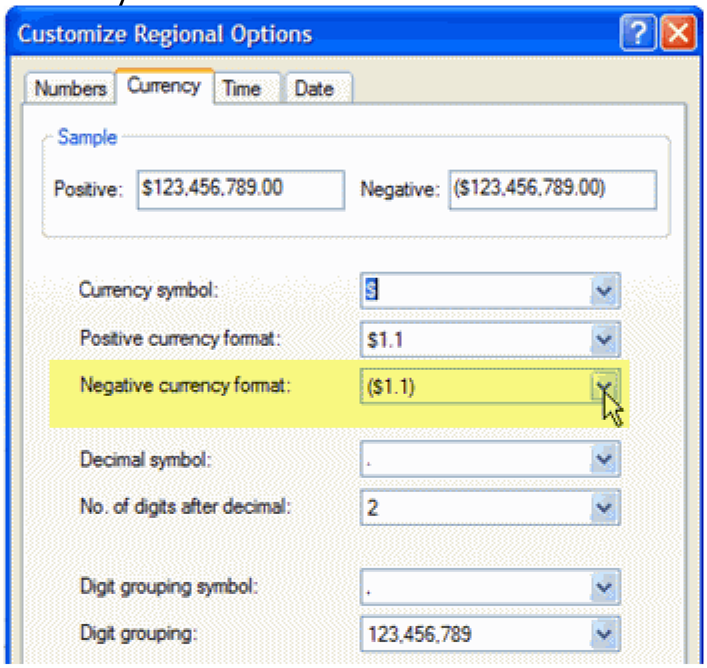
  In our example, we edited the original labor entry Service Rate Quantity to .25 and will bill that as normal to the client.



See also:
[Banked Service]

How do I enter a manual Banked Service?

NOTE: Currency is displayed according to your computer's Regional settings. For example, a negative currency amount may be displayed as ($50.00). If instead you want it to display with a minus symbol, you need to exit out of AyaNova, edit your Regional Settings, reboot your computer and then log back into AyaNova.

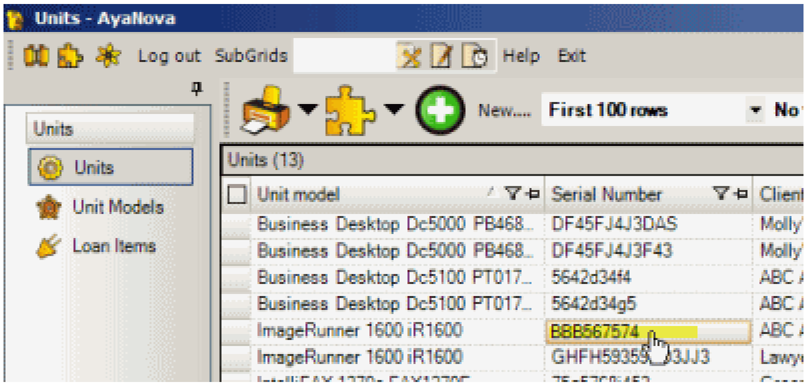


6.30 Enter a manual Unit Meter Reading

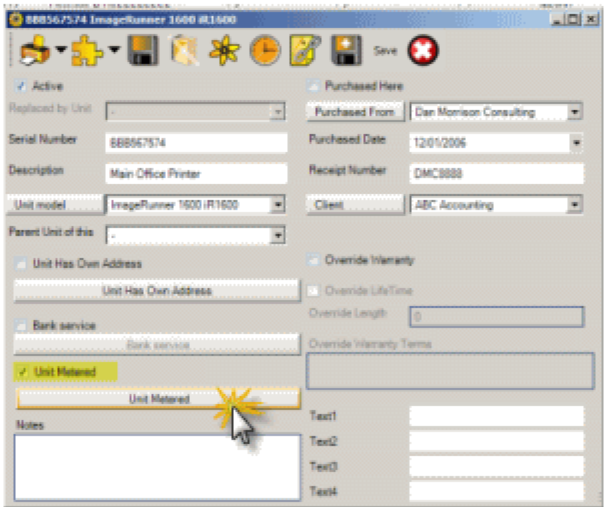
In this tutorial example, we will go over the basic steps entering a manual Unit Meter Reading for a unit.

- For example, you might be creating the unit for the first time and entering basic information including the meter reading, that is not tied to any specific service performed on this unit.
- It is highly recommended that you review this Help file's entire section on Unit and Unit Meter Reading section for complete overview , suggestions on use, tips on use and more.
    - **NOTE**: Unit Meter Readings entered manually do not display in the Unit Meter Reading column in the Service navigation pane's Items grid, **only those** entered for **that** workorder item via the workorder item menu option Unit Meter Reading will.

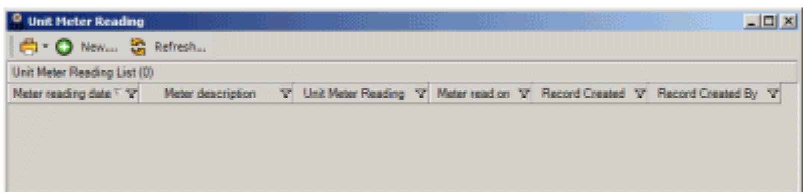
1. Open the Unit entry screen by moving to the Units navigation pane, and clicking on a Unit serial number in the Unit grid



2. In the Unit entry screen, make sure the Unit Metered is checked and then click on the Unit Metered jump button



3. The Unit Meter Reading grid displays



4. Select the 

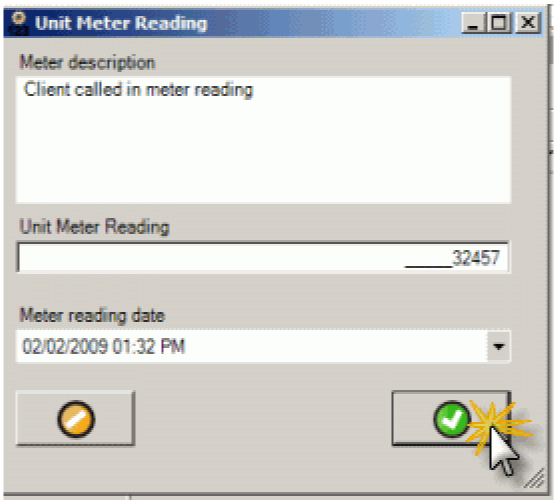
New… button on the toolbar within the Meter Reading grid to open the Meter Reading entry screen

5. Enter in the following fields:

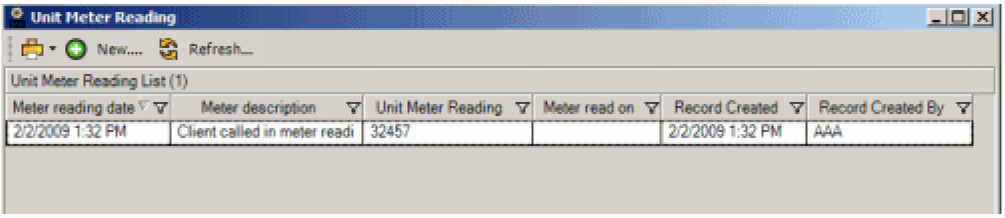
   a. In the Description field enter why this is being entered Client called in meter reading

   b. In the Unit Meter Reading field enter in a reading such as 32457

   c. Date of Reading – this will default to today's date, but you can change it to correspond to when you actually took the reading



6. Click on the OK button to save and close the entry and view it now in the grid.



7. Once an entry has been saved to the Meter Reading grid it cannot be deleted or edited. If you made a mistake, enter in a new Meter Reading.

The above is considered a "manual" entry of the a unit meter reading.

- If you enter the meter reading via a service workorder where this unit is selected in the service workorder, the service workorder number will automatically be identified in the unit meter record in the **Meter read on** field. See the next tutorial for an example of this.

6.31 Enter a Unit Meter Reading via a Service Workorder

In this tutorial example, we will go over the basic steps entering a Unit Meter Reading for a unit via service workorder.

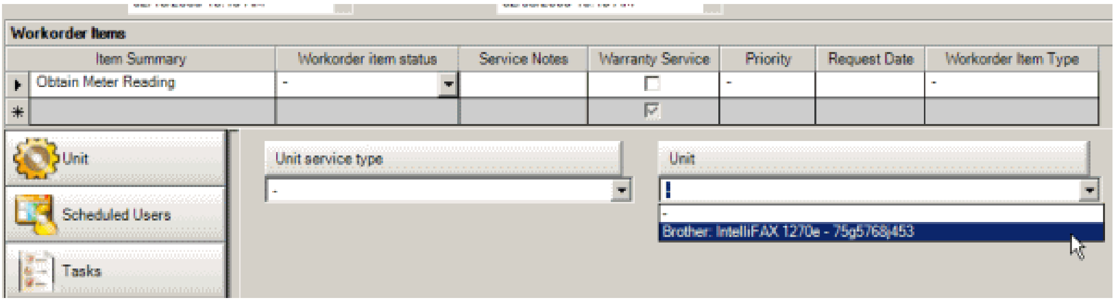
- For example, you might be performing service for this unit and what to identify the workorder you performed this service with along with when you took the meter reading.
- It is highly recommended that you review this Help file's entire section on Unit and Unit Meter Reading section for complete overview , suggestions on use, tips on use and more.
    - **NOTE**: Unit Meter Readings entered manually do not display in the Unit Meter Reading column in the Service navigation pane's Items grid, only those entered for that workorder item via the workorder item menu option Unit Meter Reading

1. Create a new workorder for the client Green, Frank

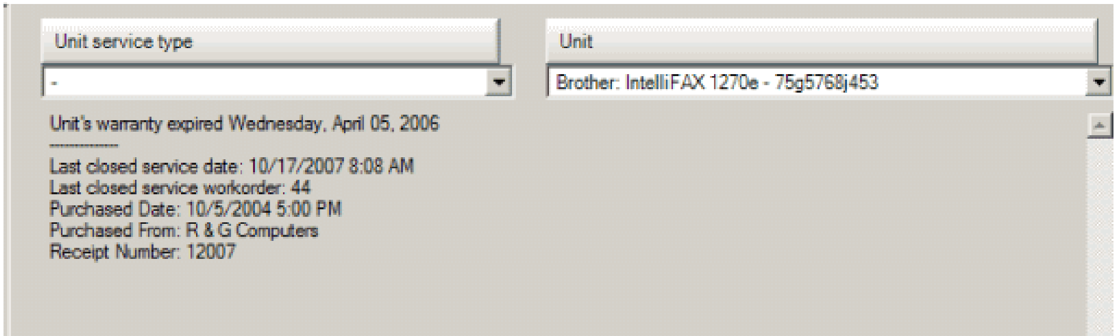
   You can create a new service workorder many different ways - review the following as they provide many time saving steps:

   Create a new service workorder
   Create new workorder for a client or unit
   Create via the schedule screen

2. Select the unit within this workorder item

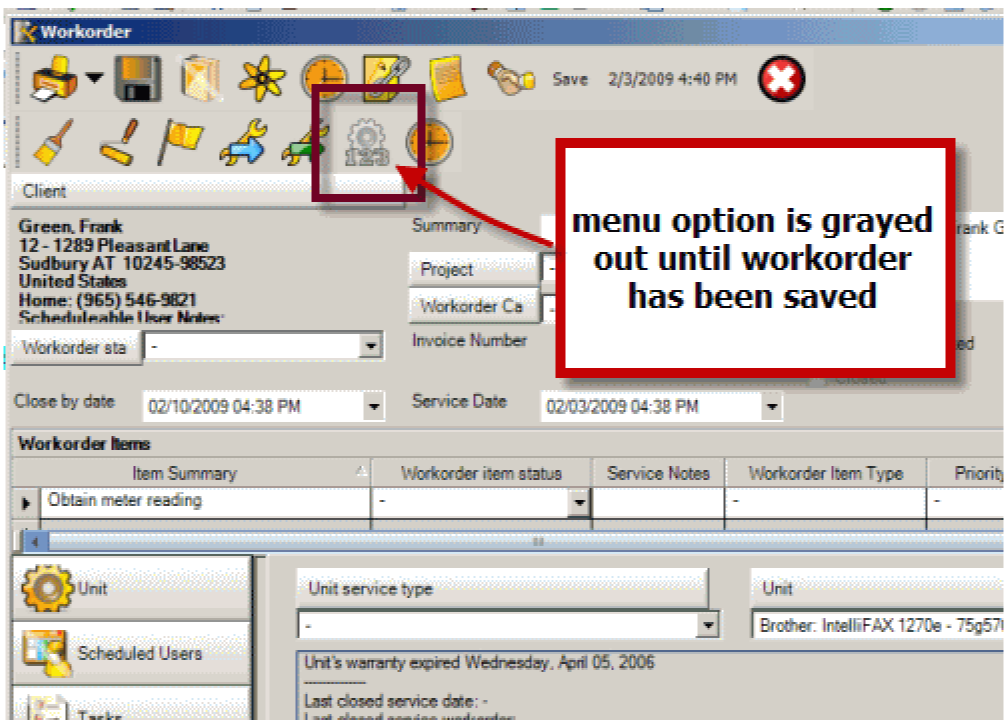
   

3. You will now note that as soon as the unit is selected, details about this unit are displayed in the Unit subsection. Refer to the Unit subsection for more.

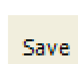


4. Enter text in the workorder item Summary column in the workorder item section of the service workorder Obtain Meter Reading just so we have some text there

5. At the top of the workorder entry screen are additional menu options - but the menu option **Meter Reading** toolbar option is grayed out:

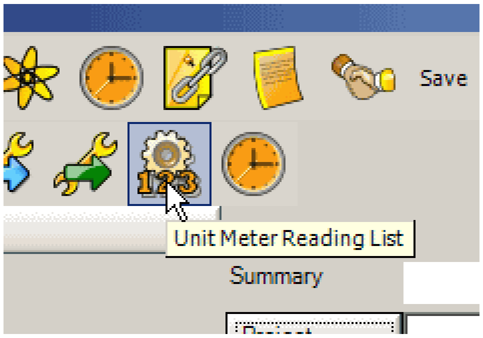


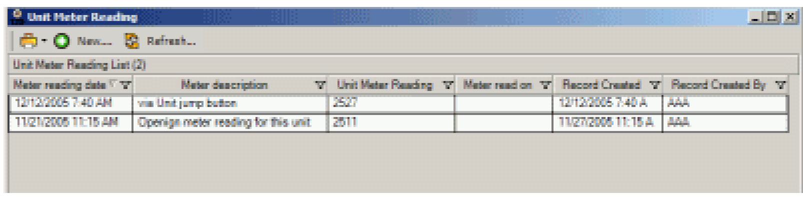
This is because you can not enter a meter reading via a service workorder **until** the service workorder itself has been saved. You need to save the workorder first.

6. Save the service workorder via the 

Save menu option

7. Now you can select the Meter Reading toolbar option to open the Meter Reading grid





8. Select the 

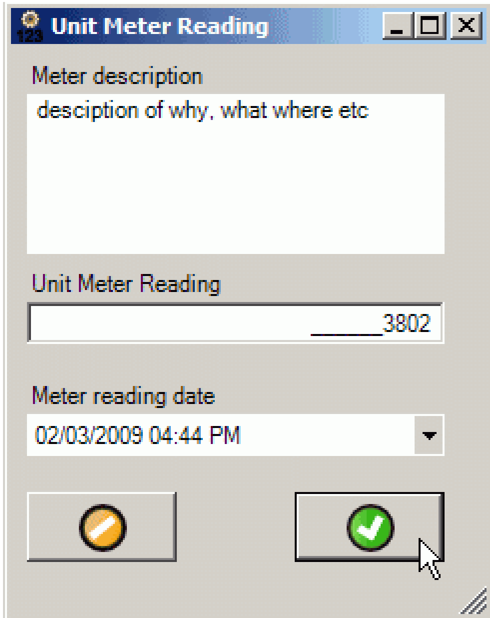
New… button on the toolbar within the [Meter Reading](#) grid to open the Meter Reading entry screen

9. Enter in the following fields:

   a. Description – i.e. possibly why entering or additional information

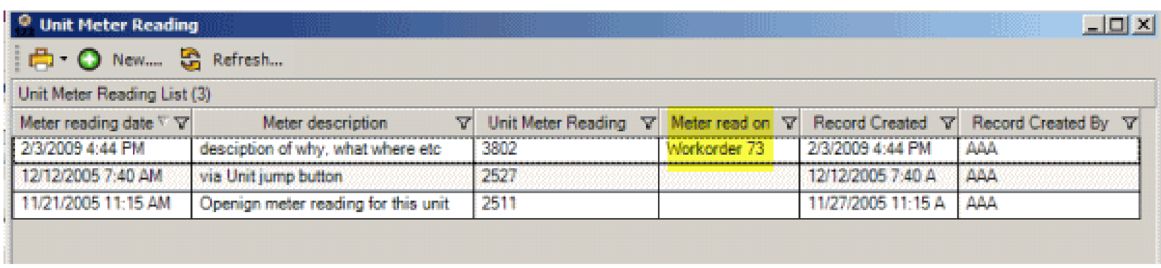
   b. Meter Reading

   c. Date of Reading – this will default to today's date, but you can change it to correspond to when you actually took the reading



10. Click on the OK button to save and close the entry.

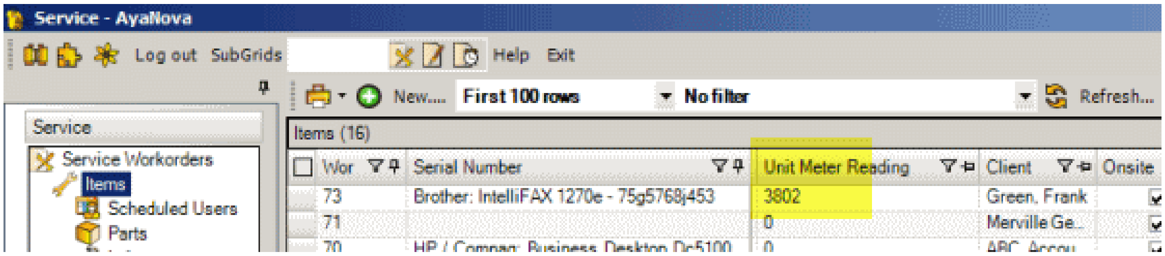
11. You will now see that the meter reading **includes the service workorder #** automatically.



12. Close out of the Unit Meter Reading subgrid to return to the workorder. Save and Exit out of the workorder

13. View the Items grid and Refresh (AyaNova refreshes itself about every 5 minutes, so manually refresh to see right away)

14. View the record for this workorder item and the Unit Meter Reading column - you will see that the Unit Meter Reading you entered for this workorder item specifically shows.



Once an entry has been saved to the Meter Reading grid it cannot be deleted or edited. If you made a mistake, enter in a new Meter Reading with the correct information and a note in the Meter Description field about this.

Or delete the entire workorder which will delete the Meter Reading entry that was entered via it.

6.32 Associate a document to an AyaNova object

NOTE: The Documents menu option does **not** provide the same feature as Wiki. With Wiki, the information is actually maintained in the AyaNova database so not dependant on the user having actual access via the link as via Documents.

You may prefer to use the Documents menu option for objects instead of WIKI so that your AyaNova database is not bloated with uploaded files.

There are a number of ways to associate a document to an object.

1. Drag and drop from Windows Explorer onto the object entry screen

1. Have an entry screen open such as the Client entry screen
2. Open Windows Explorer (which minimizes AyaNova and the entry screen) and move to location of the document
3. Click on the document to select it and hold your mouse down and drag it off the Windows Explorer screen to the Windows Task Bar overtop of the minimized AyaNova entry screen – don't let go yet.
4. This will automatically cause the Client entry screen to maximize
5. Now let go of your drag onto the client entry screen
6. This will automatically drop in within the Documents list without even having to open the Documents screen
7. As outlined above, when the entry screen has been saved, then the Documents list will also be saved.

2. Drag and drop from Windows Explorer onto the Documents list

1. Have the Documents list screen open from within the Client entry screen
2. Open Windows Explorer (which minimizes AyaNova and the Documents screen) and move to location of the document
3. Click on the document and drag it off the Windows Explorer screen to the Windows Task Bar overtop of the minimized Documents list screen – don't let go yet.
4. This will automatically cause the Documents list screen to maximize
5. Let go of your drag
6. This will automatically drop in within the Documents list.

3. Browse to the location of the file and select it for automatic listing in the Documents list screen

1. With the Documents list screen open, select the Add menu option

2. This opens the Open screen where you can browse to the location of the file which can be located on your local hard drive or anywhere on your network.
3. Do note that if the file is located on a shared drive, that unless every AyaNova user has the exact same drive letter mapped, that you should browse via My Network Places instead of your drive letter so that the path location is a UNC path, not a drive letter path
4. Select the file and then select Open
5. This displays the file and path in the Document Link column, and the filename and associated image for the type of a document (if AyaNova recognizes it) in the Description column.

4. Manually type in the Document Link the path and location of the file

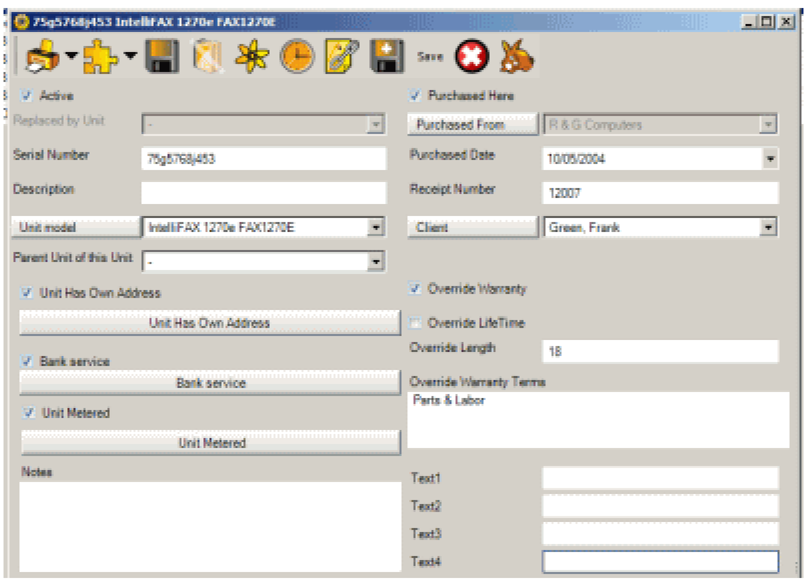
1. With the Documents list screen open, place your mouse cursor within the Document Link column and type in the full path and file name

6.33 Create custom fields for a Unit

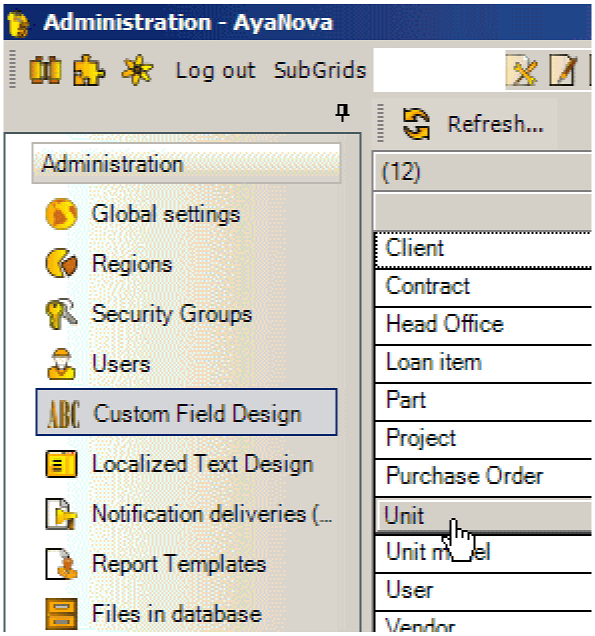
In this tutorial we will go through the steps to apply custom fields to the Unit business object, which displays on the Unit entry screen.

- It is highly recommended that you review this Help file's entire section on Custom Fields and the Units section for complete overview , suggestions on use, tips on use and more.
- You must be logged into AyaNova for this tutorial as a user with full access to the Administration navigation pane Custom Fields Design such as the user *test* or the AyaNova Administrator user *manager* if using the sample data

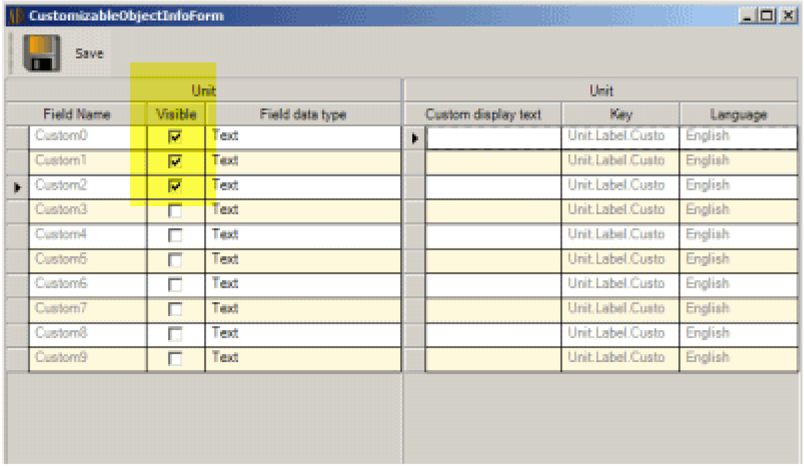
1. First, let's view the existing Unit entry screen so that you can see what it looks like without custom fields.
   a. Move to the Units navigation pane, select the Units grid, and select to open that unit's entry screen by clicking on its Serial Number
   b. See how the entry screen presently looks.



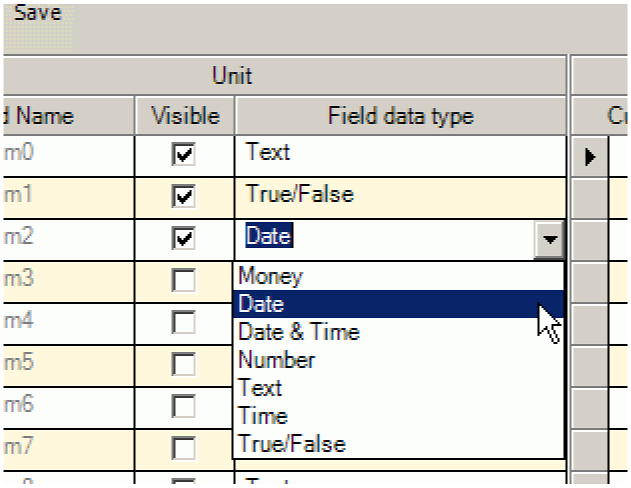
   c. Exit out of the unit entry screen
2. Move to the Administration navigation pane, and select Custom Field Design
3. Select the Unit business object



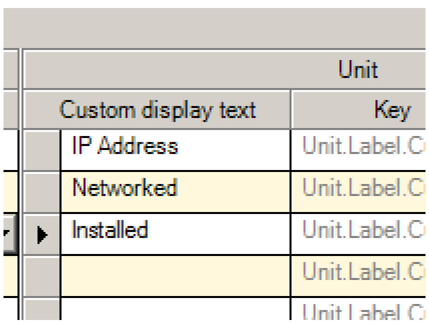
4. Make visible the first three custom fields by check-marking them



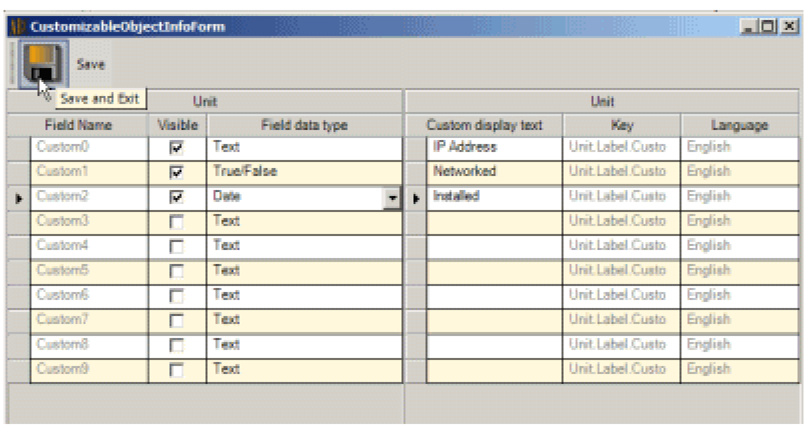
5. Set the Custom0 as data type of Text, Custom1 as data type of True/False, and Custom2 as data type of Date



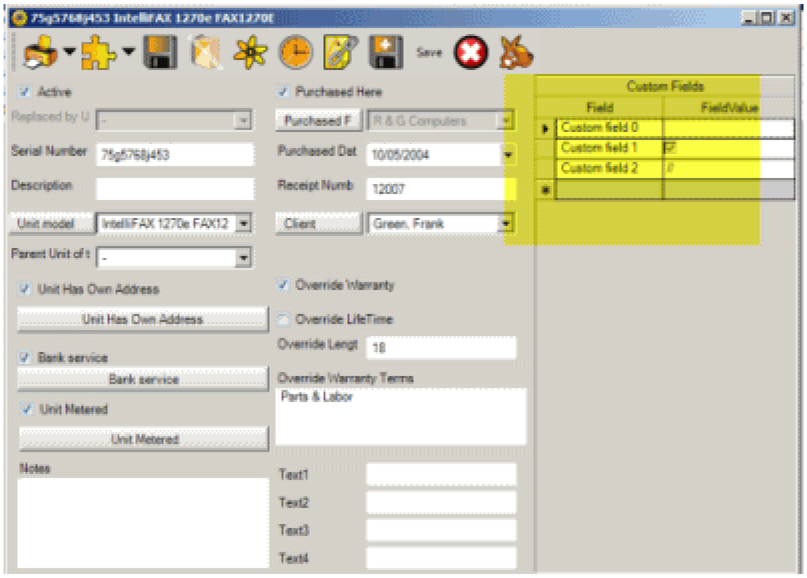
6. Enter the custom display text for Custom0 as IP Address, for Custom1 as Networked, and for Custom2 as Installed



7. Select the menu option to Save & Exit



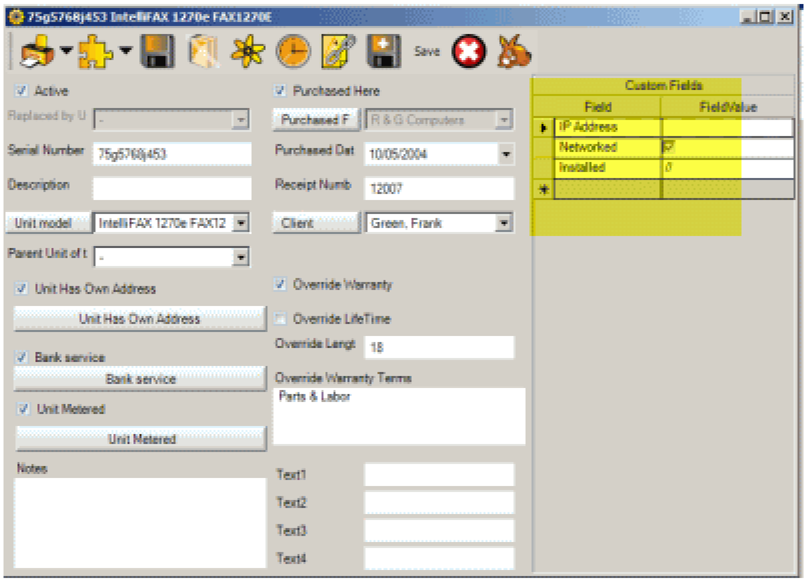
8. Move to the Units navigation pane, select the Units grid, and select to open the previous viewed Unit



9. You will note that the custom field label name is still showing Custom field 0, Custom field 1 and Custom field 2. This is because localization is loaded when **the user first logs into AyaNova**.

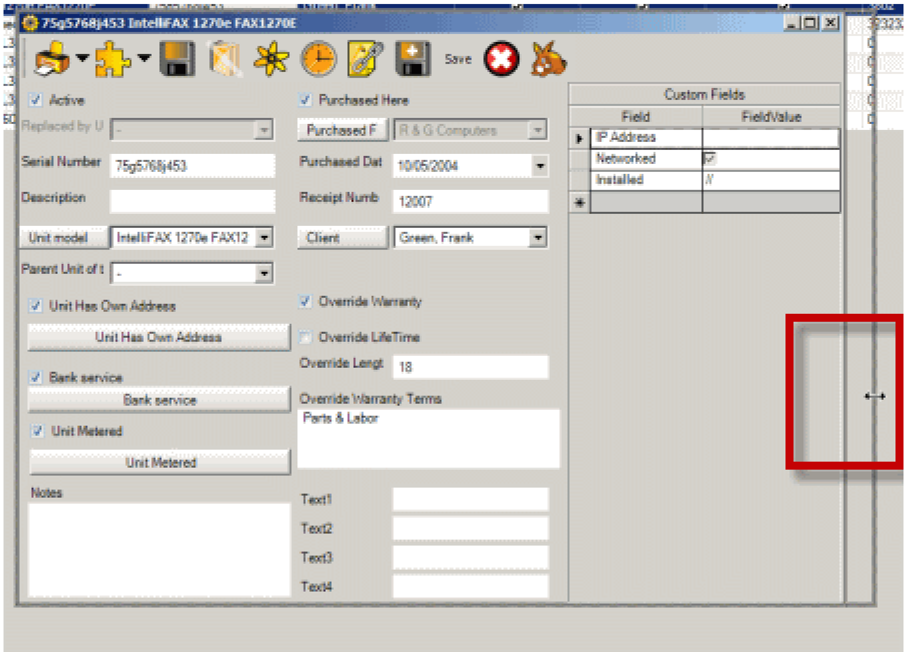
10. Log out of AyaNova, and log back in

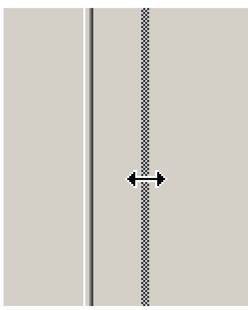
11. Open the same Unit entry screen again



12. As the display of custom fields may disrupt the display of other labels, you may wish to change the width of the Unit entry screen to accommodate.

13. Place your cursor on the side of the unit entry screen, click and drag sideways and let go





14. If you wish the Unit screen to no longer display custom fields, return to the [Custom Field Design](#) in the Administration pane, select the business object Unit, and uncheck the Visible columns, save and exit.

6.34 Create custom fields for a Workorder Item

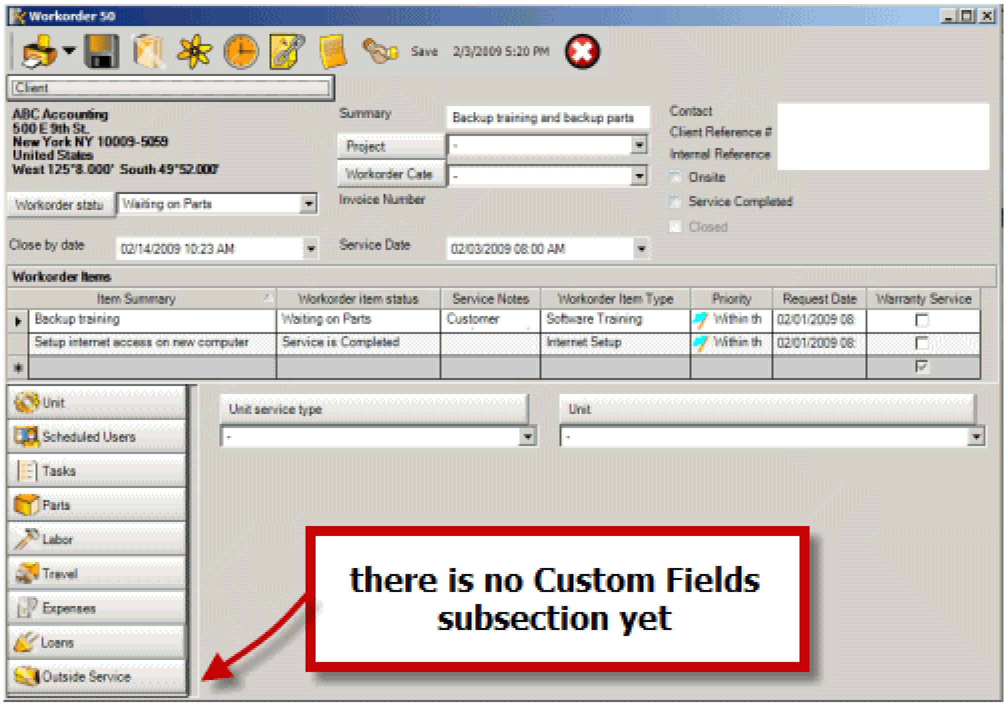
In this tutorial we will go through the steps to apply custom fields to the Workorder Item business object

- It is highly recommended that you review this Help file's entire section on Custom Fields and the Service Workorder Custom Fields section for complete overview , suggestions on use, tips on use and more.
- You must be logged into AyaNova for this tutorial as a user with full access to the Administration navigation pane Custom Fields Design such as the user *test* or the AyaNova Administrator user *manager* if using the sample data

1. First, let's view the existing Workorder entry screen so that you can see what it looks like without custom fields.

   a. Move to the Service navigation pane, and open any workorder

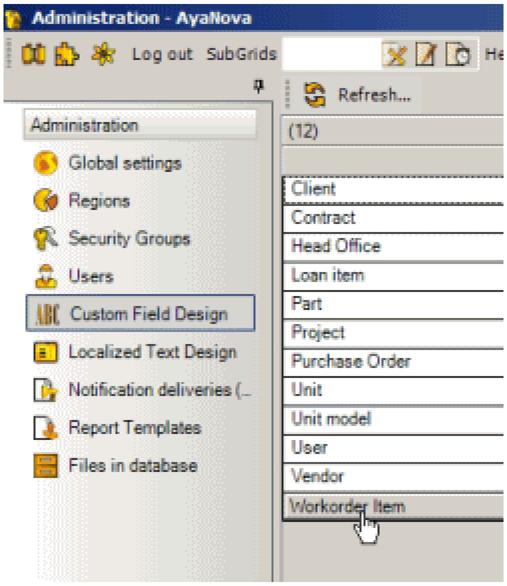
   b. See how the subsections of the workorder item presently looks - Unit, Scheduled Users, Tasks, etc - but no Custom Fields tab.



   c. Close the workorder entry screen

2. Move to the Administration navigation pane, and select Custom Field Design

3. Select the Workorder Item business object

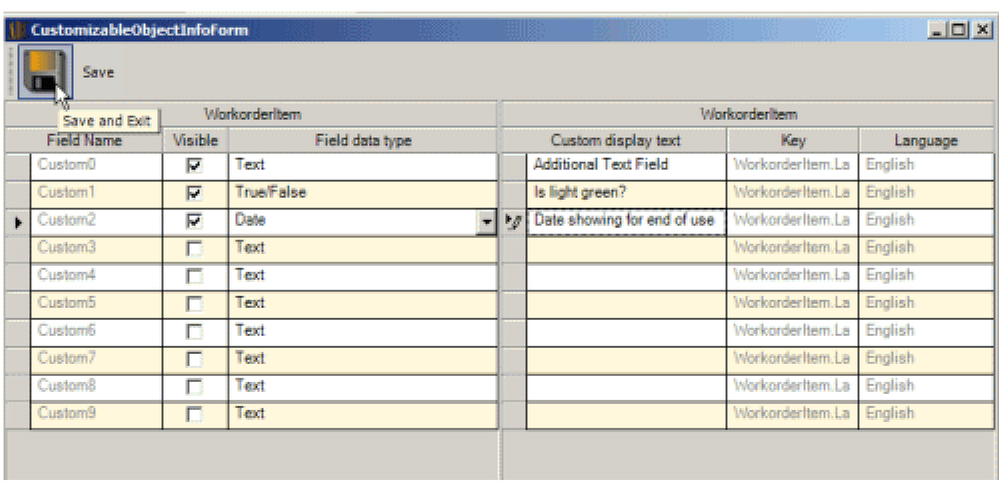


4. Make visible the first three custom fields by placing check-marks in them

5. Set the Custom0 as data type of Text, Custom1 as data type of True/False, and Custom2 as data type of Date

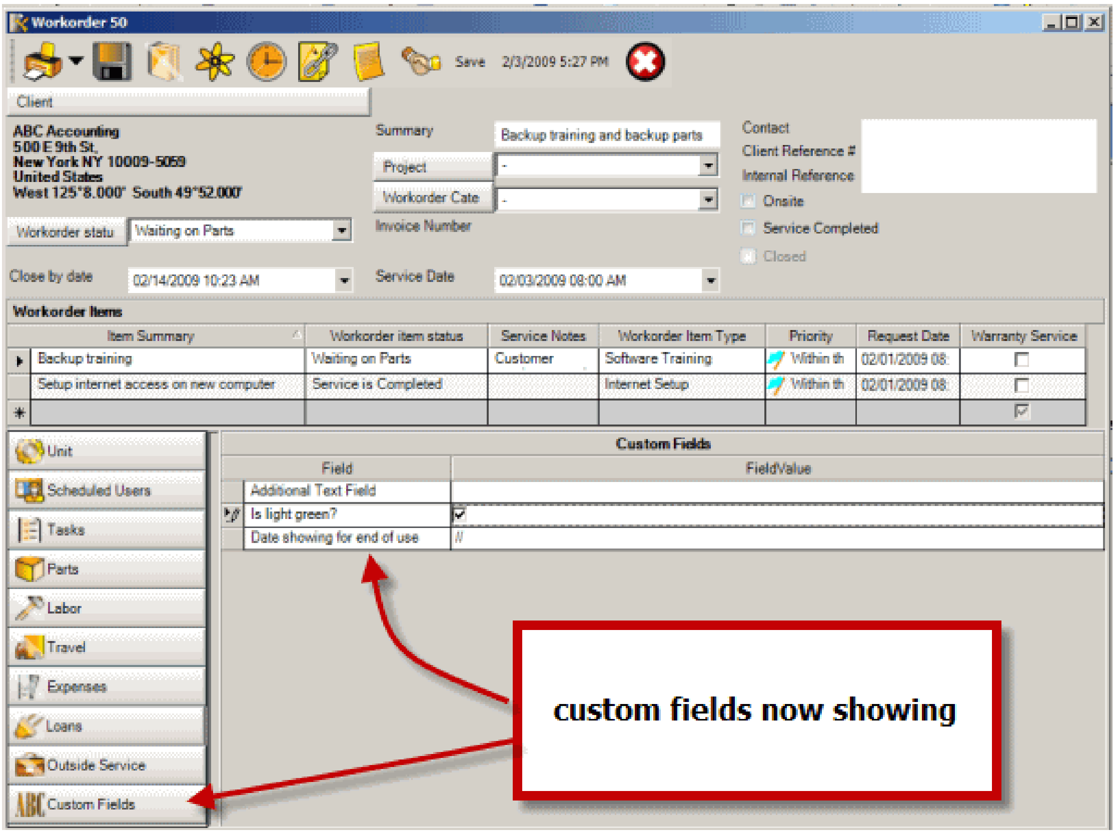
6. Enter the custom display text for Custom0 as **Additional Text Field**, for Custom1 as **Is Light Green?**, and for Custom2 as **Date showing for end of use**

7. Select the menu option to Save & Exit



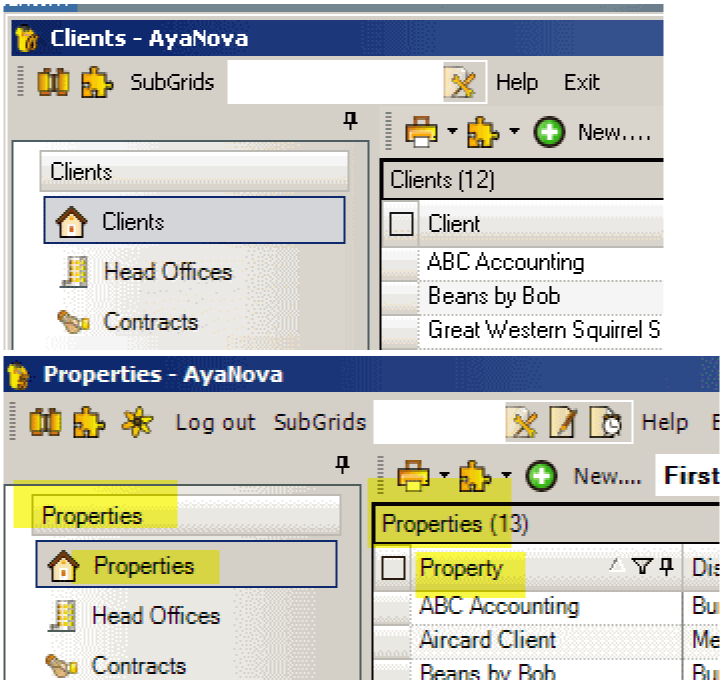
8. As localization is loaded when **the user first logs into AyaNova,** you will log out of AyaNova, and log back in

9. Now open a Service Workorder again and you will see that there is now the Custom Fields subsection. Select it and see that those custom fields labeled with that data type set are there.



10. If you wish the Workorder Item to no longer display custom fields, return to the Custom Field Design in the Administration pane, select the business object Workorder Item, and uncheck the Visible columns, save and exit.

6.35 Create new custom locale using Localized Text Design



In this tutorial we will go through the steps to create a new locale and then customize it so that labels in AyaNova display as you want them to.

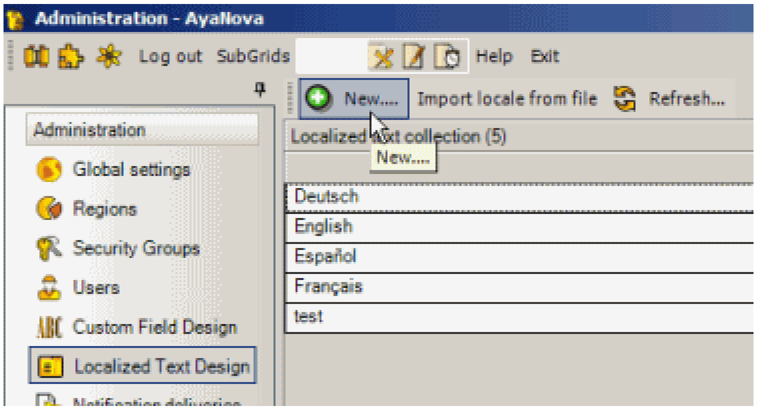
- Localization is not just for different languages.
  - For example, you may be in property management service and want what is labeled as *Clients* or *Client* throughout AyaNova to display as *Properties* or *Property* instead
  - Or another example, you may provide internal IT service for a single company, and want to identify the IP address, Operating System etc in the unit screen for each computer and have that information available for reporting from a service workorder report so want the the fields presently labeled as Text1, Text2, Text3 in the Unit entry screen to be labeled as IP Address, Operating System etc.
- It is highly recommended that you review this Help file's entire section on Localized Text Designer section for complete overview , suggestions on use, tips on use and more.
- You must be logged into AyaNova for this tutorial as a user with full access to the Administration navigation pane Localized Text Designer and Users such as the user *test* or the AyaNova Administrator user *manager* if using the sample data

There are 4 major steps:

1. Creating a copy of the existing English locale
2. Edit the newly created locale
3. Assign users to use the newly created locale
4. Log in and see the new labels

1. Creating a copy of the existing English locale

1. Select the menu option New… from the [Localized Text Design]() menu toolbar



2. Select the source to copy from, and the new locale's name

   a. Select the source locale **English**

   b. Enter in a descriptive name for the custom locale – so that it is easy to know what to select when selecting it for each user within AyaNova.

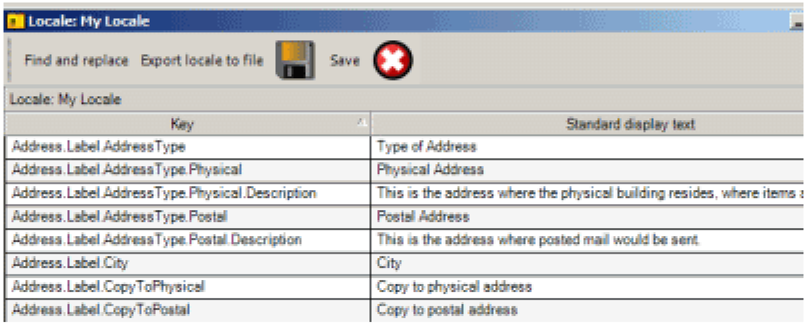
      i. The name field is restricted to no more than 15 characters.

      ii. In our example, we entered **My Locale**

   c. Select OK

3. Be patient while it copies all master localized text to this new locale name

4. Your custom Locale now displays.

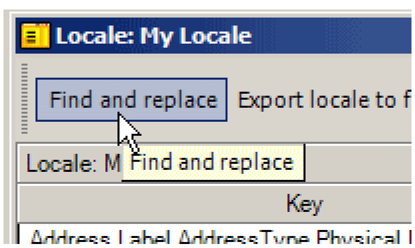


2. Edit the newly created locale

5. A quick way to replace specific text, is to perform a search for it, and replace it with the new text.

   a. For example, if we wanted to replace throughout AyaNova all instances of the text label Client with the text Property even when it is part of another label (for example "Client reference #"), perform the following:

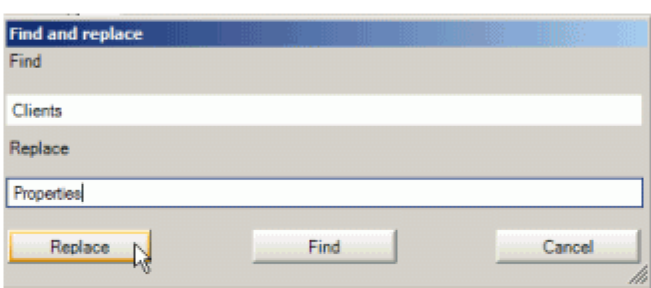
   b. Select the menu option Find and Replace



   c. Enter in the text Clients in the **Find** field

   d. Enter in the text Properties in the **Replace** field

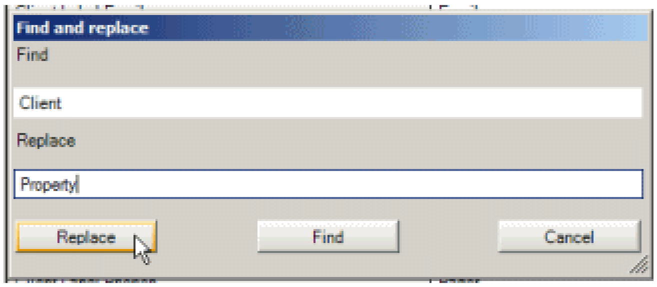
   e. Select Replace

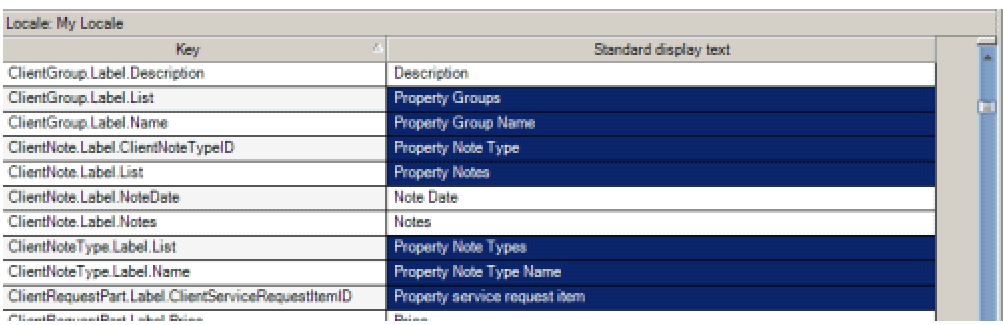


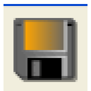
f. If you then scroll down through the grid, the fields that were replaced will be highlighted so you can see

g. You can of course just use the Find option, so that you can manually edit each individually.

h. Now do the same steps as above but for the text Client to be replaced with the text Property





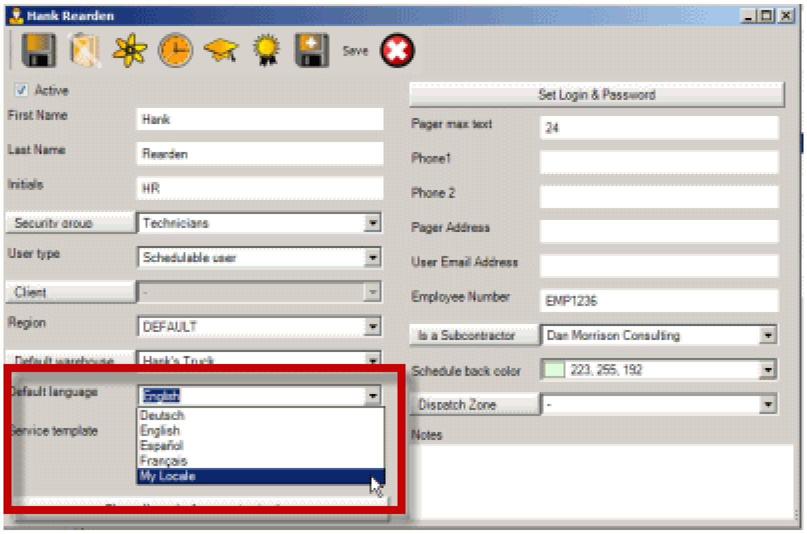
i. Save & Exit  out of the new locale

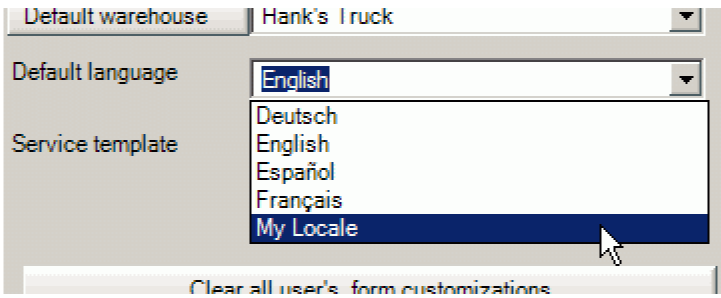
3. Assign users to use the newly created locale

6. Now that your custom locale has been made, edited and saved, you now need to identify each user to use that custom locale

7. Move to the Users grid in the Administration navigation pane

8. Open up a user's entry screen, and edit its Default Language to the newly created locale you just made





9. Save & Exit out of the user's entry screen

10. Continue for every user that you want to use this custom locale

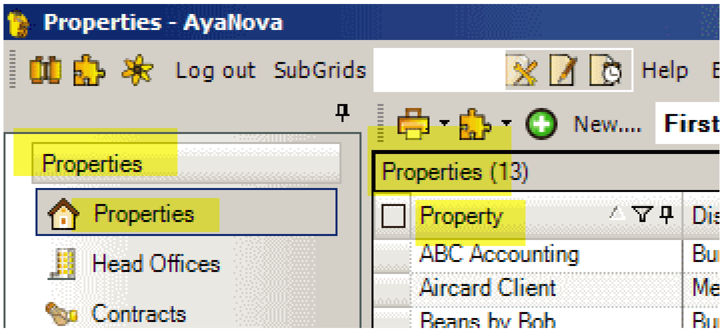
11. Make sure each user exits out of AyaNova and logs back in - as a change in locale **does not take effect until** the user **has completely exited** and then next logs in. This is because localized text for labels is loaded **only** when the user first logs in.

12. Also you can set the Default Language in Global Settings to this new custom locale so any newly created users will default to using this new custom locale

4. Log in and see the new labels

13. Exit out of AyaNova and log in as one of these users that you changed the Default Language to the newly made custom locale

14. You will see that what used to be called the Clients navigation pane is now called the Properties navigation pane



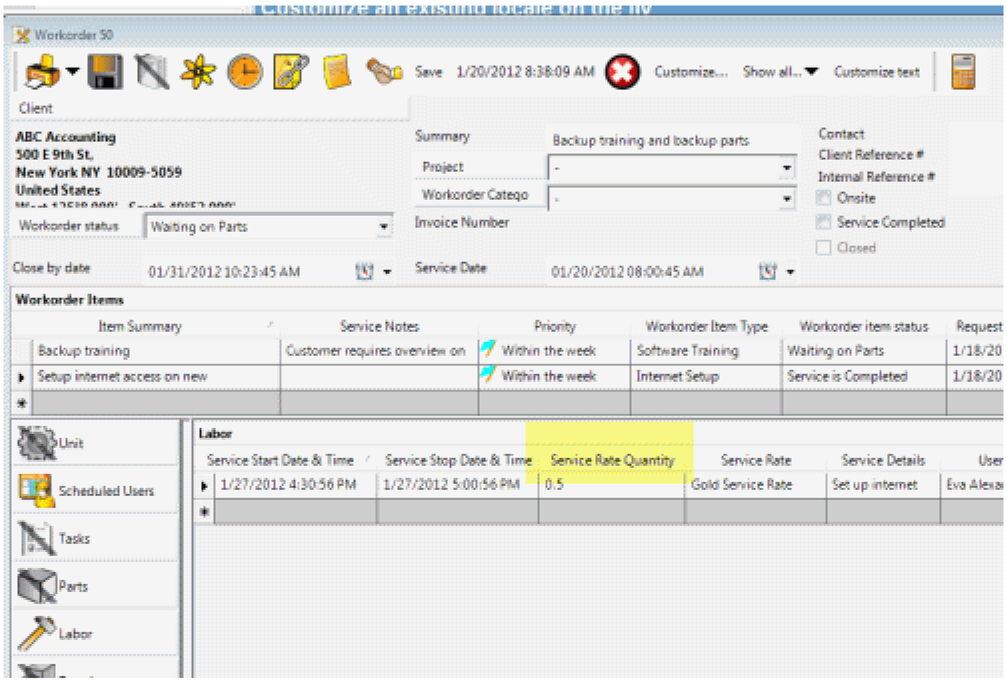
15. Open up a Property entry screen (used to be Client entry screen) and you will see that what used to be called Client Name is now called Property Name

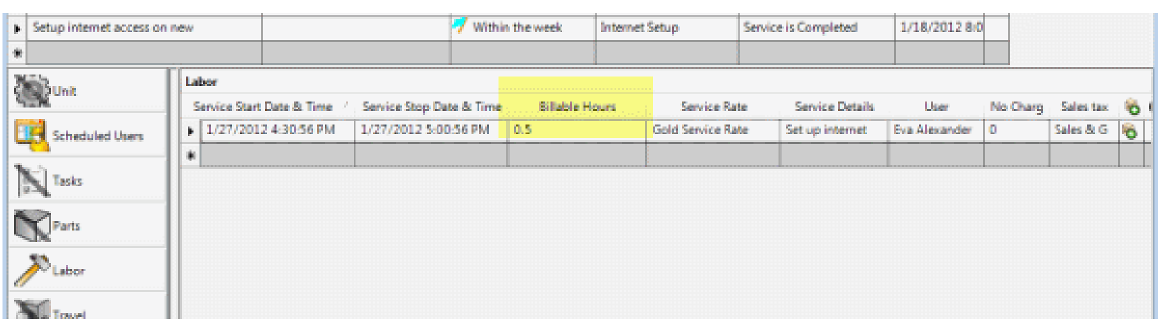
16. Open up a service workorder. You will see that what was previously labeled as the Client jump button is now labeled as Property

6.36 Customize an existing locale on the fly

In this tutorial we will go through the steps to customize an existing locale "on the fly" so that the labels you are seeing of that entry screen display as works best for your company.

For example, you may want what is default labeled as Service Rate Quantity in the Labor subsection of a workorder to instead be labeled as Billable Hours





There are 5 steps:

1. **Log in as the AyaNova Administrator**
2. **Select the Customize text... menu option at the top of the entry screen**
3. **Find the existing text listed**
4. **Edit the existing text**

5. [Exit out of the entry screen]
6. [Open up the entry screen to see the change]

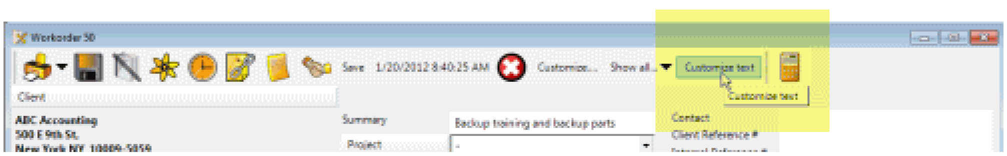
1. Log in as the AyaNova Administrator

Only when logged in as the AyaNova Administrator will the menu option to Customize text... will show

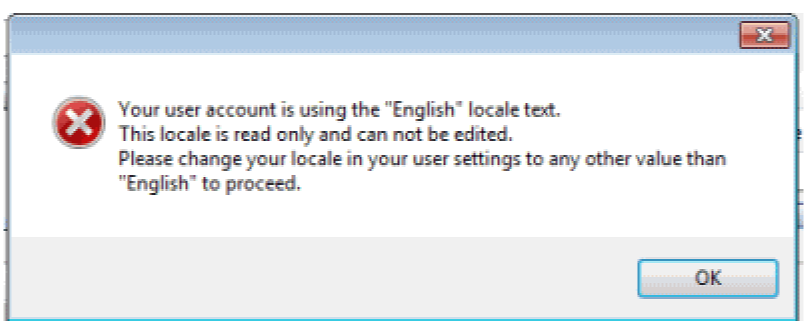
2. Select the Customize text... menu option at the top of the entry screen

Select the menu option for the entry screen's text labels you want to edit.

In this tutorial we want to edit what is default labeled Service Rate Quantity, so we will open a service workorder entry screen and select the menu option **Customize text**



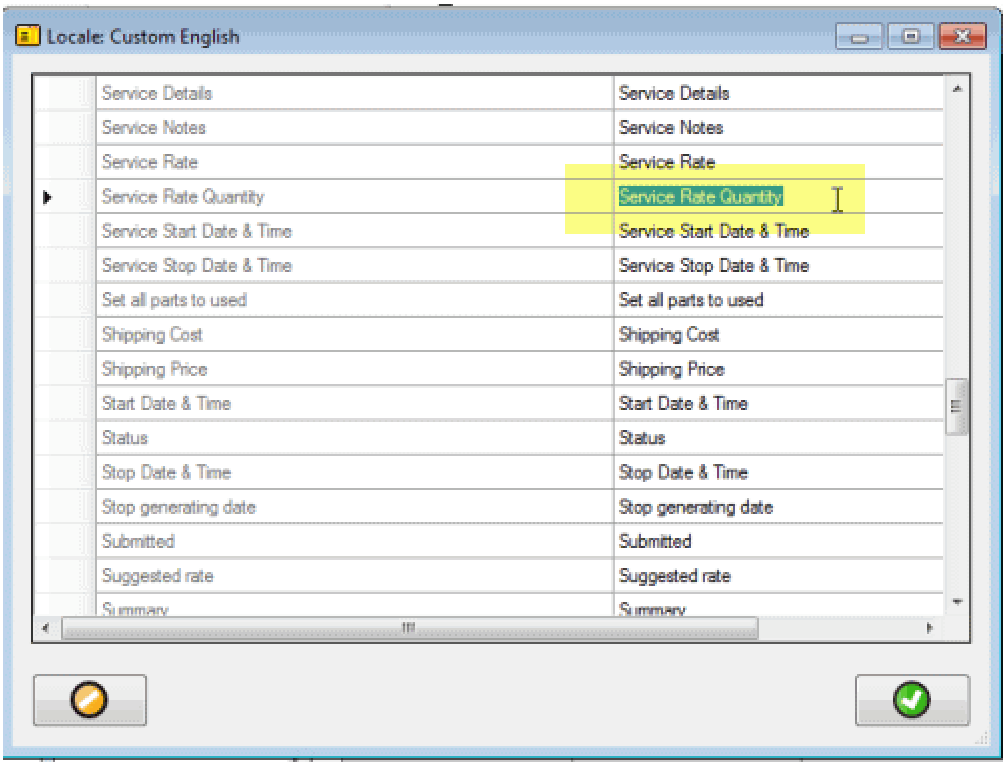
If you receive an message below, you MUST edit your user account via the User grid under Administration selecting a custom locale that has been created instead.
You will need to **first** follow the [tutorial on creating a new locale and assigning it to your user account] first. Than you can come back and perform this tutorial.



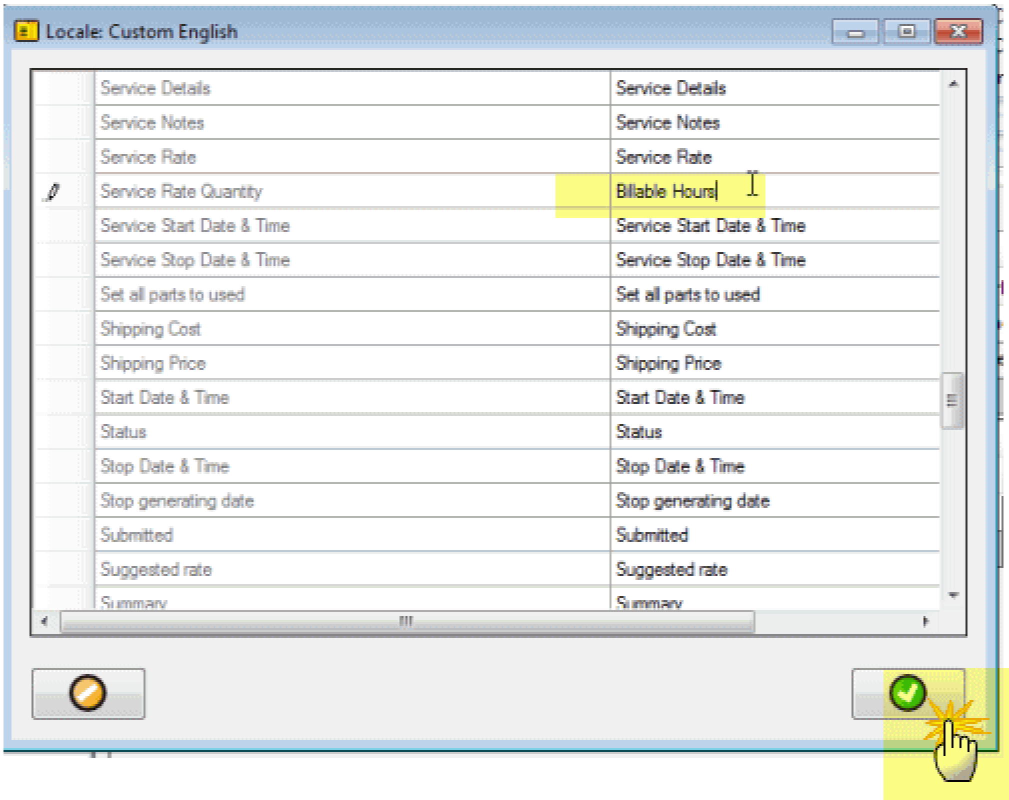
3. Find the existing text listed

The existing label text is listed in alphabetical order.

Just scroll through the listed labels and find the existing label text.



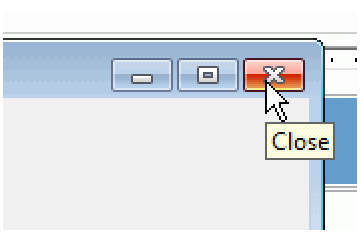
4. Edit the existing text and save



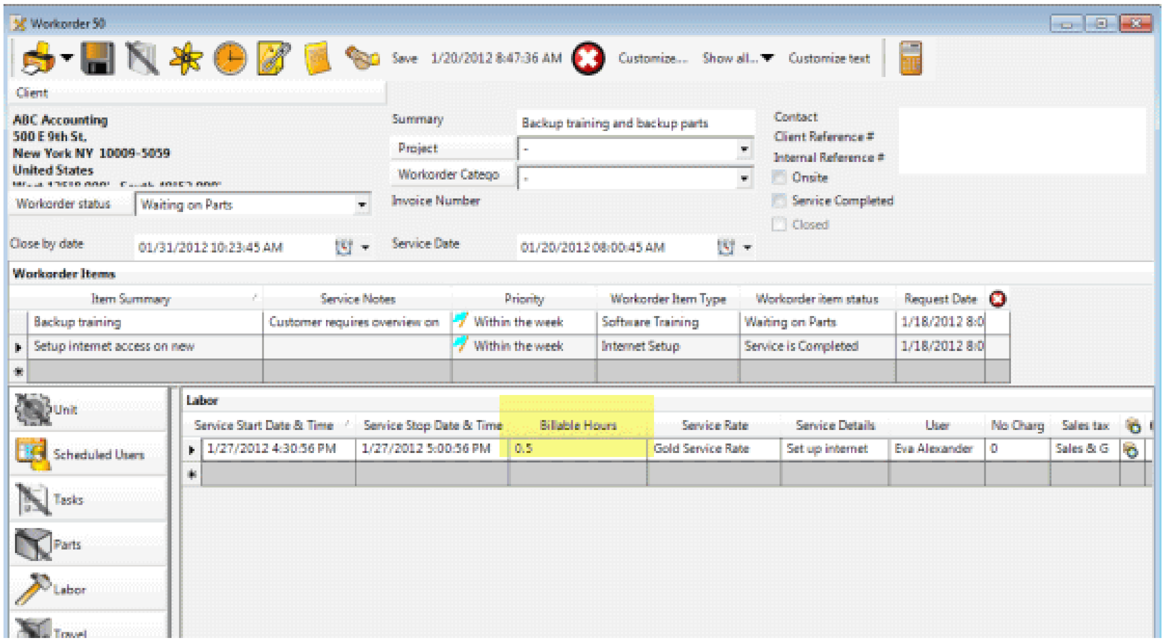
5. Exit out of the entry screen

The new text label will **not** show **until** you have exited out of the entry screen.

And if you have edited the text label for the main AyaNova navigation grids, you will need to exit out of AyaNova itself and then log back in.



6. Open up the entry screen to see the change


Workorder 50
Save 1/20/2012 8:47:36 AM
Customize...
Show all...
Customize text
Client
ABC Accounting
500 E 9th St.
New York NY 10009-5059
United States
Summary
Backup training and backup parts
Project
Workorder Catego
Invoice Number
Contact
Client Reference #
Internal Reference #
Onsite
Service Completed
Closed
Workorder status
Waiting on Parts
Close by date
01/31/2012 10:23:45 AM
Service Date
01/20/2012 08:00:45 AM
Workorder Items
Item Summary
Service Notes
Priority
Workorder Item Type
Workorder item status
Request Date
Backup training
Customer requires overview on
Within the week
Software Training
Waiting on Parts
1/18/2012 8:0
Setup internet access on new
Within the week
Internet Setup
Service is Completed
1/18/2012 8:0
Unit
Scheduled Users
Tasks
Parts
Labor
Travel
Labor
Service Start Date & Time
Service Stop Date & Time
Billable Hours
Service Rate
Service Details
User
No Charg
Sales tax
1/27/2012 4:30:56 PM
1/27/2012 5:00:56 PM
0.5
Gold Service Rate
Set up internet
Eva Alexander
0
Sales & G

6.37 Change the starting workorder number?

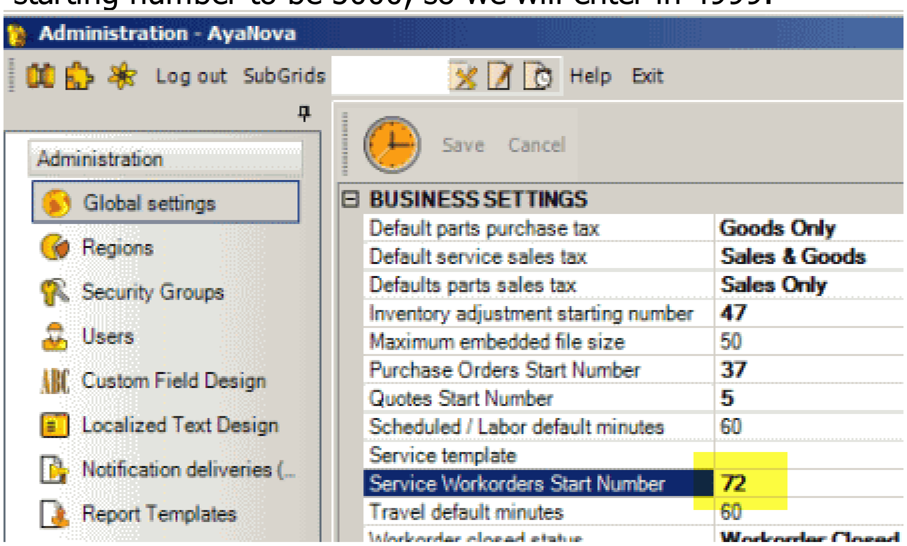
This tutorial walks through the steps to change your Service Workorder number going forward.
Once steps have been completed, note that you can not change to a lower number.

- It is recommended that you review this Help file's section on Workorder Numbers
- It is recommended that you review this Help file's section on Global Settings

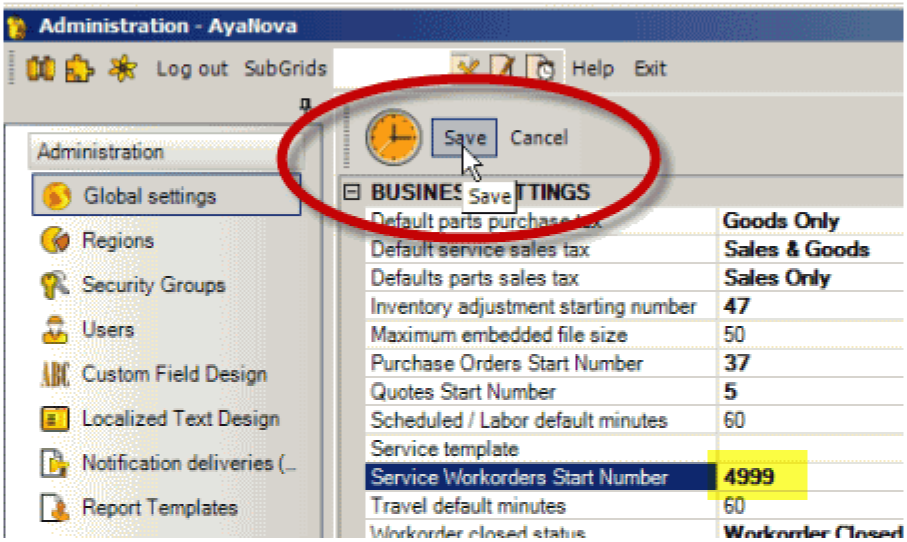
1. As recommended in the section, have all other users out of AyaNova

2. Log into AyaNova as the AyaNova Administrator

3. Edit the Global Settings field Service Workorders Start Number to a number just before your starting number you want. For example, in this tutorial we want our starting number to be 5000, so we will enter in 4999.

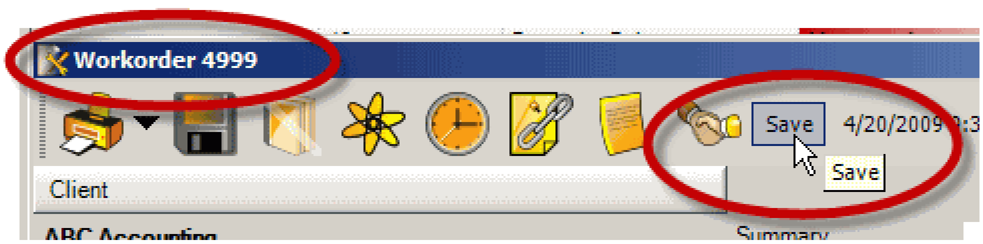


4. Click on the Save menu option for Global Settings.



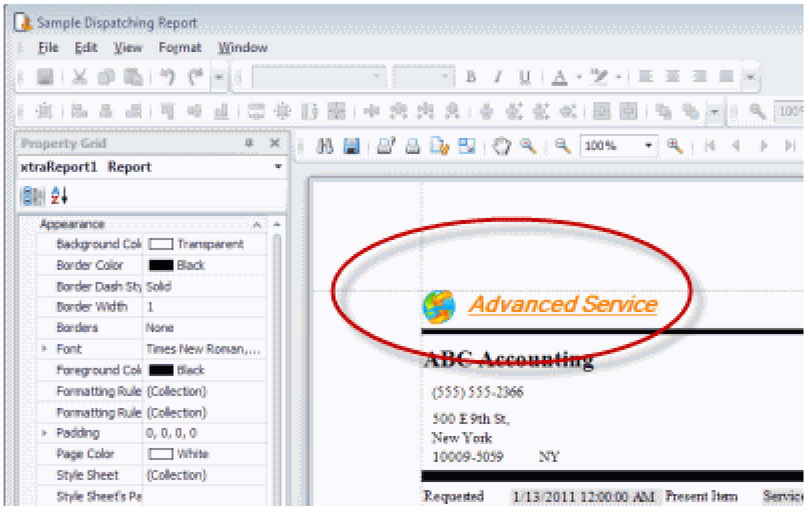
5. Now immediately go to the Service Workorders grid in the Service navigation pane and create a new workorder.

6. Save the workorder - you will note that this workorder number is 4999.



7. You can now delete this workorder, and allow other users back into AyaNova. The next workorder saved will be number 5000.

6.38 Put my company logo on a report template



In this tutorial example, we will go over the basic steps of putting your logo image into a report template.

- This is a very basic overview only, and does not cover every field and its use of the Report Template designer
- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- Of course, screenshots in any of these How do I...?'s tutorials may not be exactly as in your database as dependant on your data, grid layout, etc
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

1. From the Schedule screen, open a scheduled service workorder item by double-clicking on it so that you are viewing its service workorder entry screen.

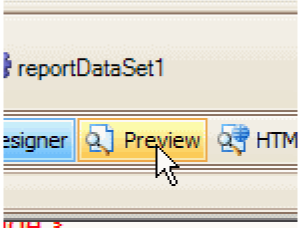
   This way we are viewing an existing workorder that definitely is scheduled.

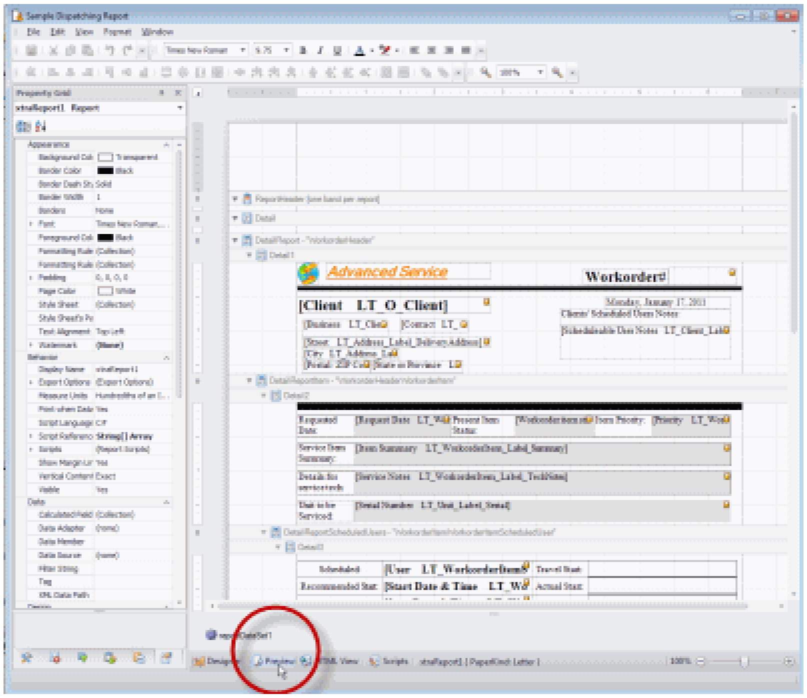
2. Now we want to open an existing report template in the Report Template Designer so that we can customize it.

Select the  Print menu option from the top of this workorder's entry screen, hold the **SHIFT** key on your keyboard, and select the **Sample Dispatching Report** report template.

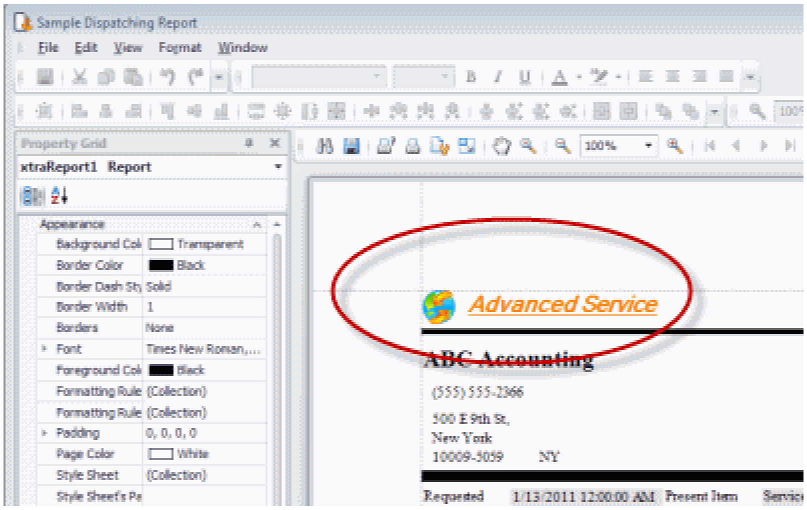
Note that it may take longer the very first time a report is opened for editing or preview since AyaNova was started as certain elements are not loaded in memory until they are required. Subsequent loads will be faster.

3. The internal report designer opens for this report template. Lets preview the existing report template before we begin
4. Click on the Preview link at the bottom of the design panel



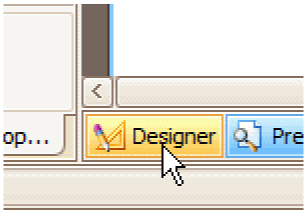


Note the sample company logo and name at the top



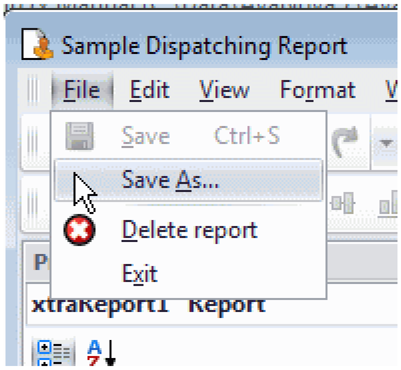
5. In this tutorial, we want to change the sample company logo and name to our own company logo and name. Remember, this is just an example to show you how to put your logo image into a report template - you will of course have a different logo image, or may be customizing a different report template, and may have your company name and logo combined in one image.

6. Select the Designer link at the bottom of the design panel to return to the design area of the internal report designer.

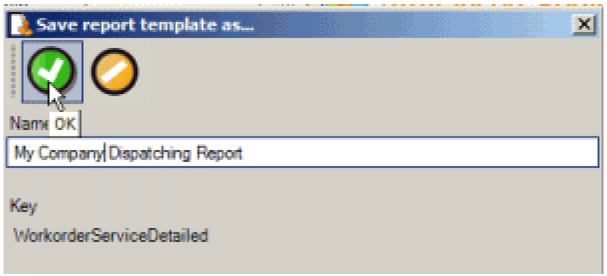


7. Although you do not have to make a copy to be able to customize an existing report template, it is recommended to do so if there is a problem with your customization, you can delete your customized report template and start again with a new copy.

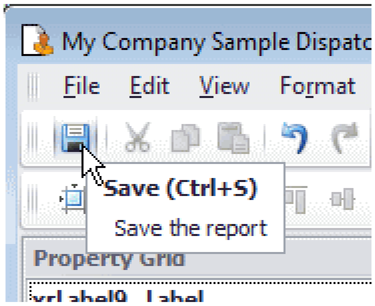
8. Select the menu Report, and select Save As…



9. Prefix the report with **your** company name and select OK to use this name



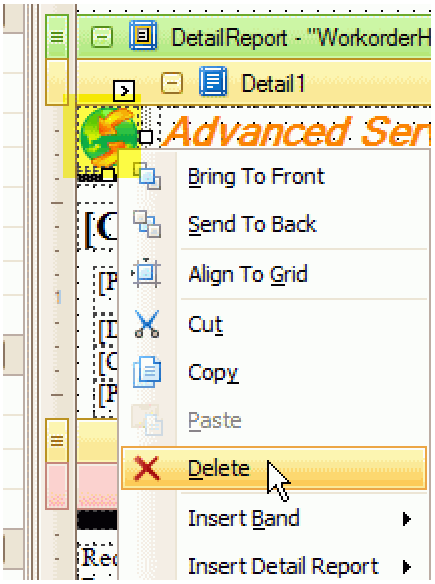
10. Don't forget to click on the Save button every so often while working in a report template, so that your changes are saved



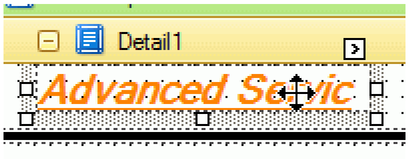
11. We will replace the existing logo with another image, and change the text for the company name.

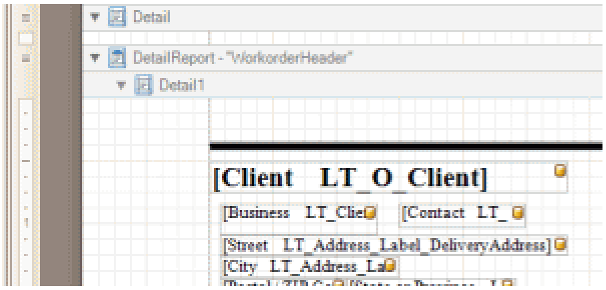
12. Remove the existing image and company name text

13. In the Design Panel, click on the existing logo image, right-click and select Delete

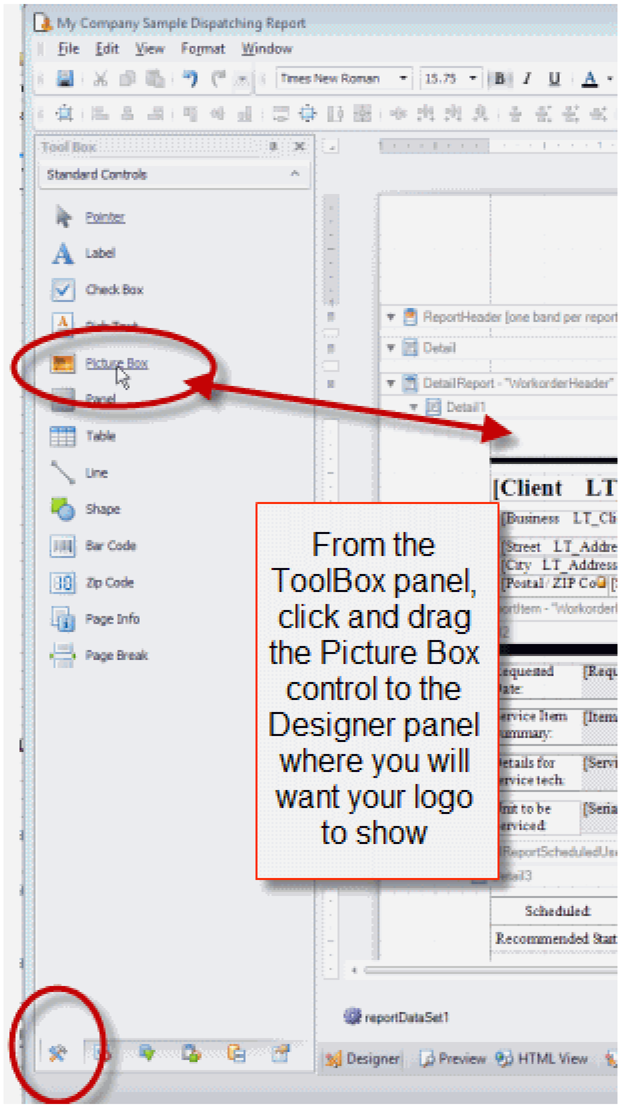


14. Click on the existing company name text and press the Delete key on your keyboard

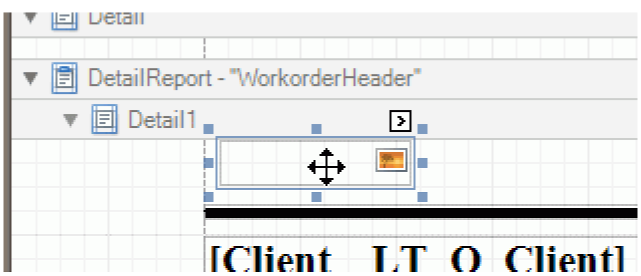




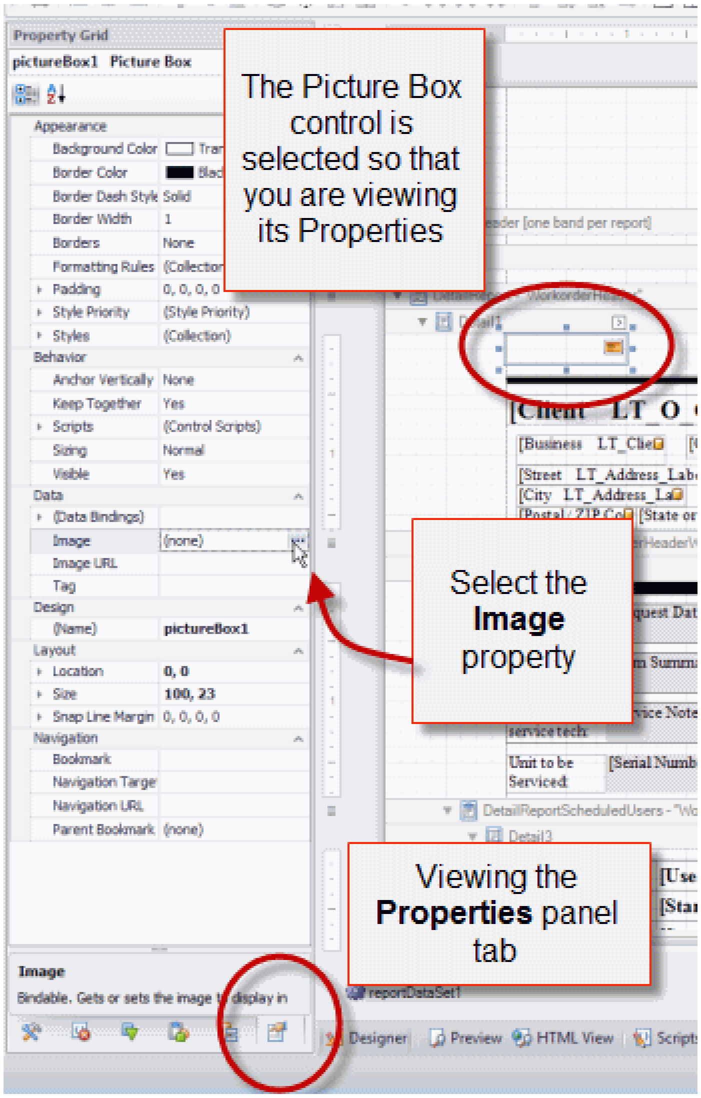
15. Select the Toolbox tab on the bottom left, select the PictureBox control and drag using your mouse onto the Design Panel



16. As you drag, your mouse turns into a  symbol until you drop the control onto the design panel

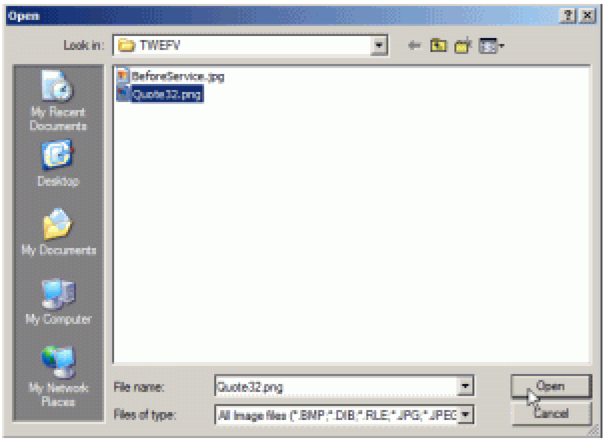


17. With that control you dragged over still selected, select the Properties panel tab, and select within the Image field to to open the window to select your image file you want to show on this report template.

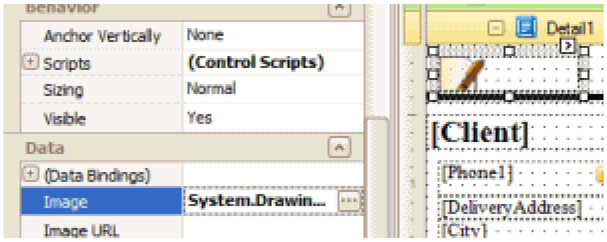


18. Move to the location of your image and select it. Click Open (do note of course that your selection will be different, as well as the location will be different)

    It is recommended that before selecting the image file, that you already have it's dimensions sized to fit how you will want it on the report template via an image manipulation program.
    For example, do not select an image file that is 1000 x 500 bytes, as it more then likely will also be quite large in MB size which can affect how fast your report will print. Instead, resize the image in a utility which will make it smaller in size in dimension as well as bytes.



19. The image is now bound to the PictureBox control

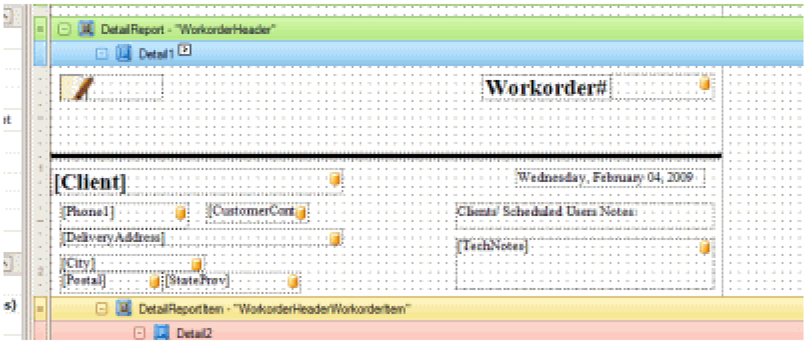


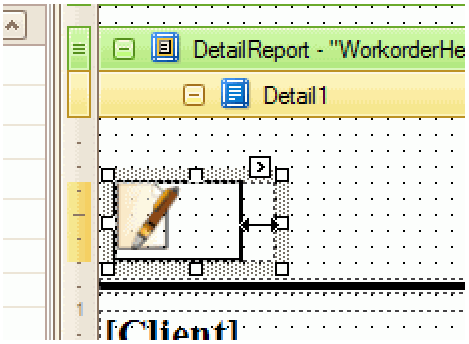
20. You may need to edit the PictureBox size to match the size of the actual image you have bound it to.

    You could also use the Sizing property in the Behaviour area to center, zoom, etc.

In the screenshot below we have moved all other fields down further in the Detail1 area so that our image shows properly and does not overlap other controls we wish to place here.

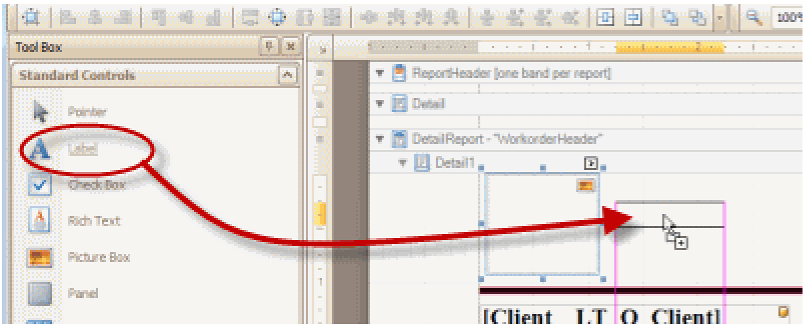
Easiest way to move a bunch of fields at once, is to use your mouse, the CTRL key and left click button to select all of the fields at once, and then use your arrow on your keyboard to move the fields down or up or sideways etc



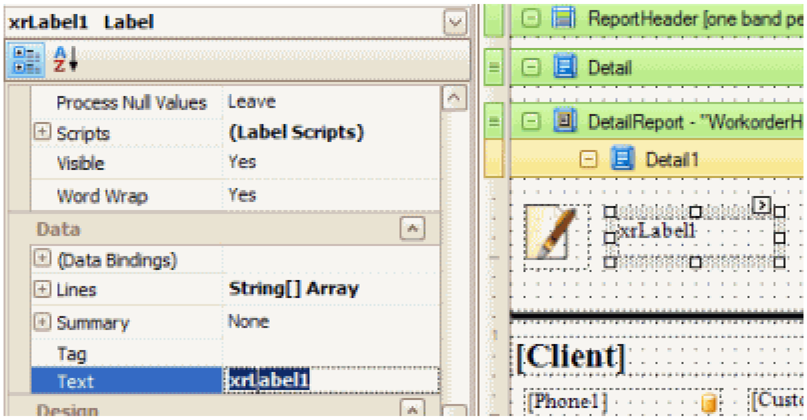


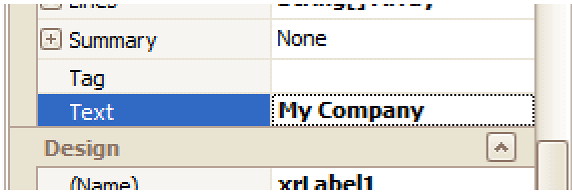
21. You may also want to include text, or your image may already have text in the image. In this tutorial we will add the company name as actual text beside the image.

22. Select the ToolBox tab, select the Label control and drag onto the Design Panel and drop onto the location beside the image.



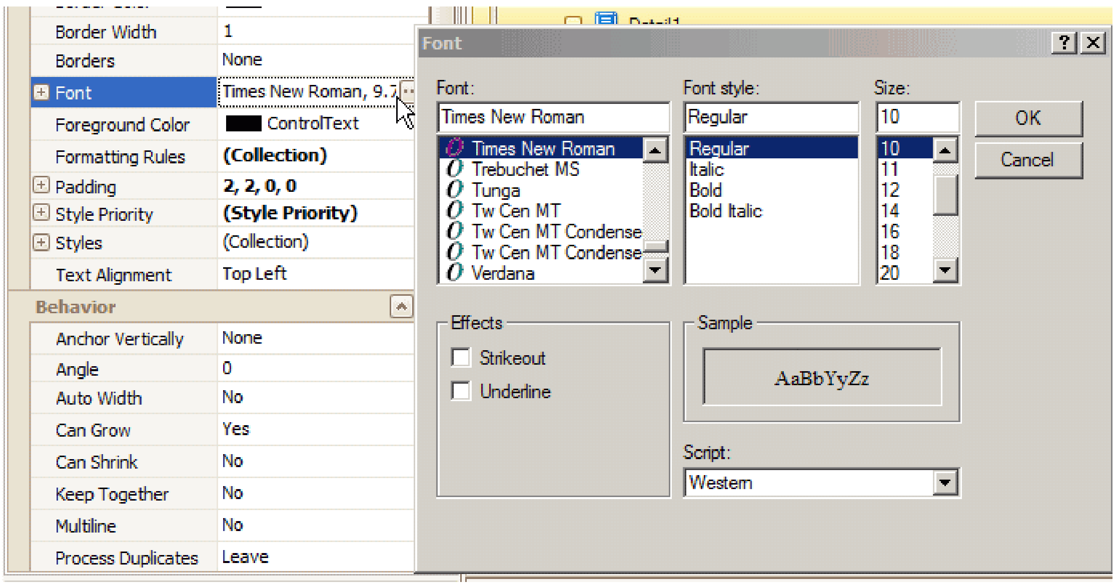
23. Select the Properties tab, with this label control still selecting, enter in the Text property field your company name. In our tutorial, we will enter in **My Company Name**





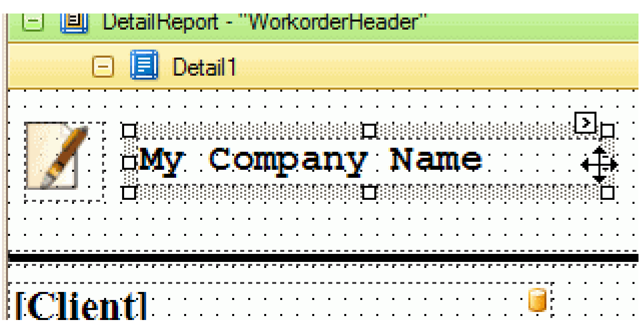
24. As in this tutorial we want this text to display in a different font, plus a larger size, we need to edit the properties of this label field.

25. Select the browser button for the Font property field for this selected label control to open up the Font properties

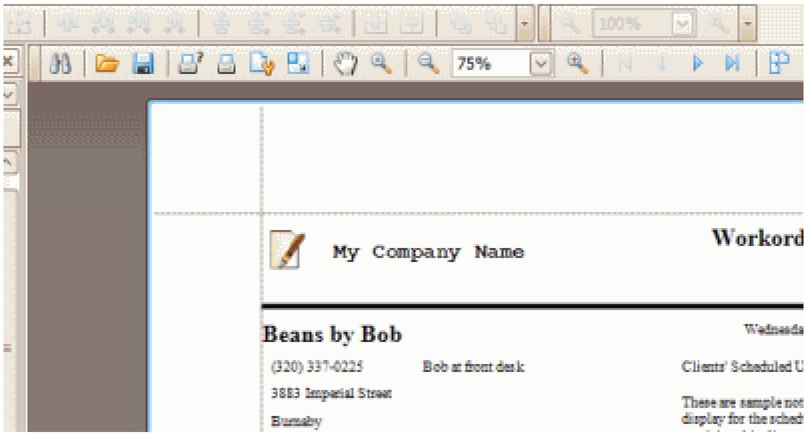


26. Change the font such as to **Courier New**, Bold and size 14, and select OK

27. If you view the label control, you will note that some of the text is cut off. Resize the label control to display all the text by hovering your mouse over the left side and click and drag

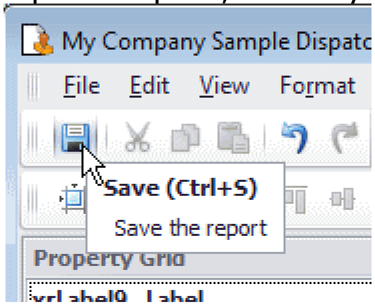


28. Select Preview link from the bottom of the Design Panel so you can see what this looks like on an actual report.



29. Make any additional changes to sizing, location, etc and Previewing so you can see what the result is before saving.

30. Don't forget to click on the Save button every so often while working in a report template, so that your changes are saved



31. Your custom report template is now selectable from the Service Workorders grid, and from within a service workorder entry screen.

6.39 Add additional datafields to a report template

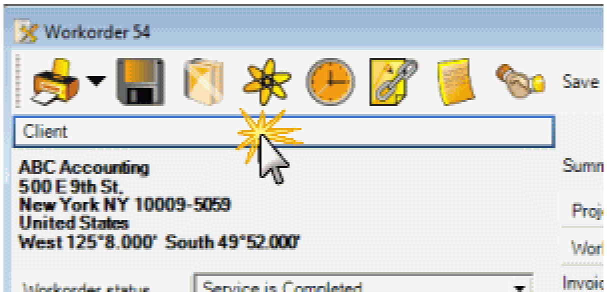
In this tutorial example, we will edit an existing sample report template so that it displays additional fields.

In the Sample Dispatching Report, in addition to the existing data that shows, we want the Other Contacts datafield from the Client's entry screen to show, and the Part Warehouse to show instead of the Serial Number, and we want to force the Price to always display in US dollars regardless of the regional settings of the computer in use.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- Do note that you can only have fields display in a report template if they are available from that report templates dataset - you can not add additional datafields to a dataset if they are not there. For example, you can not have additional fields from the Unit entry screen display on a report from the Service Workorders grid except for those that are in the Service Workorder report template dataset.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

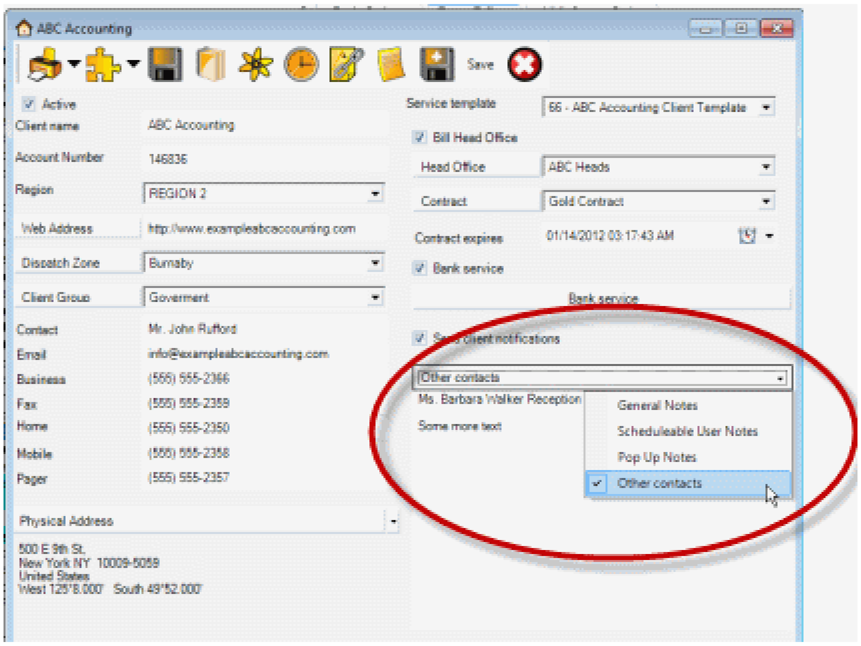
1. Confirm there is text in the Other Contacts field of the client am viewing.

   a. View the client entry screen of a workorder by selecting the Client jump button



   b. The client's entry screen opens

c. View the Other Contacts field - enter text if there is nothing yet there.



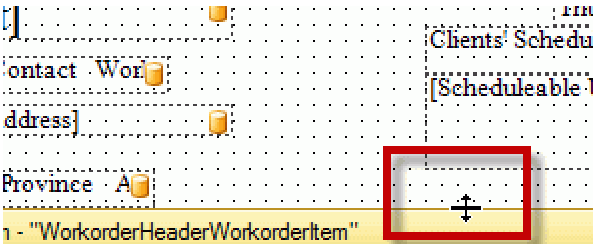
d. Save & Exit which will return you to the service workorder.

2. Now open the report template you customized in the **previous tutorial** the copy of the the **Sample Dispatching Report** - via the Report Designer (hold the SHIFT key and select the report template via the Print menu option)

3. In this tutorial, we want to have the Other Contacts field from the Client entry screen display under the Schedulable User Notes on the report.

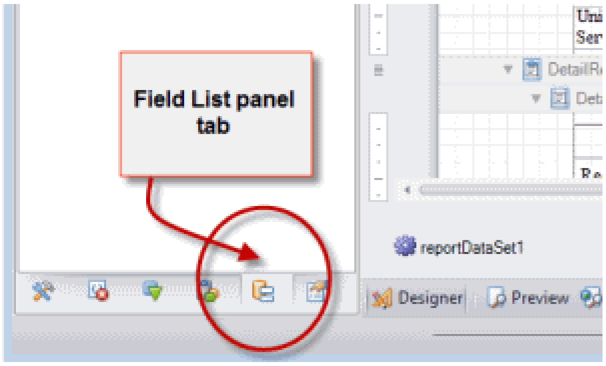
   a. First we need to make more space in the WorkorderHeader detail area so that we can place th*Other Contacts* datafield

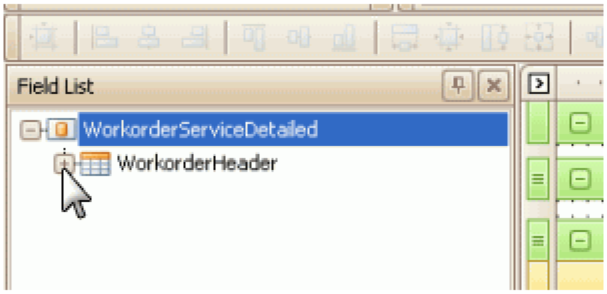
   b. Adjust the height of the WorkorderHeader detail area by clicking and dragging on the bands - you will note that your mouse changes as you click and drag



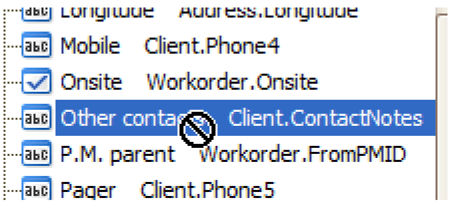
   c. Now that we have space, we will drag the Other Contacts datafield onto the design panel where we want to place it.

d. Select the Field List panel tab on the right and expand the WorkorderHeader dataset.

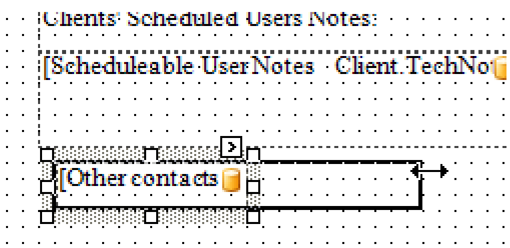




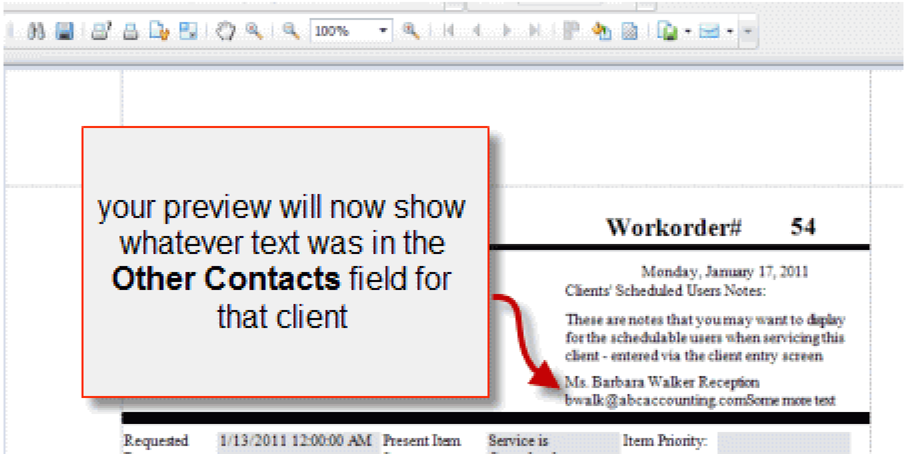
e. Scroll down, drag the Other Contacts datafield onto the design panel where you want to place it



f. Resize the datafield so that it is wider fits under the Scheduled User Notes



g. Preview so that you can now see how this field looks in the report

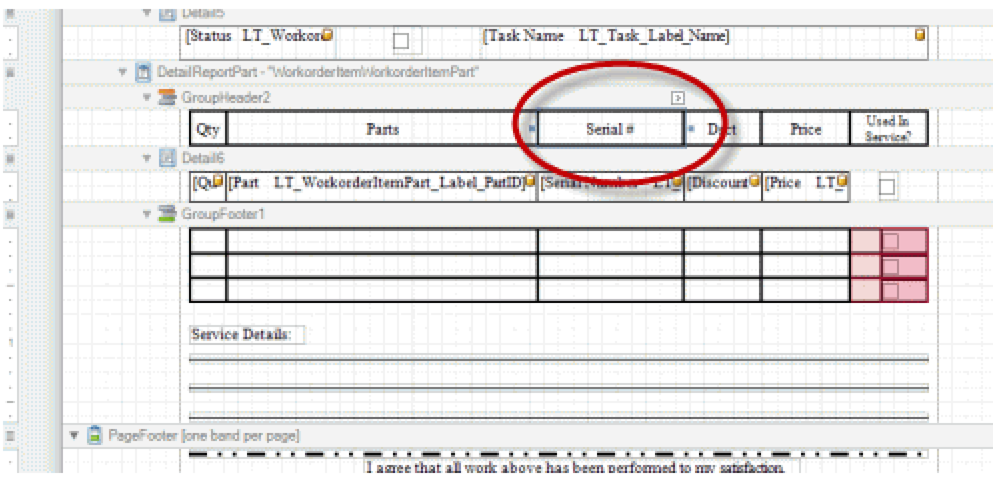


h. Return to the design panel

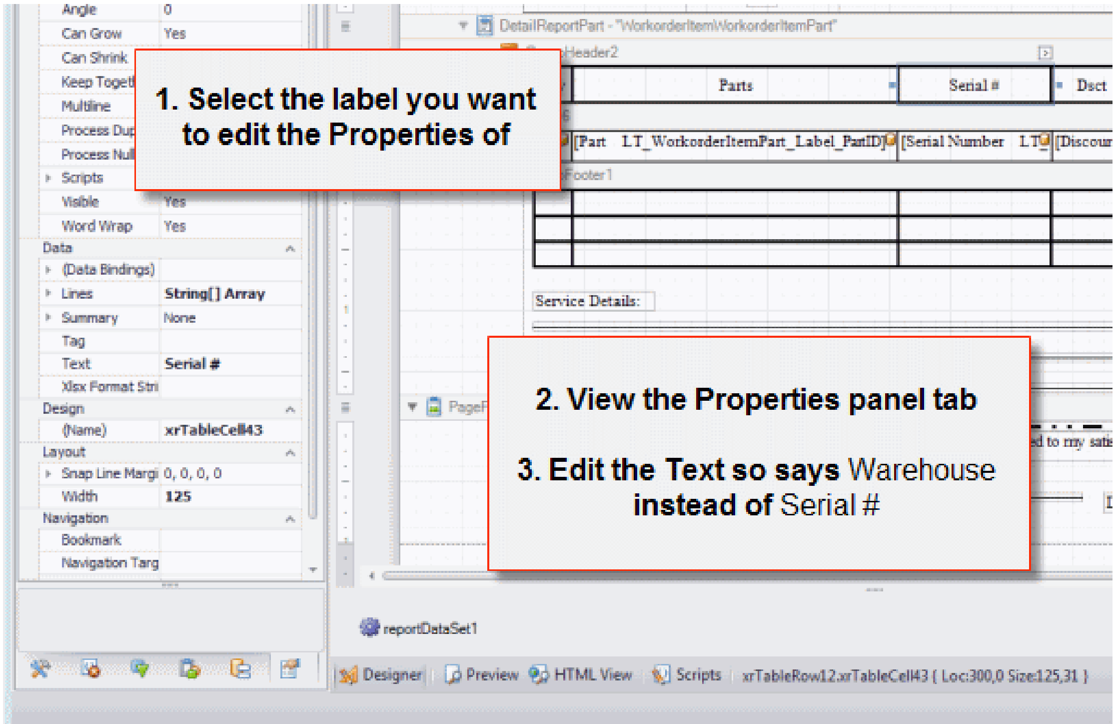
i. You can also adjust other properties of this label - such as Multi-line, font size, etc

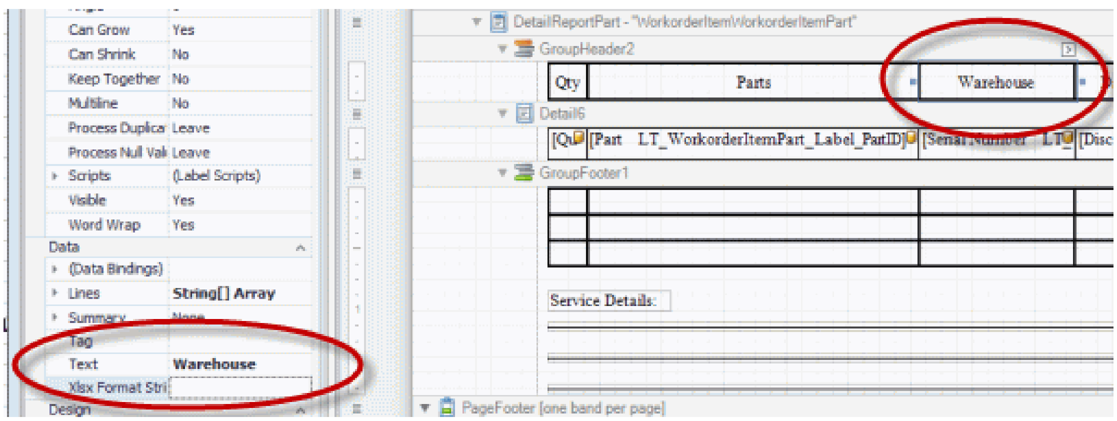
4. And also in this tutorial, we want to add the Part Warehouse to display in the part section of the report for each selected part instead of the Serial Number.

   First let's edit the text label in the GroupHeader band where it presently labels **Serial #** to **Warehouse.**



a. Click on the label itself, and view the Properties tab for it, and edit the Text property to say **Warehouse** instead of Serial #





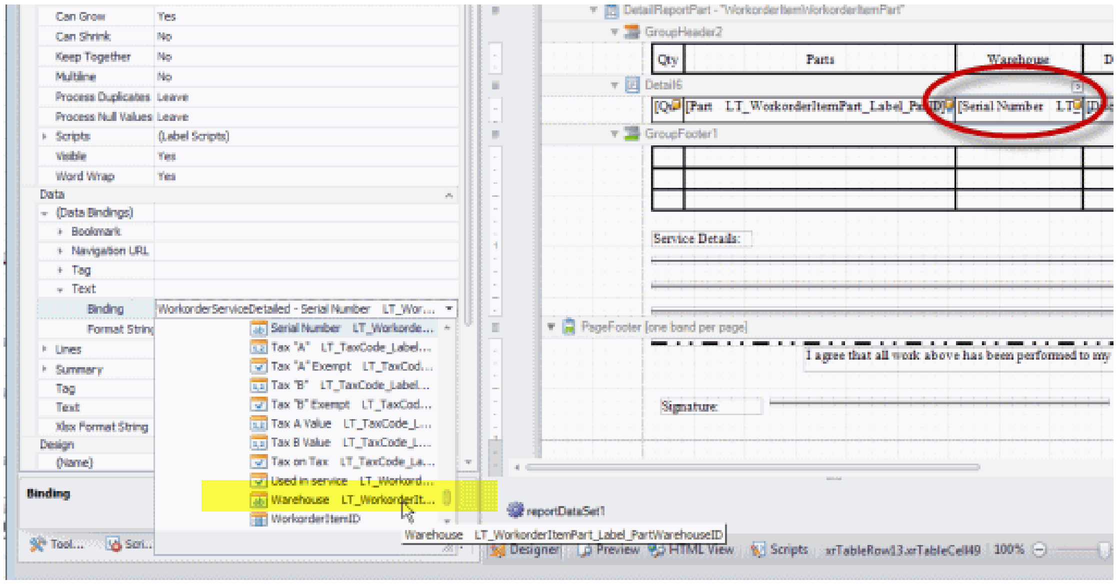
5. Now we will change the table field in the Detail band from being bound to the Serial Number datafield and bind it instead to the Part Warehouse datafield

   a. Select the Serial Number datafield in the table in Detail6

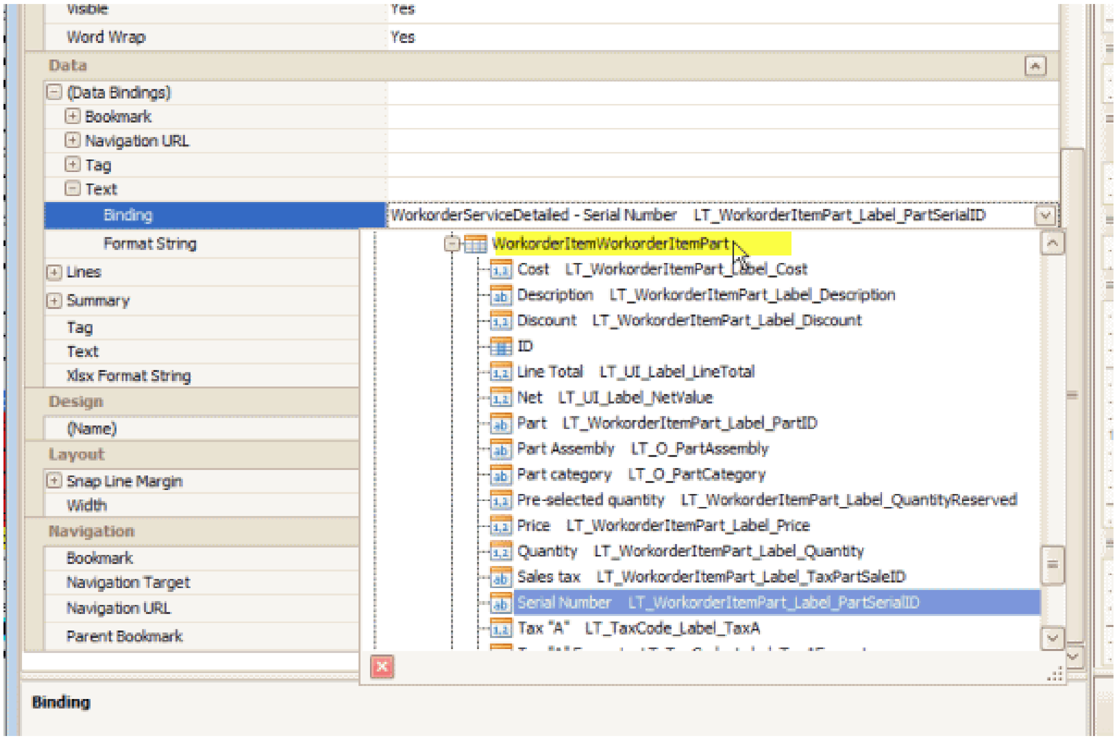
   b. View the Properties tab if not already showing

   c. Expand the (Data Bindings) property, and the Text Binding property

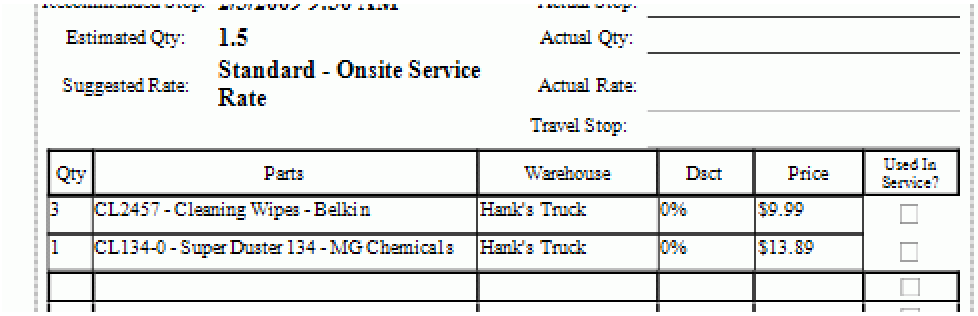
d. Drop down the selection for this Binding, and select the Warehouse datafield



e. You will have noted when you dropped down the Binding, that the selection was already "within" the dataset for WorkorderItemWorkorderItemPart - same as where the DetailReportPart band on the design panel is bound to. You only want to select datafields specific to that bound dataset so that data displays correctly on your report.

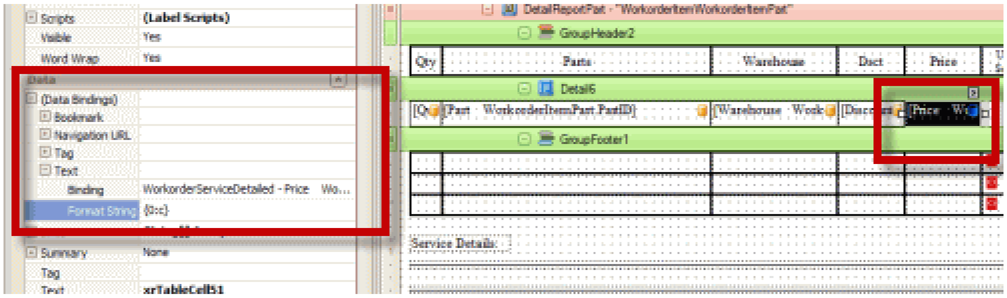


f. If you Preview now, you will see that the part section of the report will now display the Warehouse the part was selected from instead of the serial number.

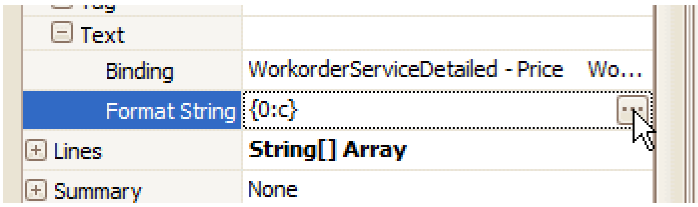


6. Now we want to check and see what the Price datafield is formated for showing.

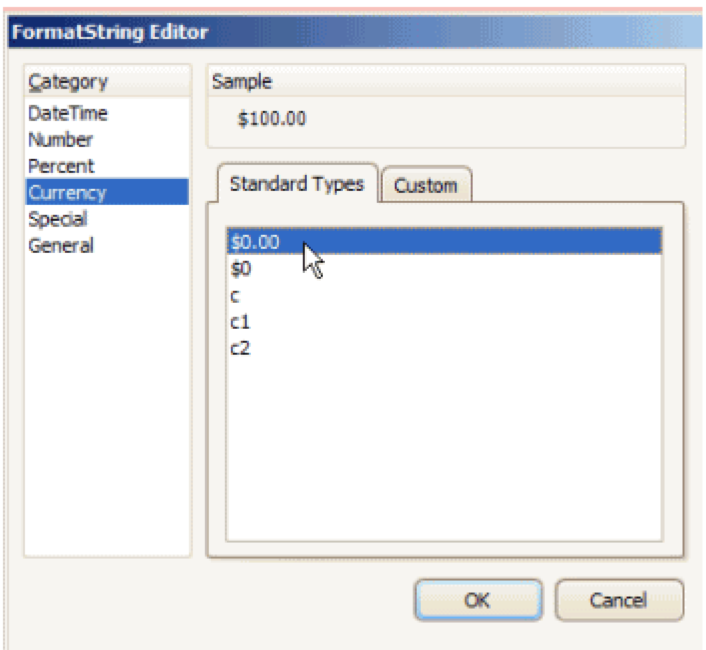
   a. Select the Price datafield, view the Properties tab for it, and expand the (DataBindings) property -> Text -> Format String

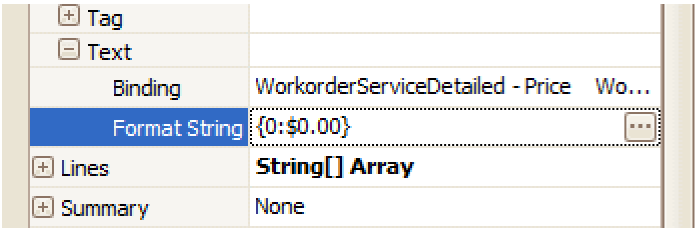


b. Right now the Format String is using the string {0:c} which tells the report template to use your computer's Regional settings to display the currency symbol



c. In this tutorial, we want it to be forced to always show as $ regardless of the regional settings of the computer accessing the data, so we click on it to bring up the FormatString editor and select $0.00





d. Preview

7. Save and exit out of the report template

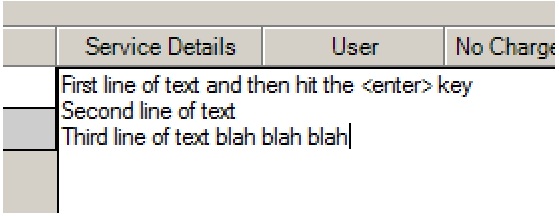
8. Congratulations - you have completed adding additional datafield to an existing report template, and changing an existing field to be bound to a different datafield.

6.40 Display multiline text with carriage returns in reports?

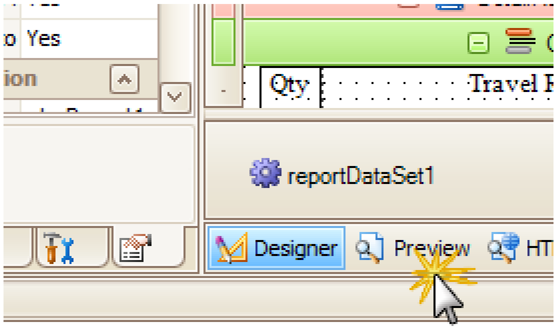
In this tutorial example, we will edit an existing sample report template so that text in a multi line field displays in the report as shown when viewing the workorder itself.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.

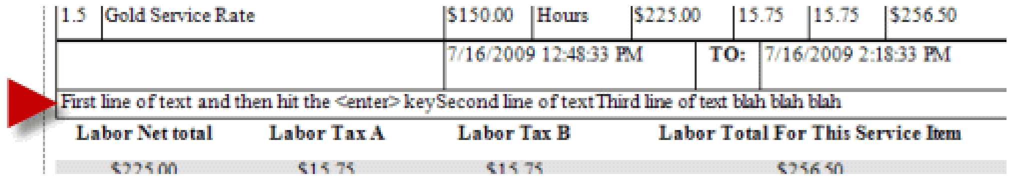
1. Open any workorder that is not yet Closed
2. View the Labor subsection
3. If a labor record is not already there, create one. Enter the following text with carriage returns so that it looks similar to the screenshot below with three distinct lines of text



4. Save the workorder
5. Now select the Print menu option, hold down the SHIFT key on your keyboard and select the **Sample Detailed Service Workorder with Grand Total** report template to open it in the Report Designer
6. Select Preview in the bottom of the report designer so that you can see what the report looks like originally

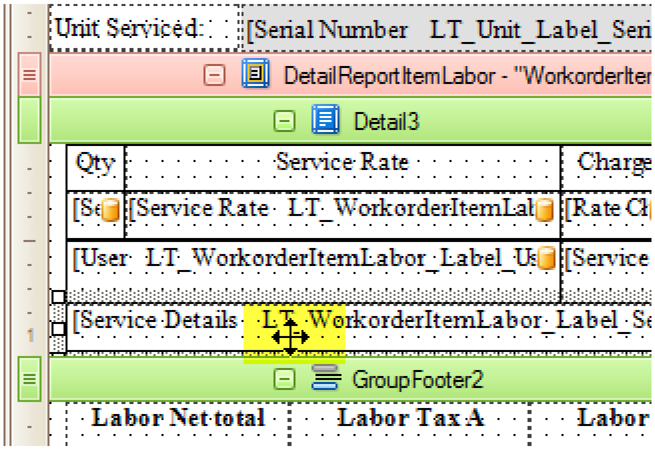


7. Note that the Service Details is not showing in the report preview as it did in the workorder itself - there are no carriage returns, all three lines are merged together without multilines



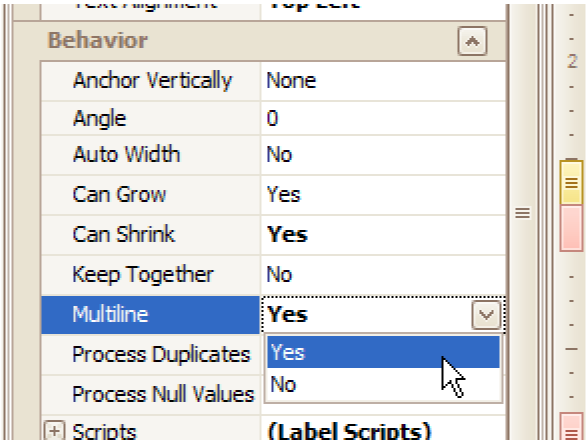
8. Return to the Designer

9. Use your mouse to click on the Service Details datafield in the design panel



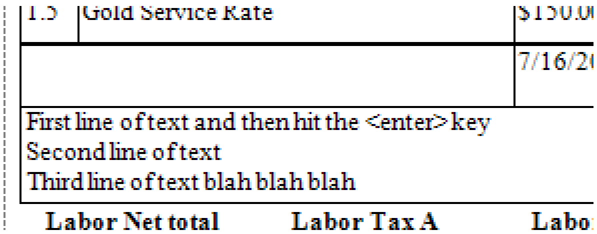
10. View the Properties tab for this datafield

11. Edit the Behaviour property MultiLine from No to Yes



12. Now click on Preview again

13. Now you will see that the Service Notes field displays just as you entered it in the workorder



14. Save your report template

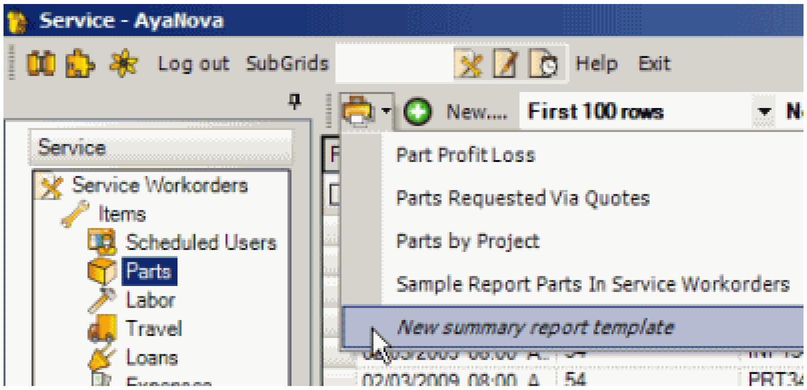
6.41 Create a report template using the Wizard

In this tutorial example, we will create a new *Summary report template* using the Wizard for the Parts grid in the Service navigation pane.

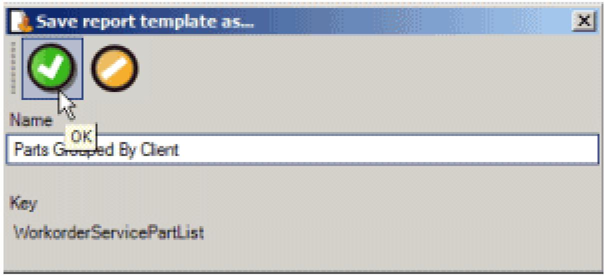
- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- You can only have fields display in a report template if they are available from that report template's dataset - you can not add additional datafields to a dataset. For example, you can not have additional fields from the Unit entry screen display on a report from the Service Workorders grid except for those that are in the Service Workorder report template dataset.
- NOTE**:** There is not an option to use the internal report designer's Wizard to create a report template for *Detailed* datasets such as a *Detailed report template* for Workorders (or PM or Quotes) because the Wizard is not able to access the many sub-sets of data that a detailed workorder (or quote or PM etc) report template has.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

In this tutorial, we want a report template to show parts used in service grouped by the client the workorder was for.

1. Select the Parts grid in the Service navigation pane
   a. Select the Print menu option
   b. Select the New summary report template to open the internal report designer for a new report template

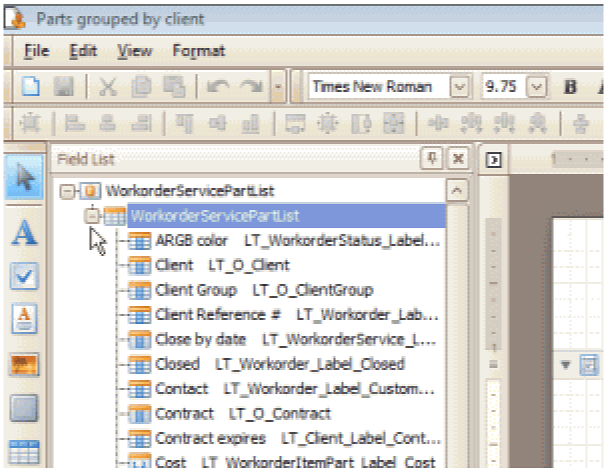


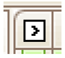
2. Enter in the report template name **Parts Grouped By Client**

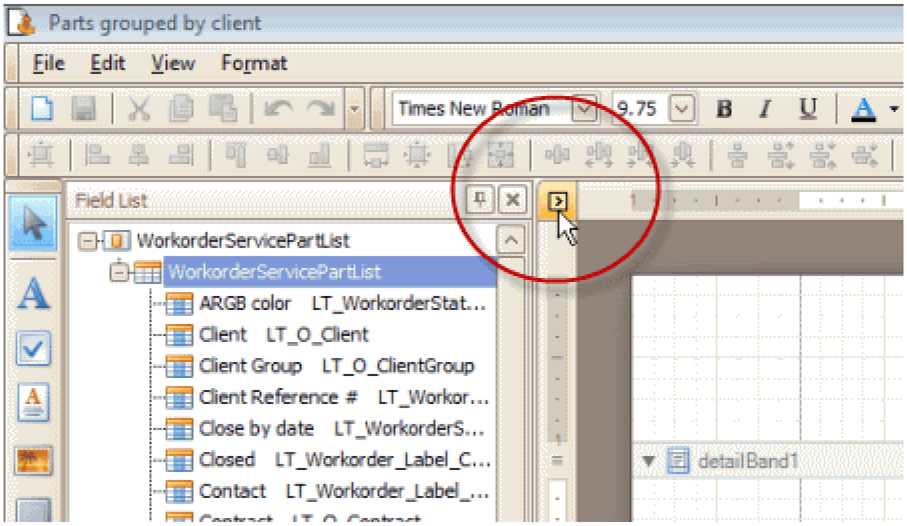


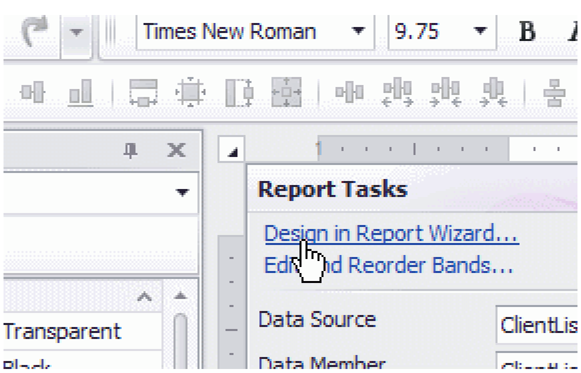
3. The internal report designer opens for a new report template

4. To see what data fields are available with this report template, select the Fields tab, and expand the dataset. This is just to show you where else you can drag the datafields from in addition to using the Wizard

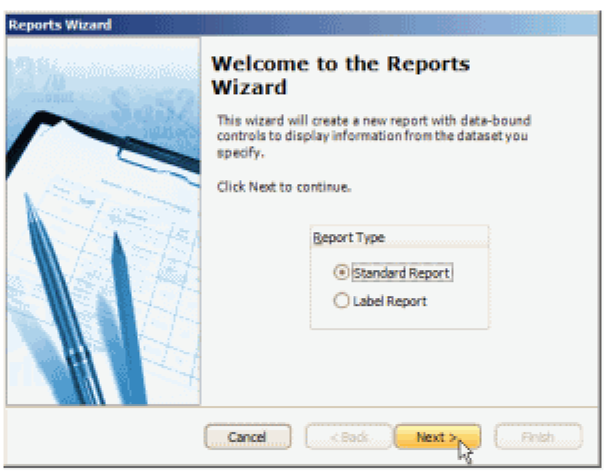


5. In the design panel, in the upper left hand corner, click on the  for a list of report tasks available for this report template, and click on the **Design in Report Wizard....**

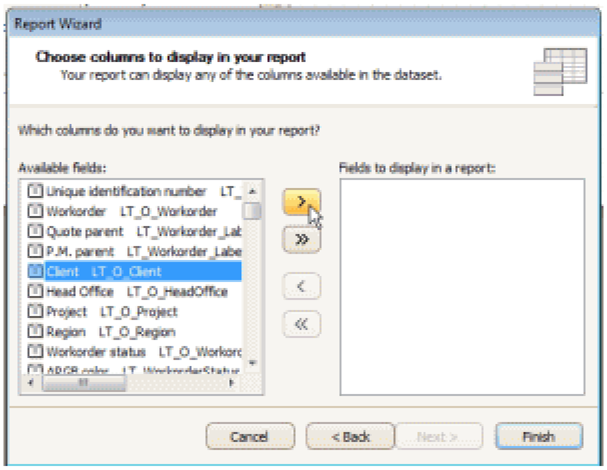




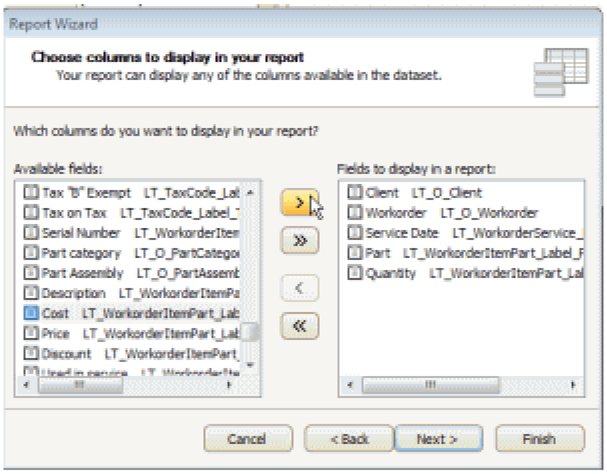
6. The Wizard defaults to Standard Report selected. Select Next >



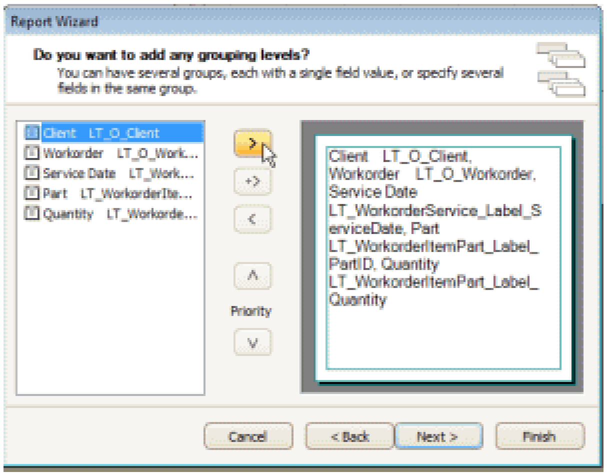
7. Now we will select the columns we want to display in the report.
8. Select Client and move this column to the right.

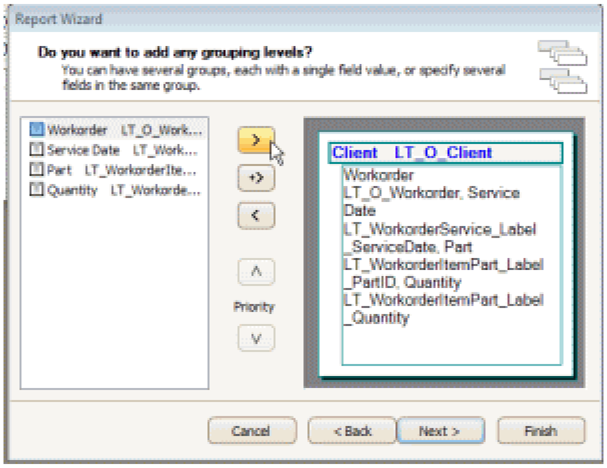


9. Do the same for Workorder, Service Date, Part, and Quantity. Then select Next>



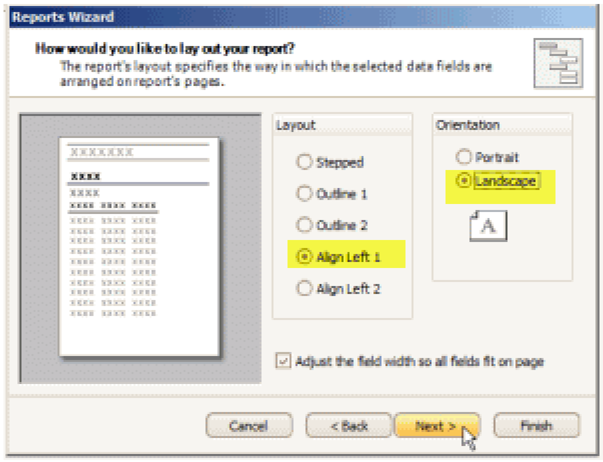
10. The next screen of the Wizard is if you wish to group by any of the selected columns. We want to group by the Client, so select Client and then Next>



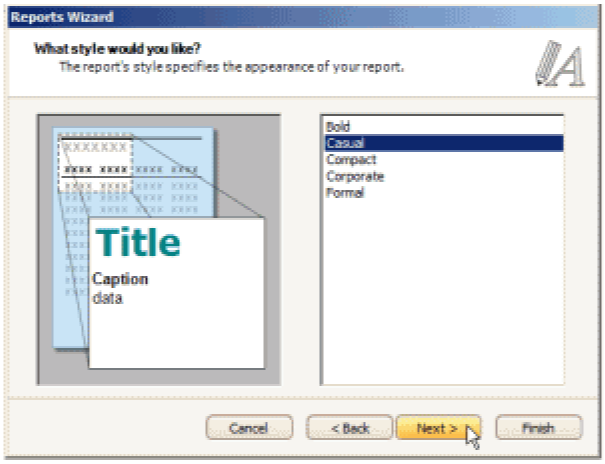


11. We will ignore summary values at this time. We do encourage you to try out different scenarios on your own. Select Next>

12. Select **Align Left 1** and **Landscape** for the layout, and select Next>



13. Select Style of Causal. Select Next >



14. Enter a title of **Parts Grouped By The Client**. Select Finish.

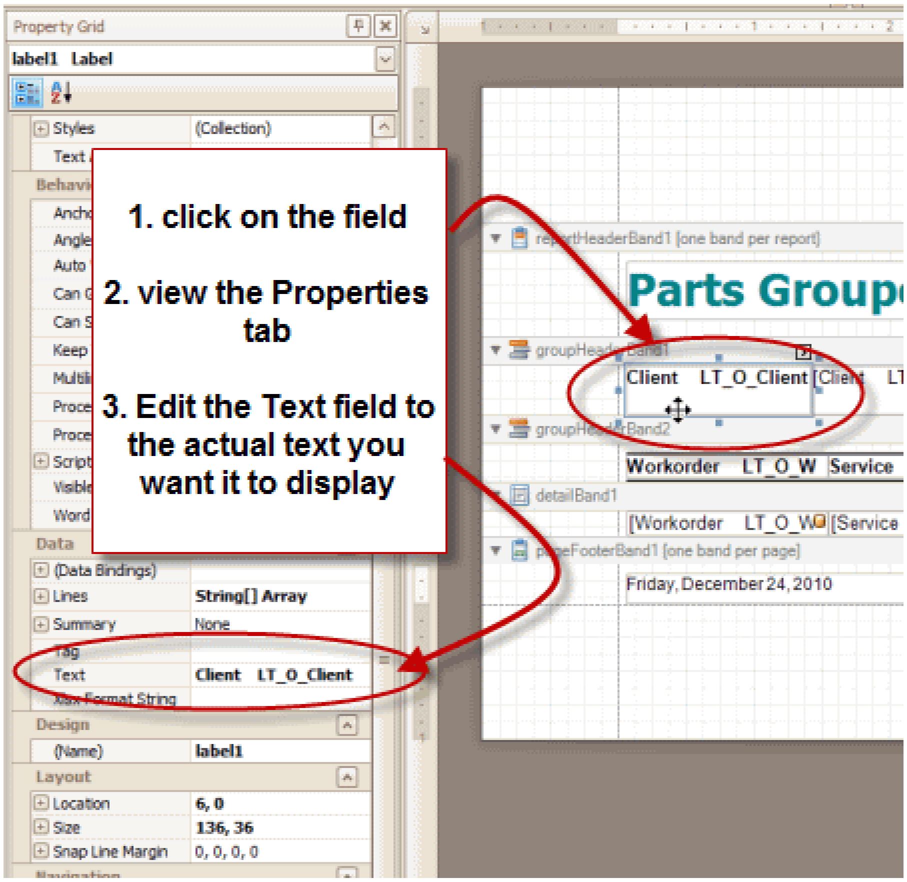
15. The Wizard takes the entered information, and creates a report template. Select Preview link at the bottom to see what the report would look like at this stage.

As you can see, the label names for data are using the localized text plus also the internal data name - so you would want to edit these. Also you might want to change font or sizing of the fields

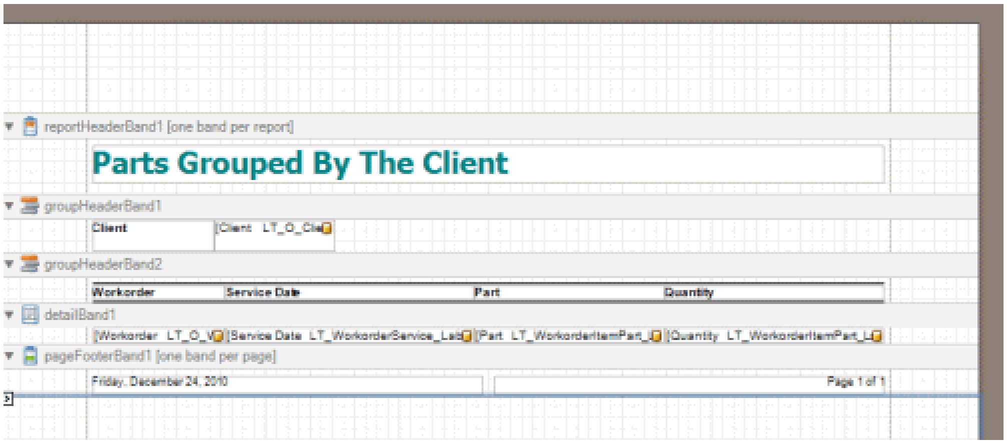
16. Select the Designer link at the bottom to return to the Design Panel.

17. Edit the labels for the group headings

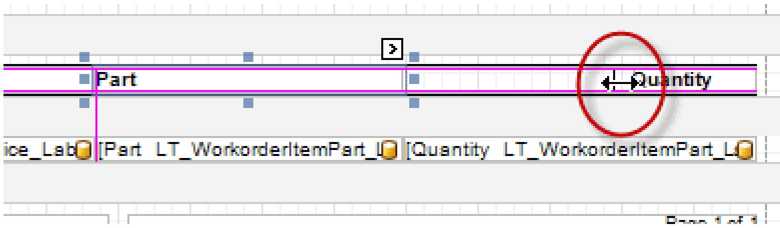
    a. Select the label control that presently has the text **Client O.Client** and edit it's Text property so that it is just labeled **Client**

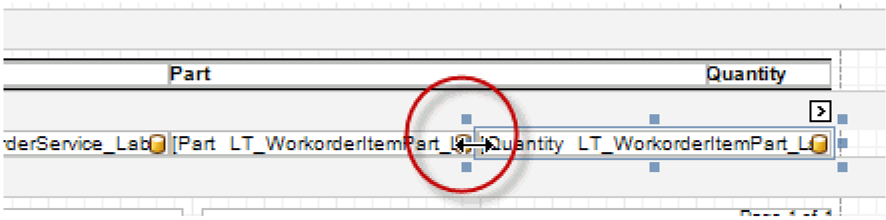


b. Do the same for the other labels such as those that are presently labeled Workorder O.Workorder etc so that the labels show with the desired text



18. There is not enough width given to the Part field, so use your mouse to click and change the width of the Quantity label first. And than click and change the width of the Part label, and than the Service Date for both the group header and for the detail

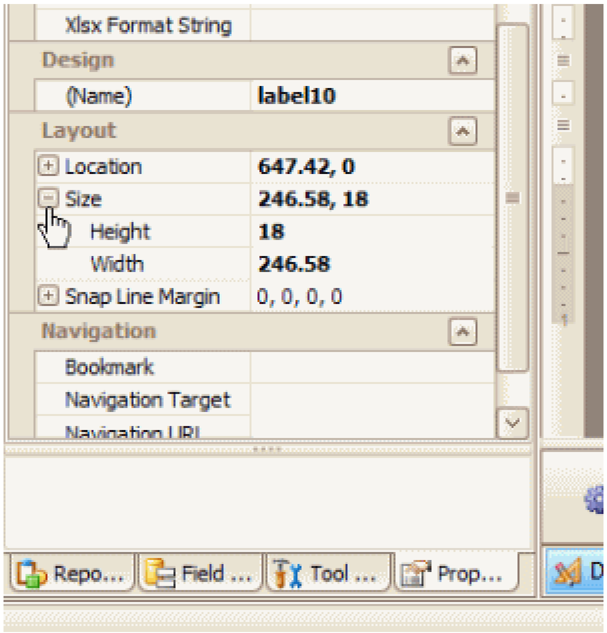




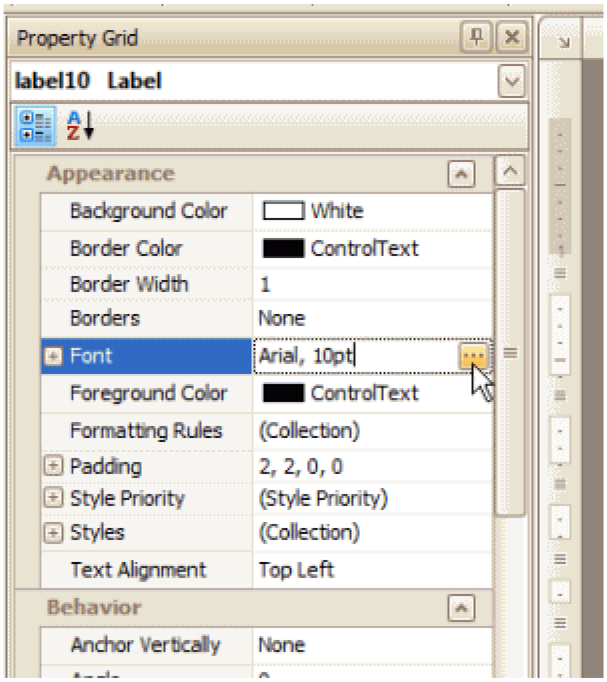
a. Preview so you can see how it now looks

b. Change the width of other fields as you want such as the Client datafield to accommodate client's with long names

c. You can also use the Properties tab to change the width of a field instead of using your mouse. Select the field you want to edit, and then adjust the Layout properties



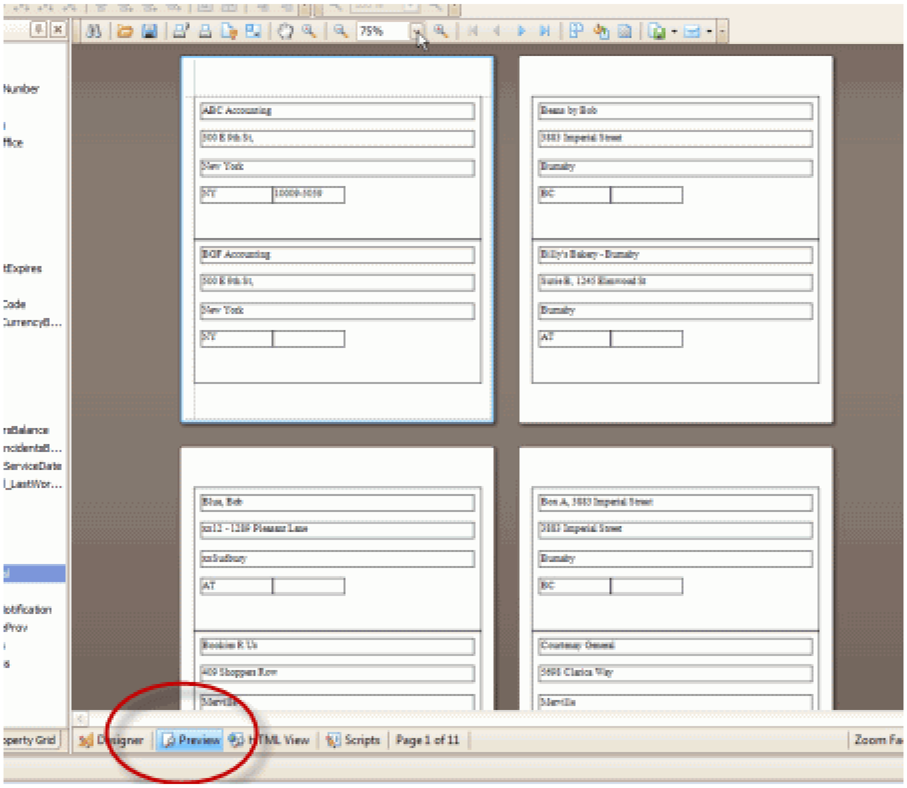
19. Edit the font of fields in a similar fashion - select the field in the design panel, view that field's Properties, and edit from the Appearance properties



20. Save the report template once finished. It will now appear for selection in the Part's grid of the Service navigation pane.

As As with any report template, if you only want specific records to display on the report when printed, first filter the grid so that it only shows the records you want to report off of. Also see [How do I filter a grid and print a report for the records that show?](#)

6.42 Create a label report template using the Wizard

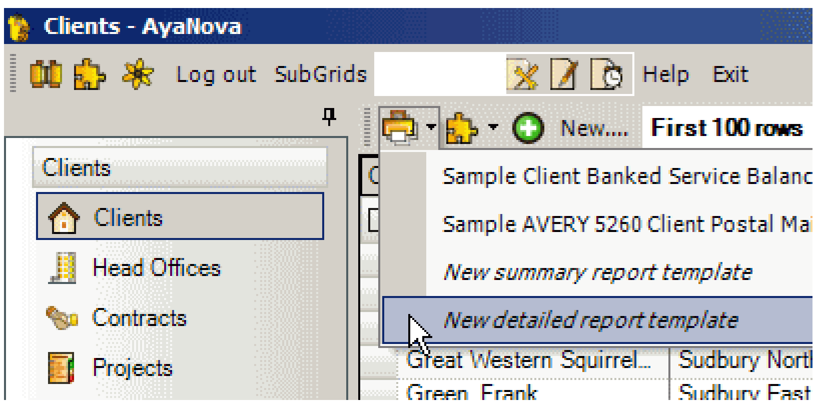


In this tutorial example, we will create a new **label** report template using the Wizard for the Clients grid.

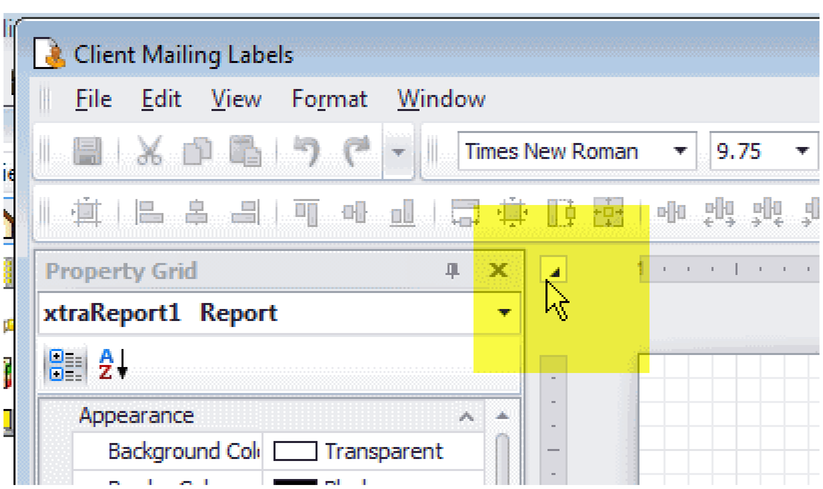
- It is recommended that you review the [Report Templates] Help section before proceeding for an overview of the Report Designer.
- You can only have fields display in a report template if they are available from that report template's dataset - you can not add additional datafields to a dataset. For example, you can not have additional fields from the Unit entry screen display on a report from the Service Workorders grid except for those that are in the Service Workorder report template dataset.
- NOTE**:** There is not an option to use the internal report designer's Wizard to create a report template for *Detailed* datasets such as a *Detailed report template* for Workorders (or PM or Quotes) because the Wizard is not able to access the many sub-sets of data that a detailed workorder (or quote or PM etc) report template has. The detailed report template for the Clients grid is an exception to this rule.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers

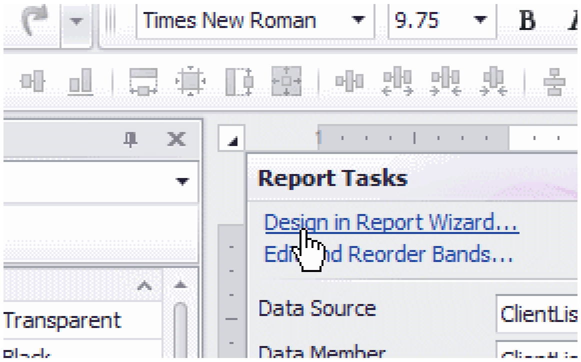
to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

1. View the Clients grid and select the Print menu option
2. Select the ***New Detailed report template*** to open the internal report designer for a new detailed report template
    a. As the Summary dataset contains the same column fields that are displaying on the grid, we know that the address fields displaying are the physical address, and we need the Postal address for mailing which are only accessible via the Detailed report template dataset.

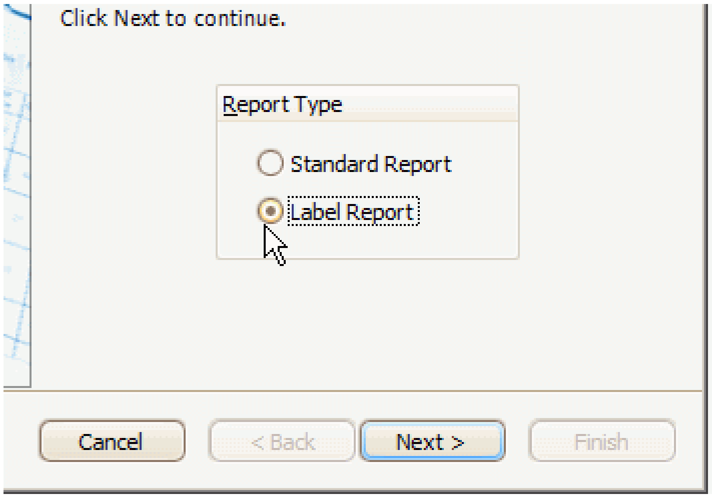


3. Enter in the report template name **Client Mailing Labels**
4. In the design panel, in the upper left hand corner, click on the  for a list of report tasks available for this report template, and click on the **Design in Report Wizard....**



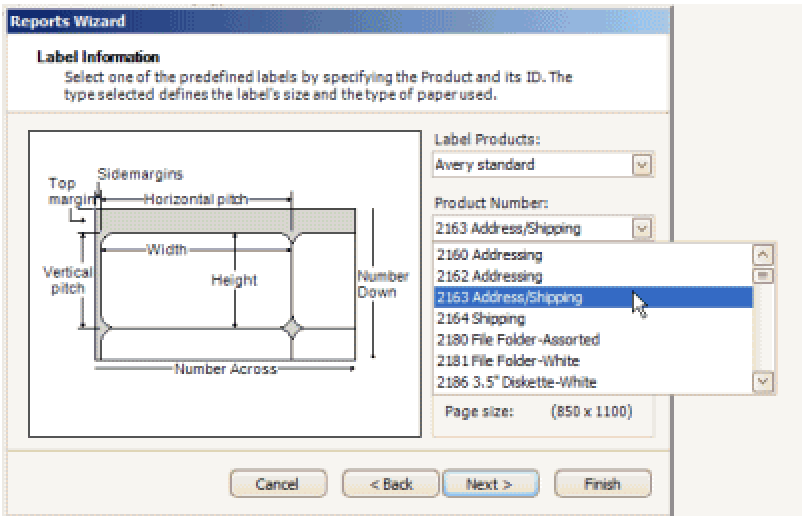


5. Select Label Report and select Next >

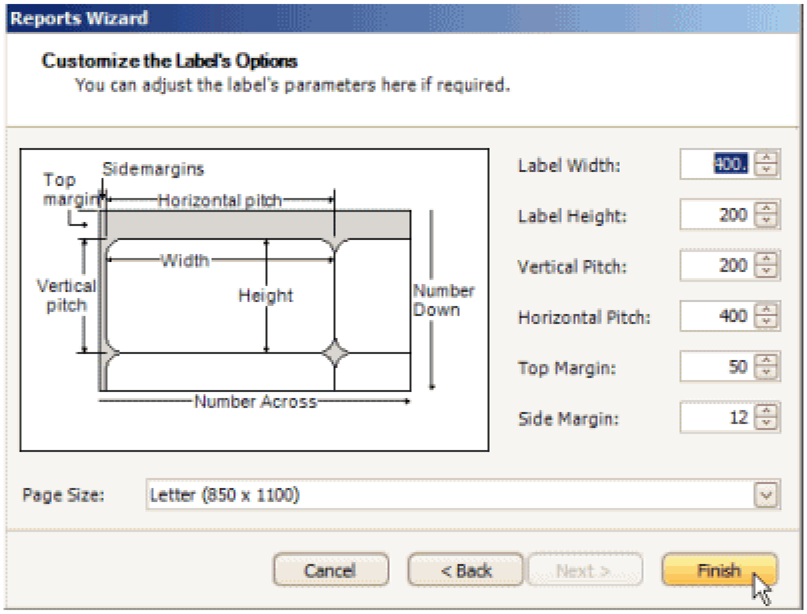


The Wizard comes standard with a large number of pre-defined Label Products and Product Numbers with the dimensions provided by the label product manufacturer. In our example, we want to print to Avery 2163 Address/Shipping labels, so that is what we will select.

6. Select the Label Product **Avery Standard**, and the Product Number **2163 Address / Shipping** and select Next >



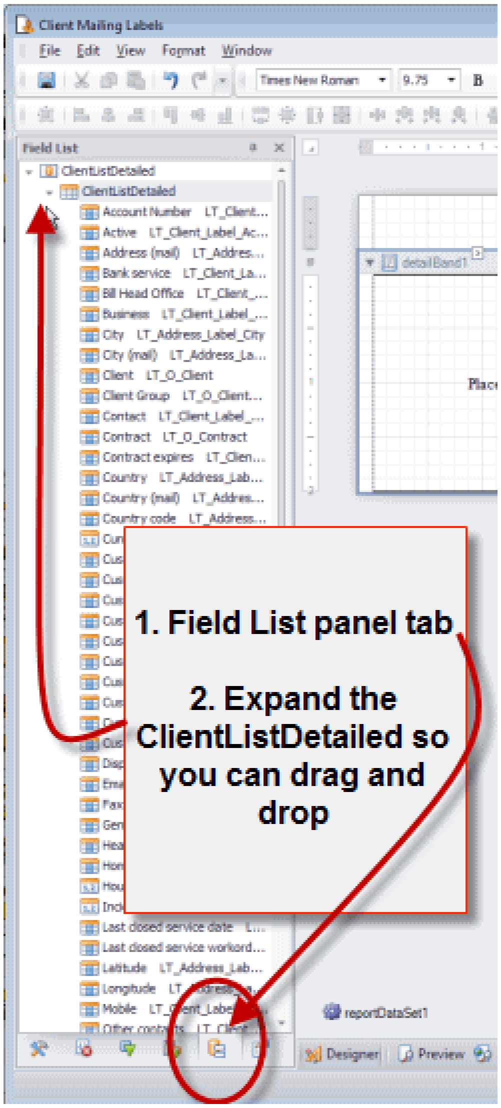
7. The next screen appears if you wish to alter the manufacturer provided dimensions for this product and number. You may want to do this due if issues with your printer, or you may do this because you have selected a product that is similar to your product but not actually listed for selection – here is where you would make any dimension modifications



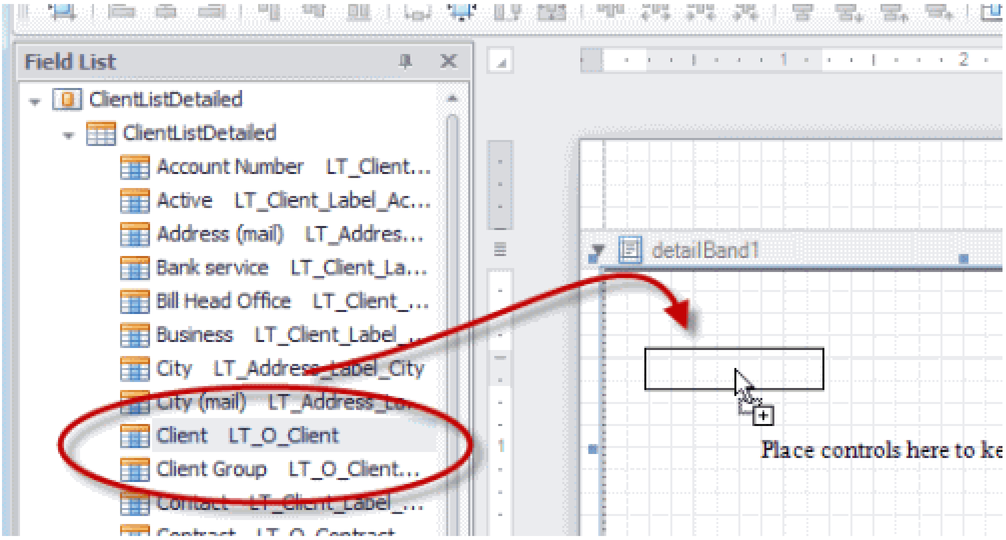
8. Select Finish

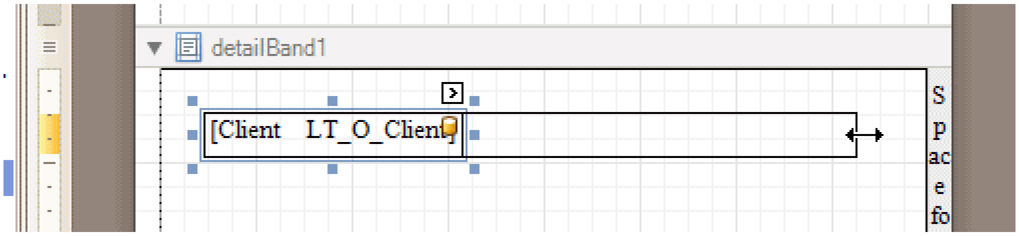
Now we will drag and drop and resize the data control fields we want to display for this label

9. Select the **Fields** tab and expand the **ClientList** dataset so you can see what fields are available.

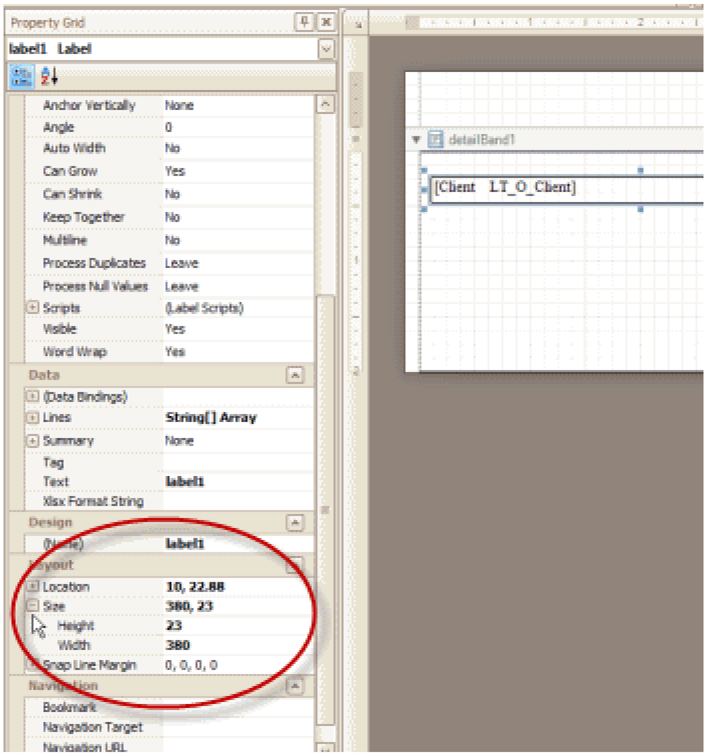


10. Select the **Client LT_O_Client** data control (Client is the localized text, and LT_O_Client is the internal Key referring ot the datafield) and drag it onto the Design Panel. Edit the width of the data control so its width is at least 350

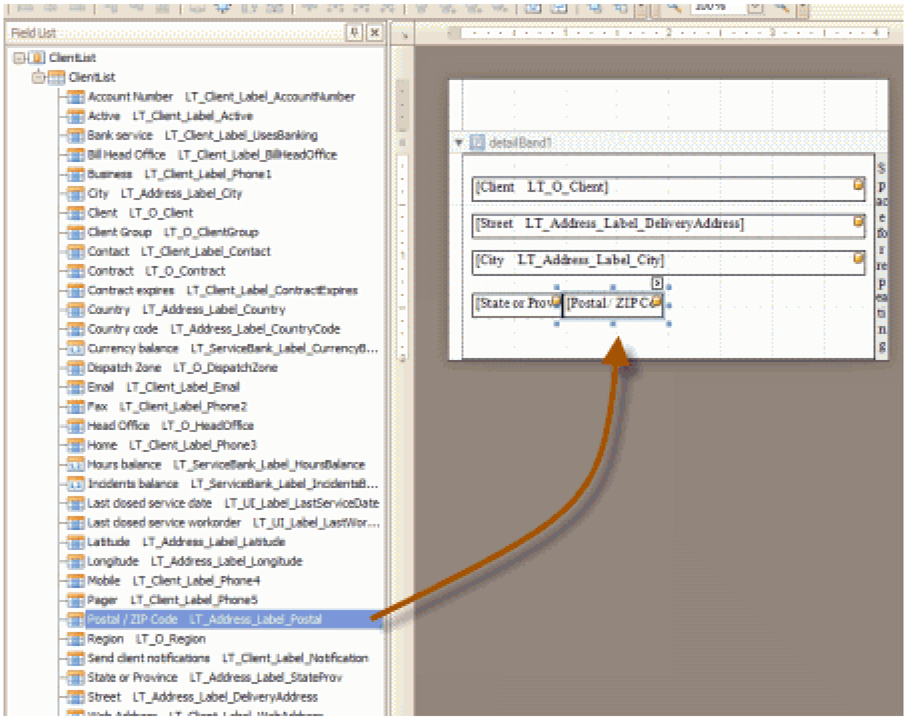




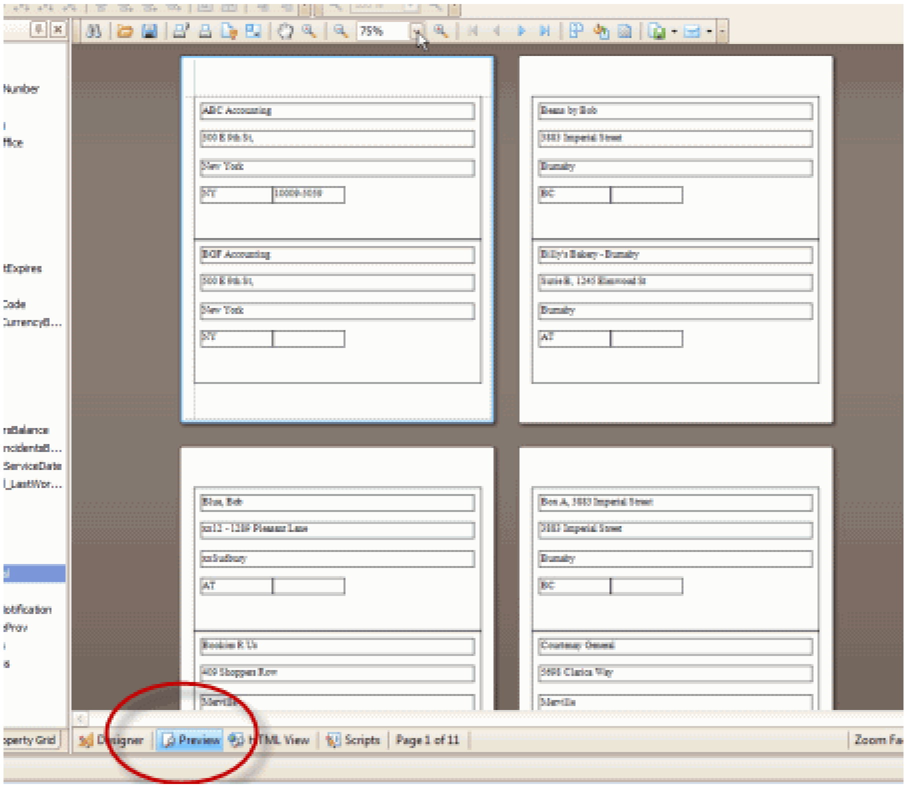
You can also edit the width and height of fields by editing the Layout properties of the field selected on the design panel



11. Drag to the design panel the address data fields



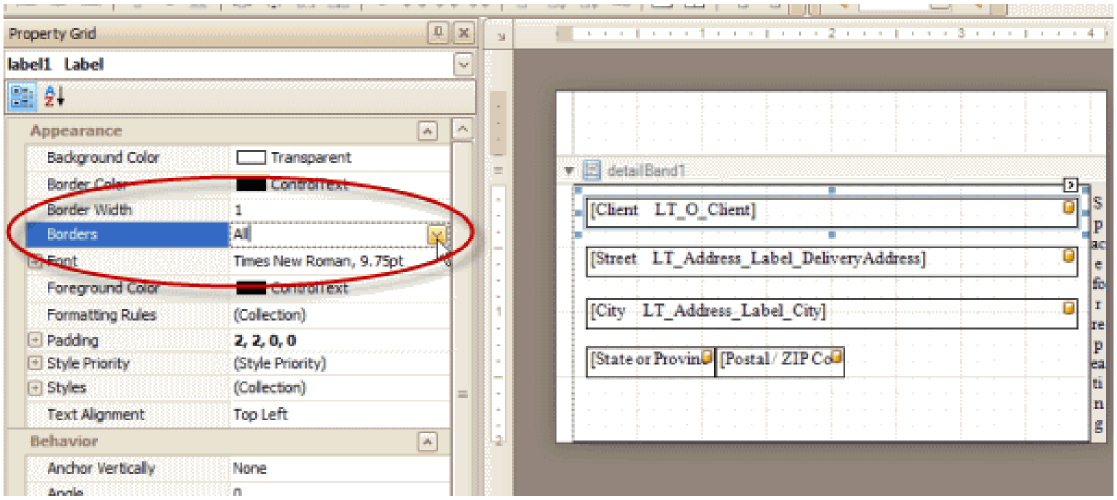
12. If we select Preview from the bottom of the Design panel, we would see that right now each of the control fields has a border.



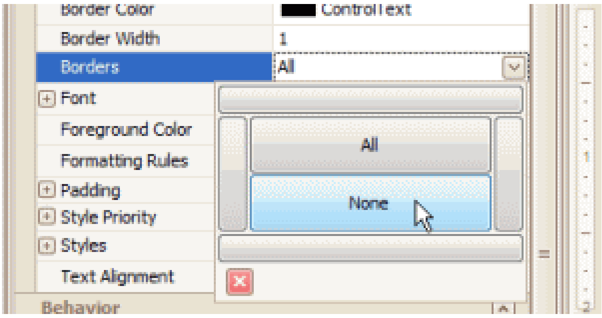
13. So lets remove the borders from showing. Click on the Designer link at the bottom so that we view the design panel again.

14. Click on the **Client** datafield control in the Design Panel, and then select the **Properties** tab.

15. You will note that the property **Borders** is presently set to **All**



16. Click on the property for Borders and change it to None (you may have to click elsewhere after selecting None for it to be applied)



17. Preview and you will see that the border is now no longer showing around the Client

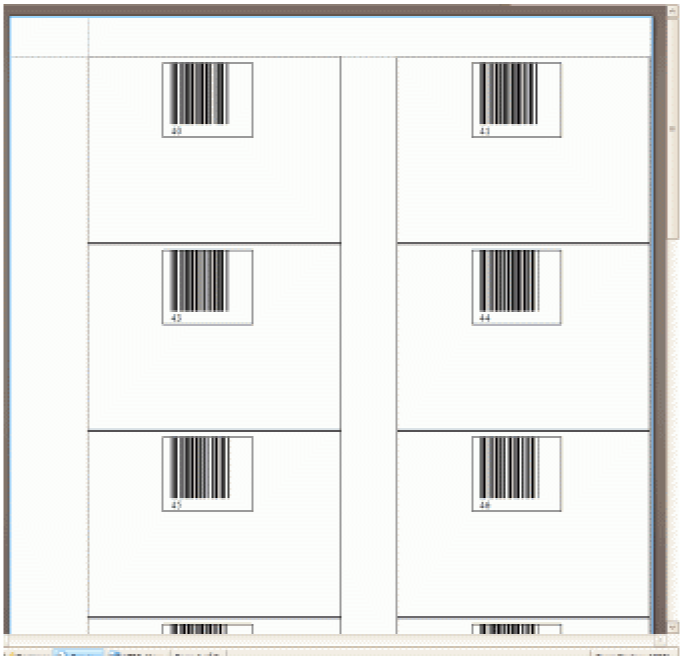
18. Perform the same for the other datafield controls (i.e. Address, City, etc) in the Design Panel

19. Select Preview link to see what it will look like

20. Don't forget to Save the report template

21. Congratulations - you have created your first label report in AyaNova. Go on and try out different fields, properties and more.

6.43 Use Barcodes in a report template

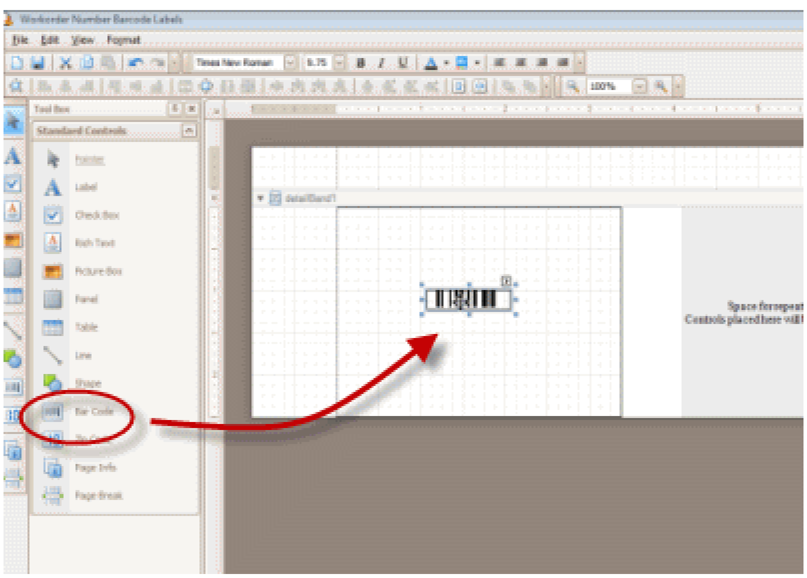


In this tutorial example, we will create a new report template that makes use of Barcodes

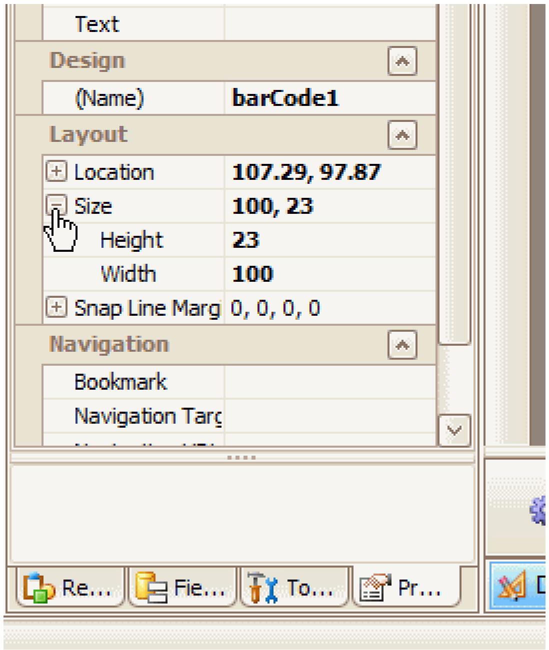
- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- You can only have fields display in a report template if they are available from that report template's dataset - you can not add additional datafields to a dataset. For example, you can not have additional fields from the Unit entry screen display on a report from the Service Workorders grid except for those that are in the Service Workorder report template dataset.
- There is not an option to use the internal report designer's Wizard to create a report template for *Detailed* datasets such as a *Detailed report template* for Workorders (or PM or Quotes) because the Wizard is not able to access the many sub-sets of data that a workorder (or quote or PM) have.
- We recommend that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further
- NOTE: Due to the large number of different types of barcodes, as well as barcode hardware, we have not tested this feature with every barcode or

barcode device. We provide the following tutorial as a tutorial only, consult your barcode reader vendor and documentation for exact settings to use. You may have to try different scenarios to find which works best for you.

1. Select the Service Workorders grid within the Service navigation pane
2. Select the ***New Summary report template*** from the Print drop down menu
3. Enter in a report name of **Workorder Number Barcode Labels**
4. Within the report designer, select the Wizard, select **Avery Standard**, select **12-295 Laser tags – White**, select Finish
    a) Refer to the previous tutorial on creating a Label report template if needed.
5. Select the Toolbox tab, select **BarCode** control field, and drag onto the design



6. Adjust the barcode control size and height and location. You can use your mouse to drag and resize, or edit the Properties **Size** and **Location** for the field.

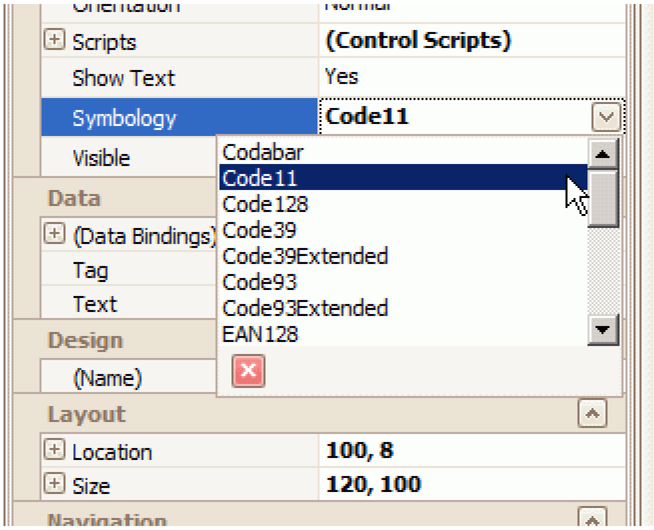


7. The basic properties of the barcode need to be set to specify its type and look.

    i. You **must** specify the BarCode.Symbology property (codetype) which returns an object that corresponds to the particular barcode's symbology type and contains all the properties required by this type.

    ii. If needed, also set the BarCode.Module and BarCode.Padding properties to change a barcode's appearance.

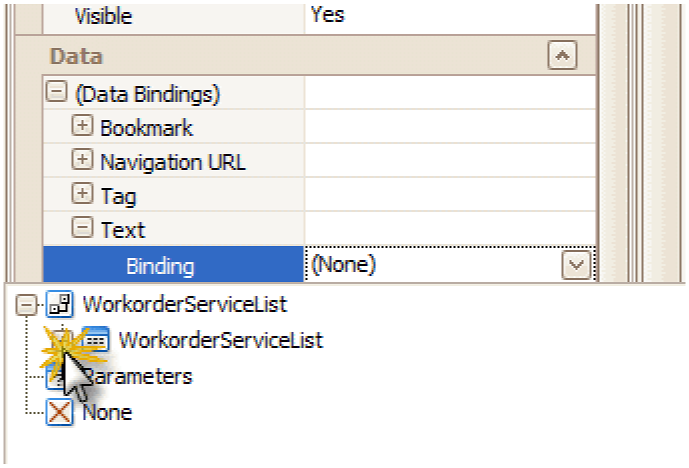
8. In this tutorial, we will select the Symbology property of Code11, refer to your barcode scanner and vendor for the proper symbology supported by your equipment and needs



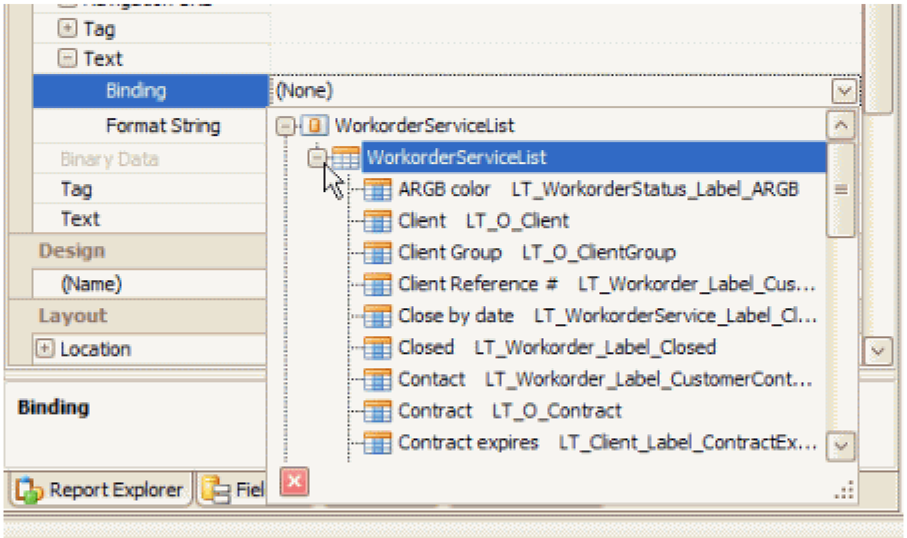
9. Now we will bind the data field for the workorder number to this barcode control

    iii. With the barcode on the panel still selected, expand the DataBinding property field -> expand the Text property field under the DataBinding field

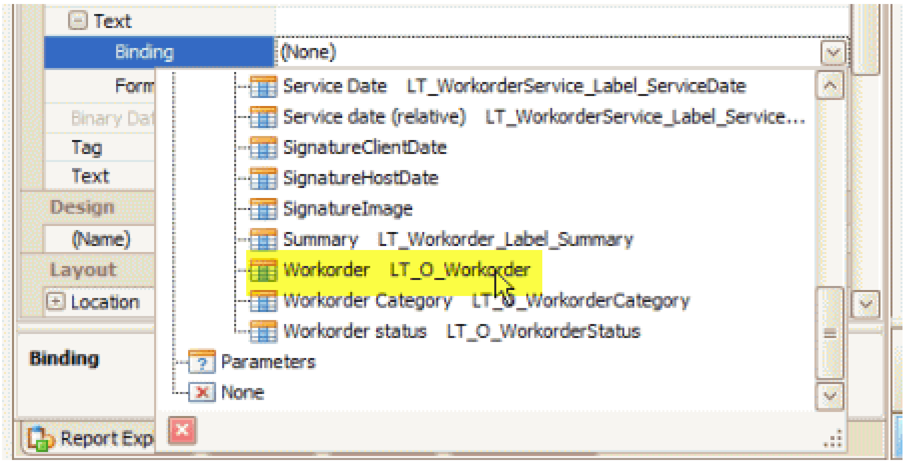
    iv. Drop down the selection for the Binding field



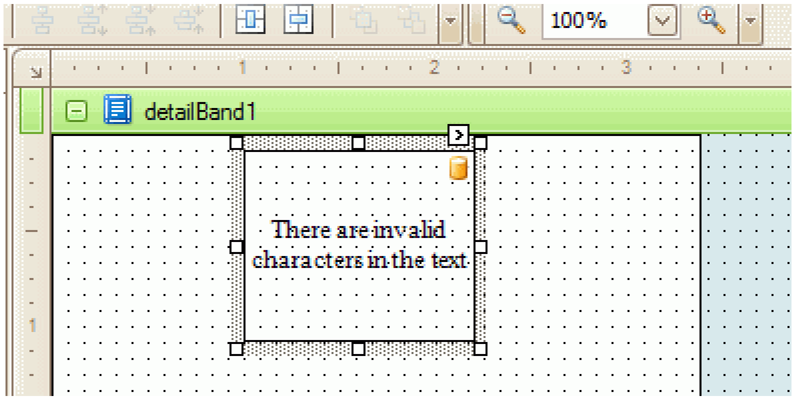
    v. Expand the WorkorderServiceList



vi. Scroll down and select the Workorder datafield

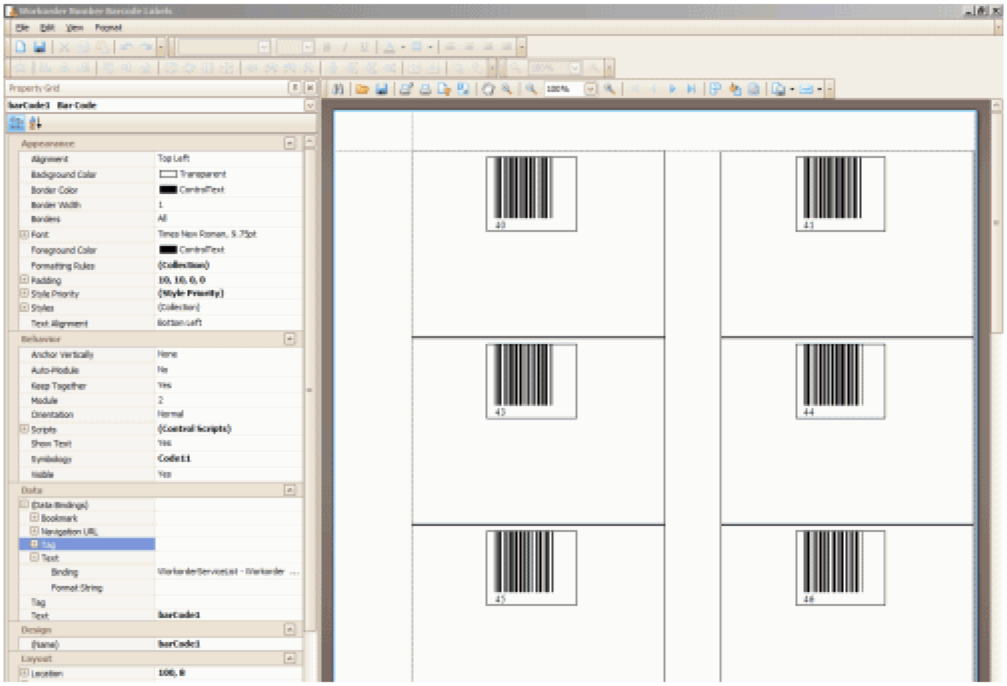


10. Note the barcode on the panel may show "there are invalid characters in the text" - if you click on **Preview** you will see it actually displays the barcode with the workorder number or not.



11. We will now also drag onto the design panel the additional data control fields such as the Client, Workorder Status, and Summary – and resize them so useful.

12. Select the Preview link to preview what the report will look like at this point.



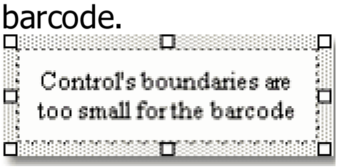
13. Drag and drop datafields and edit as desired.

14. Close and save the report

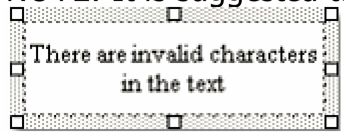
When previewing, if instead of a barcode there is a message, that would indicate you need to adjust depending on the message.

Errors that can occur with barcodes in reports

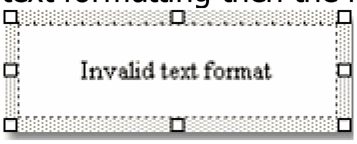
When adjusting a barcode some errors can occur due to incorrect parameters being specified. For instance, if a barcode control is too small to represent the barcode type specified, the following error message will be shown in place of the barcode.



If there any characters in the barcode's text that are not allowed by this barcode type, then the following exception will be shown. NOTE: It is suggested to check Preview first though, as it may just be cosmetic.



Also, it's necessary to ensure that the text characters meet the text format rules required by the barcode's type. When these characters do not satisfy the required text formatting then the following message will be shown.



6.44 Calculate an Automatic Summary in a report template

The internal XtraReports designer supports automatic calculation of summary functions (totals, maximum, minimum, averages, etc.) only for XRLabel controls (or its descendants) which are bound to data.

A full set of the summary functions that can be automatically calculated with **XtraReports** is listed in the SummaryFunc enumeration. Note also, that a summary value can be correctly calculated only if a label is bound to either numeric or date/time data.

All the summary options available are listed by the XRSummary object which is returned via the label's XRLabel.Summary property.

To calculate an automatic summary for a label you should be aware of the following:

- A summary is calculated only if data is bound to the XRControl.Text property of a label.
- An automatic summary can be calculated either for all the values in a particular group or the entire report.
- A label should be located in the report band which corresponds to the values it will be calculated for.
- This means that if a summary is calculated for a group, then the label should be located either in that group's header or footer band.
- At design time you can also use the Summary Editor to set all the summary options in one place.

- Since the summary value is calculated after the XRControl.BeforePrint event has been raised, the summary value can't be accessed from within the BeforePrint event. Use the XRSummary.GetResult method to get the summary's value, or handle the XRLabel.SummaryCalculated event to get the summary value calculated and perform any additional actions required after the automatic summary value has been calculated.

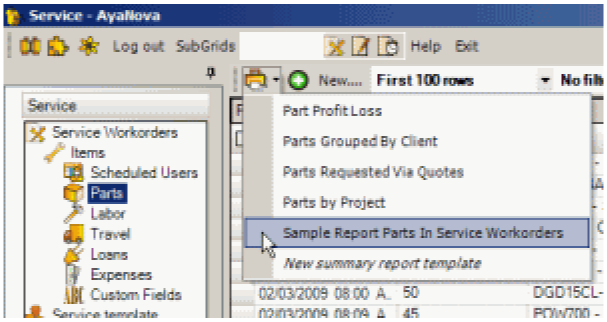
- It is suggested that you open up the existing sample report templates to see existing summaries such as those in the Sample Detailed Service Workorder with Grand Total report template. Also check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

In this tutorial we will look at an existing sample report template to view use of an automatic summary, and go through the steps to create an automatic summary.

It is recommended that you review the Report Templates Help sections before proceeding for an overview of the Report Designer.

1. Select the Parts sub-grid within the Service navigation pane

2. Drop down the Print menu option, hold down the SHIFT key on your keyboard, and select the report template **Sample Report Parts In Service Workorders**



3. Select **Preview** at the bottom of the design panel to see what results print before modification.

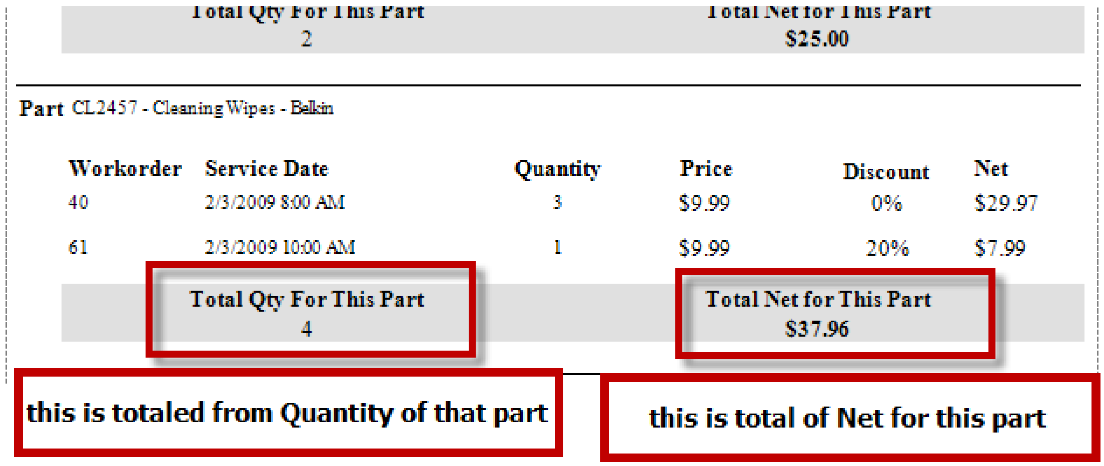
4. This sample report

   - Groups the part

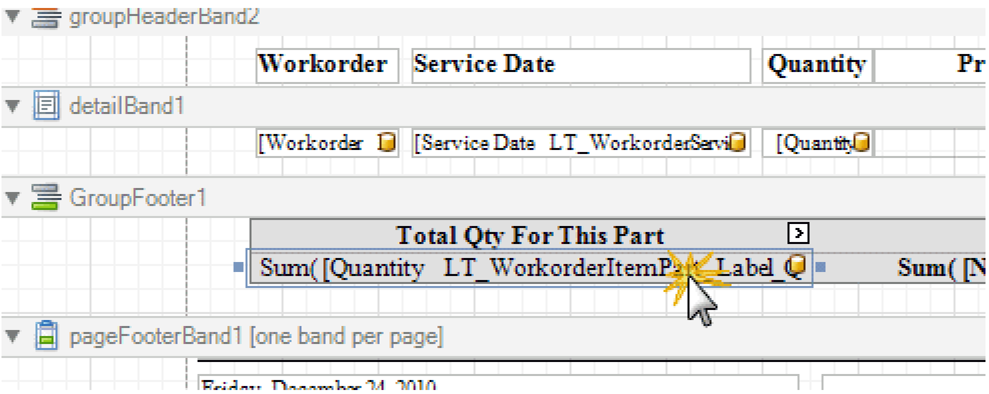
   - Lists the Quantity of that part for that workorder

   - Totals all Quantities of that part for all workorders

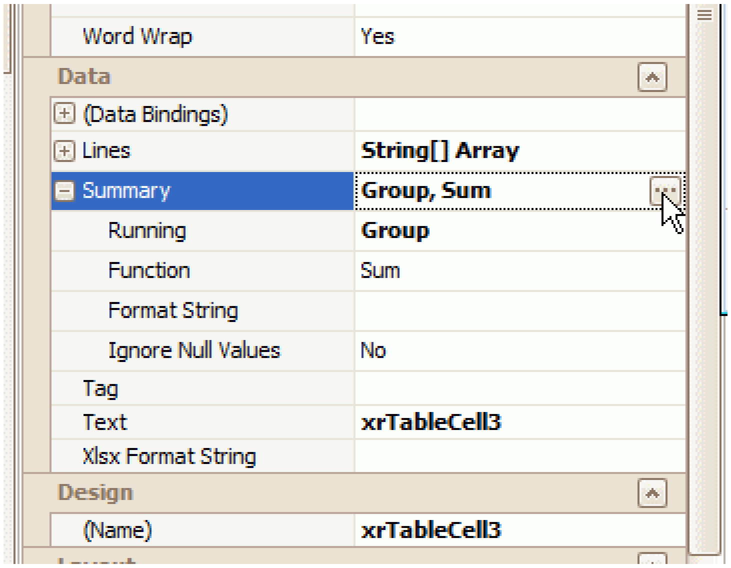
- Lists the Net of that part for that workorder
- And totals all of the Net for that part for all workorders



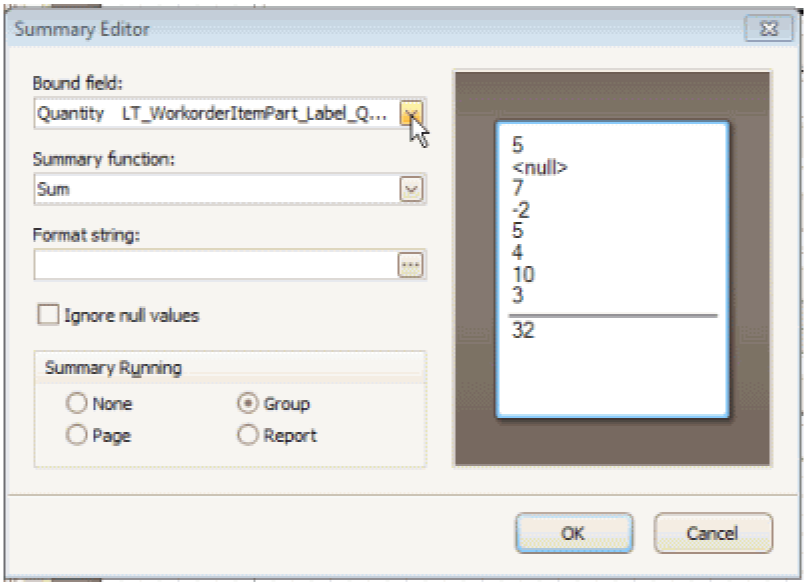
5. In the Design Panel, select the Sum([Quantity]) datafield control in the GroupFooter1



6. With that field **xrTableCell3** still selected, click on the **Properties** tab, and select the browse icon to open the Summary Editor window



7. You will note that the bound field is to the Quantity field and that the Summary function selected is Sum and that the Summary Running is Group



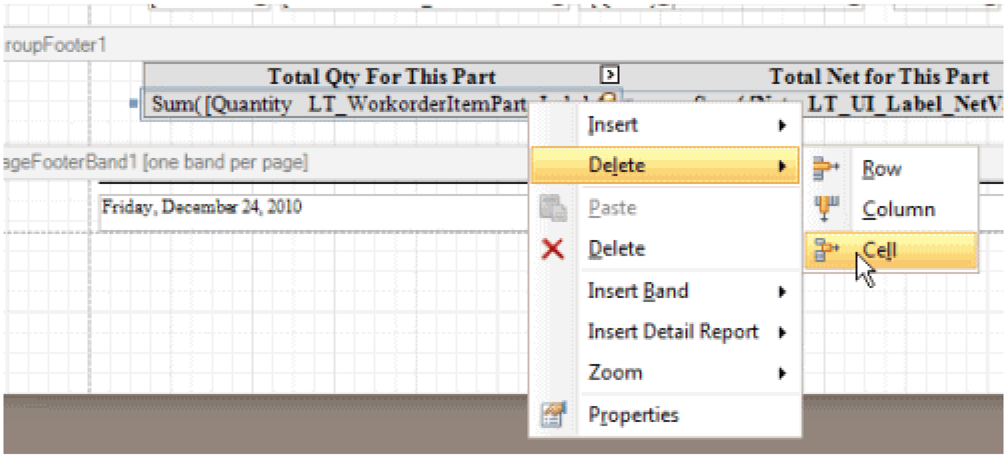
a. What this means is the Quantity field is summed up for what is set as the group - in this case, for each part as that is what this report is grouped by.

b. Note that there are other Summary functions available, like Avg (average), Max (maximum), Min (minimum) and so on.

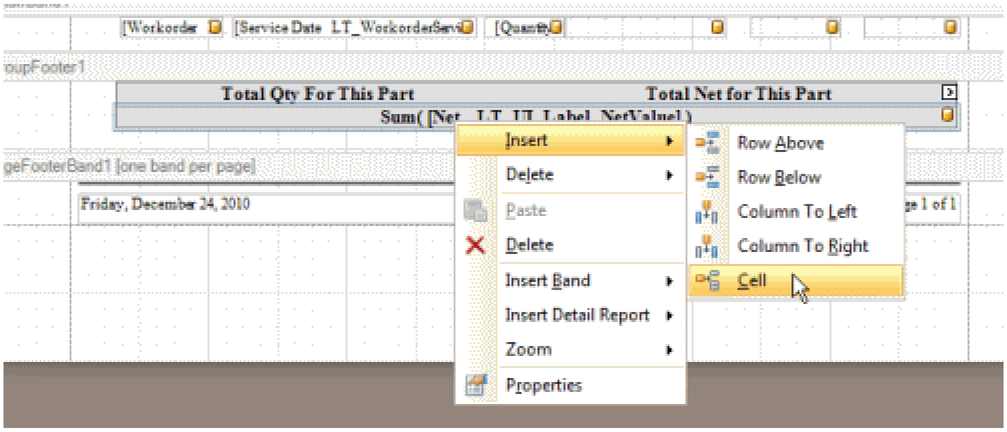
c. Cancel out of this Summary Editor

8. Now we are going to remove that present datafield, and replace it again so you can go through the steps on how to set a Summary for a bound data field

9. Right-click on the Sum([Quantity]) datafield control (you should see that in Properties it is referring to the xrTableCell3 field), select Delete, select Cell

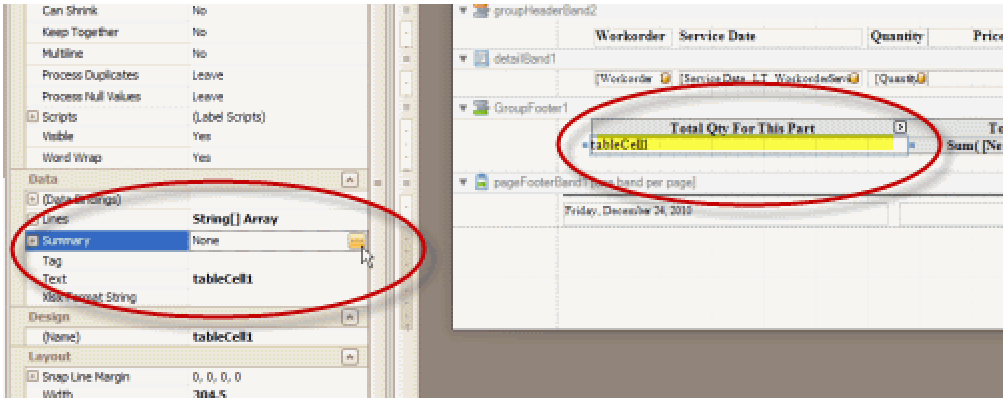


10. Now there is only one cell in this table row - so right-click on the Sum([Net]) datafield control, select Insert, select Cell

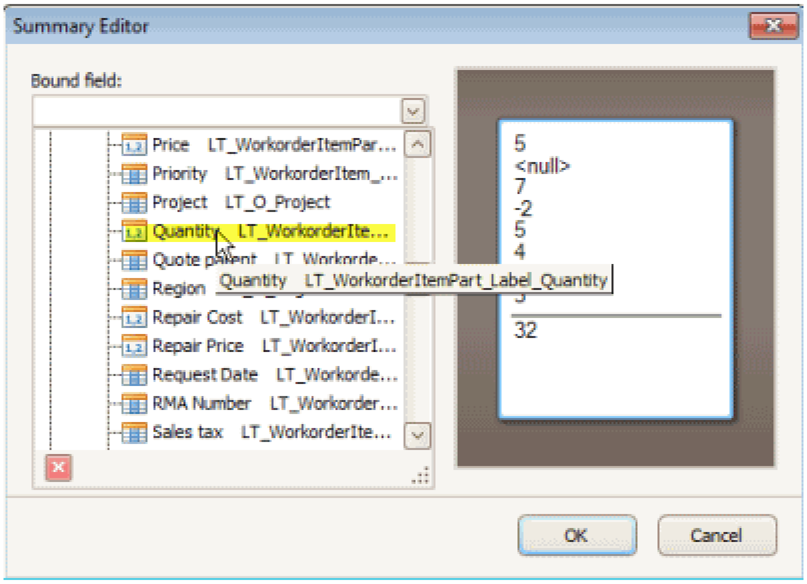


11. Select the new TableCell that was created to the left of the Sum([Net]) data control field to highlight it, and select the Properties tab so that you can now edit Properties for it

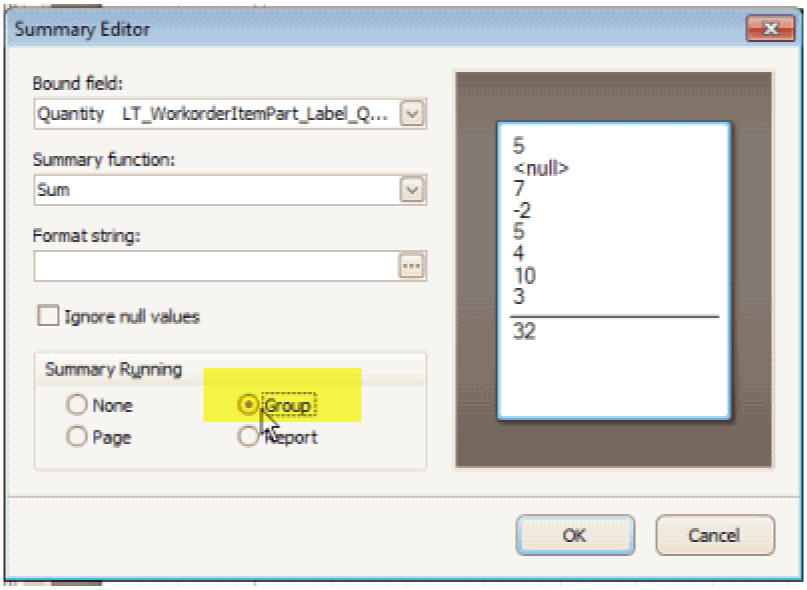
12. Select the Summary property field browse button to open the Summary Editor



13. In the Summary Editor, drop down the Bound Field, expand the WorkorderServicePartList, and select Quantity



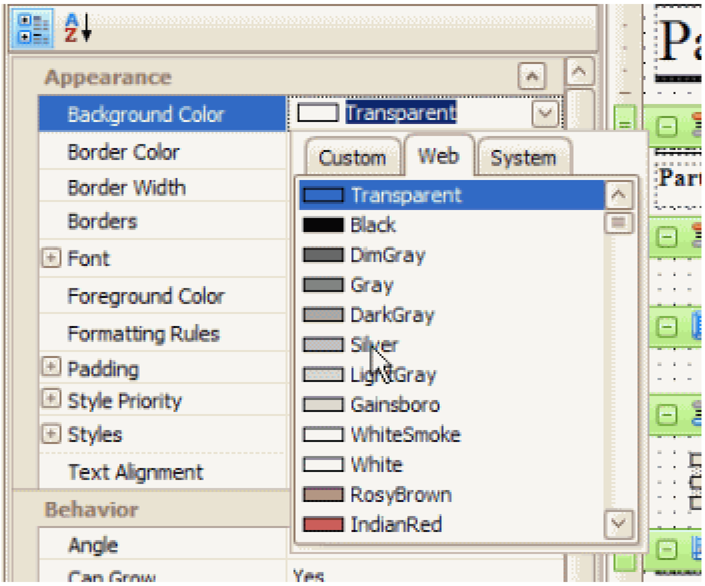
14. Sum is already selected for the Summary function. Select Group for the Summary Running. Select OK to close

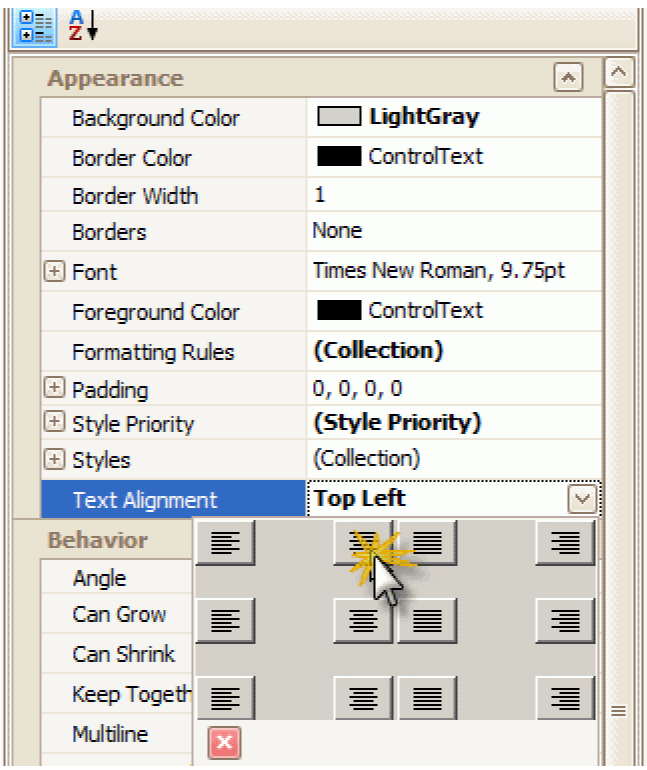


15. Select the link Preview to preview what the report looks like so far

16. You will note that although we now have the group sum - the text alignment is to the left instead of center, and the background color still needs to be edited, and the font needs to be Bold because we deleted the original cell with its formatting. You can always click on another field and see what its appearance properties are set to for reference.

17. Back in the Design Panel, select the Properties tab for this field, and **edit its text alignment** and **background color** and **font.** A suggestion is to also compare against the properties of the other sum field too.





18. Select the Preview link to view that the changes are now similar to that of the other field and as before

19. Save and close the report.

You have now customized a report template to include a automatic summary, and can use this knowledge when customizing and/or creating other report templates

6.45 Show signature image on a report

If using the Signature capture feature of the remote options RI (Responsive interface), WBI (web browser interface) and/or MBI (minimal browser interface), you may want to display the customer's signature on a report that is given to the customer.

> As the signature is saved as a special image linked to that service workorder, we can embed that datafield into a report template!

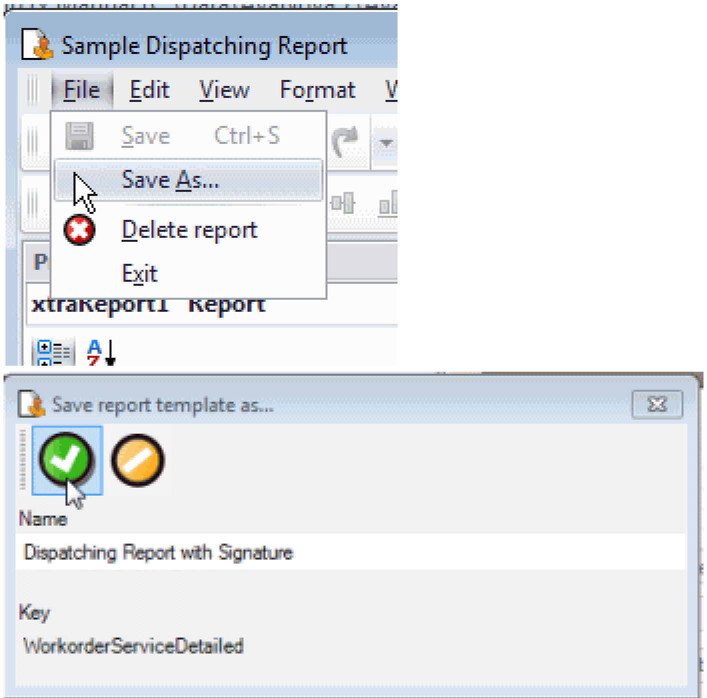
If have just installed AyaNova 7, the sample report template **Sample Detailed Service Workorder with Grand Total and Signature** is available that you can further customize and refer to.

And also in this tutorial example, we will make a copy of an existing sample report Sample Dispatching Report, and customize it to display the Signature image and Signature date if available - so that you can see how to do so for any other report templates.

1. Open a workorder entry screen that you know you has been signed through WBI or MBI (i.e. print preview the Sample Detailed Service Workorder with Grand Total and Signature)

2. Hold down the SHIFT key and select the Sample Dispatching Report template to open it in the Report Template Designer

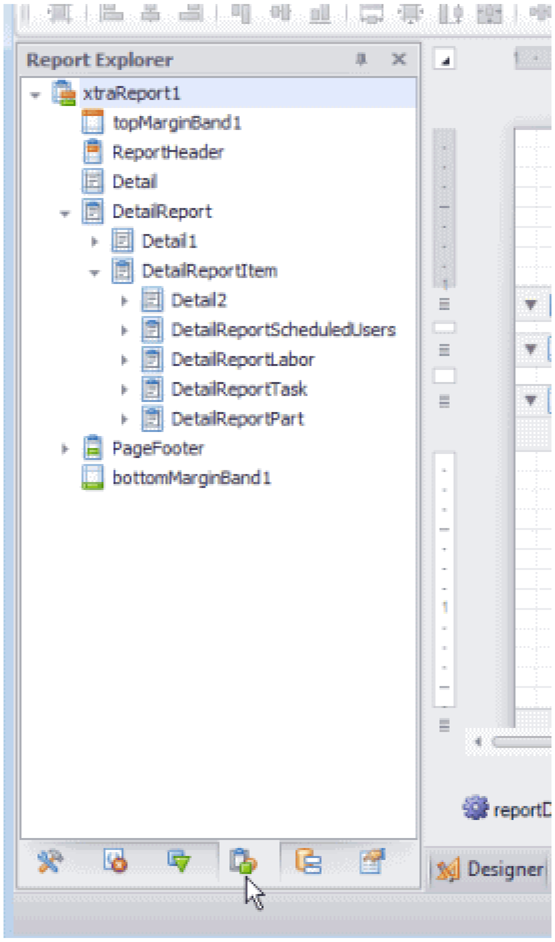
3. It is recommended to always make a copy of an existing sample report template if will be customizing it - this way you can always go back to the original if need be.



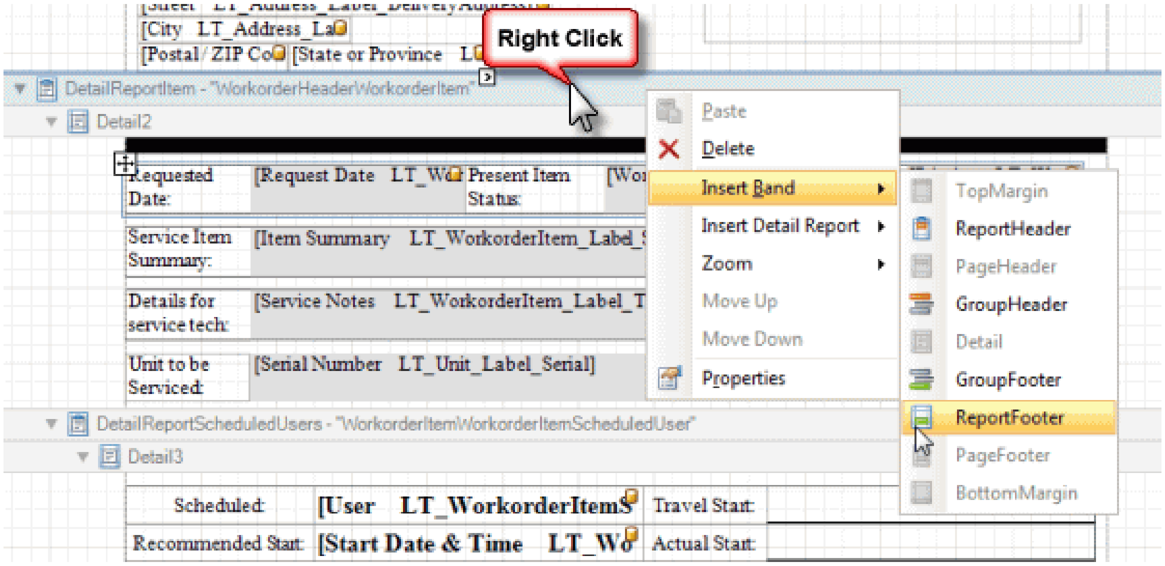
4. You can place the Signature image datafield to show in any area of the report template except for those that do not show data, such as the PageFooter.

In our example, we will place in the ReportFooter for each workorder reported on

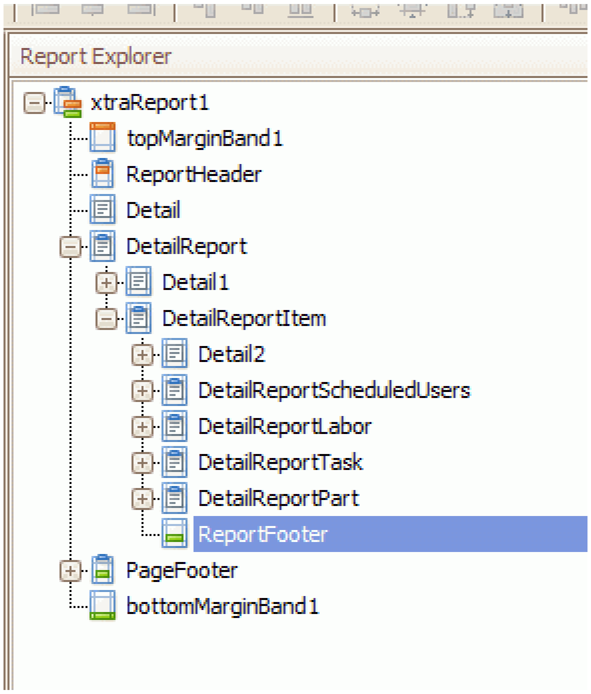
If we take a look at the **Report Explorer** panel tab and expand the existing bands, we see that there is no existing ReportFooter for this report template



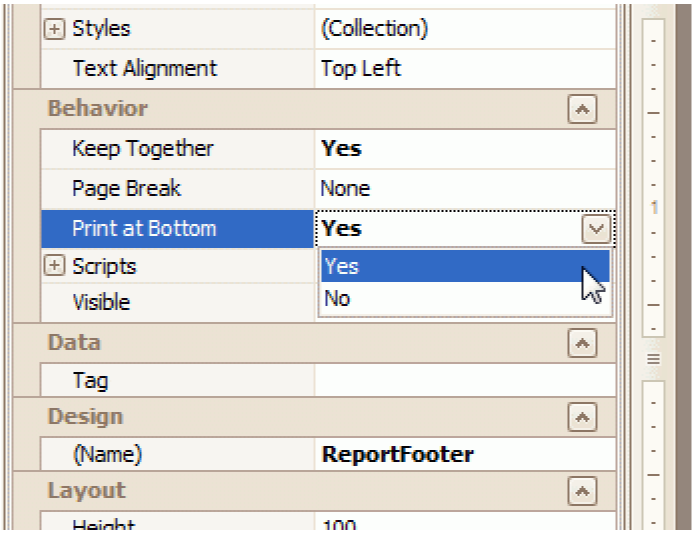
5. In the report designer panel, right-click on the WorkorderHeaderWorkorderItem band and select Insert Band -> ReportFooter



6. ReportFooter band will be added - also now shows in the Report Explorer tab

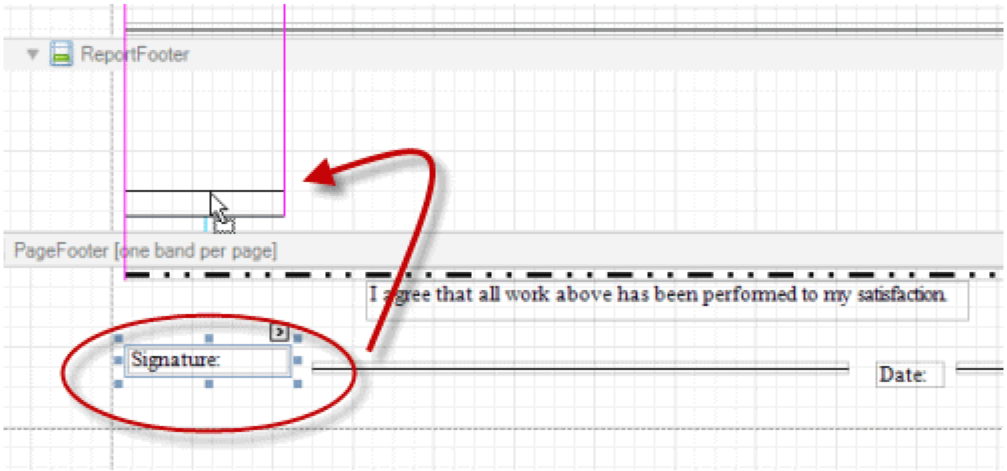


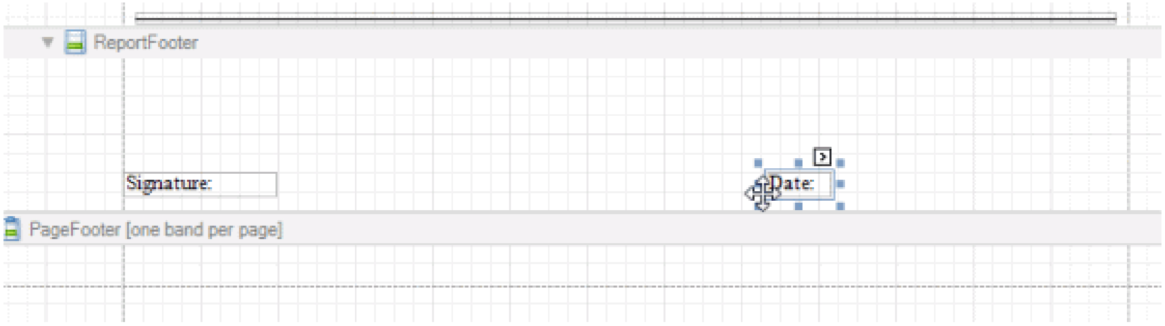
7. Set the Keep Together property to Yes (so that if page break happens, all fields in that ReportFooter stay together, and set the Print at Bottom property to Yes (so that it always prints all fields in the ReportFooter at the bottom of the page)



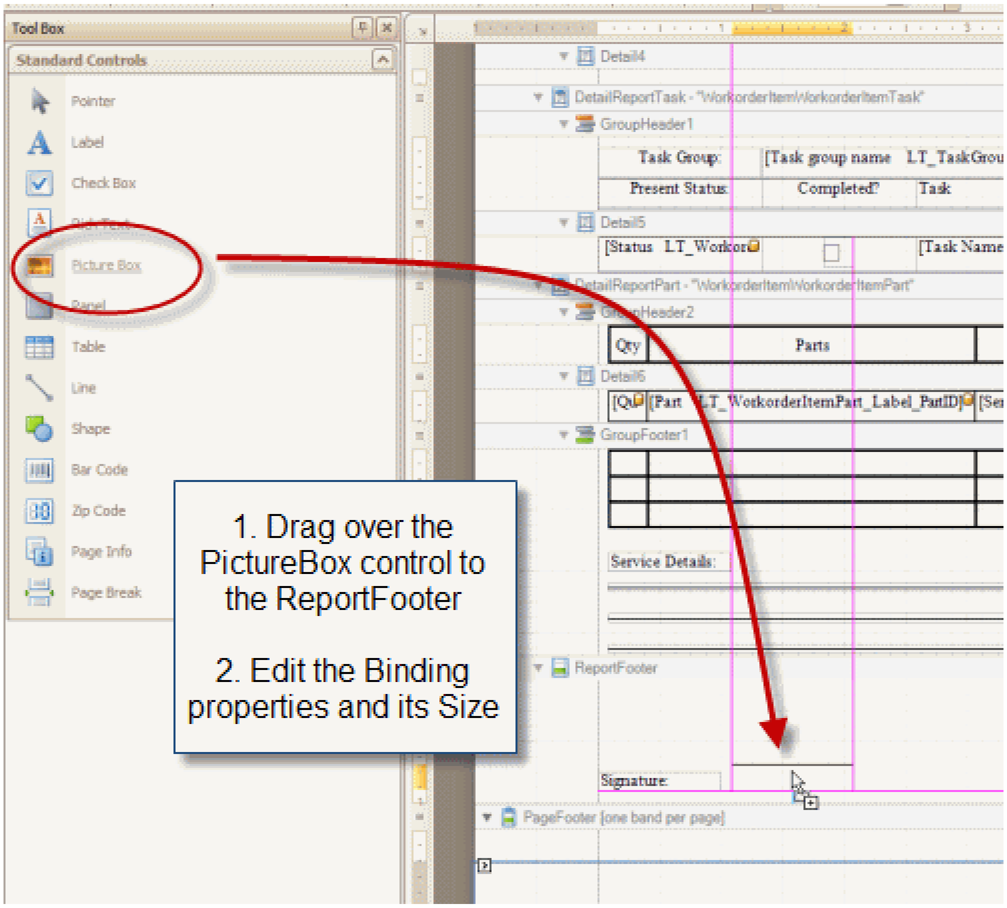
8. We're going to move the labels out of the pagefooter, and just use the ReportFooter in this example

So to save on time, just move the text labels for Signature and Date up to the ReportFooter, and delete the lines and other text fields out of the pagefooter

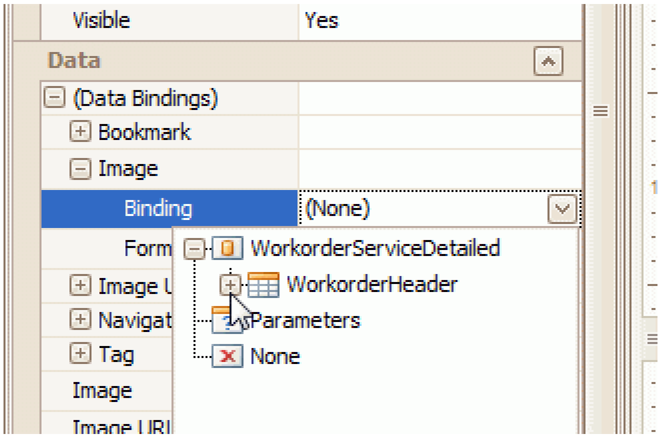


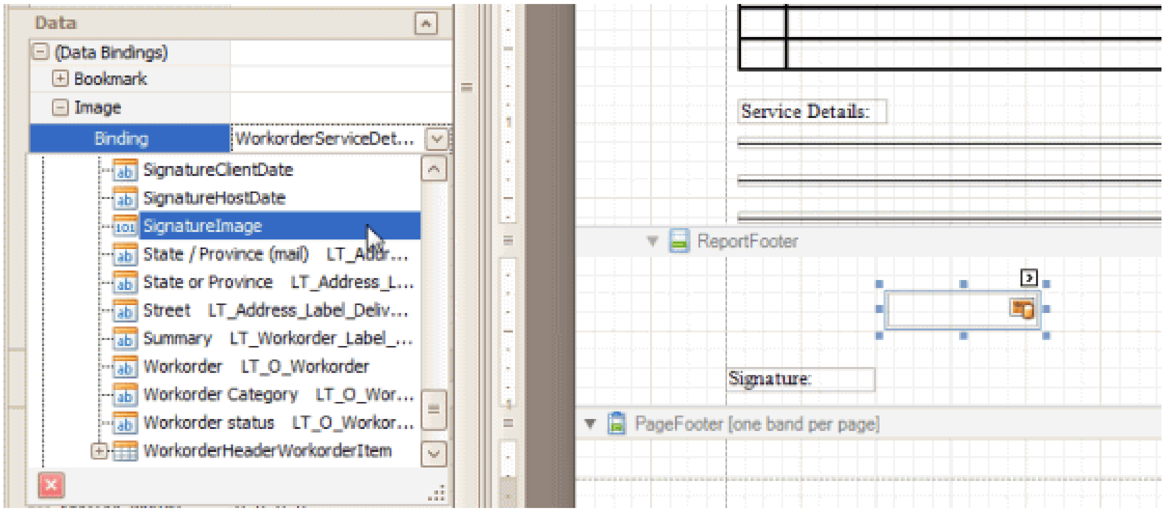


9. To display the Signature, drag over the PictureBox control

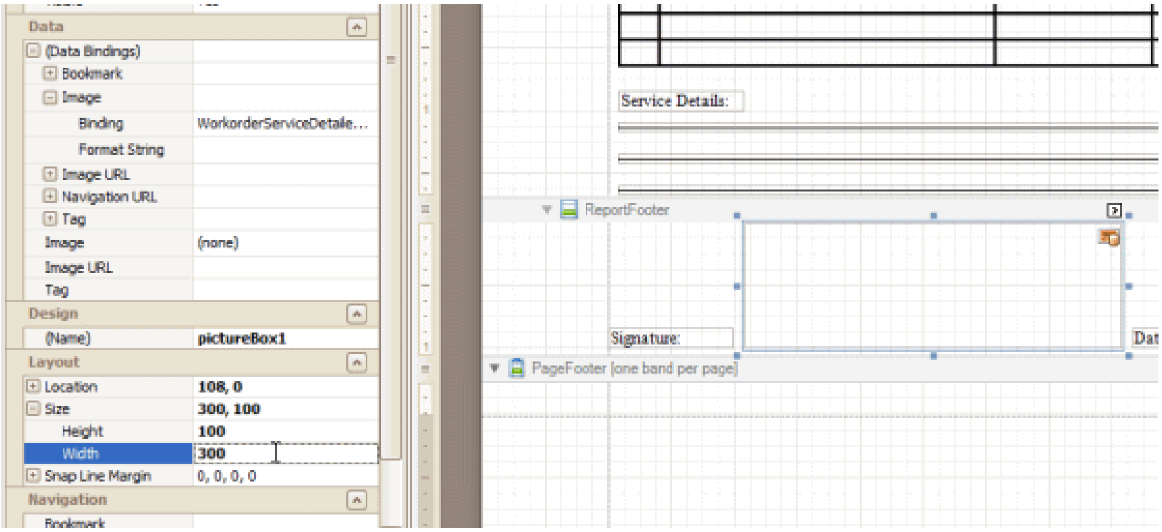


10. With that PictureBox control selected in the ReportFooter, expand the Data Bindings property -> Image -> Binding, and select the SignatureImage datafield



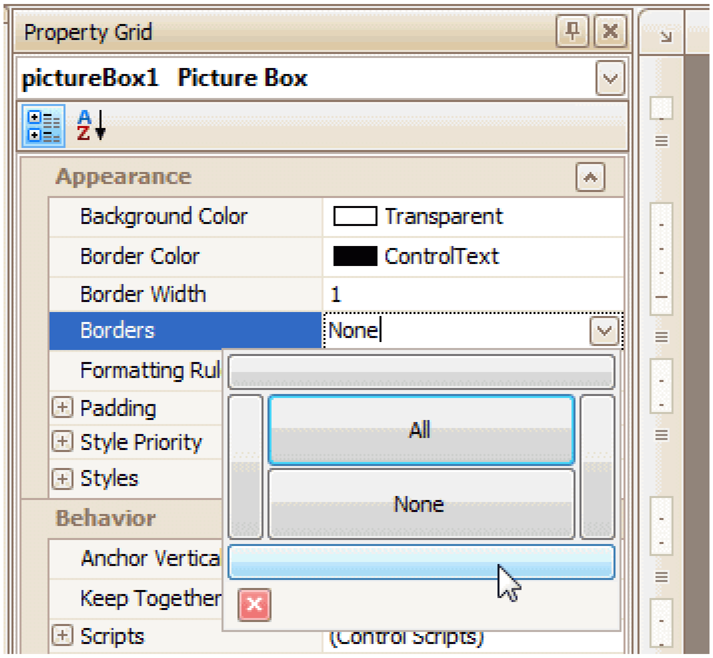


11. The Signature image has a 1 to 3 ratio with 100 height by 300 width the closest to what is actually used in WBI and MBI if looking to display as written

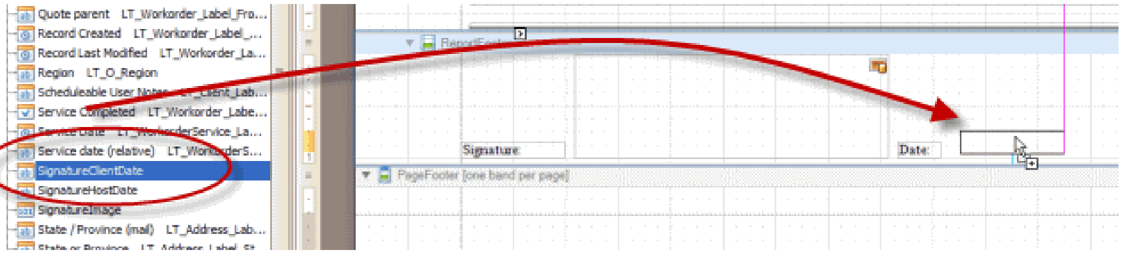


12. Preview to see what it looks like

13. You might also want to place a bottom border - so that if this report is printed off without a signature, it has a line showing where would sign manually.

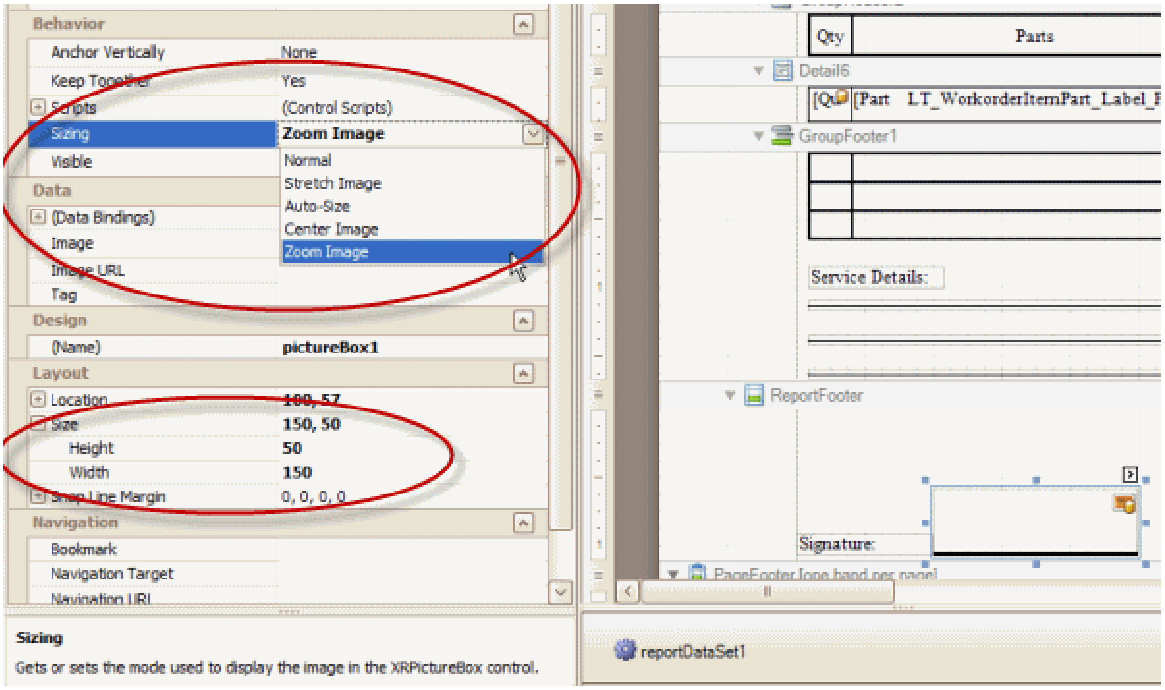


14. Show the date the client signed, by dragging over the SignatureClientDate datafield from the Fields tab



15. If you would like to have the signature field a different size, keep the 1 to 3 ratio.   And you may also need to set the **Sizing** property.

For example, in the screenshot below if we set to a height of 50 and a width of 150, would want to set the Sizing property to **Zoom Image** so that it fits within the space given



16. Do try out different settings and preview so that you can see what it will look like.

NOTE: You MUST set the Sizing back to **Normal** before being able to change the size (width and/or height) of the control field.

17. Save any changes made to your customized report, exit out and congratulations - you have customized another report template!

6.46 More report template examples on the AyaNova Support Forum

Providing report template design support is outside of our AyaNova free support.

We have gladly provided many tutorials in this Help documentation to get you going, as well as many additional examples on our AyaNova Support Forum https://forum.ayanova.com

Some of the examples may include screenshots from an older version of the report template designer, but are very easy to relate to the latest version.

If you are interested in having a custom report template created for you, provide the following information sent directly to *support@ayanova.com*

- a mockup of the report you would like (in Word, Excel, PDF) or existing report template exported to file from AyaNova that you want further customized.
- identify from what AyaNova entry screen or grid this report is for (from Service Workorder entry screen, from Client entry screen, from Labor grid in Service navigation pane, etc)
- identify in red font in the mockup the datafields that correspond with fields of that AyaNova entry screen
- if report will use logos or images, be sure to provide also attached to your email
- any additional information that would be relevant that will help us understand how the report will look and act with actual data and how it will react based on the data.

6.47 Check out the Tips on the AyaNova Support Forum

In addition to the detailed information on every feature in this Help file and its tutorials, also check out the tips on use on the AyaNova Support Forum

Generator for use with Notification & PMs

7 Generator for use with Notification & PMs

7.1 What is the Generator?

The Generator checks every 5 minutes to see if an event has occurred that it is supposed to do something about.

Events could be:

- Preventive Maintenance order ready to generate to a service workorder
- User notifications
- Client notifications

For example, if you have subscribed to a notification so you are notified whenever a customer service request has been made, the Generator will check to see if there has been any made every 5 minutes. If it finds a new customer service request, it will start the process to ensure you get notified.

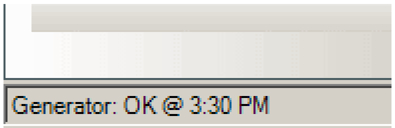
Another example, you have a Preventive Maintenance order that is set to automatically create a workorder for a specific client every two months starting next month 7 days before the work is to be performed so that the scheduled user sees it on their schedule. The Generator will do this - will create the workorder exactly when it should as well as automatically reset the PM for its Next Service Date.

- If using a **network configuration of AyaNova**, you must install and configure the network Generator service.

- If using the **default stand-alone AyaNova installation**, an **internal** Generator runs automatically and you **do not** install the network Generator service.

Note that the internal Generator will run and **only** check for events if:
- The AyaNova program is itself running
- The AyaNova program was run in a new session (i.e. if you Log Out and log back in, the internal stand-alone Generator will **not** run. You must have Exit out of AyaNova and run AyaNova)
- The user is **not** logged in as the AyaNova Administrator account
- The user logged in is a member of a security group with full rights to preventive maintenance and workorder objects

You can see that the default stand-alone single computer configuration Generator is running successfully because it says so in the bottom left-hand corner:



- This message ONLY shows when logged in to AyaNova in a default stand-alone single computer configuration. It does NOT show for a network configuration of AyaNova.
- Internal generator message ONLY shows when logged in NOT as the AyaNova Administrator

7.2 Network Generator installation steps

Read through all instructions and notes first before proceeding.

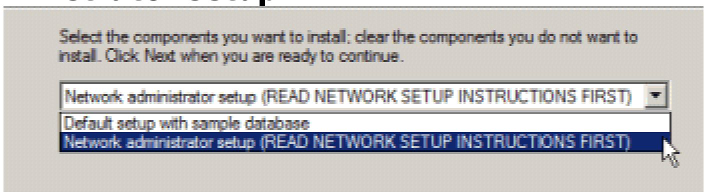
1. **Confirm requirements**
2. **Install the network Generator**
3. **Start and confirm Generator service loads successfully**
4. **Perform notification tests to confirm Generator is running**

1. Confirm requirements

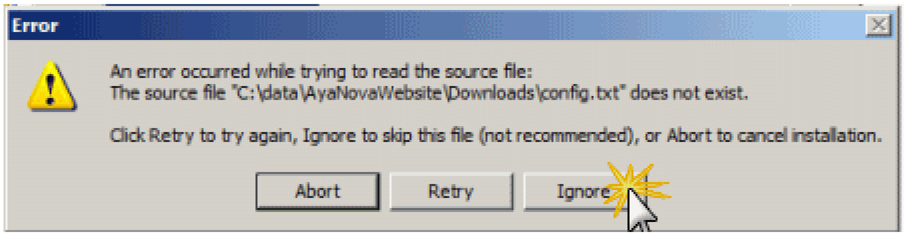
- that you have successfully installed AyaNova for network use on your server (i.e. network Firebird Server, or network SQL Express or network SQL Server)
- that the network Generator service is NOT installed on any other computer (it should only be installed ONCE on the server where the AyaNova database is networked)
- If installing on a 64bit computer, make sure QBI is **NOT** also installed on this same computer(server) as you will get an error when you run the Generator service.

2. Install the network Generator

a. On the server where you have the AyaNova database networked, run the AyaNovaSetup.exe installation **again** this time **selecting the network administrator setup**

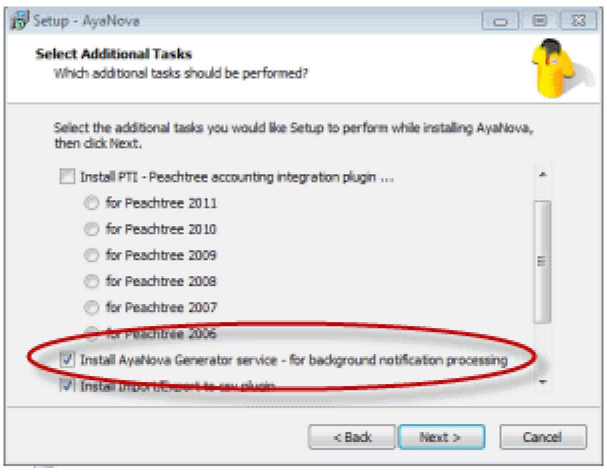


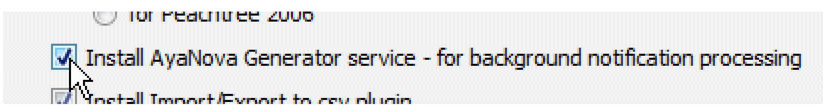
- As you will be selecting the Network administrator setup to install the network Generator, run the AyaNovaSetup.exe file from the **same** folder where you placed the copy of your networked edited config.txt file as per step #7 of your AyaNova networking steps - as it will expect to find a copy of the config.txt file in the same folder.
- If you run the AyaNovaSetup.exe file from a folder where a copy of your config.txt file is not located, you will get the following message. Just click on Ignore.



- Do **NOT** install the Generator to run on multiple computers - only on the server where the database is.

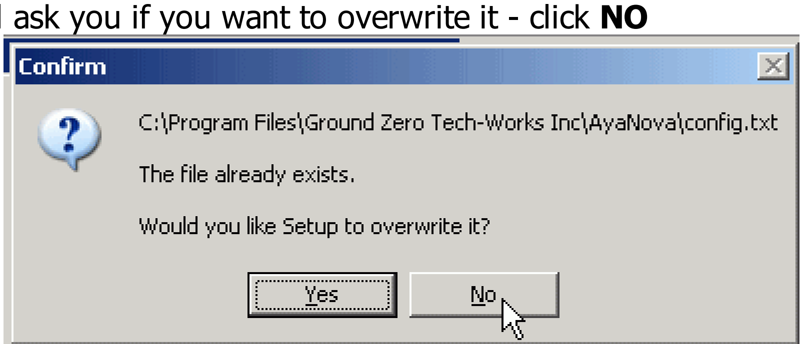
b. In the list of options, select to **Install AyaNova Generator service - for background notification processing**





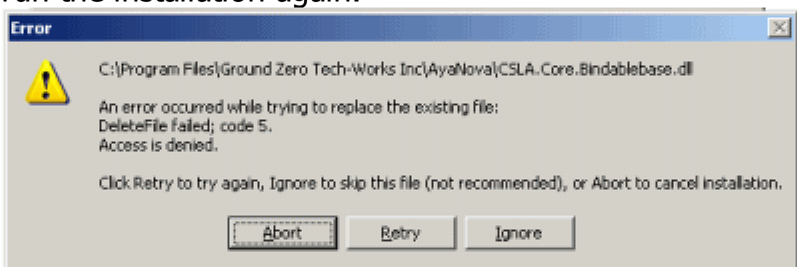
c. Proceed with the installation.

d. If during the installation, it sees that there already is a config.txt file and will ask you if you want to overwrite it - click **NO**



- You do **NOT** want to overwrite your config.txt file because it is already configured to point to your networked AyaNova database

NOTE: if you get a message such as below about replacing a file, this is occurring because you have something running. Click Abort, and then check to make sure you do NOT have the AyaNova program running, nor QBI or PTI or any of the import/export utilities, and check IIS to make sure that the Default Web Site and AyaNovaDP (the data portal) is shut down while installing. Then run the installation again.

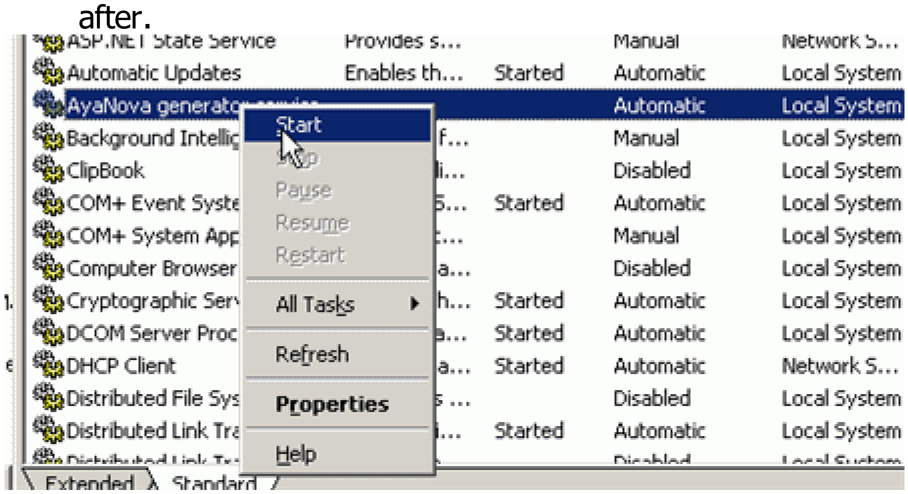


3. Start and confirm Generator service loads successfully

a. Once installation is completed, open Services (right-click on My Computer -> select Manage -> expand Services)

b. Find the **AyaNova generator service** – start it (right-click on AyaNova Generator and select Start)

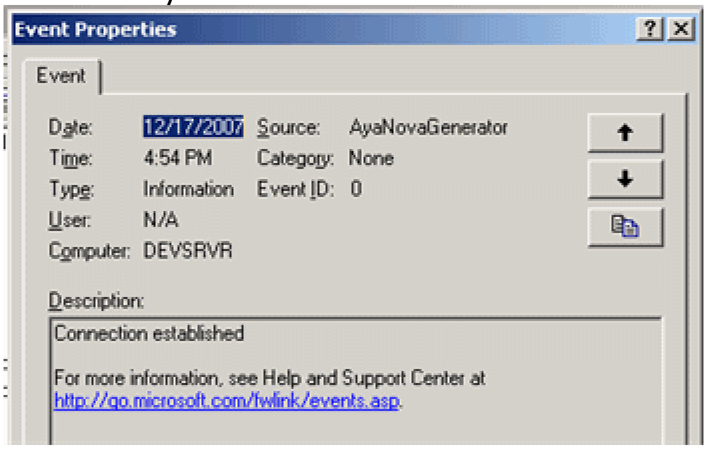
- When the Generator service first starts, it will poll the database to process any notification events. Then it will poll every five minutes after.



c. Check the Event Log for the AyaNova Generator and confirm it loaded and connected successfully

- Expand the Event Viewer in Computer Management window
- Double click on the Application Log

- Double-click on the last log entry for the source AyaNovaGenerator – it should say the service has connected successfully.

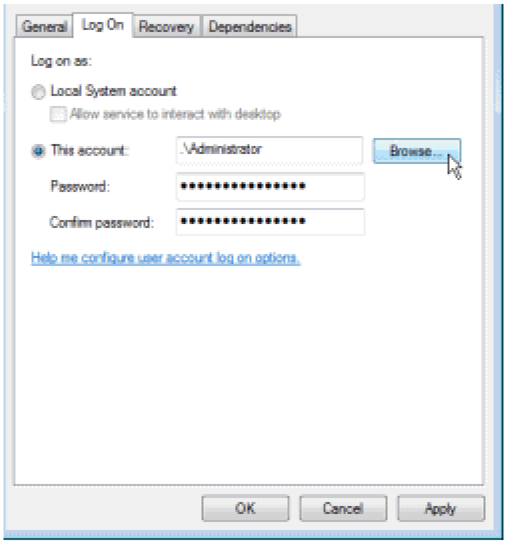


  - If the service did not start successfully, check the other logs at that time to help identify the reason.
  - Most common issue is that the config.txt in the AyaNova program directory is not correctly edited. Edit the config.txt file and confirm that it does have the correct database server, database, username and password, and that you can successfully run AyaNova program connecting to your networked AyaNova database.

d. Set the AyaNova Generator service to start automatically

e. if this computer where the Generator service is now installed and running is logged out of on a regular basis (not running all the time logged in), you may want to/need to set the Logon properties of the service so that it can run while the computer itself is not logged on.

  - Right-click on AyaNova generator service
  - Select Properties
  - Select the Logon tab
  - Set a specific account that has full rights to computer

- 

4. Perform notification tests to confirm Generator is running

Now perform the notification tests to confirm that your Generator is running correctly.

NOTE: Make sure that **only one** instance of Event Generator service is ever running for your database. Do NOT install the Generator to multiple computers - doing so will cause errors.

NOTE: You may need to create an exception with your firewall on the server for the generator.exe that runs

7.3 Generator testing steps

Perform notification tests to confirm Generator is running successfully

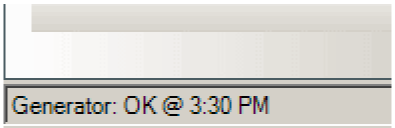
A. Is the Generator successfully running?

a. Stand-alone configuration of AyaNova

1. If your AyaNova was installed taking the defaults, this means you are running AyaNova in the stand-alone configuration so you do not have to install anything for the Generator to run.

2. All you have to do is log in as an AyaNova user that is NOT the AyaNova Administrator.

3. And you will see the Generator OK message in the bottom left hand corner



b. Networked AyaNova

1. If your AyaNova is networked using Firebird Server, SQL Express or SQL Server, than you need to install the network Generator

B. Simple test using delivery method of internal AyaNova memo

First test uses the very simple notification "Schedule Marker - just created" with delivery method of "AyaNova memo"

a. Log in as a schedulable user

b. Subscribe to "Schedule Marker - just created"

c. Create delivery method of "AyaNova memo" and add as the delivery method for this subscription

d. Create a new Schedule Marker for this schedulable user as the Source: and save

e. Refresh the Notification Logs (last 7 days) grid after more than 5 minutes have passed to give it time to generate

f. You should see a record identifying the notification, what it was for and any errors it may have encountered

g. If you do not see a notification record, nor receive a memo, recheck your Generator installation and configuration steps, including redoing the steps above for subscribing.

C. Second test uses delivery method of email to confirm if your Global Settings are correct

You would only perform this test if you want to be able to send out user notifications via email and/or notifications to clients.

Second test again uses the simple notification "Schedule Marker - just created" but this time with delivery method of "internet mail account" to confirm that you have your Global Settings for SMTP notification set up correctly.

a. Log in as the AyaNova Administrator, and confirm that the SMTP Notification settings in Global Settings have been set correctly.

If you make any changes, don't forget to Save and exit out of AyaNova; as well as restart the Generator service so that the changes are taken into effect

b. Log in as a schedulable user

c. Delete the previous notification subscription

d. Subscribe to "Schedule Marker - just created"

e. Create delivery method of "internet mail account" with a value email address and add as the only delivery method for this subscription

f. Create a new Schedule Marker for this schedulable user as the Source: and save

g. Refresh the Notification Logs (last 7 days) grid after more than 5 minutes have passed to give it time to generate

h. You should see a record identifying the notification, what it was for and any errors it may have encountered

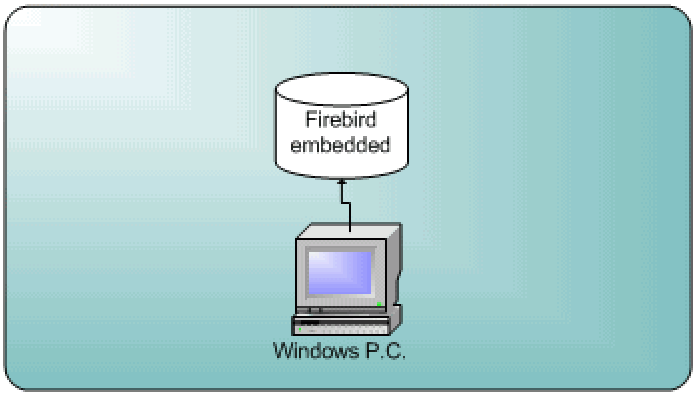
i. If you do not see a notification record, nor receive an email, recheck your Generator installation and configuration steps, and Global Settings for Notification, including redoing the steps above for subscribing.

Network & Remote Installation

8 Network & Remote Installation

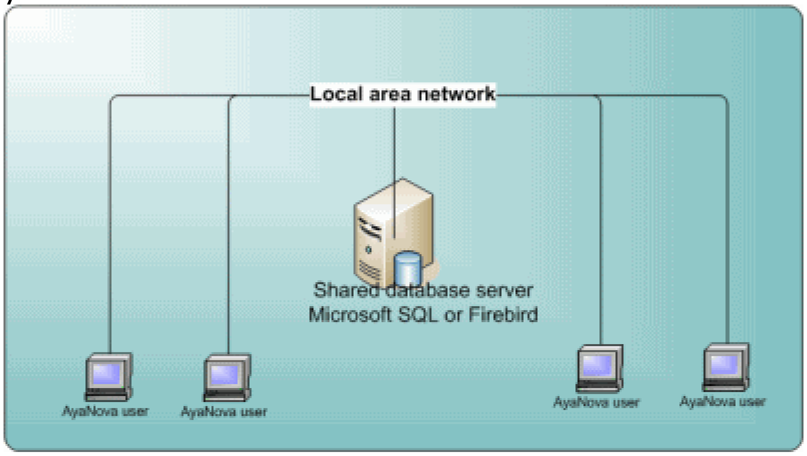
8.1 AyaNova network installation

On initial installation, both the AyaNova program and the database are installed to the local hard drive - this is the **[stand-alone default installation]**



You can also configure AyaNova for use in a **network environment**

- AyaNova can be configured for network use using either the network Firebird Server, SQL Express and SQL Server. AyaNova is not compatible with MySQL.
- The image below shows an example of a AyaNova network installation - local networked computers run the AyaNova program connecting to the networked AyaNova database on the server.



1. For network installation, we provide specific steps depending on which database server you wish to use
    - See the section Which database server should I use? to help you decide

2. Once you determine which database server you want to use, you follow the specific steps for that database server
    - Network Firebird Server configuration

  - Network SQL Express configuration
  - Network SQL Server configuration

- The specific steps you follow in the link above go through installing the AyaNova program at the database server, configuring the database server, set up of the AyaNova database for network use with that database server, editing of the AyaNova configuration file on the server so that it accesses the networked AyaNova database, and installation and configuration of AyaNova at the users computers.

8.2 Which database server should I use?

You have three choices for database server in a networked AyaNova configuration:

- Firebird Server 2.1.1 or newer
- SQL Express 2005 or higher
- SQL Server 2005 or higher

Note that we provide a utility so that your data can be converted from Firebird to Microsoft SQL server (but not the other way around) so you can start with Firebird and later move to the Microsoft SQL server platform; we do not provide a utility to go back to Firebird from an MS SQL server platform.

In general, we recommend you start with the Firebird server and move up from there if performance is an issue.

Firebird pros

- Free
- Far less resource intensive than SQL Express or full Microsoft SQL server, can be run on older more limited hardware
- Easiest to install
- Good for small to medium sized offices with a tight budget for both equipment and software
- Long history going back many years to when it was originally a Borland product (InterBase)
- Rock solid and used widely in corporate and other critical environments
- Open source product if that is important to you
- Easily converted to a Microsoft SQL server platform down the road using our free "ToMSSQL" utility if required
- Paid for support is available from IBPhoenix. It is extremely unlikely you will need support, we provide all the information you require for use with AyaNova.

Firebird cons

- Not as fast as Microsoft SQL on identical hardware under appropriate loads
- If you will enter a large amount of data (i.e. have a large number of parts, clients, etc) will be much slower than SQL
- If will be utilizing any of the remote access options (Data Portal, WBI and/or MBI) it is recommended for speed to use SQL Express or SQL Server

- If your computer(s) is 64bit, the optional add-on OLI is not compatible with Firebird. If your computer(s) is 64bit, you must be configured for use with SQL Express or Server. Note - this is only if 64bit **and** only if you also want to use the optional add-on OLI

Our network Firebird installation and configuration guide will show you how to obtain and use Firebird with AyaNova.

Microsoft SQL Express 2005 or newer
Pros
- AyaNova is optimized for use with SQL
- Free
- Less resource intensive than full Microsoft SQL Server
- Appropriate for small offices with smaller databases
- Can easily be up sized to full paid for SQL Server down the road

Cons
- Consumes a lot more memory and resources than Firebird server, requires more powerful equipment
- Unsupported by Microsoft
- Limited to a single processor
- Limited to 1gb of ram
- Limited management tools compared to full Microsoft SQL Server

Our network SQL Express configuration guide will show you how to obtain and use SQL Express with AyaNova.

Microsoft SQL Server 2005 or newer (Paid for version)
Pros
- AyaNova is optimized for use with SQL
- Very high performance
- Unlimited scalability for large corporate and enterprise users
- Good for multiple database situations
- Excellent suite of management tools
- Full support from Microsoft available

Cons
- Pricey
- Requires modern high performance multi CPU hardware and a *lot* of memory to get the most out of it
- Requires knowledgeable installation and configuration and some ongoing administration

Our SQL Server configuration guide will show you how to use your existing SQL Server platform with AyaNova

8.3 Network AyaNova database server requirements

Requirements for the server depend on which network database configuration you would be using, and the load your server is under.

AyaNova is hardware scalable - performance is directly related to the performance of the computer where the AyaNova database is.
Obviously a computer with a light load of traffic and processing is going to be able to respond more quickly than the same computer with a heavy load of traffic and processing.

When networking AyaNova using Firebird 2.1.1 SuperServer, we recommend a minimum of Windows 7 updated with the latest updates, and latest Microsoft .NET Framework 4, and at least 1GHz CPU and 1GB RAM

When networking AyaNova using SQL Express or SQL Server, refer to Microsoft for their minimum recommended OS and minimum recommended hardware for the version of SQL Express or SQL Server you will be using.

8.4 Network Firebird Server configuration

Read through all instructions first before proceeding.

Make sure you have the latest Windows operating system service patches installed **before** proceeding.

If you perform the installation via a remote connection and encounter any issues, first always recheck that each step was fully completed successfully before going to the next. If still an issue, perform the installation while physically at the server and redo all steps from scratch again.

Your Firebird Server version must be 2.1.1 See steps below for download location.

Use of AyaNova with network Firebird engine is a 7 step process

1. **Enable firewall port for Firebird Server**
2. **Ensure network uses TCPIP for communication between computers and server**
3. **Stand-alone AyaNova database and program is installed to server**
4. **Move stand-alone AyaNova database to new location on server**
5. **Network Firebird database server is installed and configured**
6. **Configure and confirm access for the AyaNova program on the server to the database**
7. **Configure and confirm access from network computers to networked database**

1. Enable firewall port for Firebird Server

The network Firebird server by default uses tcp/ip port number 3050.

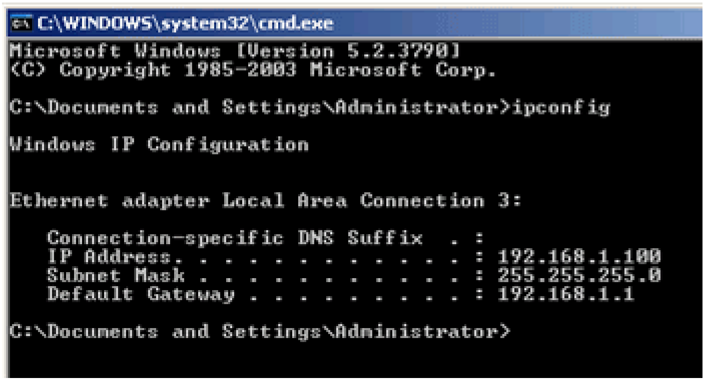
If there is a firewall enabled on the "server" computer where the network Firebird configuration is installed and setup, port 3050 needs to be enabled for local connections.

2. Ensure network uses TCPIP for communication between computers and server

- The server and networked computers will communicate via TCPIP. If your network is not yet configured, do so. If you are not experienced with this, please contact your local computer center.

- To confirm whether your network can communicate or not, determine the server’s static internal IP address and ping from a local area networked computer

a. Open a command prompt on the server (Start -> Run -> type in **cmd** and click on OK) and type **ipconfig** in the DOS prompt



b. Make a note of your server’s IP Address

c. Confirm that network computers can “talk” to the server by opening a command prompt on a local area networked networked computer and typing **ping xxx.xxx.xxx.xxx** and the Enter key where xxx.xxx.xxx.xxx is the IP address of your server

For example, if your server's IP address is 192.168.1.15, you would type **ping 192.168.1.15**

If you get a timeout, there is an issue connecting via TCPIP. Please contact your local computer center to troubleshoot.

3. Stand-alone AyaNova database and program is installed to server

a. Install the stand-alone AyaNova database and program to the server's local hard-drive while logged into that server itself. Refer to Stand-alone default AyaNova installation

- Do not bother selecting to install anything else at this time (i.e. do not install QBI, Data Portal, Generator etc until after the network configuration has been done as you can go back and select additional items to reinstall as needed when needed)
- Once you have completed all of the network steps, you can remove the AyaNova program from the server itself if you do not want the program files on it and won't be installing any optional add-on's such as Data Portal,

Generator, etc. Do note that having AyaNova program files on the Firebird Server does not hamper it in any way, and takes up a maximum of 50MB in space; and provides you with a location to confirm your setup with AyaNova Support in the event you experience an issue.

b. Once installation is complete, run the AyaNova program and confirm you can log in

c. Exit out of the AyaNova program

d. It is very important that the AyaNova database file is not accessed (copied, moved, etc) unless explicitly stated so in the following steps. If the AyaNova database file is accessed before steps are completed, corruption could occur.

e. The AyaNova program files are installed by default to ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova (or C:|Program Files|... if 32 bit)***

f. The AyaNova sample stand-alone database is located at %AllUsersProfile%\AyaNovaData\AYANOVA.FDB

- as per the Stand-alone default AyaNova installation on a Windows 7 or higher computer, this usually is the C:\ProgramData\AyaNovaData folder (note: you may have to unhide this to see it)
- as per the Stand-alone default AyaNova installation on an older computer such as XP, this usually is the C:\Documents and Settings\All Users\Application Data\AyaNovaData folder

4. Move stand-alone AyaNova database to new location on server

a. Using Windows Explorer, create a folder on the server from which the networked AyaNova database will be located - for example: C:\Data\AyaNova

b. In Windows Explorer, move the AYANOVA.FDB file from *%AllUsersProfile% |AyaNovaData|* to this new folder C:\Data\AyaNova (or whatever folder you created on the server)

NOTE: Never ever move or edit or copy the AyaNova database file once network Firebird is installed and running **unless**:

- every user is out of AyaNova
- any additional AyaNova related programs are shut down (Event Generator, AyaNovaDP, etc)
- **and** you have stopped the Firebird service by opening Control Panel -> Firebird Server Manager -> select Stop

- Moving, editing or copying a live database file **will** cause database problems – even corruption

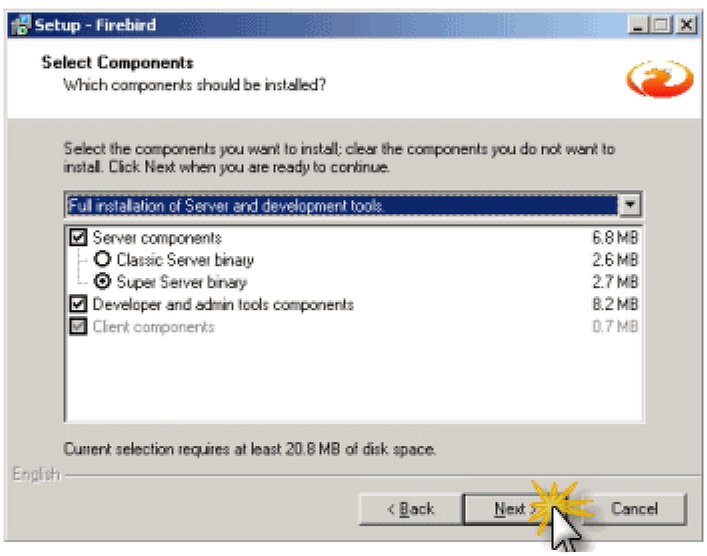
5. Network Firebird 2.1.1 database server installation and configuration

a. Download the network Firebird 2.1.1 database server installation file from the link on the AyaNova web page http://www.ayanova.com/download.htm (scroll down to under *Other AyaNova related downloads*) and be logged into the server as the server's administrator user

- **NOTE**: AyaNova **requires** Firebird 2.1.1
- If you have an older version of Firebird on this server, uninstall **before** installing Firebird 2.1.1 as you can **not** have both versions of Firebird service running on a computer at the same time
- If your server is 64x, make sure to download and install the 64bit Firebird Server 2.1.1 setup file from http://www.ayanova.com/download.htm

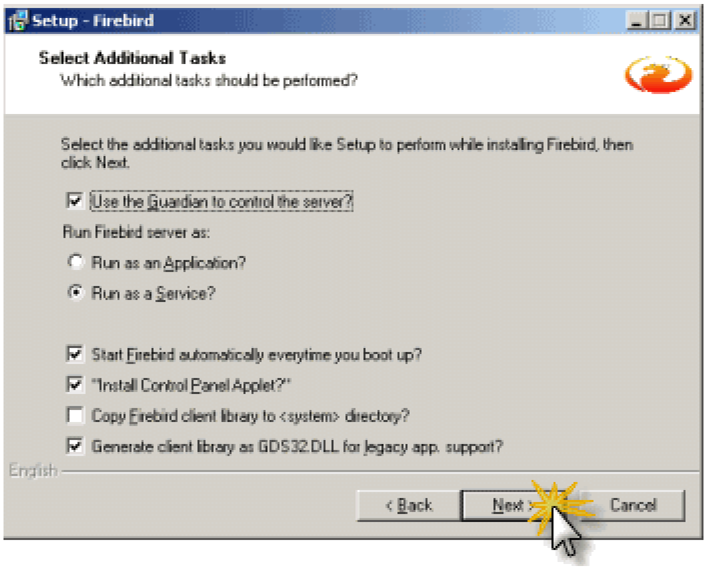
b. Start the network Firebird 2.1.1 database server installation

- The installation will have defaults selected, and these defaults are what you **do** want.
- Make sure Super Server binary is selected, and leave all other selections as shown below



- EXCEPTION - ONLY if installing to a Vista computer, **uncheck** the "Install Control Panel Applet" in the next screenshot.

- This exception is ONLY if using Vista, hopefully no one still is and that you are using at least Windows 7 or newer OS.



c. Once the network Firebird server installation is complete, move to the Firebird program directory **C:\Program Files\Firebird\Firebird_2_1** via Windows Explorer

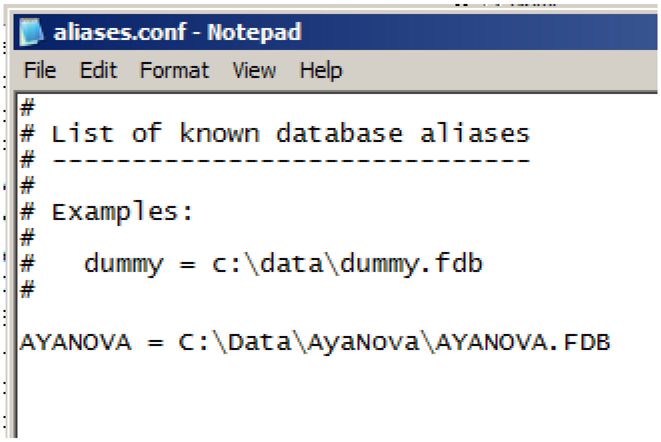
d. Using NotePad, open the file aliases.conf

- Do NOT use any other program to open and edit this file

e. Enter text identifying the name of your database and the path where you moved the database file to from step 3

- For example, if your database is in C:\Data\AyaNova, enter the text as follows - <u>note</u> there is no # in front of it

AYANOVA = C:\Data\AyaNova\AYANOVA.FDB

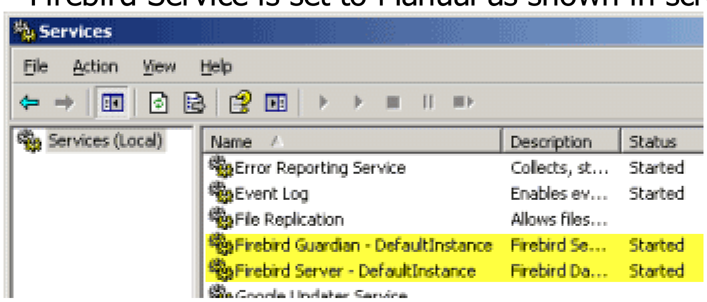


f. Save and close the aliases.conf file

g. Reboot the computer and log in as the windows administrator

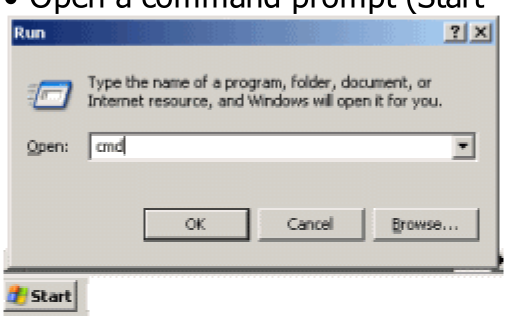
h. Confirm that the network Firebird server is running

- Open Control Panel -> Administrative Tools -> Services
- Confirm both the Firebird Guardian Service and the Firebird Service are running, that the Firebird Guardian Service is set to Automatic and the Firebird Service is set to Manual as shown in screenshot below



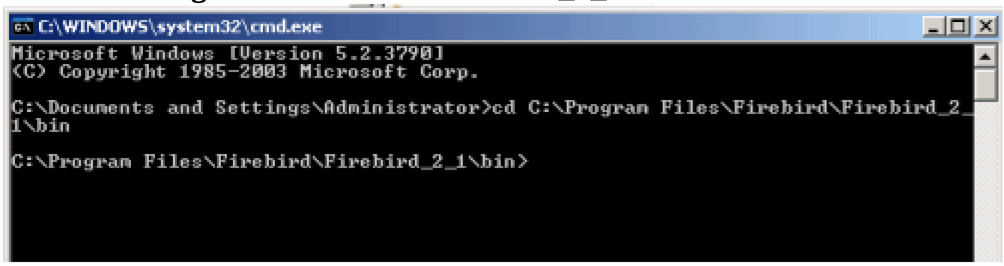
Additional optional step i. As the network Firebird server uses a default password that is known by all, it is suggested that you change the default password.

- Open a command prompt (Start -> Run -> **cmd**)



- Move to the C:\Program Files\Firebird\Firebird_2_1\bin directory by changing to that directory by typing

CD C:\Program Files\Firebird\Firebird_2_1\bin

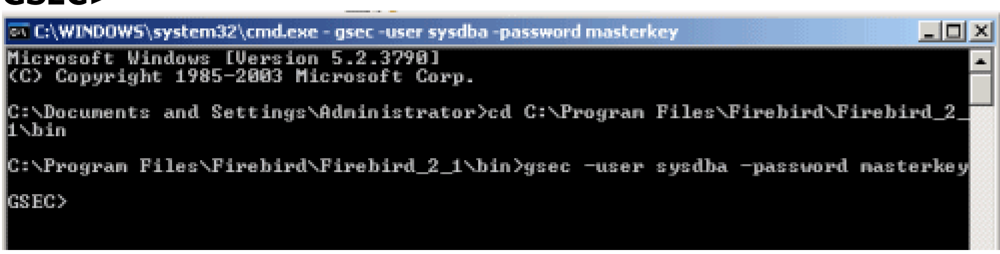


- Type the following (*do **not** copy – will receive syntax error message if attempt to do so*)

gsec –user sysdba –password masterkey

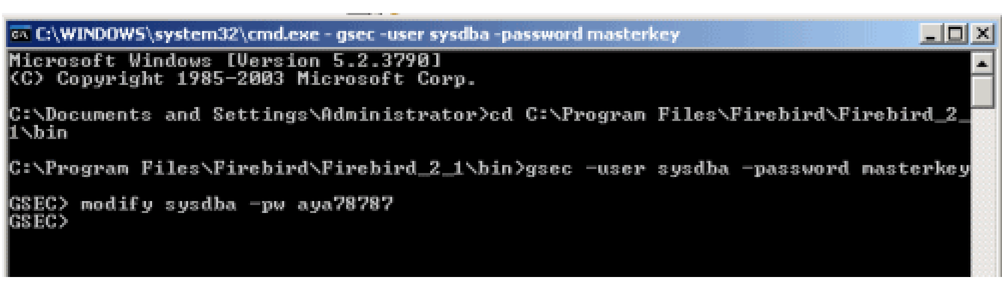
- You will now see a shell prompt

GSEC>



- Now you will type in to modify the Firebird Server's sysdba's password to something other than the default. In the example below, we have entered aya78787. You can and should of course have your sysdba password set to something different

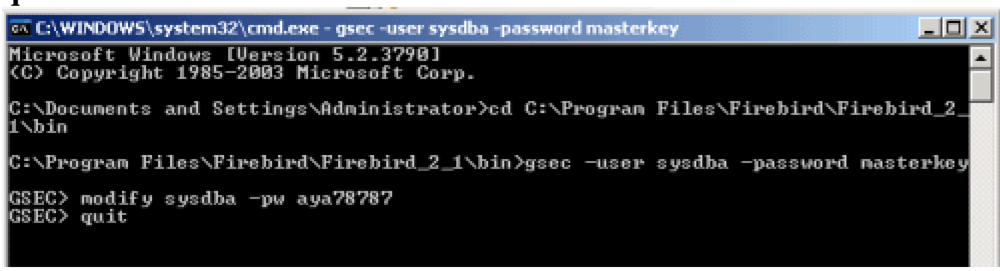
modify sysdba –pw aya78787



- Make a note of the password you have chosen exactly as typed as you will need it when you edit your config.txt to be able to connect to your AyaNova database.

- Type the following at the prompt which will close out of the gsec utility.

quit



- Exit out of the command prompt window

6. Configure and confirm access for the AyaNova program on the server to the database

a. Delete the existing config.txt in the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova (or C:|Program Files|... if 32 bit)*** folder

b. Move to the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova/examples*** folder

c. Copy the ***EXAMPLE_FIREBIRD_SERVERconfig.txt*** file

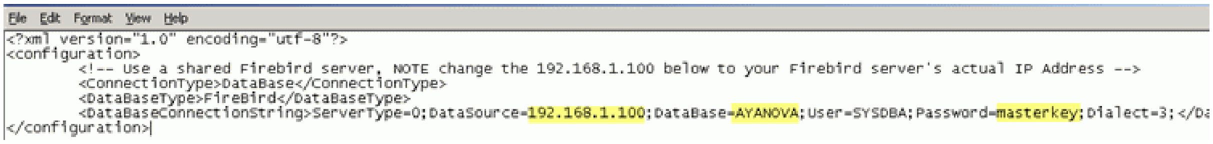
d. Move back to the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova*** folder

e. Paste in the ***EXAMPLE_FIREBIRD_SERVERconfig.txt*** file into the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova*** folder

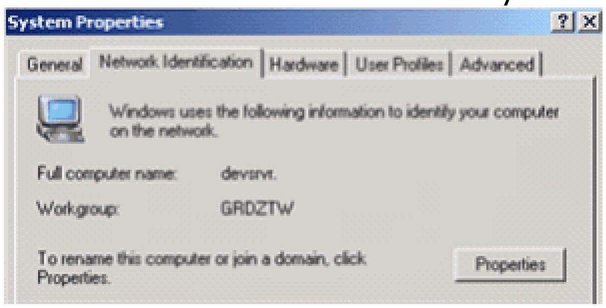
f. Rename this file to ***config.txt***

g. Edit this new ***config.txt*** using NotePad

- Reminder: use only NotePad to edit this file
- Edit the example IP address in this file's DataSource to your server's IP address where the AyaNova database is.
- Edit the database name to what you set in the aliases.config file
- If you changed the Firebird Server's password in step 4.j you also need to edit the password in this config.txt file to that new password.



- Alternatively, you can use your server's computer name instead of its IP address. In the screenshot below, the server's full computer name is *devsrvr* so instead of entering where it is 192.168.1.100, you would enter devsvr if that was the name of your server

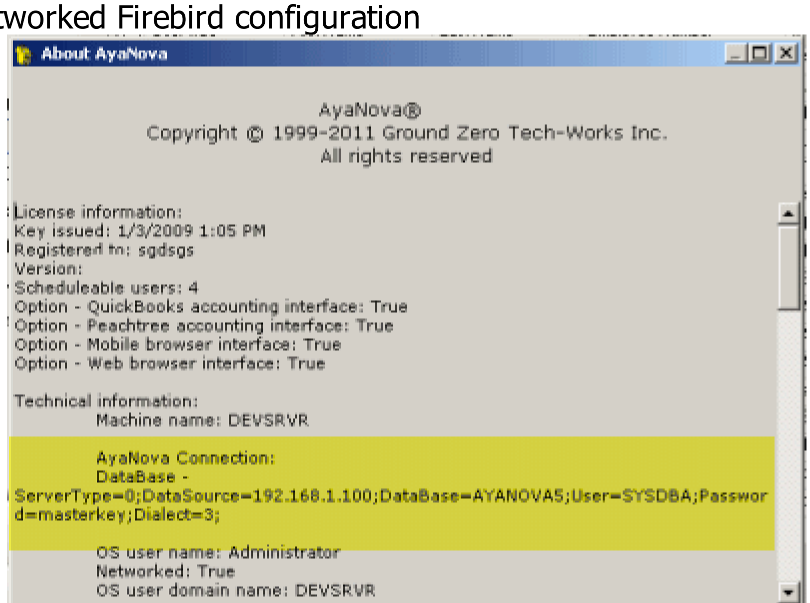


j. Save the file.

k. Run the AyaNova program and log in.

l. Select menu Help -> About AyaNova

m. Confirm that it shows the correct connection for you (screenshot below is an example and may not have the same ip address as you, same database name, nor same password) - so that you know that you are correctly connecting to the networked Firebird configuration



If you encounter an issue connecting to the AyaNova networked database, 99% of the time it is because a step was missed or done incorrectly. Go back and double-check each of your steps from the beginning.

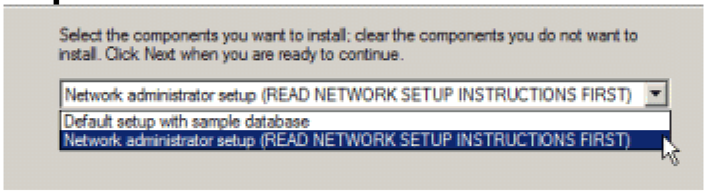
7. Configure and confirm access from network computers to networked database

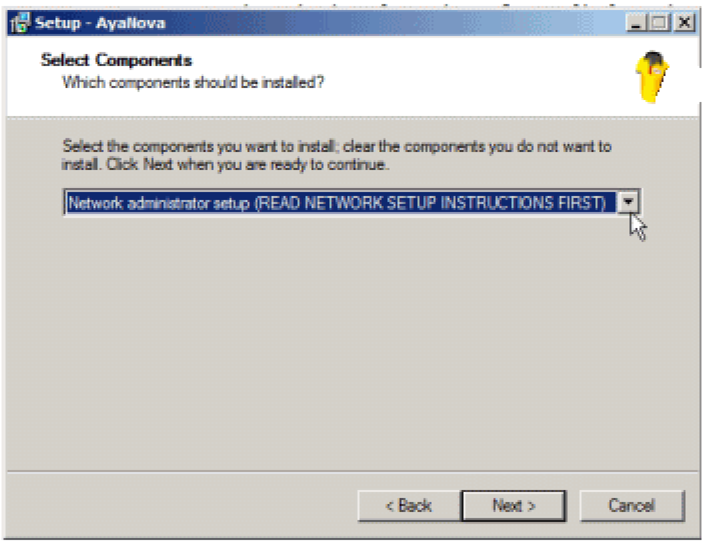
a. Copy your network Firebird configured ***config.txt*** file from the ***C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova (or C:\Program Files\... if 32 bit)*** folder to a shared location that your networked users can access. Now that you have confirmed it works you can re-use it at all work stations.

b. Copy/Move to this same shared folder the AyaNova installation file AyaNovaSetup.exe that you used to install on the server. When a network setup is run it will automatically use the config.txt file it finds in the same folder as the setup program.

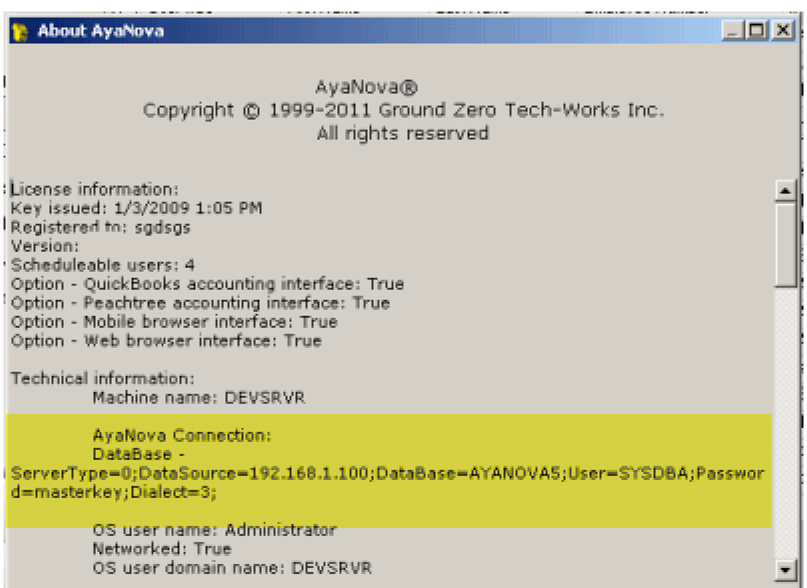
c. Have each local networked computer run the AyaNovaSetup.exe file from that shared location that also has the edited config.txt in that same shared location.

- Make sure at the networked computer to select **Network administrator setup**





- If the local networked computer will also run QBI, or PTI or perform an import, select when installing on that computer those optional AyaNova programs. Refer to the QBI Manual or PTI Manual available from the AyaNova download web page if using QBI or PTI. Refer to the appropriate ImportExport.csv utility section in this help file if using one of the import utilities.
- The AyaNovaSetup.exe will "see" that config.txt file and automatically copy it to that computer's AyaNova program directory so no additional configuration is needed on that user's computer.
- The install will only install the AyaNova program files it has been told to install, will copy the config.txt file to the networked workstations AyaNova program folder and will not install a trial database.
- The AyaNova installation will place a desktop icon for AyaNova on the desktop as well as in the start menu.
- You can confirm that AyaNova is configured correctly on the networked computer by logging in on that networked computer, selecting Help -> About AyaNova so that you know that you are correctly connecting to the networked Firebird configuration (screenshot below is an example and may not have the same ip address as you, same database name, nor same password)



Refer to Network Generator installation steps to install and configure the Event Generator in a network setup if applicable.

Refer to the Data Portal installation and configuration steps to install and configure the AyaNova Data Portal if applicable.

8.5 Network SQL Express configuration

Read through all instructions first before proceeding.

Make sure you have the latest Windows operating system service patches installed **before** proceeding.

If you perform the installation via a remote connection and encounter any issues, first always recheck that each step was fully completed successfully before going to the next. If still an issue, perform the installation while physically at the server and redo all steps from scratch again.

The oldest version of SQL Express version that can be used with AyaNova is 2008 R2. You can use the latest version of SQL Express or any version 2008 R2 or newer. It would be recommended to use the latest version, along with the latest SSMS (SQL Server Management Studio).

It is HIGHLY recommended to make yourself aware of any known issues about SQL before proceeding, including those identified in our AyaNova Support Forum

It is your responsibility to be knowledgeable about SQL databases, especially about how to backup.

Use of AyaNova with SQL Express is a 7 step process

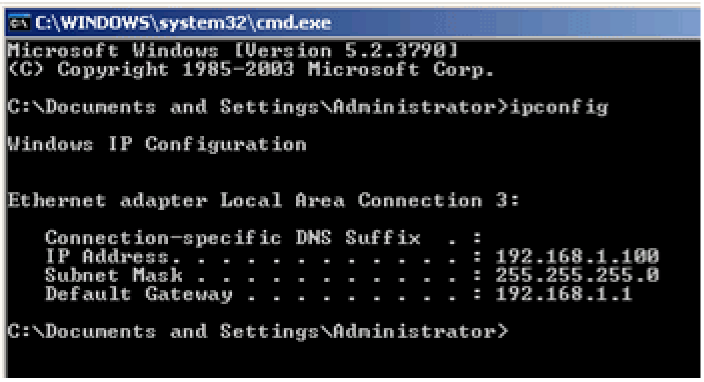
1. **Ensure network uses TCPIP for communication between computers and server**
2. **Stand-alone AyaNova database, AyaNova program and To SQL utility**
3. **SQL Express is installed and configured**
4. **Set exceptions in server's firewall for SQL**
5. **Creation of SQL Express AyaNova database**
6. **Configure and confirm access for the AyaNova program on the server to the database**
7. **Configure and confirm access from network computers to networked database**

1. Ensure network uses TCPIP for communication between computers and server

- The server and networked computers will communicate via TCPIP. If your network is not yet configured, do so. If you are not experienced with this, please contact your local computer center.

- To confirm whether your network can communicate or not, determine the server’s static internal IP address and ping from a local area networked computer

a. Open a command prompt on the server (Start -> Run -> type in **cmd** and click on OK) and type **ipconfig** in the DOS prompt



b. Make a note of your server’s IP Address

c. Confirm that network computers can “talk” to the server by opening a command prompt on a local area networked networked computer and typing **ping xxx.xxx.xxx.xxx** and the Enter key where xxx.xxx.xxx.xxx is the IP address of your server

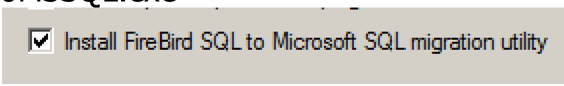
For example, if your server's IP address is 192.168.1.15, you would type **ping 192.168.1.15**

If you get a timeout, there is an issue connecting via TCPIP. Please contact your local computer center to troubleshoot.

2. Stand-alone AyaNova database, AyaNova program and To SQL utility is installed to server

a. Install the **stand-alone AyaNova database** and program to the server's local hard-drive while logged into that server itself. Refer to Stand-alone default AyaNova installation

- You **must** also select to install the **Install Firebird SQL to Microsoft SQL migration utility** as this is the utility to create the AyaNova SQL database ToMSSQL.exe



- Once you have completed all of the network steps, you can remove the AyaNova program from the server itself if you do not want the program files on it and won't be installing any optional add-on's such as Data Portal, Generator, etc. Do note though, that having AyaNova program files on the Firebird Server does not hamper it in any way, and takes up a maximum of 50MB in space; and provides you with a location to confirm your setup with AyaNova Support in the event you experience an issue.

b. Once installation is complete, run the AyaNova program and confirm you can log in

c. Exit out of the AyaNova program

3. SQL Express installation and configuration

a. The oldest version of SQL Express version that can be used is 2008 R2. You can use the latest version or any version 2008 R2 or newer. It would be recommended to use the latest version, along with the latest SSMS (SQL Server Management Studio).

- Refer to the steps SQL Express example installation for specific settings to set
- It is HIGHLY recommended to make yourself aware of any known issues about your version of SQL before proceeding, including those identified in our AyaNova Support Forum

b. Once installation is complete with the settings set as per the SQL Express example installation , reboot your computer, log in as the computer administrator, and confirm your SQL services have successfully started and are running

4. Set exceptions in server's firewall for SQL

If there is a firewall enabled on your "server" computer where the SQL configuration is installed and setup, set exceptions for sqlserver.exe and sqlbrowser.exe (check the path of each SQL service to confirm its specific path and file name), and/or TCP or UDP port 1434 and 1433 in some cases.

If unfamiliar with setting firewall exceptions, your best suggestion would be to perform a search online for your server's operating system (i.e. perform a search for *Windows 10 firewall exceptions port program*)

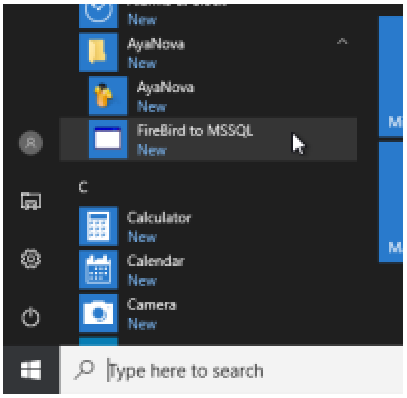
TIP: If after all steps are completed and AyaNova successfully loads on the server, but does not on a local area network computer, that may indicate that your firewall settings are restricting access.
You can confirm the issue is due to your firewall or not, by turning off your firewall to troubleshoot.

5. Creation of SQL Express AyaNova database

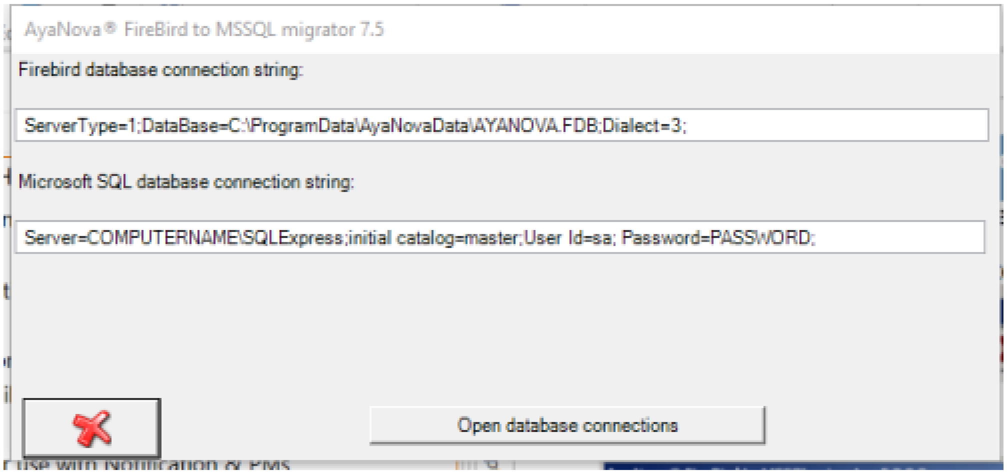
a. Via the server's Start menu, select to run AyaNova -> Utilities -> **Firebird to MSSQL**

How you get there depends on your version of Windows. For example, with an older version of Windows:

Or with Windows 10:



b. This will open the ToMSSQL utility

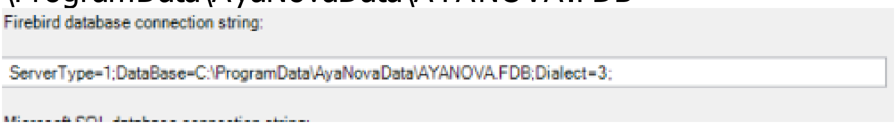


c. You WILL NEED to edit the two fields **to what you actually have**

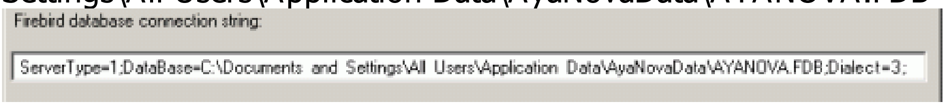
<u>Firebird database connection string:</u>

This MUST identify the location of your actual existing AYANOVA.FDB database file.

- If you installed for standalone use to a Windows 7 or newer computer, the default location and file is C:\ProgramData\AyaNovaData\AYANOVA.FDB



- If you installed for standalone use to an old operating systems such as XP or 2003, the default location and file is C:\Documents and Settings\All Users\Application Data\AyaNovaData\AYANOVA.FDB



- **OPEN YOUR Windows Explorer and actually confirm that YOUR AyaNova database file AYANOVA.FDB <u>is in</u> the path stated before proceeding.**

- **<u>Whereas if instead</u>** you had previously configured AyaNova for network Firebird use but are now converting to SQL, you will need to edit the entire string so that it reflects your networked AyaNova Firebird database such as the example string below:

```
ServerType=0;DataSource=SERVERIPADDRESS_OR_NAME;DataB
ase=AYANOVA;User=SYSDBA;Password=masterkey;Dialect=3;
```


(where SERVERIPADDRESS_OR_NAME is your network Firebird server's name or ip address, where AYANOVA is the database name you set in the aliases.conf, and where masterkey is the password you set for your Firebird Server)

Microsoft SQL database connection string:

By default the string will initially say as per below, but you **NEED TO** edit this string to **your** SQL Express server settings - with what your actual servername is and what your actual password is.

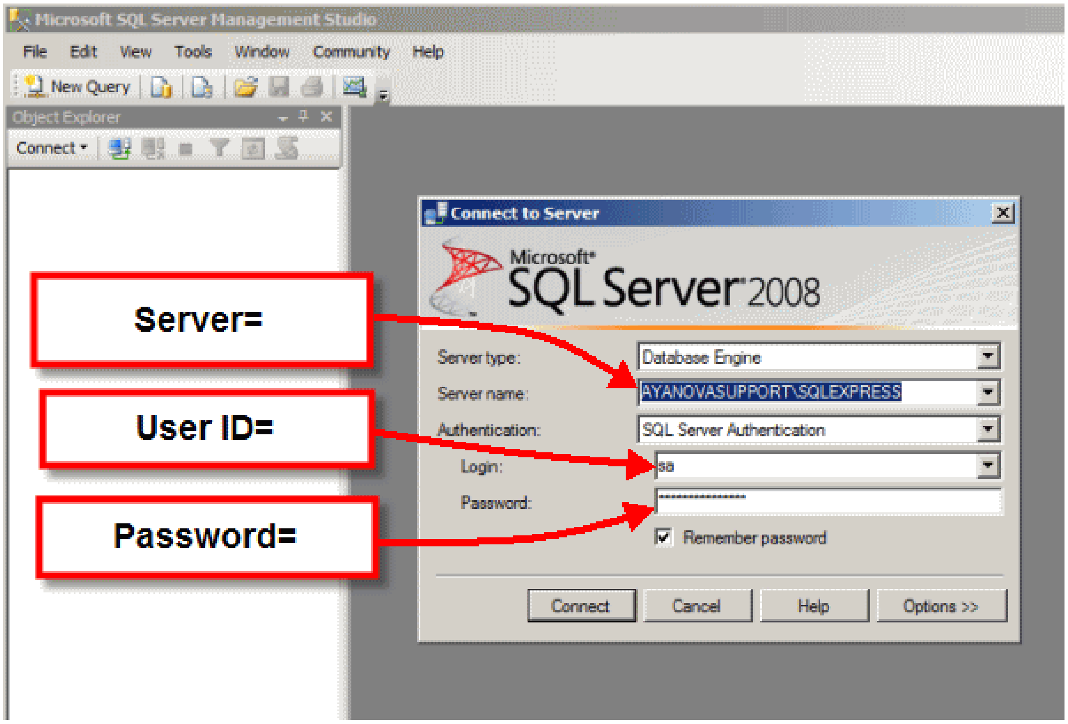
```
Server=SERVERNAME\SQLExpress;initial
catalog=master;User Id=sa; Password=PASSWORD;
```

(where SERVERNAME is your server computer's name, and PASSWORD is your sa password, and note also that the initial catalog is master for this utility)

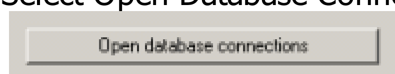
For example, if your SQL Express server is called *AYANOVASUPPORT/SQLEXPRESS* and your sa username password is *letmein*, then your string would look like:

```
Server=AYANOVASUPPORT/SQLEXPRESS;initial
catalog=master;User Id=sa; Password=letmein;
```

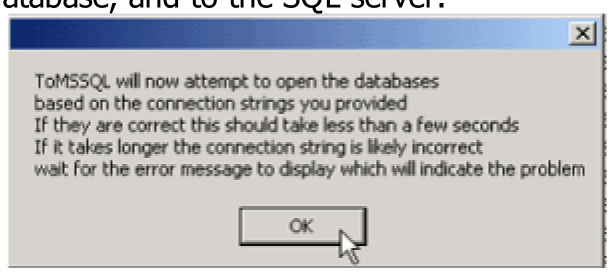
Confirm what the name is of your SQL Express server by running SQL Management Studio as is identified in the **Service name:** field.



d. Select Open Database Connections to test your connection strings

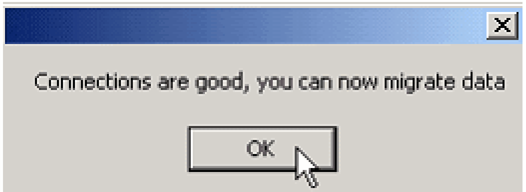


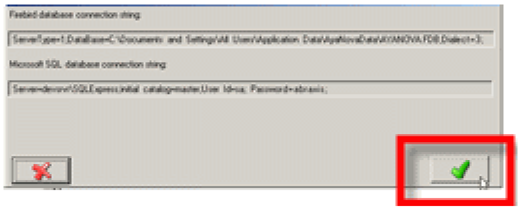
- As the message says, it will now confirm connection to the original AyaNova database, and to the SQL server.



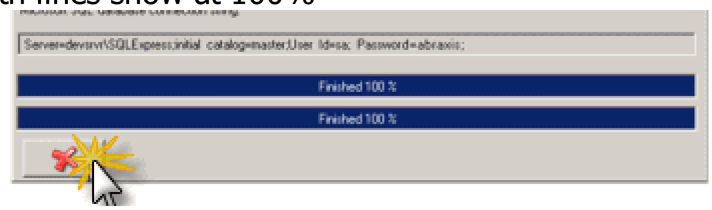
- If the connection strings are not correct, a message will appear that you need to correct them - there may be an incorrect text entry in either the Firebird database connection string or the Microsoft SQL database connection string – check your punctuation, your spelling, your database location, your server name, your server password etc and retry

e. You will receive a message if connection is successful – select the OK button to proceed to create the SQL AyaNova database.



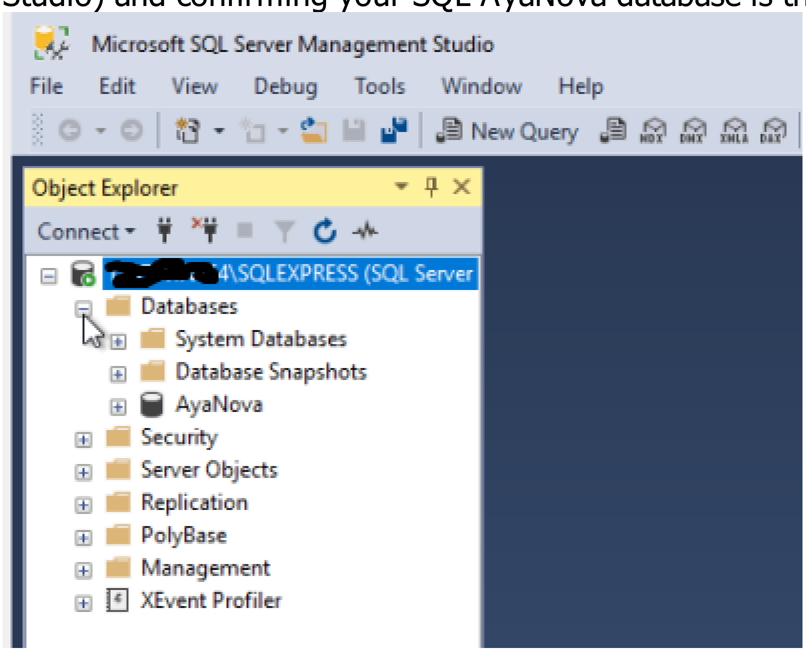


f. When finished at 100%, select the cancel button to close (the X) – wait until both lines show at 100%



g. The AyaNova SQL database has now been successfully created

You can also confirm by logging into your SSMS (SQL Server Management Studio) and confirming your SQL AyaNova database is there.



6. Configure and confirm access for the AyaNova program on the server to the database

a. Delete the existing config.txt in the *C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova (or C:|Program Files|... if 32 bit)* folder

b. Move to the *C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova**/examples*** folder

c. Copy the ***EXAMPLE_SQLEXPRESSconfig.txt*** file

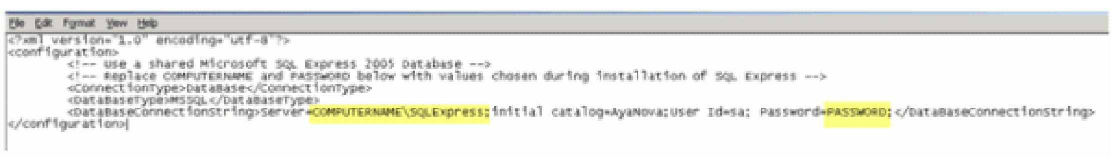
d. Move back to the *C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova* folder

e. Paste in the ***EXAMPLE_SQLEXPRESSconfig.txt*** file into the *C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova* folder

f. Rename this file to ***config.txt***

g. Edit this new ***config.txt*** using NotePad

- Do not use any other program but NotePad to edit this file
- Edit Server= to your SQL Express server's name
- Edit to your sa password



```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
	<!-- Use a shared Microsoft SQL Express 2005 Database -->
	<!-- Replace COMPUTERNAME and PASSWORD below with values chosen during installation of SQL Express -->
	<ConnectionType>DataBase</ConnectionType>
	<DataBaseType>MSSQL</DataBaseType>
	<DataBaseConnectionString>Server=COMPUTERNAME\SQLExpress;initial catalog=AyaNova;User Id=sa; Password=PASSWORD;</DataBaseConnectionString>
</configuration>
```

h. Now run the AyaNova program and confirm you can log in.

7. Configure and confirm access from network computers to networked database

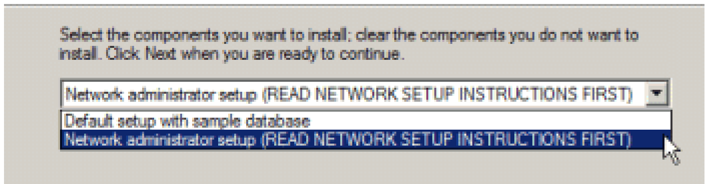
a. Copy your network SQL Express configured ***config.txt*** file from the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova*** folder to a shared location that your networked users can access.

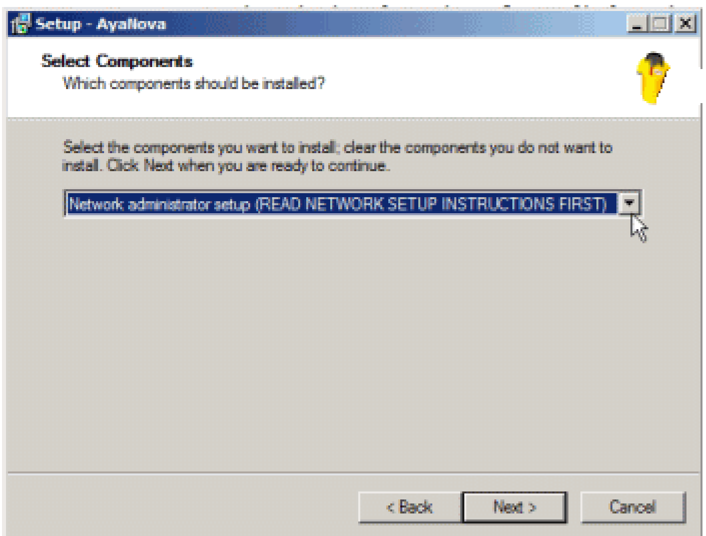
b. Copy/Move to this same shared folder the AyaNova installation file AyaNovaSetup.exe that you used to install on the server. Now that you have confirmed it works you can re-use it at all work stations.

c. Have each local networked computer run the AyaNovaSetup.exe file from that shared location that also has the edited config.txt in that same shared location.

When a network setup is run it will automatically use the config.txt file it finds in the same folder as the setup program.

- Make sure the networked computer selects **Network administrator setup**





- If the local networked computer will also run QBI, or PTI or perform an import, select when installing on that computer those optional AyaNova programs. Refer to the QBI Help documentation or PTI Help documentation available from the AyaNova web site if using QBI or PTI. Refer to the appropriate ImportExport.csv utility section in this help file if using one of the import utilities.

- The AyaNovaSetup.exe will "see" that config.txt file and automatically copy it to that computer's AyaNova program directory so no additional configuration is needed on that user's station.

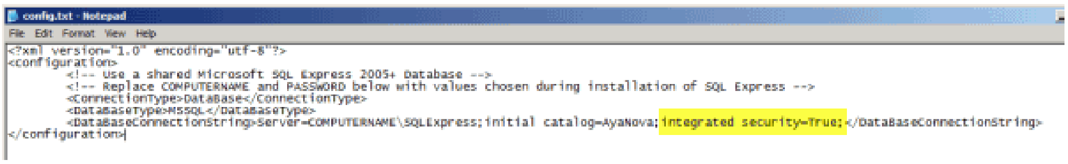
- The install will only install the AyaNova program files it has been told to install, will copy that config.txt file to the networked workstations AyaNova program folder and will not install a trial database.

- The AyaNova installation will place a desktop icon for AyaNova on the desktop as well as in the start menu.

- **TIP**: If after all steps are completed and AyaNova successfully loads on the server, but does not on a local area network computer, that may indicate that your firewall settings (step 4 above) are restricting access. You can confirm the issue is due to your firewall or not, by turning off your firewall to troubleshoot.

- You can confirm that AyaNova is configured correctly on the networked computer by logging in on that networked computer, selecting Help -> About AyaNova so that you know that you are correctly connecting to the networked SQL Express configuration

- If you do not want your networked users to see the SQL Express sa user's password as it is in their config.txt, you might want to edit the config.txt that you copy to that shared location for networked computers to use integrated security. If so, once you have copied over the config.txt to its shared location and before networked users set up AyaNova using that config.txt, remove the *User Id= sa; Password = xxxx;* replacing it with *integrated security=true;* Of course, do confirm this works as in the screenshot below:



```
config.txt - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
        <!-- Use a shared Microsoft SQL Express 2005+ Database -->
        <!-- Replace COMPUTERNAME and PASSWORD below with values chosen during installation of SQL Express -->
        <ConnectionType>DataBase</ConnectionType>
        <DataBaseType>MSSQL</DataBaseType>
        <DataBaseConnectionString>Server=COMPUTERNAME\SQLExpress;initial catalog=AyaNova;integrated security=True;</DataBaseConnectionString>
</configuration>
```

Refer to [Network Generator installation steps] to install and configure the Event Generator in a network setup if applicable.

Refer to the [Data Portal installation and configuration steps] to install and configure the AyaNova Data Portal if applicable.

8.5.1 SQL Express installation example

Below is an example of the settings required when installing SQL Express 2017.

Similar settings would apply for older versions of SQL from version 2008 R2 and newer.

1. Download the version of SQL you wish to use with your AyaNova
2. Download the latest version of SQL Server Management Studio (SSMS)
3. Install your version of SQL, selecting and setting as outlined:
4. Install your SSMS
5. Additional
6. Log in via SSMS
7. Return and continue with your SQL (Server or Express) configuration steps for AyaNova

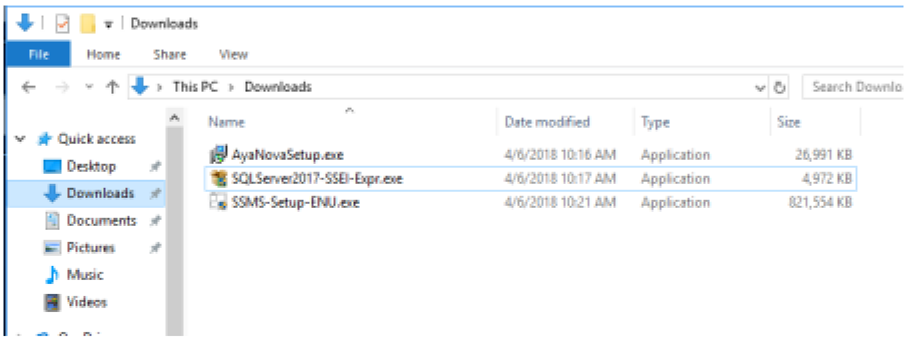
1. Download the version of SQL you wish to use with your AyaNova.

- In our example, as we want to use SQL Express 2017, we will search for that version to download:
  - We go to Google.com
  - We enter in the search term **Microsoft SQL Express 2017 download**
  - Select the result that is from Microsoft, and download

2. Download the latest version of SQL Server Management Studio (SSMS)

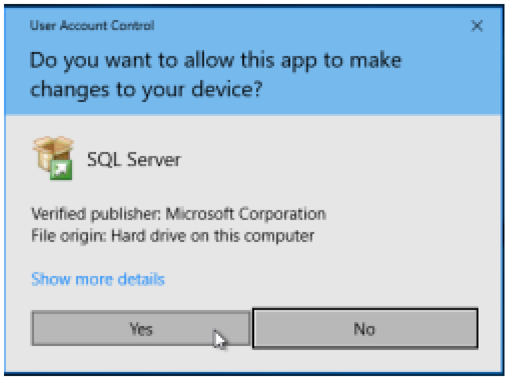
- In our example, as we want to use the latest SQL Server Management Studio, we will search for the latest:
  - Go to Google.com
  - Enter in the search term **Microsoft latest ssms**
  - Select the result that is from Microsoft, and download

3. Install your version of SQL, selecting and setting as outlined:

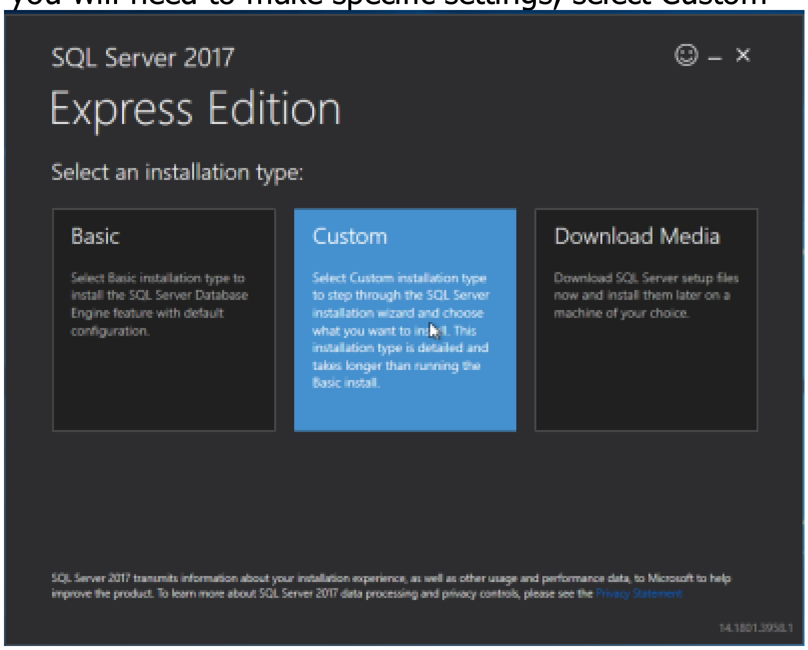


a. In our example, we run the file we downloaded for installing SQL Express 2017.

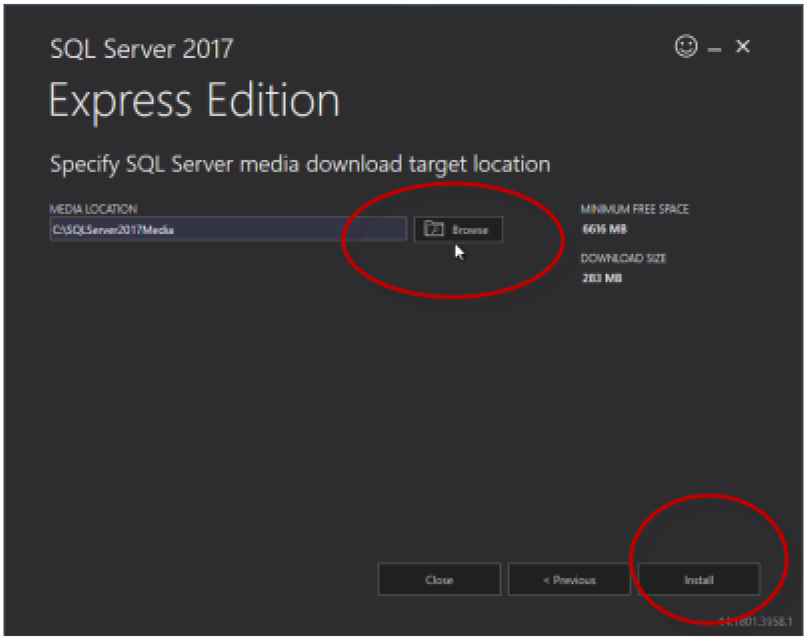
- In our example, the file was called SQLServer2017-SSEI-Expr.exe
- You may receive the message similar to below, select Yes to continue

o 

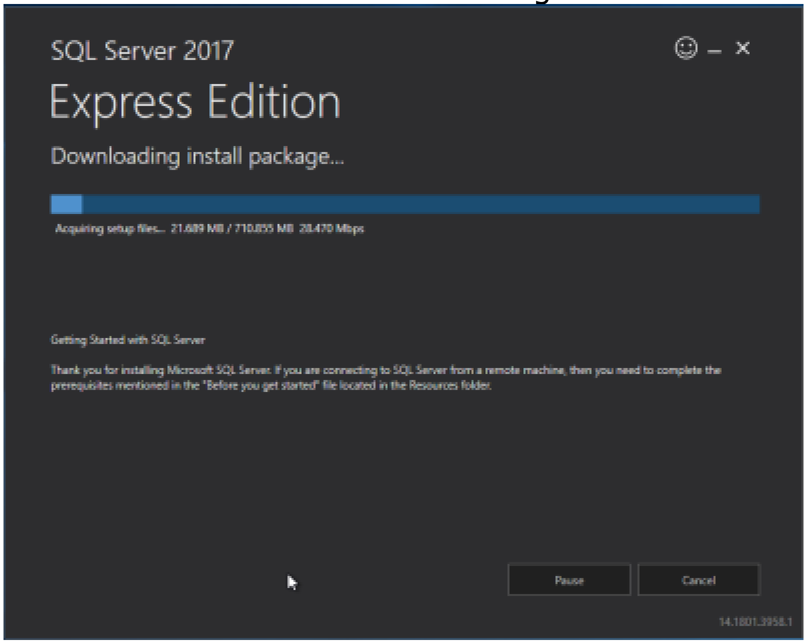
b. As you will need to make specific settings, select Custom



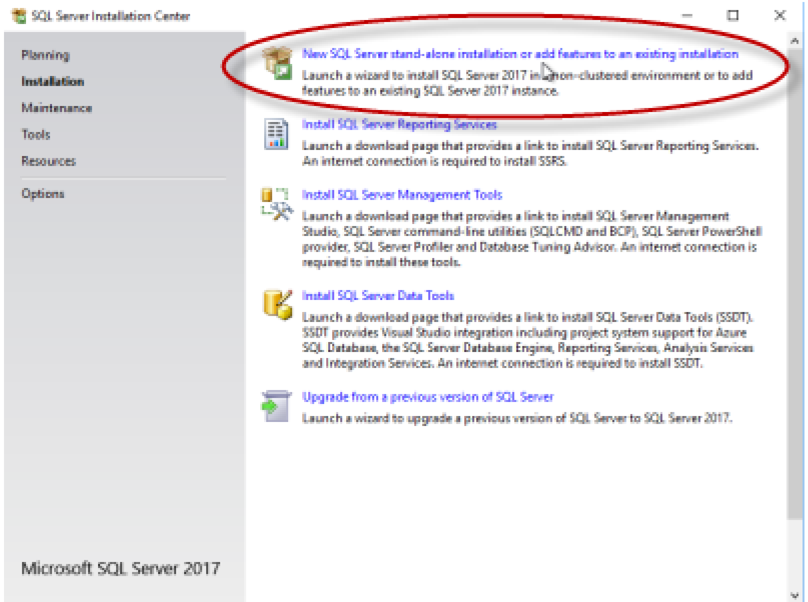
c. Accept to download to the stated location or change if need to. Than select Install.



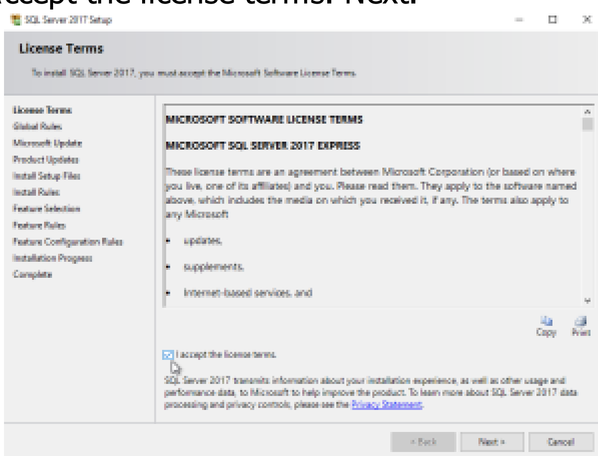
d. The download and initial install will begin



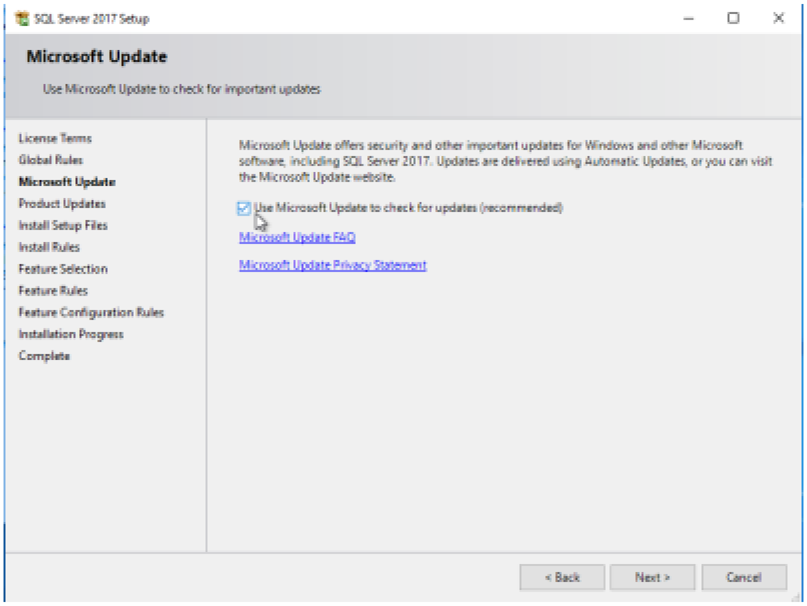
e. Select New SQL Server stand-alone installation



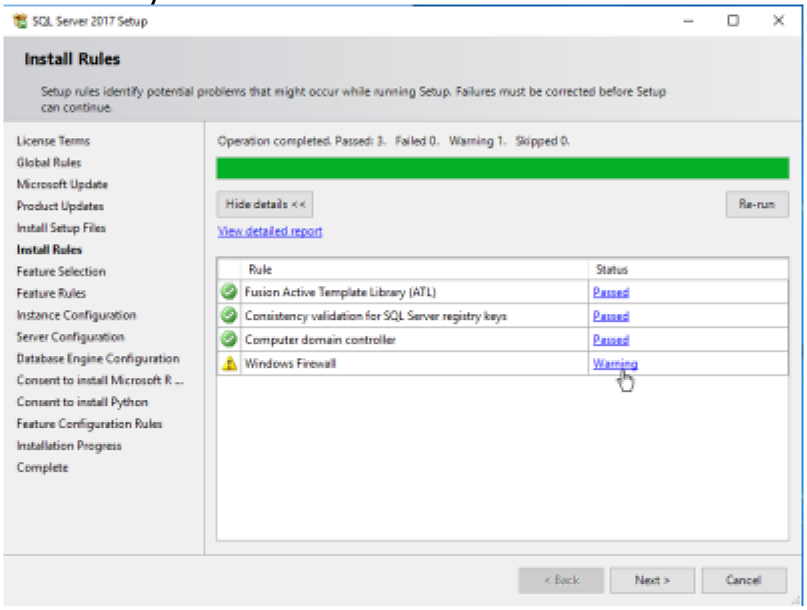
f. Accept the license terms. Next.



g. Allow to check for updates. Next.



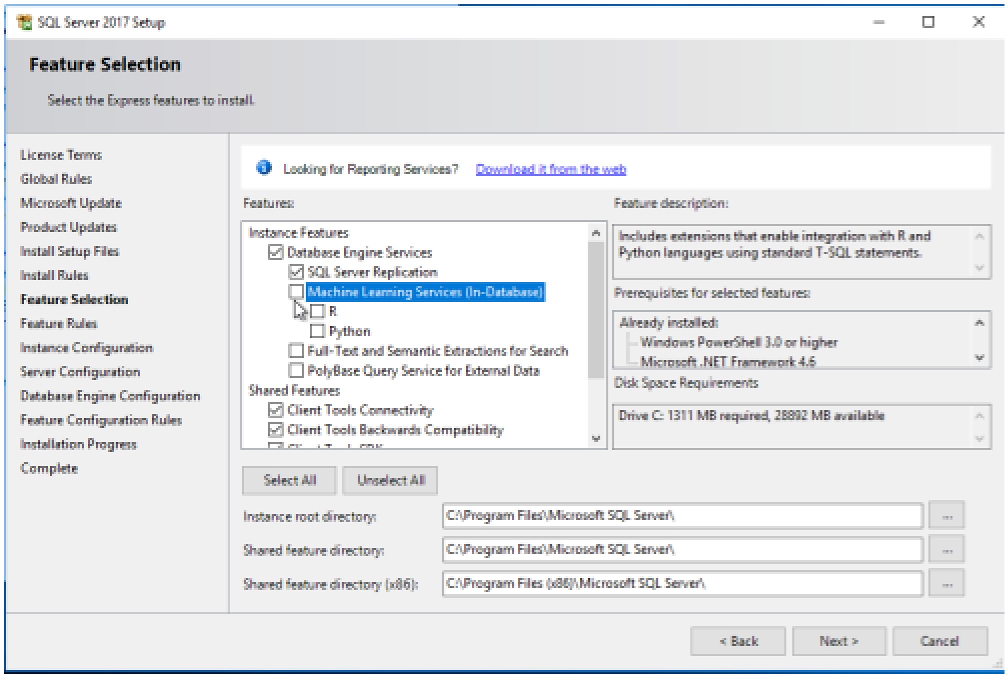
h. Address any issues found. Next.



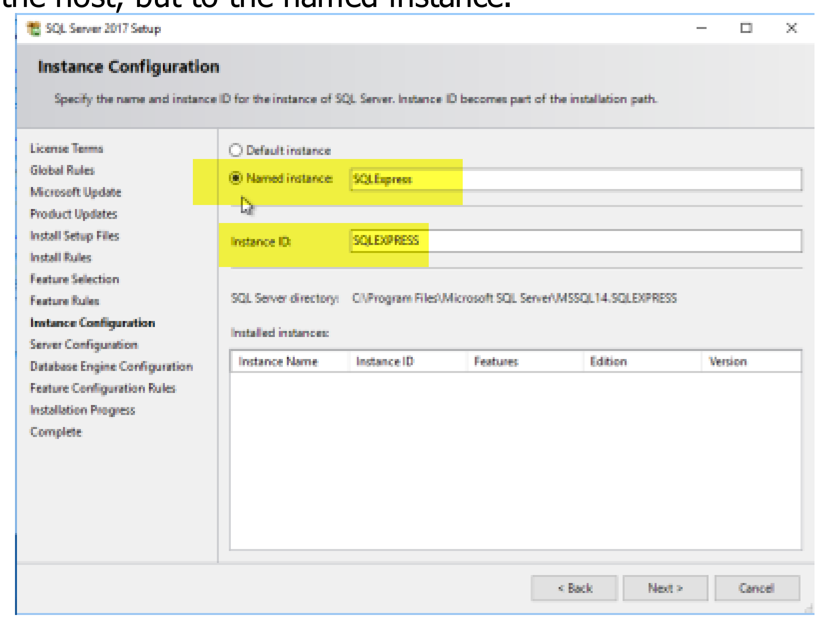
i. At the "Feature Selection" page:

Deselect:
- Machine Learning Services
- Full-Text and Semantic Extractions for Search

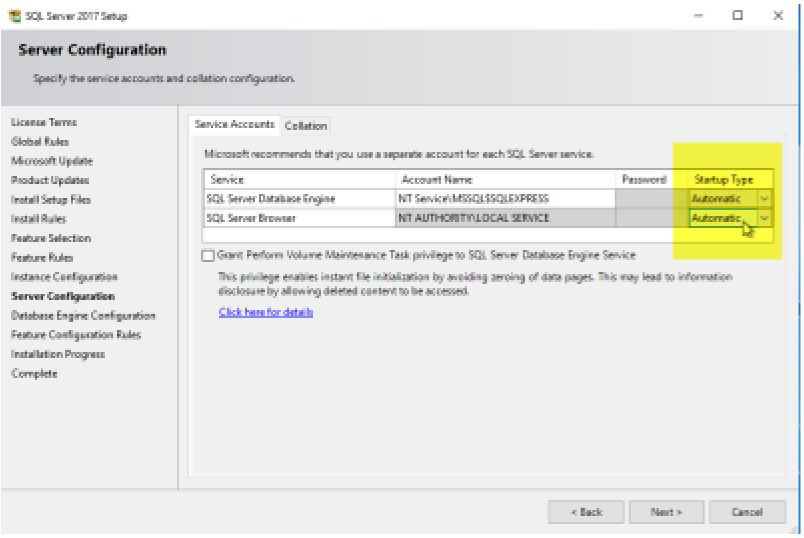
Ensure selected:
- Database Engine Services
- SQL Server Replication
- Client Tools (all)



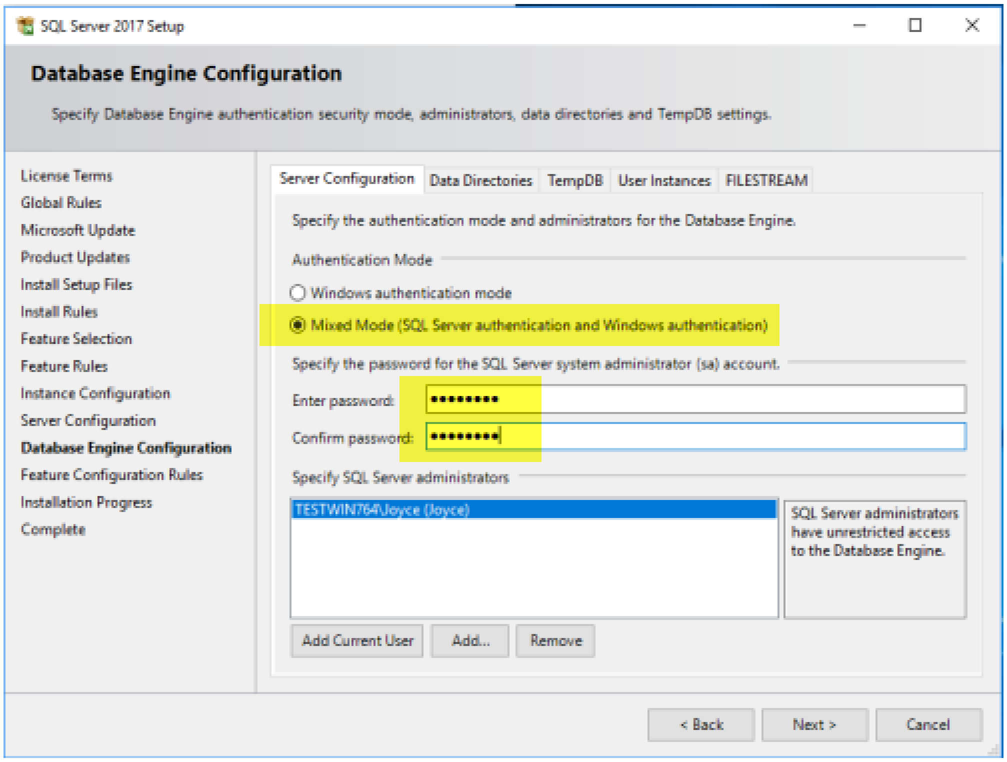
j. In the "Instance Configuration" page, we took the suggested specified **SQLExpress** in both the "Named instance" and "Instance ID" fields.
We want to have a named instance of our SQL so that we are connecting not just to the host, but to the named instance.



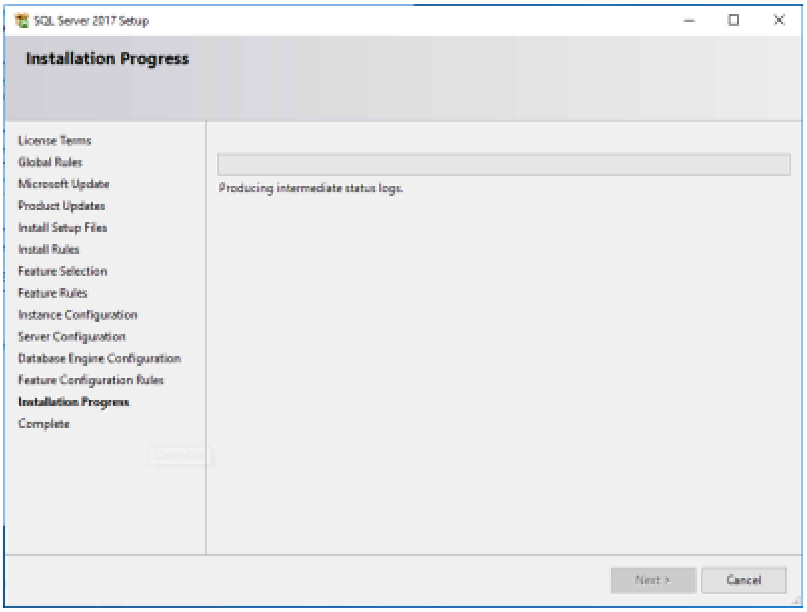
k. At the "Server Configuration" page all Startup Type are set to Automatic



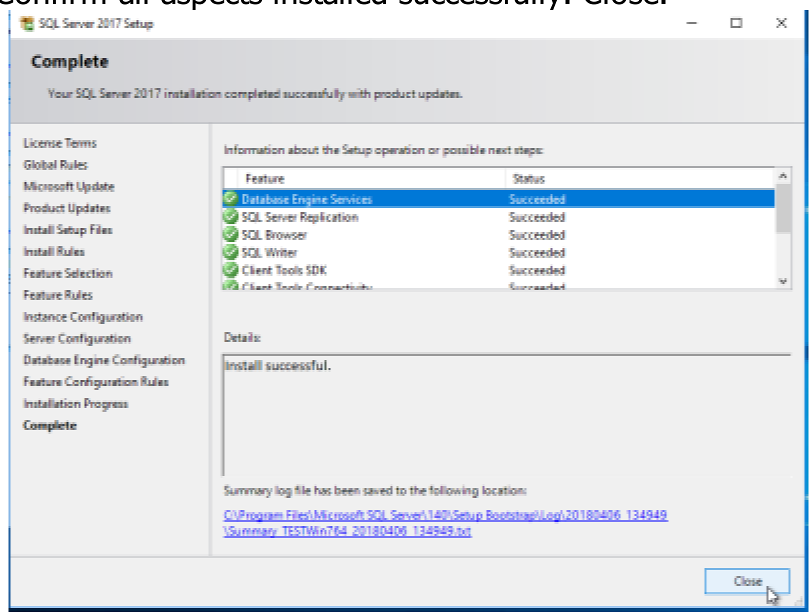
l. On the Database Engine Configuration page, enable **Mixed Mode;** enter and confirm a password for the Built in SQL server system administration account (note this is the user account **sa**); optionally add a user as an administrator. Next.



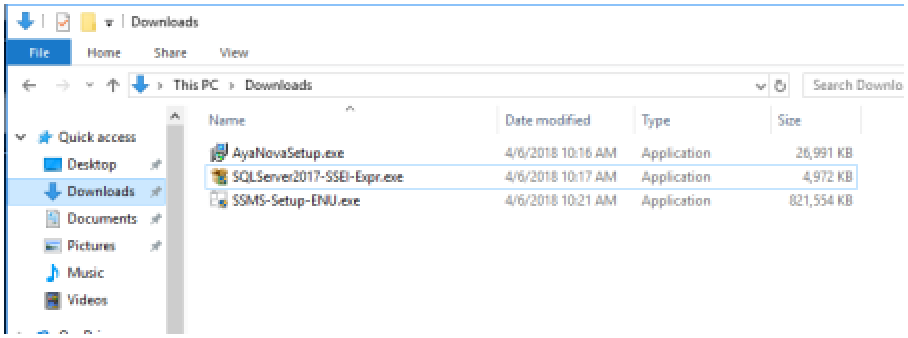
m. Installation with those settings will now proceed.



n. Confirm all aspects installed successfully. Close.

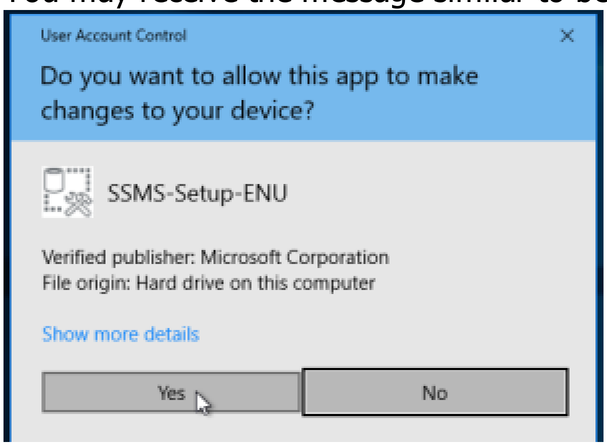


4. Install your SSMS

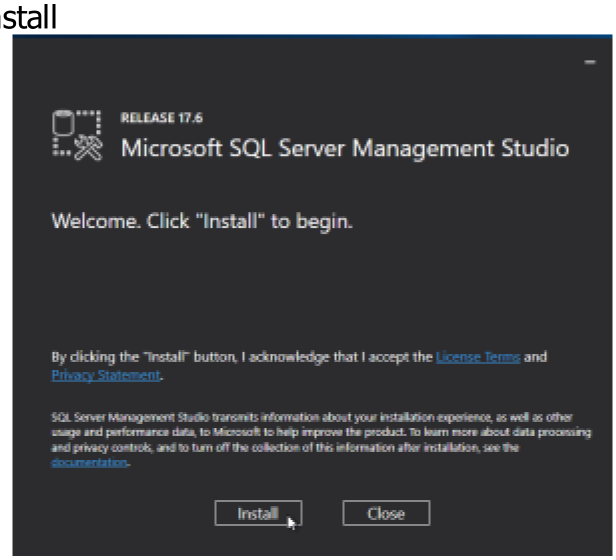


a. Run the file you downloaded for installing your SSMS

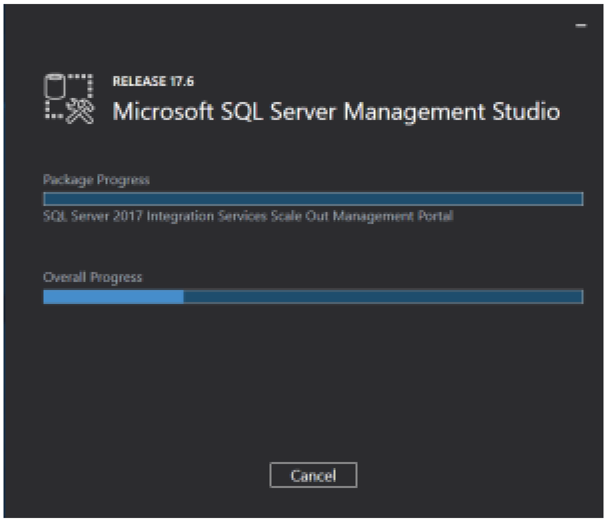
- In our example, our file was called SSMS-Setup-ENU.exe
- You may receive the message similar to below, select Yes to continue



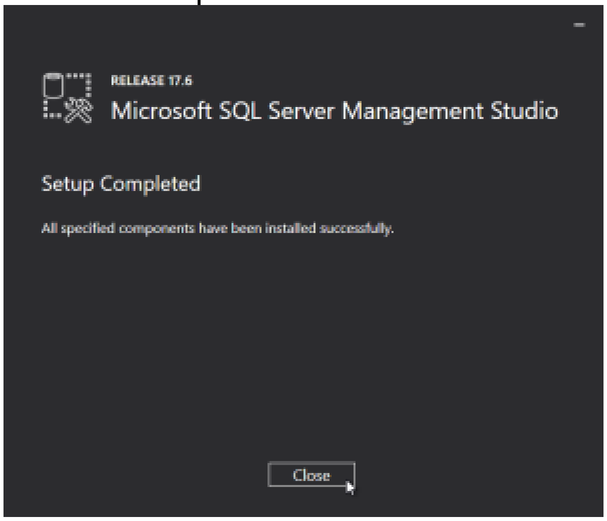
b. Install



c. Allow the installation to complete



d. Close when completed



5. Additional

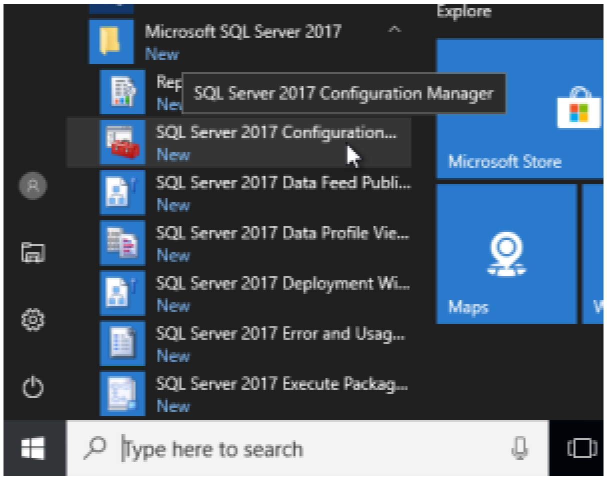
a. Where you confirm remote connections are enabled depends on your version.

For example with SQL 2017 and SSMS 17.6

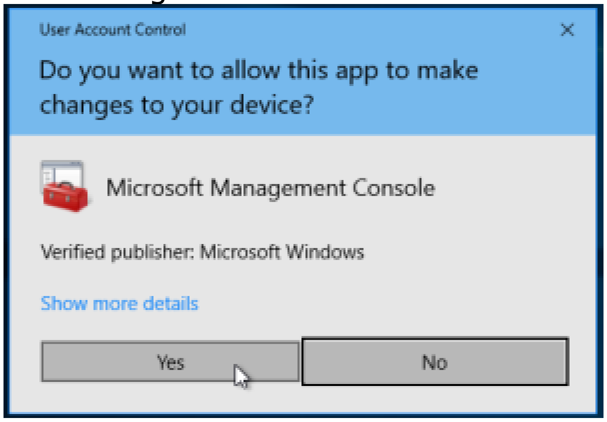
i. Log into your SSMS as sa and the password you set above
ii. Right-click on your server, select **Properties**
iii. Click the **Connections** mode
iv. Under **Remote Server Connections**, ensure ***Allow remote connections to this server*** is checkmarked.

b. Confirm protocols are enabled

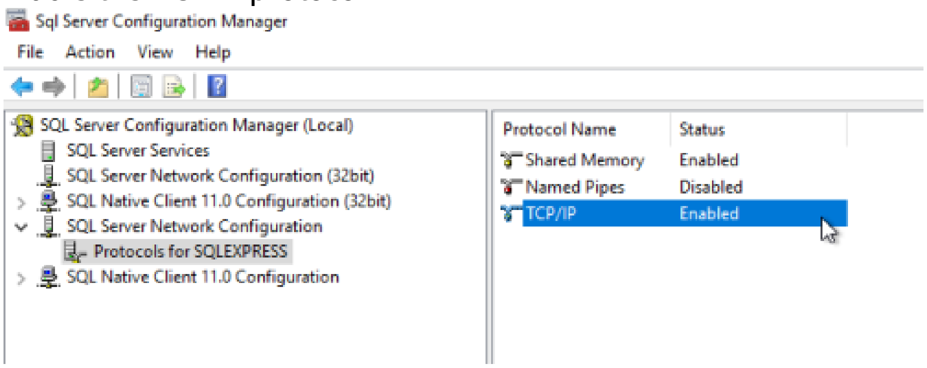
i. Open your Microsoft SQL Configuation Manager

- o 

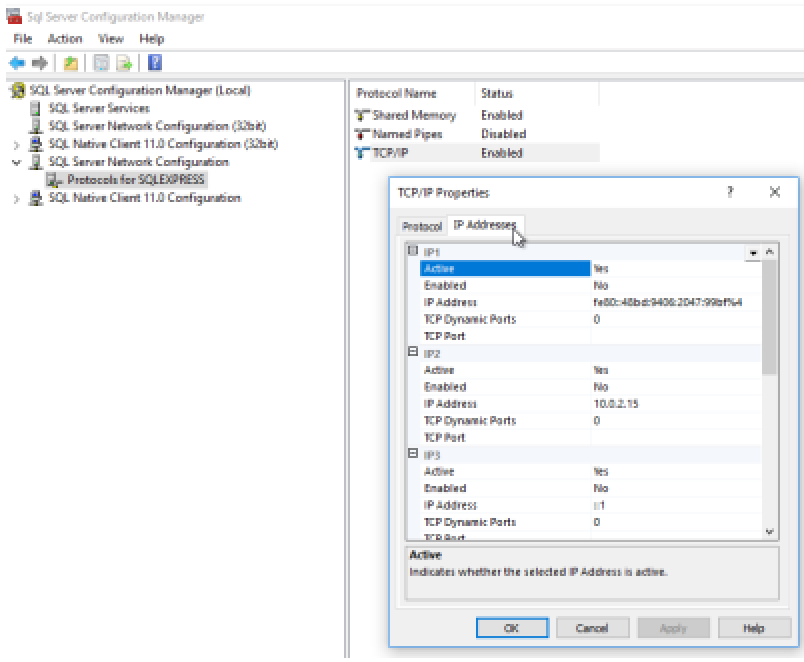
ii. Allow changes

- o 

iii. Enable the TCPIP protocol

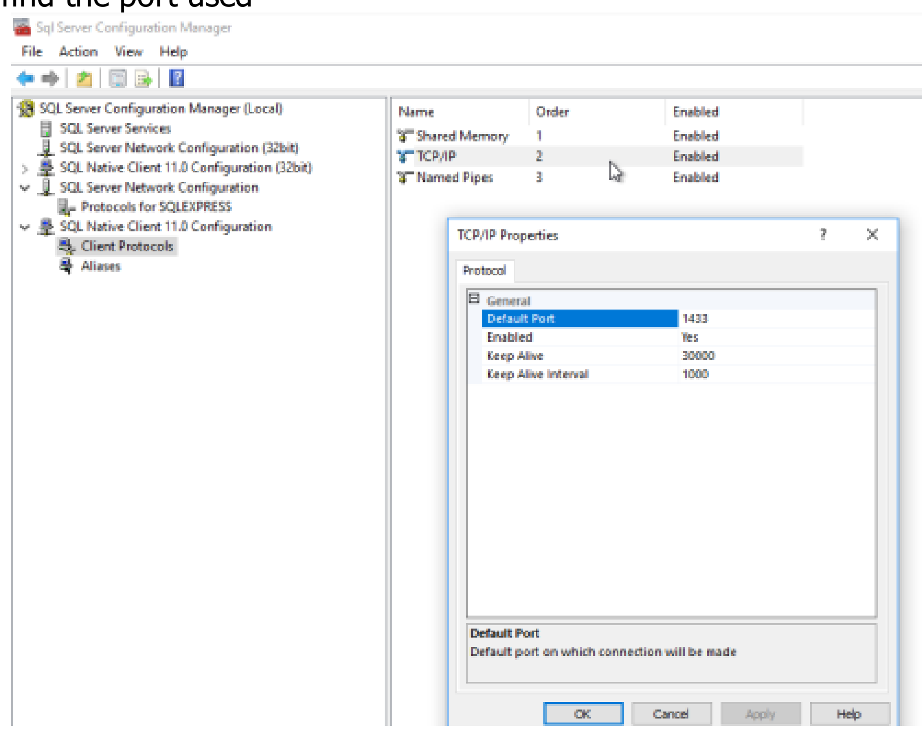
- o 

iv. Confirm IP Addresses are active



o

v. If troubleshooting needed for port exceptions, here is where you can find the port used



o

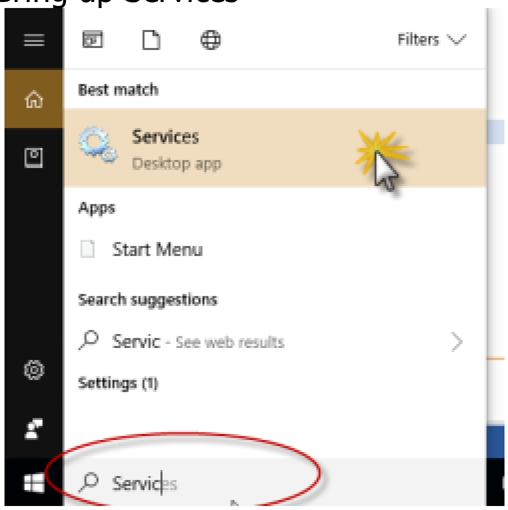
c. Restart your server.

d. Log in as the computer administrator

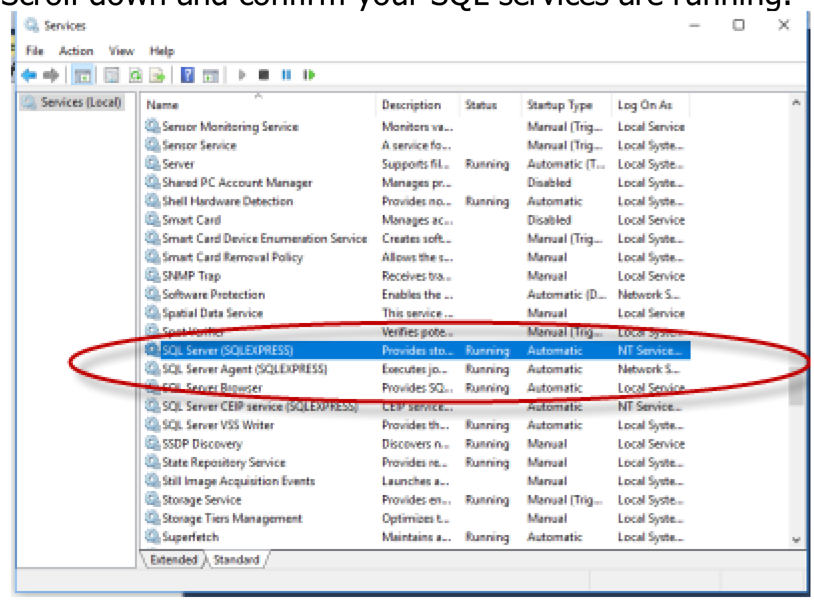
e. Confirm your SQL services **have successfully started and are running**.

If your SQL services are not successfully running, you WILL receive errors attempting to run SSMS or load your AyaNova.

i. Bring up Services

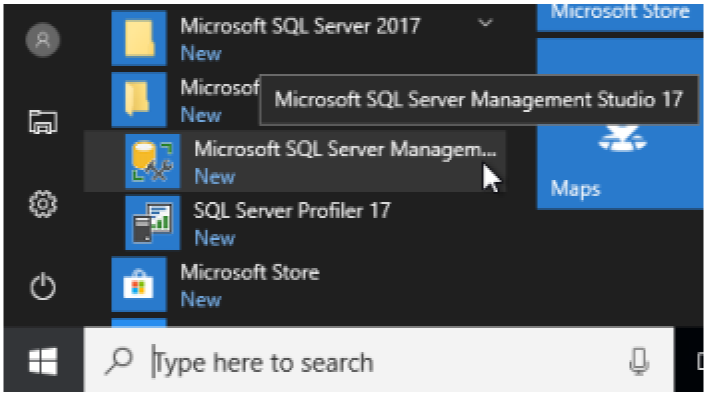
- 

ii. Scroll down and confirm your SQL services are running.

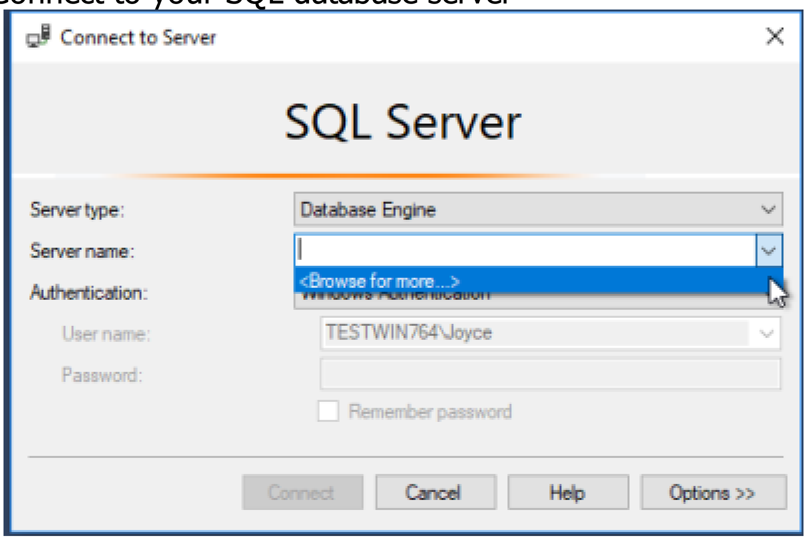
- 

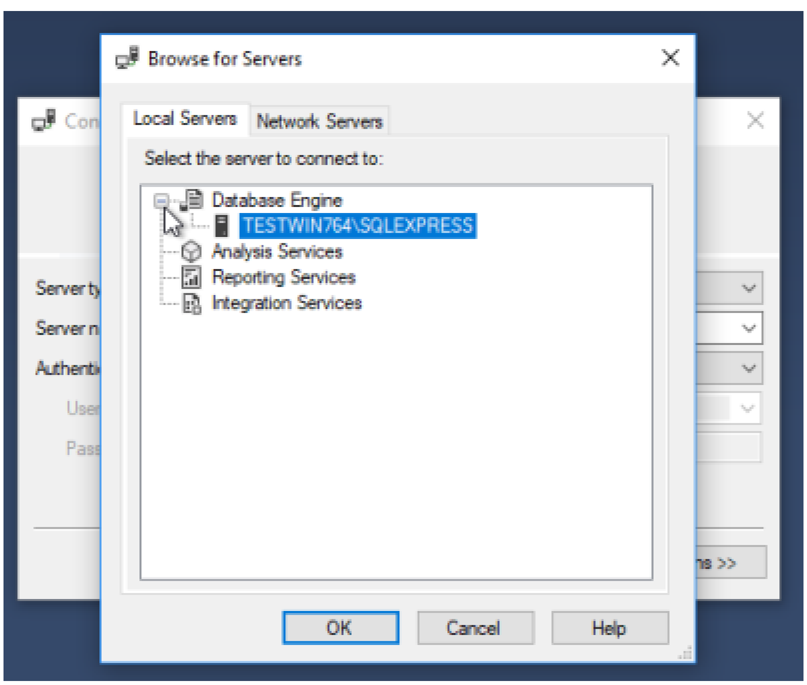
6. Log in via SSMS

a. Run your SQL Server Management Studio

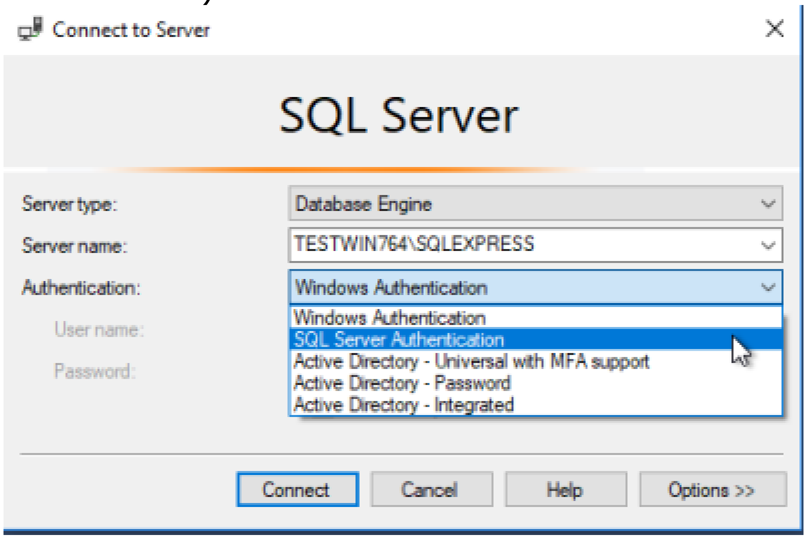


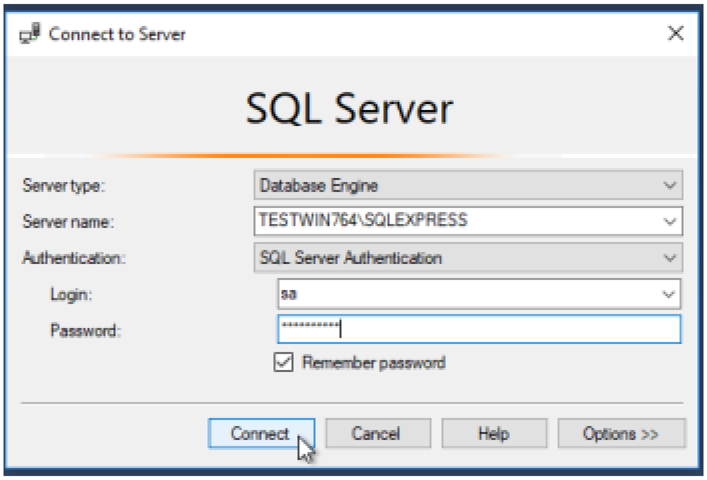
b. Connect to your SQL database server





c. Log in using SQL Authentication (using the sa password you set in the SQL installation earlier)





c. Now that you have confirmed can load, exit out of your SSMS.

7. Return to the [Network SQL Express configuration](#) or [Network SQL Server configuration](#) for AyaNova and continue with step 4

Now you can continue with your Network SQL configuration, following the steps to create your SQL AyaNova database and completing your AyaNova configuration settings to connect to your SQL AyaNova database

8.6 Network SQL Server configuration

Read through all instructions first before proceeding.

Make sure you have the latest Windows operating system service patches installed **before** proceeding.

If you perform the installation via a remote connection and encounter any issues, first always recheck that each step was fully completed successfully before going to the next. If still an issue, perform the installation while physically at the server and redo all steps from scratch again.

The oldest version of SQL Server version that can be used with AyaNova is 2008 R2. You can use the latest version of SQL Server or any version 2008 R2 or newer. It would be recommended to use the latest version, along with the latest SSMS (SQL Server Management Studio).

It is HIGHLY recommended to make yourself aware of any known issues about SQL before proceeding, including those identified in our AyaNova Support Forum

It is your responsibility to be knowledgeable about SQL databases, especially about how to backup.

Use of AyaNova with SQL Server is a 7 step process

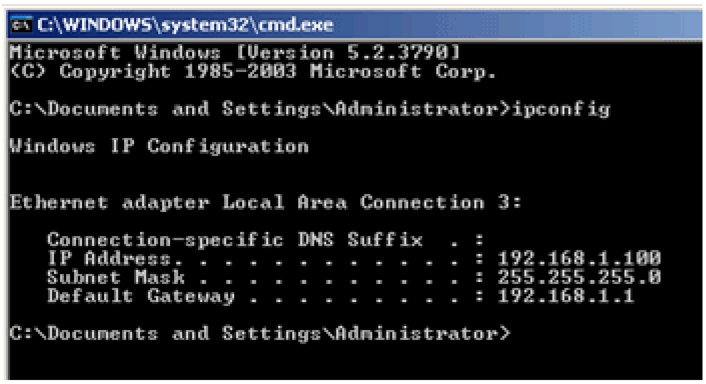
1. **Ensure network uses TCPIP for communication between computers and server**
2. **Stand-alone AyaNova database, AyaNova program and To SQL utility**
3. **SQL Server is installed and configured**
4. **Set exceptions in server's firewall for SQL**
5. **Creation of SQL Server AyaNova database**
6. **Configure and confirm access for the AyaNova program on the server to the database**
7. **Configure and confirm access from network computers to networked database**

1. Ensure network uses TCPIP for communication between computers and server

- The server and networked computers will communicate via TCPIP. If your network is not yet configured, do so. If you are not experienced with this, please contact your local computer center.

- To confirm whether your network can communicate or not, determine the server's static internal IP address and ping from a local area networked computer

a. Open a command prompt on the server (Start -> Run -> type in **cmd** and click on OK) and type **ipconfig** in the DOS prompt



b. Make a note of your server's IP Address

c. Confirm that network computers can "talk" to the server by opening a command prompt on a local area networked networked computer and typing **ping xxx.xxx.xxx.xxx** and the Enter key where xxx.xxx.xxx.xxx is the IP address of your server

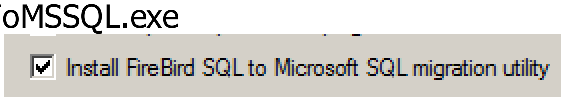
For example, if your server's IP address is 192.168.1.15, you would type **ping 192.168.1.15**

If you get a timeout, there is an issue connecting via TCPIP. Please contact your local computer center to troubleshoot.

2. Stand-alone AyaNova database, AyaNova program and To SQL utility is installed to server

a. Install the stand-alone AyaNova database and program to the server's local hard-drive while logged into that server itself. Refer to Stand-alone default AyaNova installation

- You **must** also select to install the **Install Firebird SQL to Microsoft SQL migration utility** as this is the utility to create the AyaNova SQL database ToMSSQL.exe



- Once you have completed all of the network steps, you can remove the AyaNova program from the server itself if you do not want the program files on it and won't be installing any optional add-on's such as Data Portal, Generator, etc. Do note though, that having AyaNova program files on the Firebird Server does not hamper it in any way, and takes up a maximum of 50MB in space; and provides you with a location to confirm your setup with AyaNova Support in the event you experience an issue.

b. Once installation is complete, run the AyaNova program and confirm you can log in successfully

c. Exit out of the AyaNova program

3. SQL Server installation / configuration

a. The oldest version of SQL Server version that can be used is 2008 R2. You can use the latest version or any version 2008 R2 or newer. It would be recommended to use the latest version, along with the latest SSMS (SQL Server Management Studio).

- Refer to the steps SQL Express example installation as settings to select for SQL Server are similar
- It is HIGHLY recommended to make yourself aware of any known issues about your version of SQL before proceeding, including those identified in our AyaNova Support Forum

b. Once installation is complete with the settings set as per the SQL Express example installation , reboot your computer, log in as the computer administrator, and confirm your SQL services have successfully started and are running

4. Set exceptions in server's firewall for SQL

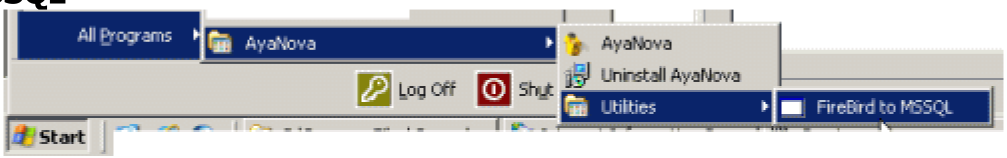
If there is a firewall enabled on your "server" computer where the SQL configuration is installed and setup, set exceptions for sqlserver.exe and sqlbrowser.exe (check the path of your SQL services to confirm the specific path and file name), and/or TCP or UDP port 1434 and 1433 in some cases.

If unfamiliar with setting firewall exceptions, your best suggestion would be to perform a search online for your server's operating system (i.e. perform a search for *Windows 10 firewall exceptions port program*)

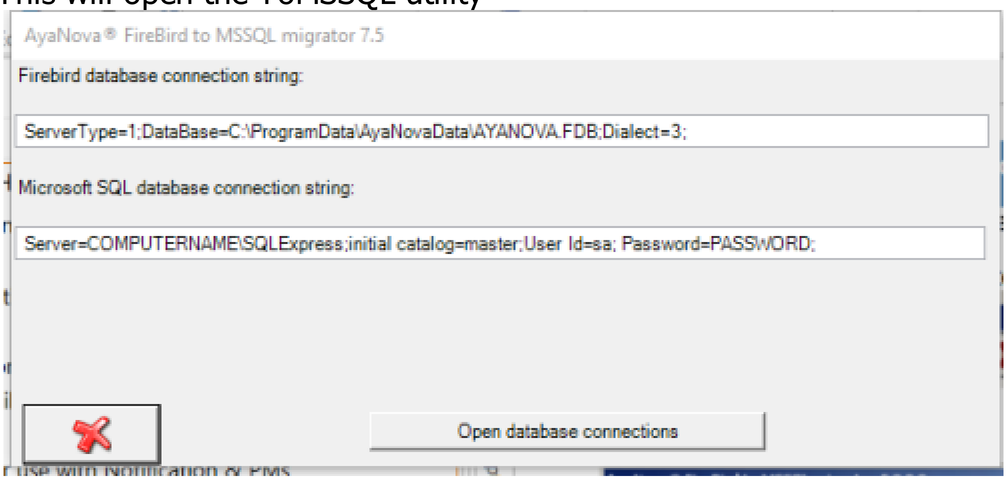
TIP: If after all steps are completed and AyaNova successfully loads on the server, but does not on a local area network computer, that may indicate that your firewall settings are restricting access.
You can confirm the issue is due to your firewall or not, by turning off your firewall to troubleshoot.

5. Creation of SQL Server AyaNova database

a. Via the server's Start menu, select to run AyaNova -> Utilities -> **Firebird to MSSQL**



b. This will open the ToMSSQL utility

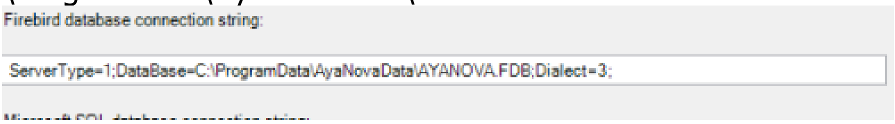


c. You now need to edit the connection strings **to what you actually have**

<u>Firebird database connection string:</u>

This MUST identify the location of your actual existing AYANOVA.FDB database file.

- If you installed for standalone use to a Windows 7 or newer computer, the default location and file is C:
\ProgramData\AyaNovaData\AYANOVA.FDB



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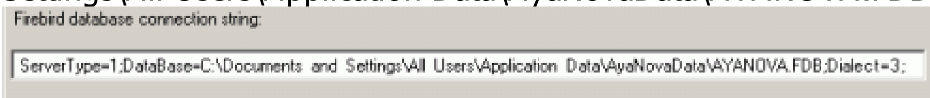
- If you installed for standalone use to an old operating systems such as XP or 2003, the default location and file is C:\Documents and Settings\All Users\Application Data\AyaNovaData\AYANOVA.FDB
- 

- **OPEN YOUR Windows Explorer and actually confirm that YOUR AyaNova database file AYANOVA.FDB <u>is in</u> the path stated before proceeding.**

- **<u>Whereas if instead</u>** you had previously configured AyaNova for network Firebird use but are now converting to SQL, you will need to edit the entire string so that it reflects your networked AyaNova Firebird database such as the example string below:

```
ServerType=0;DataSource=SERVERIPADDRESS_OR_NAME;DataB
ase=AYANOVA;User=SYSDBA;Password=masterkey;Dialect=3;
```

(*where SERVERIPADDRESS_OR_NAME is your network Firebird server's name or ip address, where AYANOVA is the database name you set in the aliases.conf, and where masterkey is the password you set for your Firebird Server*)

Microsoft SQL database connection string:

The Microsoft SQL database connection string defaults to an example SQL <u>Express</u> configuration string. You **<u>must</u>** change it so it uses the following format:

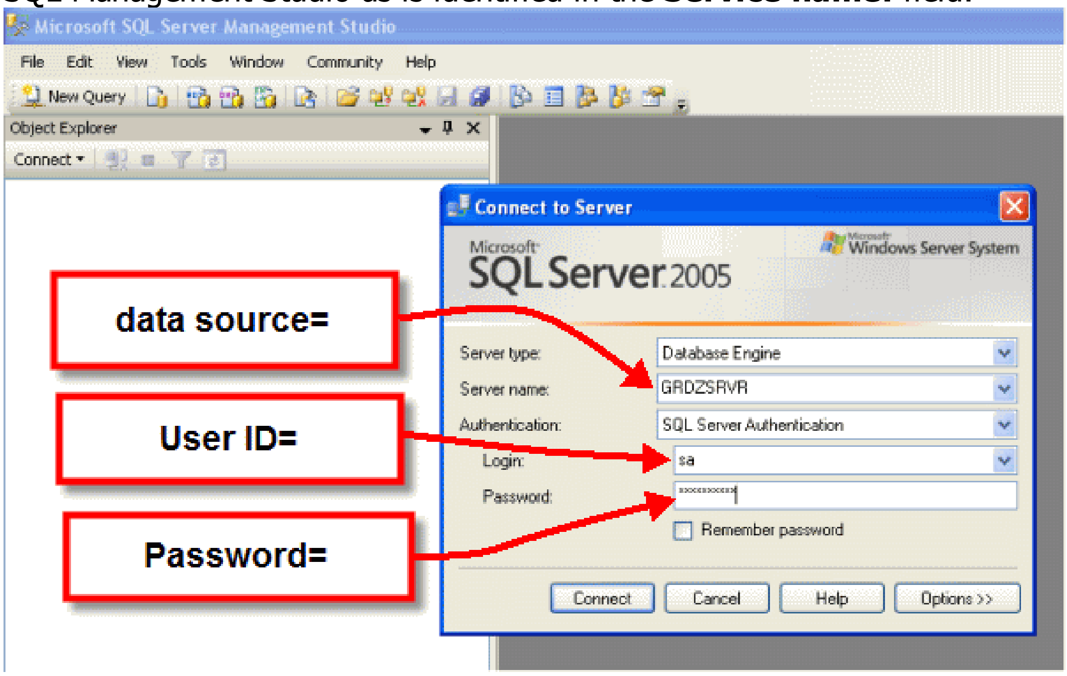
```
data source=SQL_SERVER_NAME;initial
catalog=master;User Id=USERNAME; Password=PASSWORD;
```

(*where SQL_SERVER_NAME is your SQL Server name, USERNAME is a SQL user with full rights to the SQL Server such as user "sa", and PASSWORD is that SQL user's password. And note also that the initial catalog is master for this utility*)

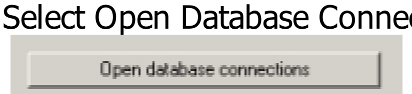
So if your SQL Server is called GRDZSRVR and your SQL Server full administrative username is sa and the password is letmein, then your string would look like:

```
data source=GRDZSRVR;initial catalog=master;User
Id=sa; Password=letmein;
```

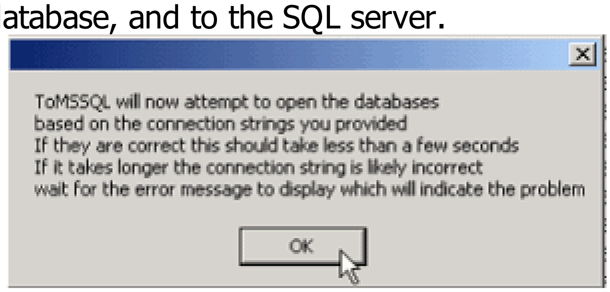
Do note you can also find what the name is of your SQL Server by running SQL Management Studio as is identified in the **Service name:** field.



d. Select Open Database Connections to test your connection strings

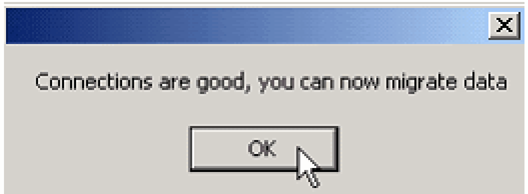


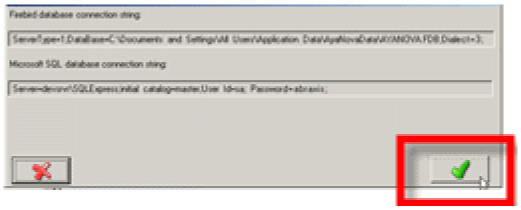
- As the message says, it will now confirm connection to the original AyaNova database, and to the SQL server.



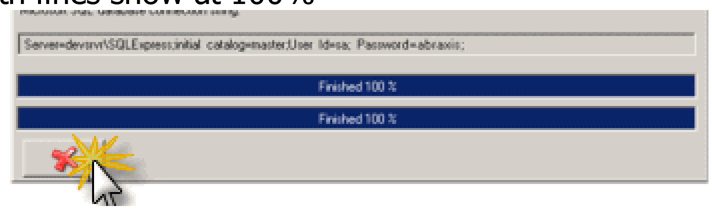
- If the connection strings are not correct, a message will appear that you need to correct them - there may be an incorrect text entry in either the Firebird database connection string or the Microsoft SQL database connection string – check your punctuation, your spelling, your database location, your server name, your server password etc and retry

e. You will receive a message if connection is successful – select the OK button to proceed to create the SQL AyaNova database.



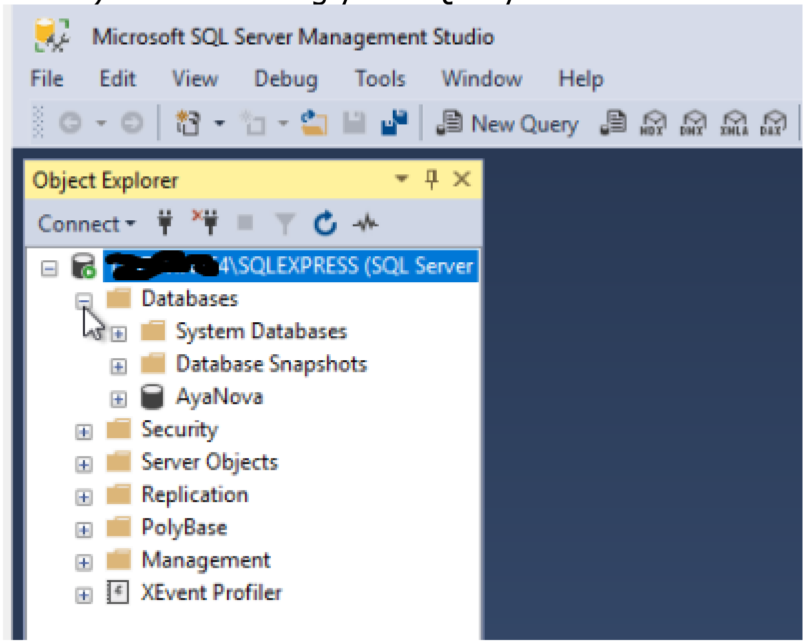


f. When finished at 100%, select the cancel button to close (the X) – wait until both lines show at 100%



g. The AyaNova SQL database has now been successfully created

You can also confirm by logging into your SSMS (SQL Server Management Studio) and confirming your SQL AyaNova database is there.



6. Configure and confirm access for the AyaNova program on the server to the database

a. Delete the existing config.txt file in the ***C:\|Program Files (x86)\|Ground Zero Tech-Works Inc\|AyaNova (or C:\|Program Files\|... if 32 bit)*** folder

b. Move to the ***C:\|Program Files (x86)\|Ground Zero Tech-Works Inc\|AyaNova/examples*** folder

c. Copy the ***EXAMPLE_MSSQLSERVERconfig.txt*** file

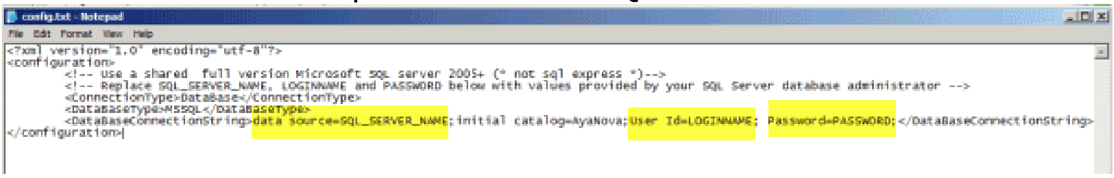
d. Move back to the ***C:\|Program Files (x86)\|Ground Zero Tech-Works Inc\|AyaNova*** folder

e. Paste in the ***EXAMPLE_MSSQLSERVERconfig.txt*** file into the ***C:\|Program Files (x86)\|Ground Zero Tech-Works Inc\|AyaNova*** folder

f. Rename this file to ***config.txt***

g. Edit this new ***config.txt*** using NotePad

- Do not use any other program but NotePad to edit this file
- Edit data source= to your SQL Server's name
- Edit User ID= to a SQL server username with full rights (suggested to use user "sa")
- Edit Password= to the password of that SQL user



h. Now run the AyaNova program and confirm you can log in.

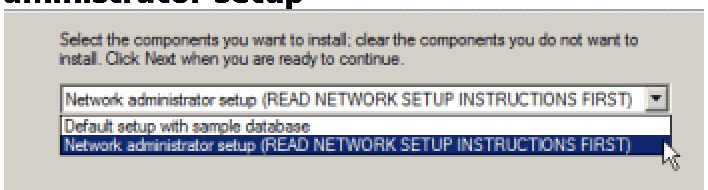
7. Configure and confirm access from network computers to networked database

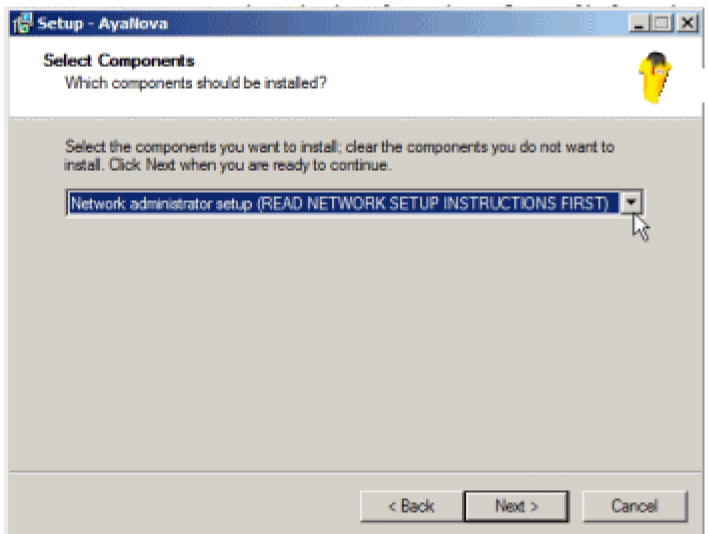
a. Copy your network SQL Server configured ***config.txt*** file from the ***C:\|Program Files (x86)\|Ground Zero Tech-Works Inc\|AyaNova*** folder to a shared location that your networked users can access.

b. Copy/Move to this same shared folder the AyaNova installation file AyaNovaSetup.exe that you used to install on the server. Now that you have confirmed it works you can re-use it at all work stations.

c. Have each local networked computer run the AyaNovaSetup.exe file from that shared location that also has the edited config.txt in that same shared location. When a network setup is run it will automatically use the config.txt file it finds in the same folder as the setup program.

- Make sure the at the networked computer to select **Network administrator setup**



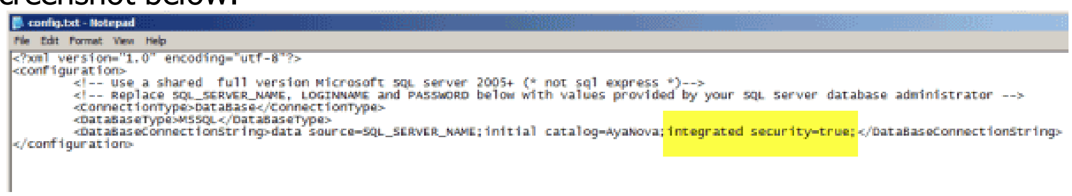


- If the local networked computer will also run QBI, or PTI or perform an import, select when installing on that computer those optional AyaNova programs. Refer to the QBI Help documentation or PTI Help documentation available from the AyaNova website if using QBI or PTI. Refer to the appropriate ImportExport.csv utility section in this help file if using one of the import utilities.

- The AyaNovaSetup.exe will "see" that config.txt file and automatically copy it to that computer's AyaNova program directory so no additional configuration is needed on that user's station.

- The install will only install the AyaNova program files it has been told to install, will copy that config.txt file to the networked workstations AyaNova program folder and will not install a trial database.

- The AyaNova installation will place a desktop icon for AyaNova on the desktop as well as in the start menu.
- **TIP**: If after all steps are completed and AyaNova successfully loads on the server, but does not on a local area network computer, that may indicate that your firewall settings (step 4 above) are restricting access. You can confirm the issue is due to your firewall or not, by turning off your firewall to troubleshoot.
- You can confirm that AyaNova is configured correctly on the networked computer by logging in on that networked computer, selecting Help -> About AyaNova so that you know that you are correctly connecting to the networked SQL Server configuration
- If you do not want your networked users to see the SQL Server sa user's password as it is in their config.txt, you might want to edit the config.txt that you copy to that shared location for networked computers to use integrated security. If so, once you have copied over the config.txt to its shared location and before networked users set up AyaNova using that config.txt, remove the *User Id= sa; Password = xxxx;* replacing it with *integrated security=true;* Of course, do confirm this works as in the screenshot below:



```
config.txt - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
	<!-- Use a shared  full version Microsoft SQL server 2005+ (* not sql express *)-->
	<!-- Replace SQL_SERVER_NAME, LOGINNAME and PASSWORD below with values provided by your SQL server database administrator -->
	<ConnectionType>DataBase</ConnectionType>
	<DataBaseType>MSSQL</DataBaseType>
	<DataBaseConnectionString>data source=SQL_SERVER_NAME;initial catalog=AyaNova;integrated security=true;</DataBaseConnectionString>
</configuration>
```

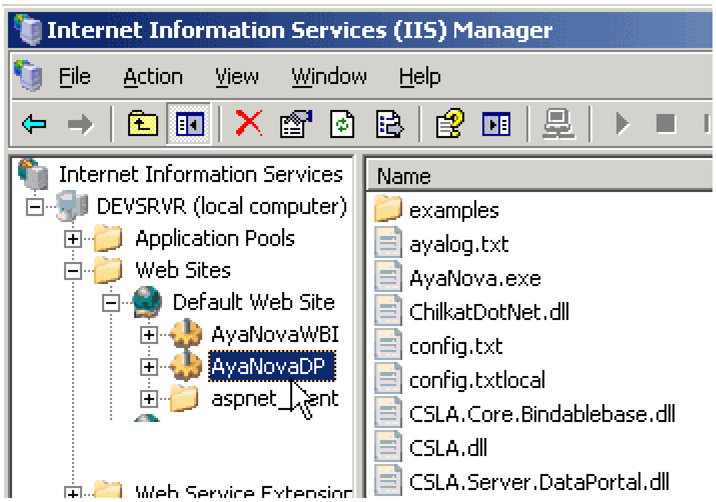
Refer to Network Generator installation steps to install and configure the Event Generator in a network setup if applicable.

Refer to the Data Portal installation and configuration steps to install and configure the AyaNova Data Portal if applicable.

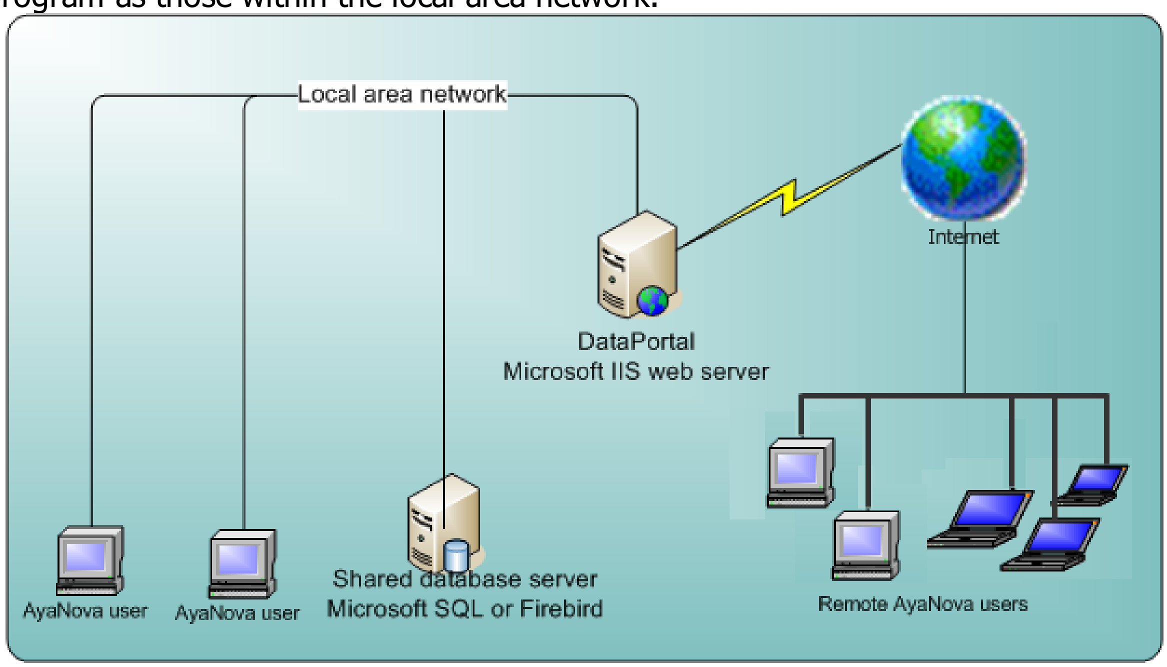
8.7 Data Portal for use by remote users

8.7.1 What is the AyaNova Data Portal?

- The AyaNova Data Portal is a web server application useful for remote users with a windows computer and full time internet connection.



- The AyaNova Data Portal allows remote users to run the exact same full AyaNova program as those within the local area network.



So instead of connecting directly to the database server, the remote users connect to the Data Portal which **then** connects to the database server.

This difference in connection for a user connecting via the data portal is via the *config.txt* configuration file on the remote users computer as per the Data Portal configuration steps.

- The advantage of the Data Portal is security and relative speed over a slow connection such as a VPN or via the internet while still being able to use the full AyaNova program. The Data Portal has been specifically optimized for the slower connection speed of a remote user.

  Although the Data Portal has been optimized for use with slower connection speeds, how fast the response is to retrieve data (i.e. printing a report, opening a workorder entry screen, filtering a grid, etc) will be affected by the connection speed between the remote user and the Data Portal.

- The AyaNova Data Portal requires that AyaNova be configured for network use first.

  Do note that you **can** have AyaNova configured for network use on one computer only so that you can remote access through the Data Portal to your AyaNova data while out of your office.

Requirements:

1. The network configuration (Firebird server installation or SQL Express or SQL Server) **must** be performed **before** following the Data Portal configuration steps.
2. Confirm that you can connect to the networked AyaNova database from a local networked connected computer
3. Server where the Data Portal will be installed has IIS installed **before** the data portal installation, configuration and testing steps
4. Server where the Data Portal will be installed has confirmed that AyaNova runs successfully on it, and connects to the networked database (i.e. the Data Portal can be installed on the same server where the database actually resides, OR it can be installed to another computer that can access the AyaNova database through a networked config.txt)
5. Your router/firewall has a static external IP address *(you can not use a dynamic IP address as that means it constantly changes, and therefore your remote users won't be able to connect as won't know what IP address to use)*

6. Your router/firewall configured for port forwarding for the IIS computer.

7. High-speed internet / network connection between remote user and network where database resides

8.7.2 DataPortal Requirements

Minimum requirements before proceeding with DataPortal setup:

- AyaNova minimum requirements:
  - ☐Latest version of AyaNova
  - ☐AyaNova database must be networked
    - SQL Express or SQL Server is recommended if will be using any of the remote access options.
  - ☐There is no dataportal license - the dataportal available to use with your database at no charge

- Computer minimum requirements:
  - ☐recommended minimum Windows 7 but will run on as old as Windows XP with IIS5
  - ☐Installs its files by default to the same folder as your AyaNova program files
  - ☐Computer can be the same server where your database is networked on, or it can be another computer within the same LAN
  - ☐As with the AyaNova database server, the higher the hardware specifications, the better the performance. If you are encountering slow response, you will want to upgrade your hardware and/or operating system. Minimum hardware requirements would be that for the IIS version compatible with your Windows operating system.

- Network requirements:
  - ☐Static external Internet IP address for your Internet router/firewall is recommended
    - Your router/firewall has a static external IP address
    - Your router/firewall configured for port forwarding of your IIS computer.

  NOTE: you can certainly use a dynamic IP address for your public router/firewall, but of course you are aware that as a dynamic IP address changes constantly, you and your staff would need to know what the changed IP address is every time it changes to be able to access via any AyaNova remote option.

  OR

  If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

- Security requirements:
  - ☐IIS / firewall / router security:
    - If you are not comfortable with configuring your IIS / firewall / router, it is recommended that you call in a local IT networking professional to do so.
    - Any additional IIS security settings other than what is set when your IIS is default installed is beyond the scope of the support we provide.
    - If you wish to implement additional security settings, we highly recommend you first follow the default settings for setting up your dataportal confirming you can successfully access, and only then make any changes, being sure to check after each change to see if affects the dataportal adversely.
  - ☐If your data is highly sensitive:
    - Any information sent over the internet is susceptible to Man-In-The-Middle (MitM) Attacks and it is recommended if your data is highly sensitive, to implement Transport Layer Security, typically involving HTTPS, TLS and SSL.
    - SSL / TLS is enabled at the Microsoft IIS web server, not via AyaNova WBI or RI or MBI or Dataportal which do not have any special requirements or settings for encryption as that happens a layer below AyaNova at the web server.
    - How to procure and install an SSL certificate and enable SSL on an IIS web server is beyond the scope of the support we provide. A suggestion would be to search via Google https://www.google.ca/search?q=microsoft+How+to+implement+SSL+in+IIS
    - Be aware that SSL certificates need to be purchased from a certificate issuing authority and can be pricey **however** there is a new industry sponsored certificate authority providing no charge certificates which has been started up recently in an attempt to get everyone to start using encryption that might be of interest: https://letsencrypt.org/

8.7.3 Step #1: DataPortal Installation

It is always recommend to read through all instructions first before proceeding.

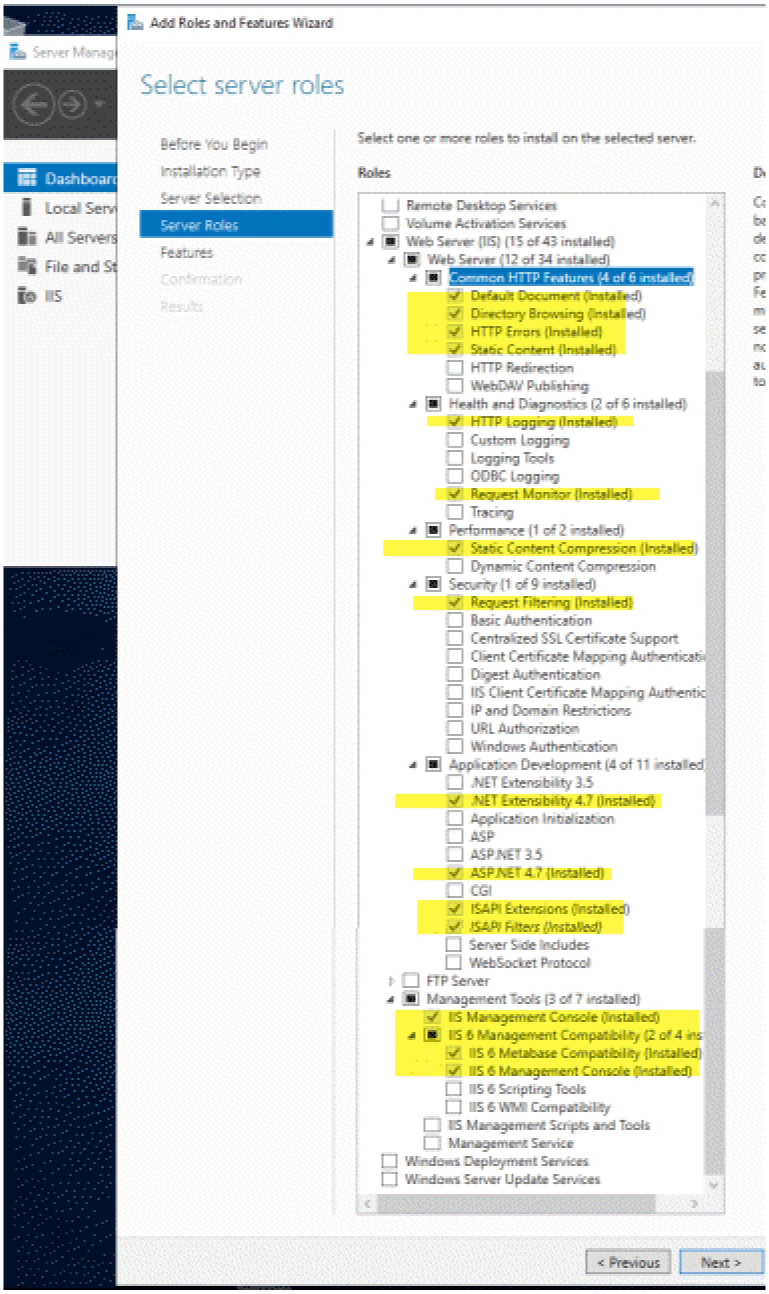
A. IIS (Internet Information Services) is installed on the computer you want to run DataPortal on
B. AyaNova is networked and is the latest version.
C. AyaNova is installed on this computer and successfully runs
D. Run the AyaNova setup file to select the data portal installation

A. Is IIS (Internet Information Services) installed on the computer you want to run DataPortal on?

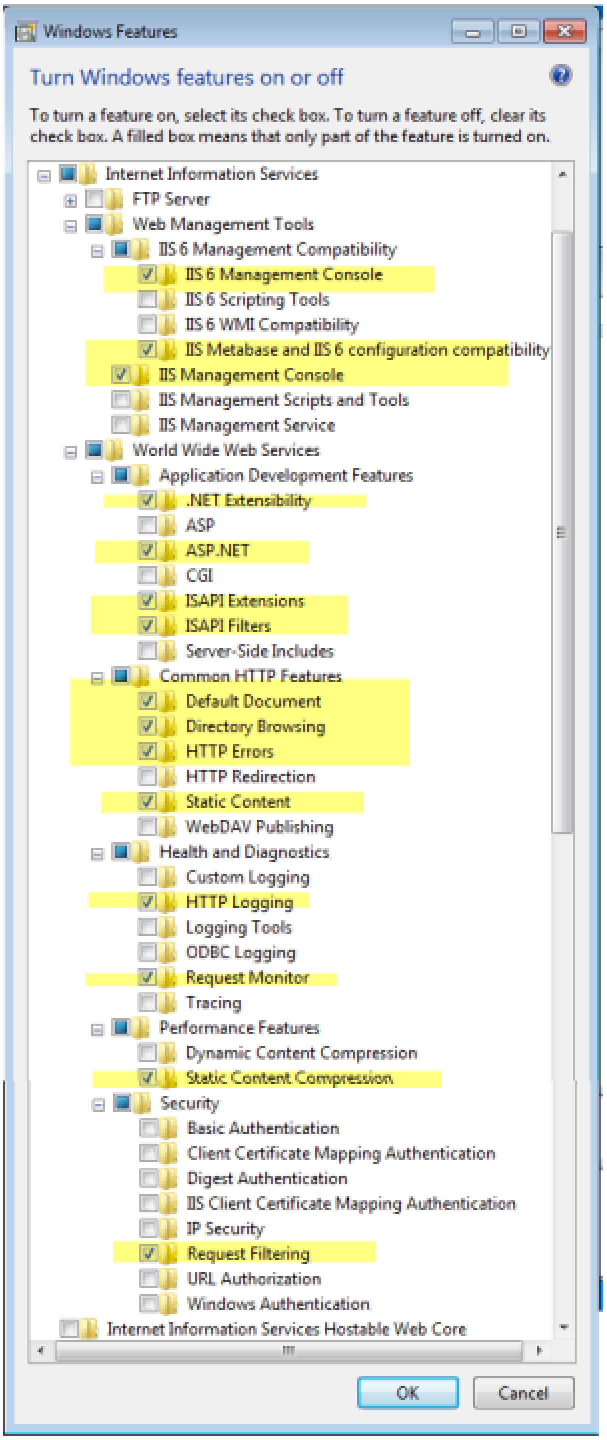
Depending on the your operating system, you might install the required IIS features by going to **Add/Remove Windows Components** or through **Turn Windows Features On** or Off or through **Server Manager**. If not sure how to add the IIS Windows feature components required onto your operating system, do a search online including your operating system version.

In the two screenshots below you will see that the specific components that must be installed are the same regardless of which operating system, just how you get there, the order listed etc may not be the same depending on the operating system. We have included below an example from a Windows 2019 Server and a Windows 7 computer:

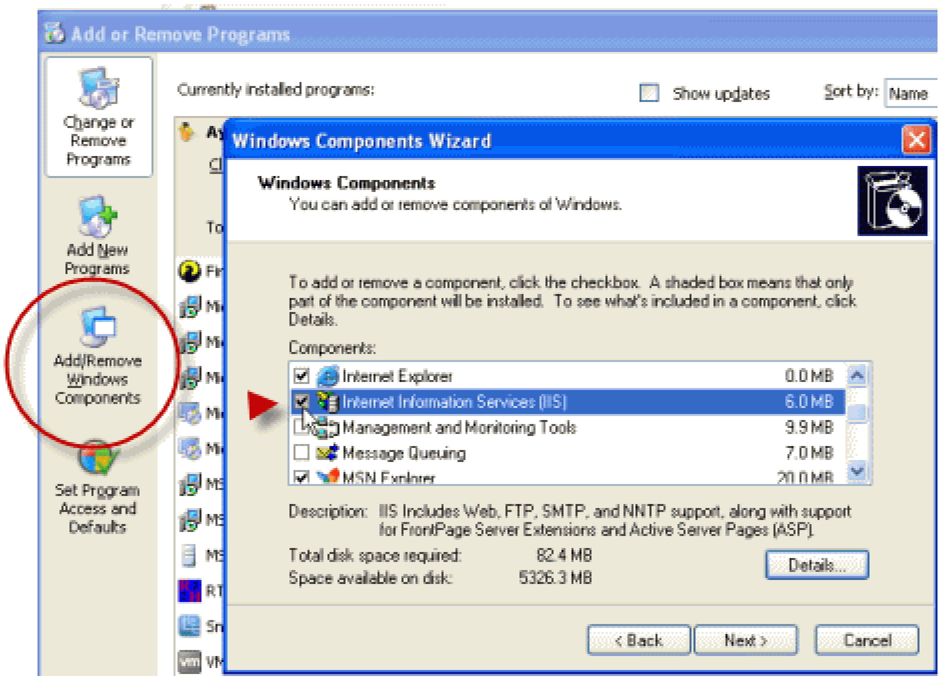
Example showing the IIS features selected for a Windows 2019 Server:



Example showing the IIS features selected for a Windows 7 64bit:



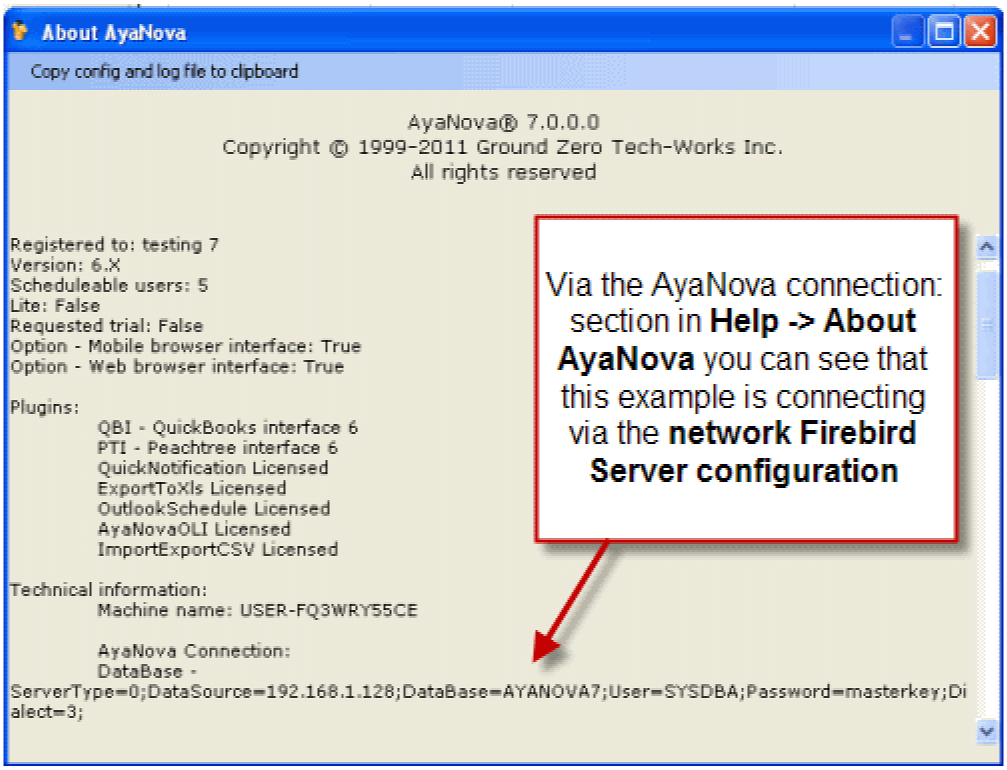
Below is example screenshot of selecting to install IIS onto an old XP 64 via Add/Remove Windows Components



- Once installed, run Windows Updates again and apply **all** recommended updates
- Reboot again and check Windows Updates again, **before** proceeding with the Data Portal installation.

B. Confirm that your AyaNova is networked and is the latest version.

- AyaNova **must** be networked using either Firebird Server, SQL Express or SQL Server. The DataPortal will not run if using the default stand-alone installation of AyaNova.
- Refer to the AyaNova Help documentation section on networking AyaNova if you have not yet done so.

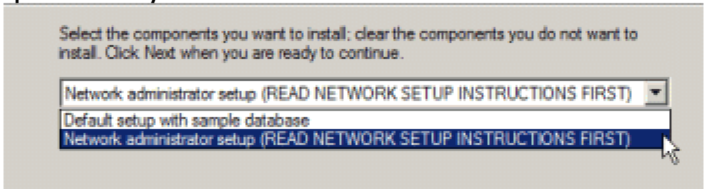


C. AyaNova is installed on to this computer and successfully runs

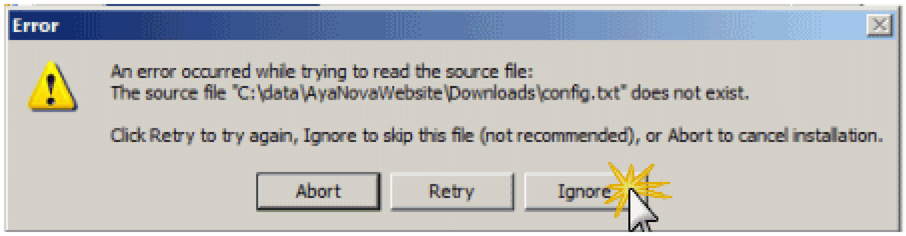
- Run AyaNova. Log in. Make sure you can log in successfully, and are connecting to your networked AyaNova database.

D. Run the AyaNova setup file and install the data portal

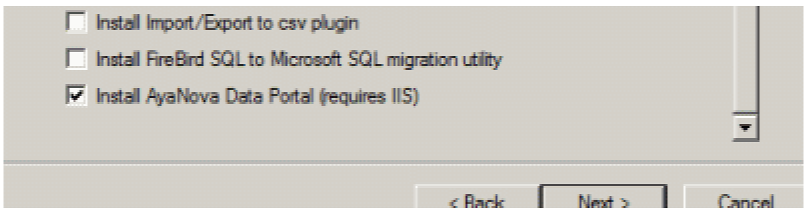
Run the AyaNovaSetup.exe installation again on this same server where you have already configured network AyaNova use and select the network administrator setup so that you can select to install the Data Portal



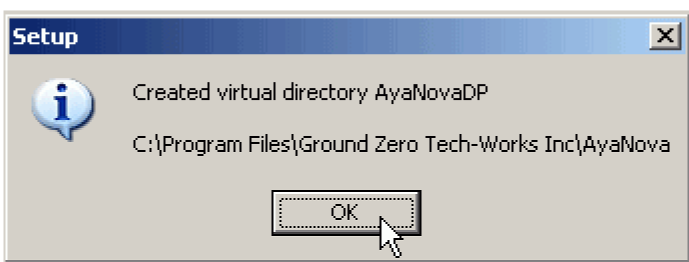
- As you will be selecting the Network administrator setup to install the Data Portal, run the AyaNovaSetup.exe file from the **same** folder where you placed the copy of your networked edited config.txt file as per step #7 of your AyaNova networking steps - as it will expect to find a copy of the config.txt file in the same folder.
- If you run the AyaNovaSetup.exe file from a folder where a copy of your config.txt file is **not** located, you will get the following message. Just click on Ignore.



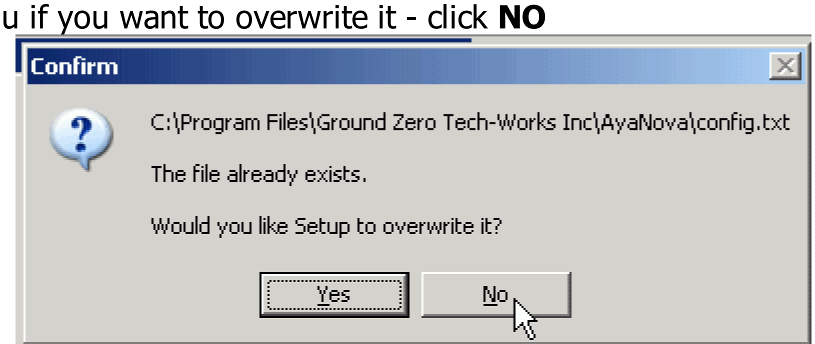
Select to **Install AyaNova Data Portal (requires IIS)**



During the installation it will notify you that it created the virtual directory AyaNovaDP from C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova (or C:\Program Files\... if 32 bit)

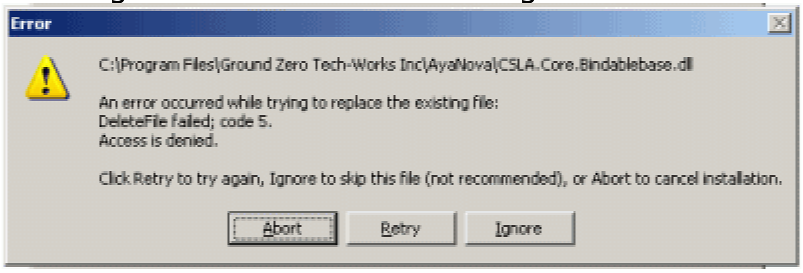


If during the installation, it sees that there already is a config.txt file and will ask you if you want to overwrite it - click **NO**



- You do **NOT** want to overwrite your config.txt file because it is already configured to point to your networked AyaNova database

NOTE: if you get a message such as below about replacing a file, this is occurring because you have something running. Click Abort, and then check to make sure you do NOT have the AyaNova program running, nor OLI, and check Services to make sure that the AyaNova Generator is shut off while installing. Then run the installation again.



d. Once installation is complete, continue with configuration and testing

If you encounter any errors or issues refer to DataPortal Common Issues

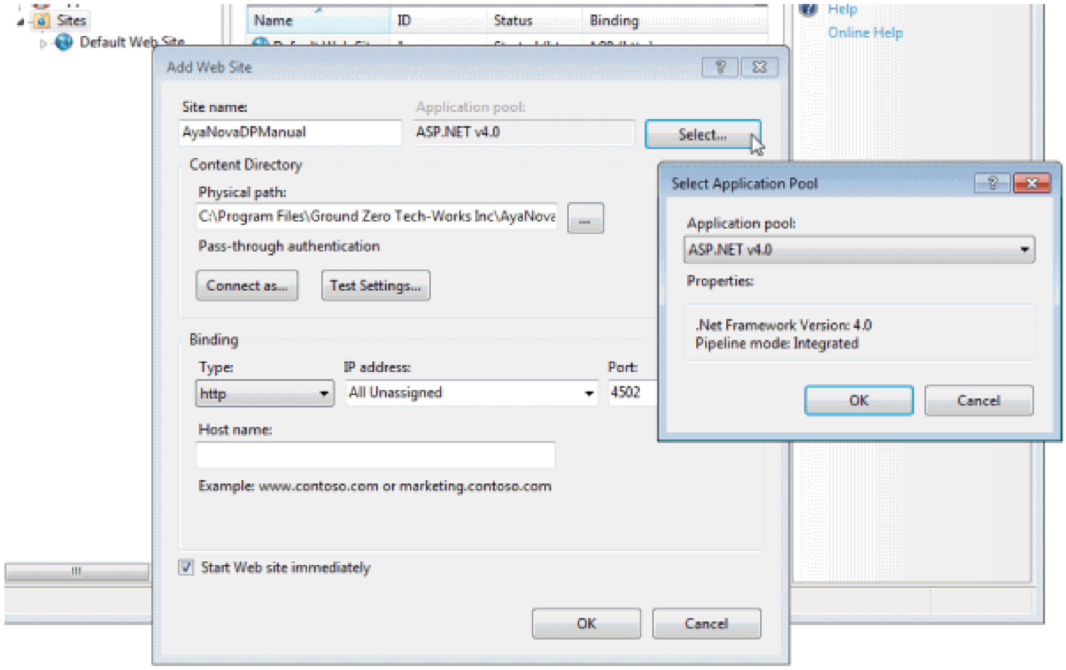
8.7.4 Extra: If do not want to use Default Web Site

NOTE: If on your server you can not or do not want to use a web site off of Default Web Site as per the installation steps, you can manually create a new virtual web site pointing to the AyaNova folder as per the following steps:

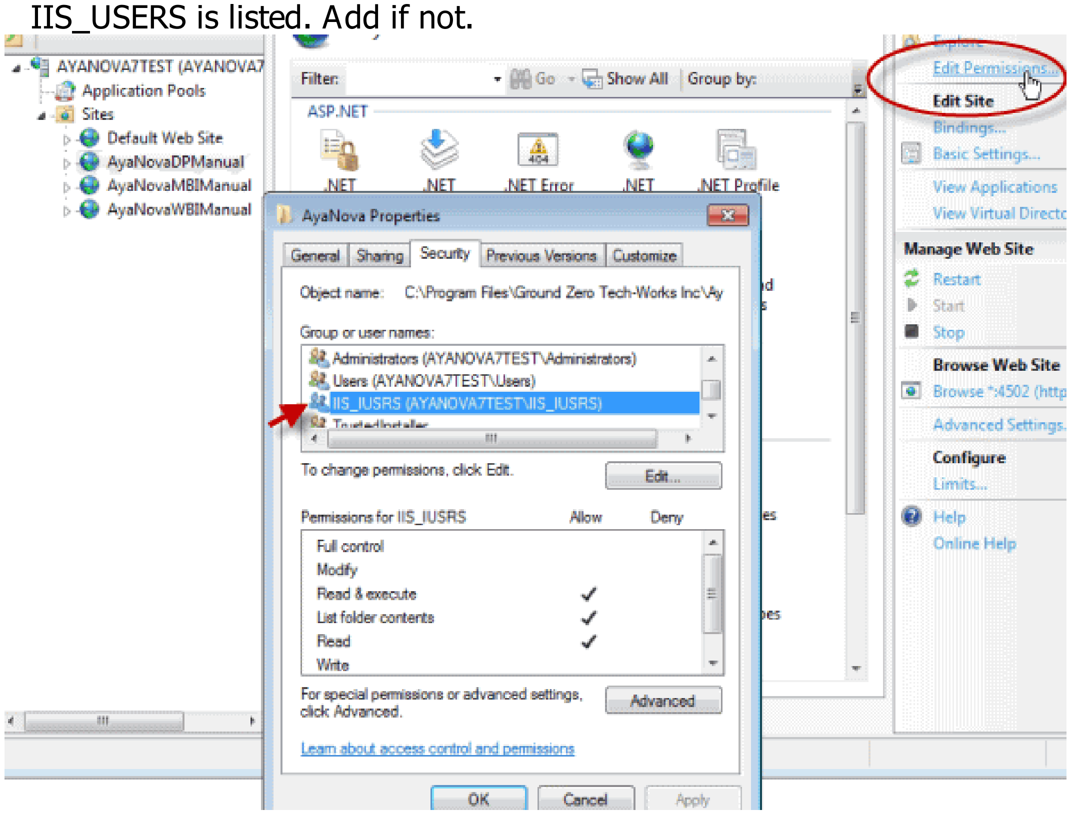
1. Perform all steps as per Step #1: Data Portal Installation
2. In IIS Manager, delete the installed web site AyaNovaDP under Default Web Site (this should not remove the installed files)
3. In IIS Manager, create a new web site pointing to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova (or C:\Program Files\... if 32 bit) folder with its own port #

   If using older OS such as Windows 2003:
   - Allow anonymous access to the web site
   - The web site access permissions must be at minimum Read, Run scripts and Execute
   - Make sure .NET 4 is selected in the ASP.NET tab for this new site
   - You may or may not have to set the IP Address property of your new website to the computer's actual internal ip address instead of (All Unassigned)

   If using Windows 7 or newer:
   - Select **ASP.NET v4.0** application pool (uses Integrated managed pipeline mode)



- Right-click on the newly created site, select Security tab, see that IIS_USERS is listed. Add if not.



4. Stop and Start this new web site that you just created

5. As the site is not under Default Web Site, note of course that the port # you set for your router in the Configuration steps would be for this new AyaNova Data Portal site itself, not for Default Web Site.

6. As the site is not part of Default Web Site, the URL for testing would now be http://localhost:xxxx/DataPortal.rem?wsdl where xxxx is the port number you gave when you manually created the site. (or use xxx.xxx.xxx.xxx:XXXX where xxx.xxx.xxx.xxx is the server's internal IP address)

8.7.5 Step #2: DataPortal Configuration

Configuration of the Data Portal differs depending on the operating system in use.

Below are first after that are the steps for Windows 7 and newer and than second the steps if using an older OS such as Windows XP Pro or Windows 2003

Data Portal Configuration Steps to perform if Windows 7 or newer

A. After installation has completed, open the IIS Manager and confirm that AyaNovaDP is present

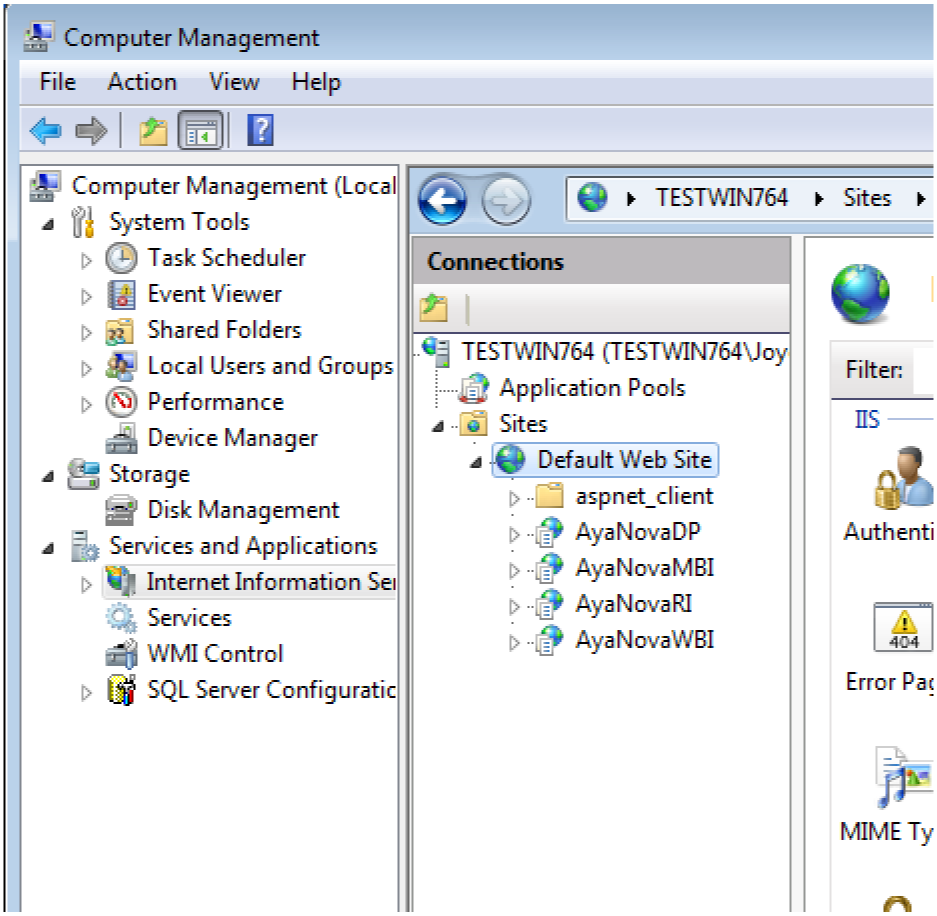
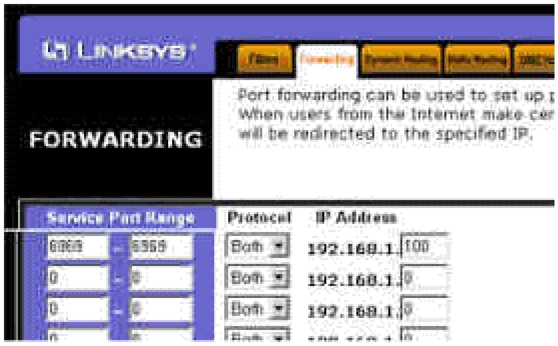


image displayed includes all remote access options installed following the basic steps. your layout under Default Web Site may be different.

B. Confirm what the external static IP address is for your router/firewall (as your remote users will use that ip address, not a private internal ip)

C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)
Confirm that your router/firewall is configured to forward port to the database server where the Data Portal will be set up

- Refer to your firewall documentation for setting up forwarding as every firewall is different and we would not be able to put here examples of every type available.
- Contact a networking professional if you have any questions about firewall configuration
- in our example screenshot below for our example LinkSys router - the forwarding port we have set is 6969 for the database server's internal IP address of 192.168.1.100



C.2 If you only have dynamic IP

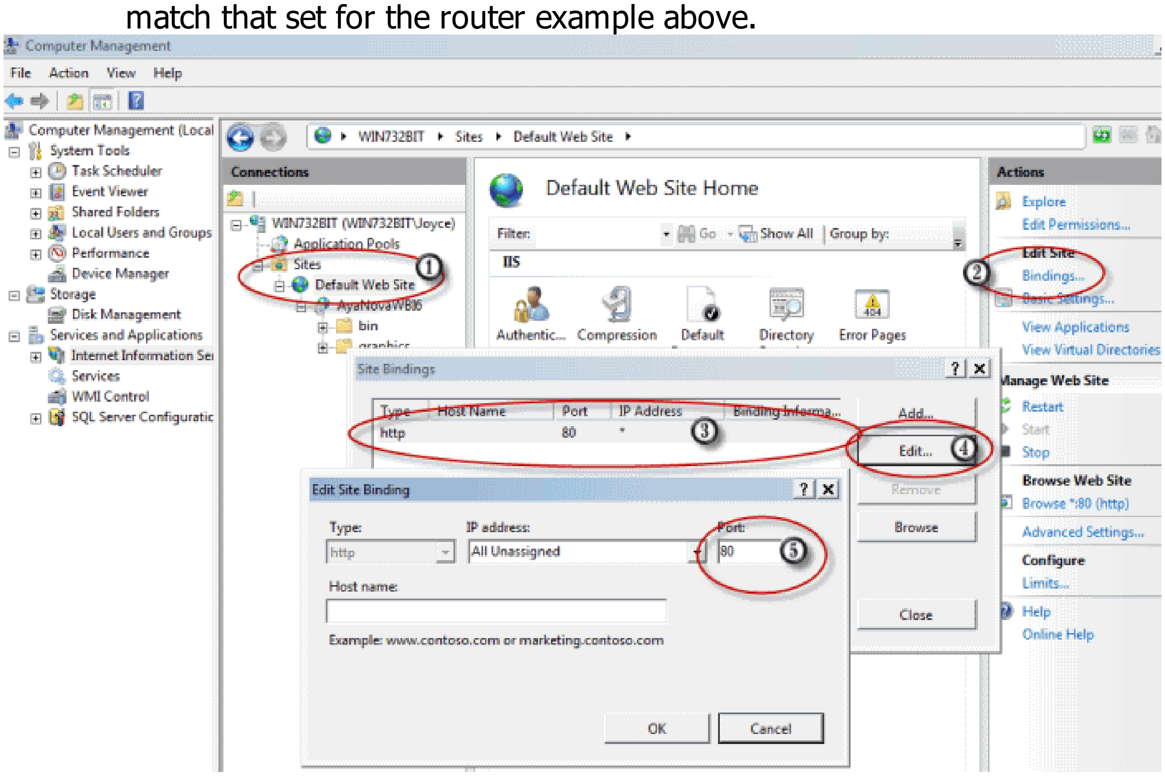
You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

D. Confirm that IIS is configured for this same port (or vice versa of course)

- In our **example screenshot below**, the Port is 80 for the Default Web Site.
- So would need to edit the port for the Default Web Site to 6969 to match that set for the router example above.

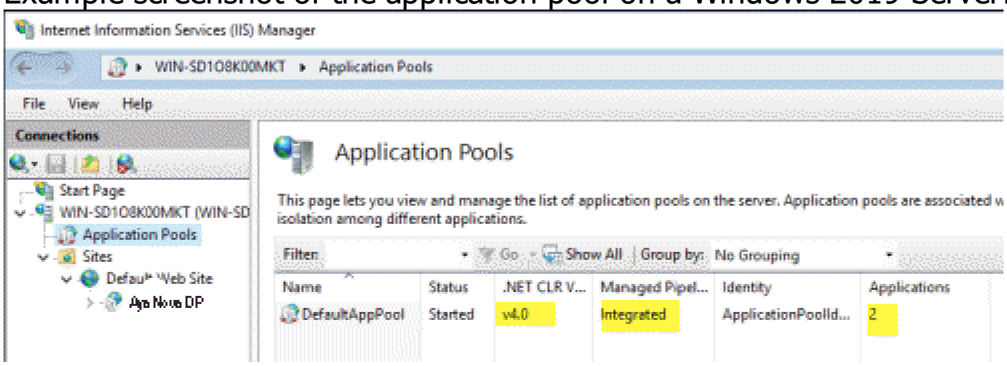


E. There is no editing of a web.config file because AyaNovaDP uses the same config.txt that the AyaNova program file uses to connect to the networked database.

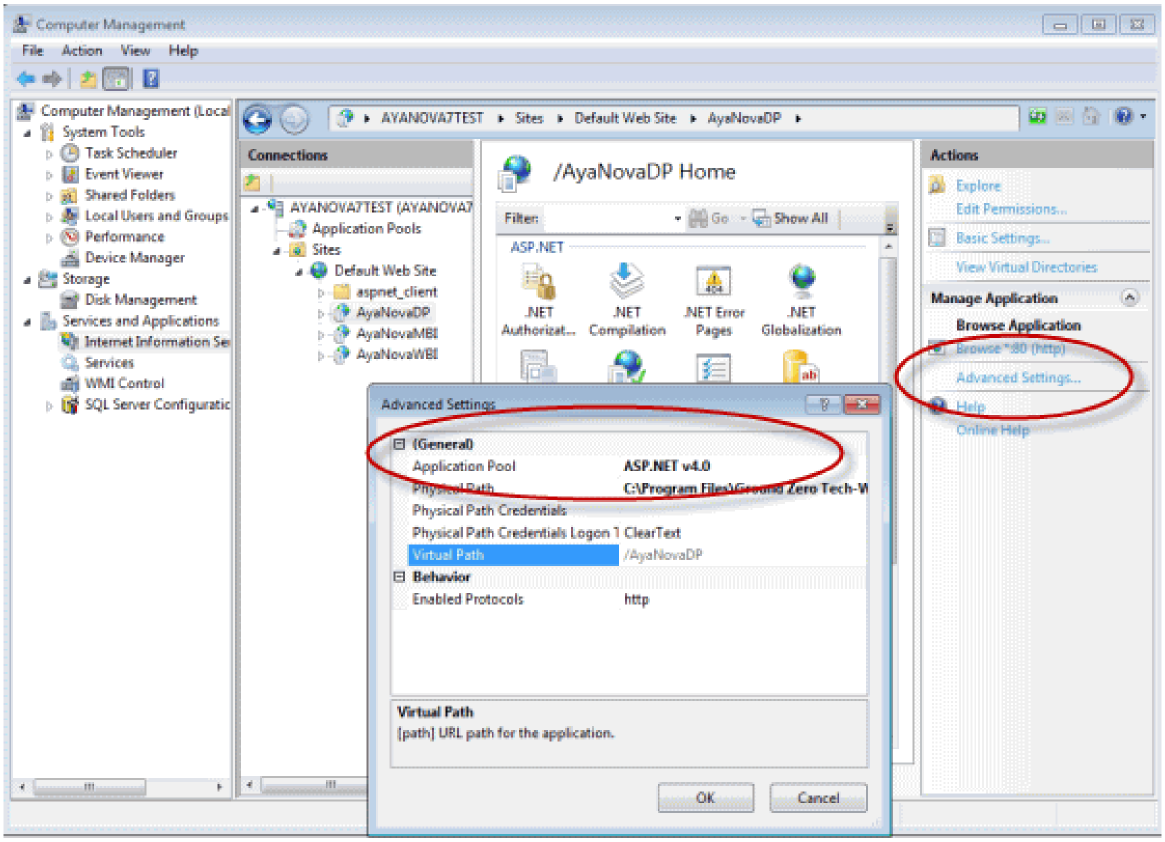
F. View the Advanced Settings for the AyaNovaDP web site, and select to use the Application Pool **ASP.NET v4.0**

- This ASP.NET v4.0 app pool is **created automatically** for you when you installed the IIS components in Step #1 - Data Portal Installation with .NET 4 installed
- The application pool uses managed pipeline mode of **Integrated** with .NET 4 Framework
- If this App pool is not listed, you may need to re-registered ASP.NET 4 with your IIS by running *"%windir%\Microsoft.NET\Framework\version\aspnet_regiis.exe" -i* at command prompt where *%winver%* is the Windows directory for your operating system, and *version* represents the version number of the .NET Framework that you installed on your server. Don't forget to reboot after.

Example screenshot of the application pool on a Windows 2019 Server:

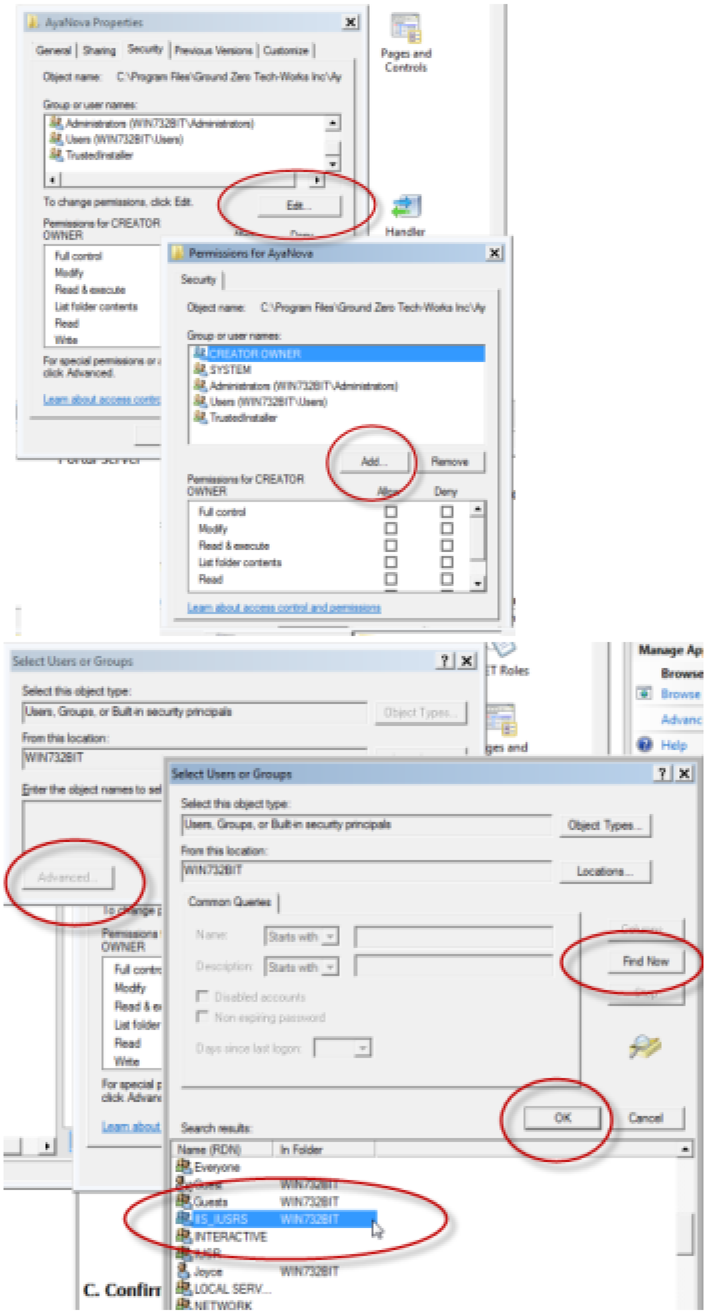


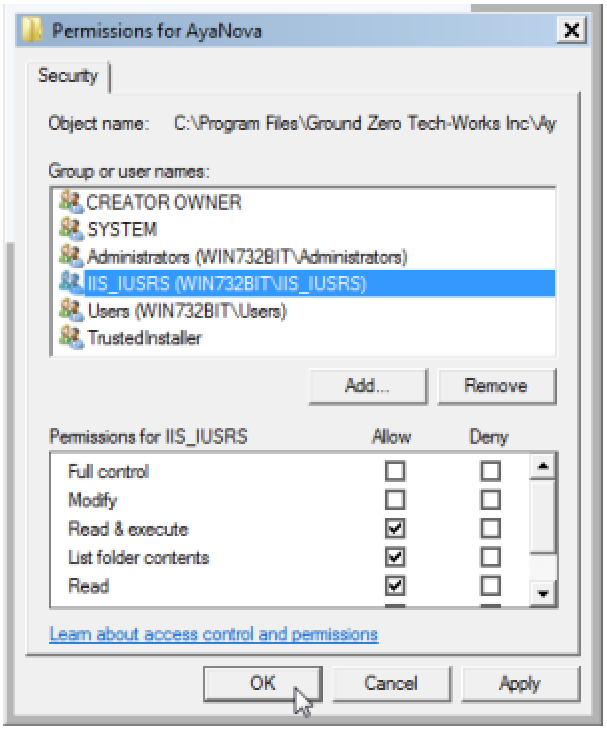
Example screenshot of Windows 7:



G. Check that IIS_Users has permissions for Default Web Site

Right-click on **Default Web Site** -> Select **Edit Permissions...** -> Select the **Security** tab
This should be there by default - if not, may be indicative of issues with your IIS. Try adding manually.
Example screenshot shows beginning of how to do this which is click on Edit -> than Add... -> Advanced -> Find Now -> scroll down and click on IIS_USERS and OK till now showing.


AyaNova Properties
General
Sharing
Security
Previous Versions
Customize
Object name: C:\Program Files\Ground Zero Tech-Works Inc\Ay
Group or user names:
Administrators (WIN732BIT\Administrators)
Users (WIN732BIT\Users)
TrustedInstaller
To change permissions, click Edit.
Edit...
Permissions for CREATOR OWNER
Full control
Modify
Read & execute
List folder contents
Read
Write
For special permissions or a click Advanced.
Pages and Controls
Handler
Permissions for AyaNova
Security
Object name: C:\Program Files\Ground Zero Tech-Works Inc\Ay
Group or user names:
CREATOR OWNER
SYSTEM
Administrators (WIN732BIT\Administrators)
Users (WIN732BIT\Users)
TrustedInstaller
Add...
Remove
Permissions for CREATOR OWNER
Allow
Deny
Full control
Modify
Read & execute
List folder contents
Read
Learn about access control and permissions
Select Users or Groups
Select this object type:
Users, Groups, or Built-in security principals
Object Types...
From this location:
WIN732BIT
Enter the object names to sel
Advanced...
Manage Ap
Browse
Help
Select Users or Groups
Select this object type:
Users, Groups, or Built-in security principals
Object Types...
From this location:
WIN732BIT
Locations...
Common Queries
Name:
Starts with
Description:
Starts with
Disabled accounts
Non expiring password
Days since last logon:
Find Now
OK
Cancel
Search results:
Name (RDN)
In Folder
Everyone
Guests
WIN732BIT
IIS_IUSRS
WIN732BIT
INTERACTIVE
Joyce
WIN732BIT
LOCAL SERV...
NETWORK
C. Confirm

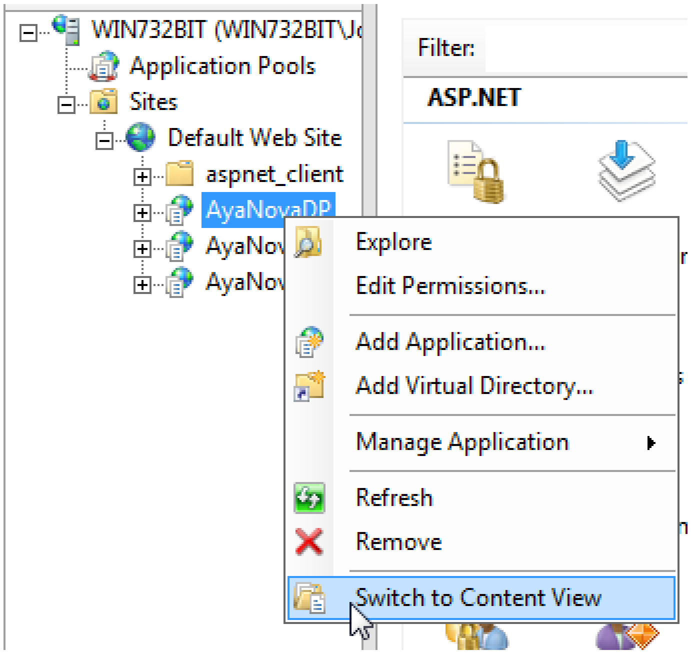


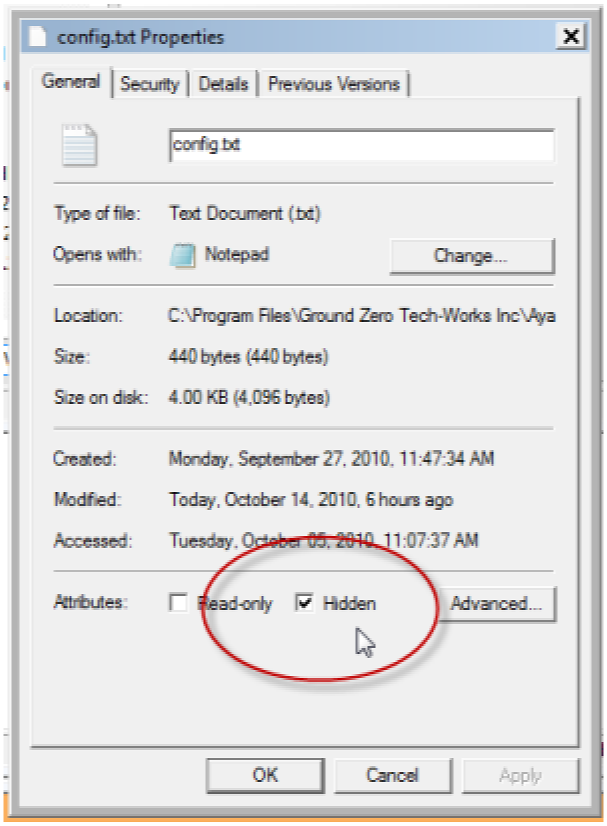
H. The following are additional rights settings you may want to set so that external users can not view the contents of the config.txt file

1. Switch to Content View for AyaNovaDP

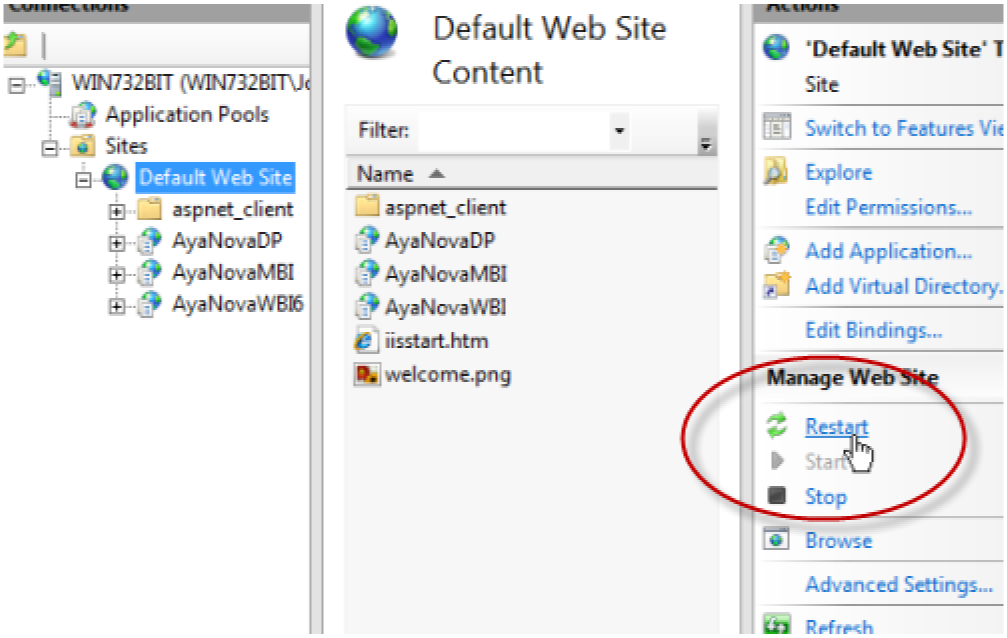
3. Right-click on the config.txt file and edit permissions

4. Check-mark Hidden





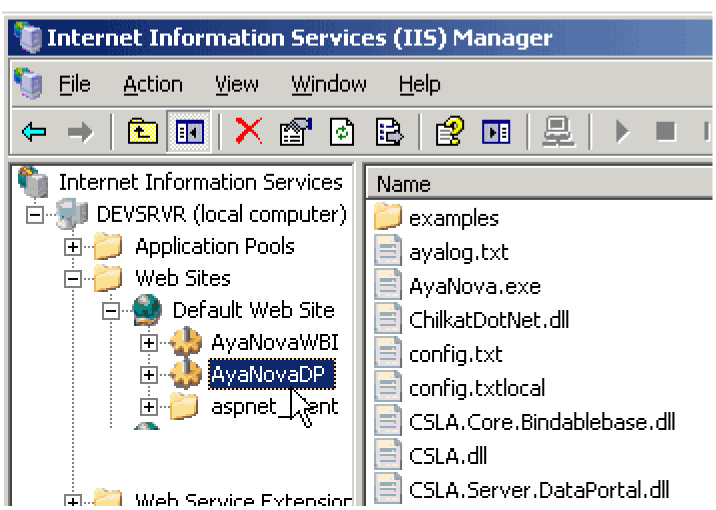
I. Restart the default web site



J. Continue to [Testing](#)

DataPortal Configuration Steps to perform if using older OS such as Windows XP Pro or Windows 2003:

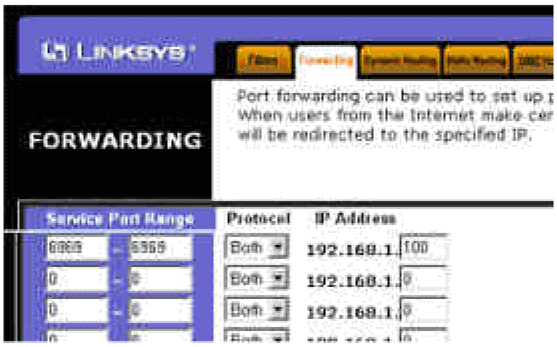
A. Open the IIS Manager and confirm that AyaNovaDP is present as an application site under Default Web Site [after installing](#)



B. Confirm what the external static IP address is for your router/firewall (as your remote users will use that ip address, not a private internal ip)

C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)
Confirm that your router/firewall is configured to forward port to the database server where the Data Portal will be set up

- Refer to your firewall documentation for setting up forwarding as every firewall is different and we would not be able to put here examples of every type available.
- Contact a networking professional if you have any questions about firewall configuration
- in our example screenshot below for our example LinkSys router - the forwarding port we have set is 6969 for the database server's internal IP address of 192.168.1.100



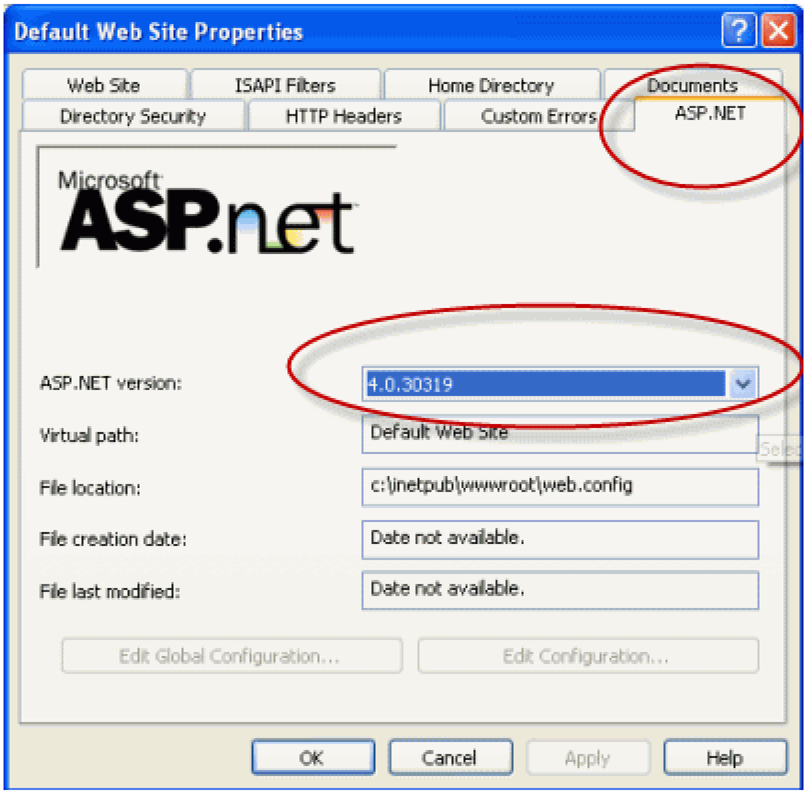
C.2 If you only have dynamic IP

You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

OR

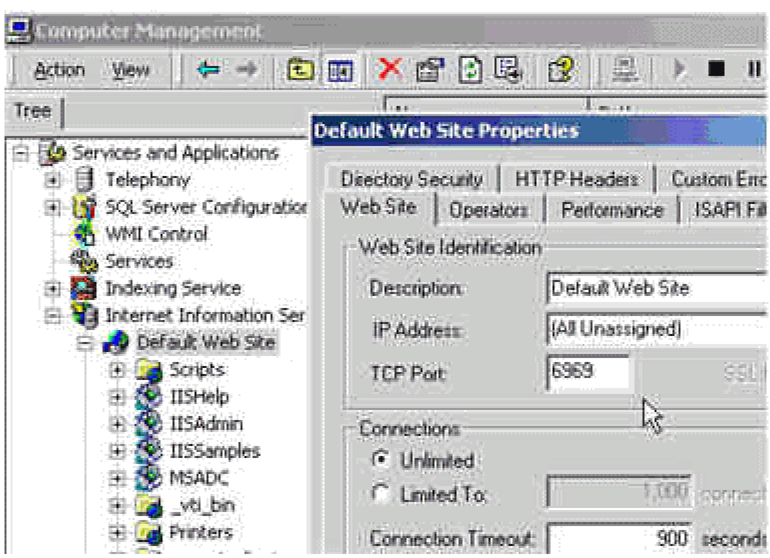
If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

D. Confirm that the ASP.NET tab in the Default Web Site is set to use the Microsoft.NET Framework 4



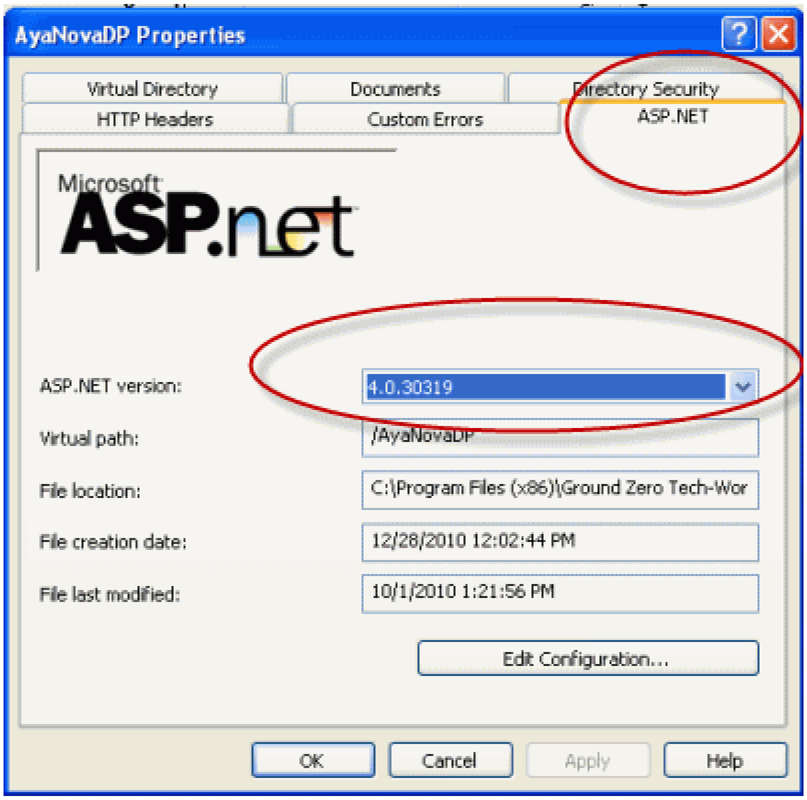
E. Confirm that the Default Web Site in IIS is configured for this port

- In our **example**, we have the TCP Port as 6969 for the Default Web Site because as the above example, we want to have remote users forwarded to port 6969 onto the server.



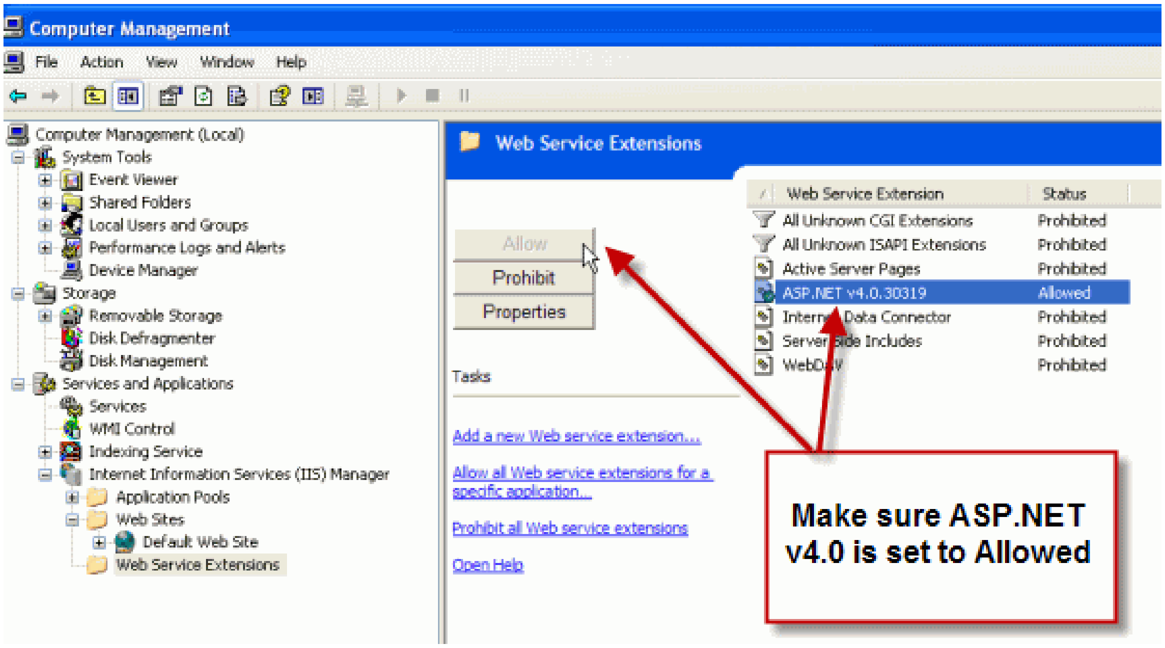
F. There is no editing of the web.config file because AyaNovaDP uses the same config.txt that the AyaNova program uses to connect to the networked database.

G. Confirm that AyaNovaDP web site is using Microsoft.NET Framework 4



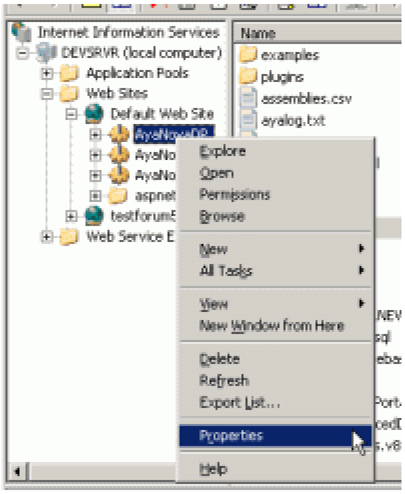
H. If using an older OS such as Windows 2003 or Windows XP 64 bit, select the Web Service Extensions and make sure is set to Allowed *(if not set to Allowed, will get 404 error Page Not Found when performing step N)*

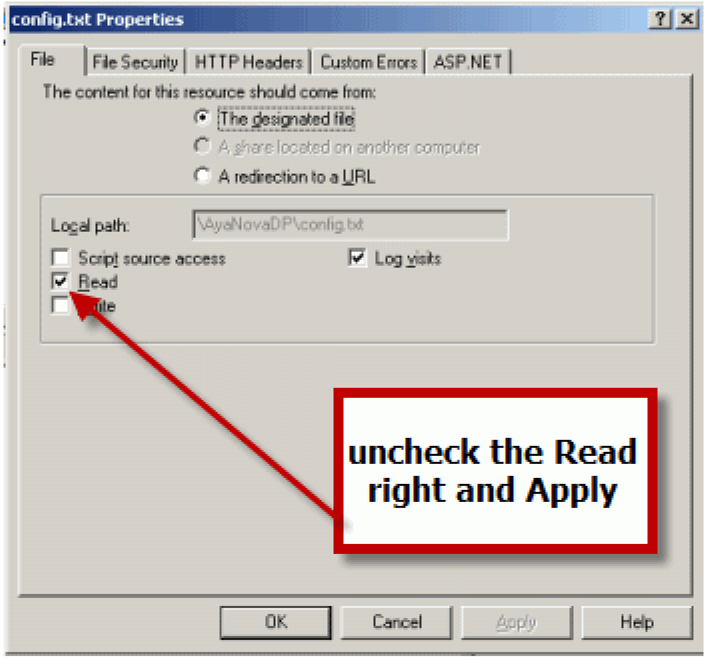
NOTE: If you do not see this extension listed, it may be because your ASP.NET needs to be re-registered to work with IIS again by running *"%windir%\Microsoft.NET\Framework\version\aspnet_regiis.exe" -i* where *%winver%* is the Windows directory for your operating system, and *version* represents the version number of the .NET Framework that you installed on your server. You must replace this placeholder with the actual version number when you type the command.



I. The following are additional rights settings you may want to set so that external users can not view the contents of the config.txt file

1. Open the IIS Manager or Computer Management
2. Right-click on config.txt that is within the folder of the AyaNovaDP site
3. Select Properties
4. Un-check the Read right, and save.





J. Stop and Start the default web site

K. Continue to the [testing steps]

8.7.6 Step #3: DataPortal Testing

A. Test .NET connection on the server itself
B. Test connectivity from within the local area network
C. Test connection from outside of the network (connecting over the internet)

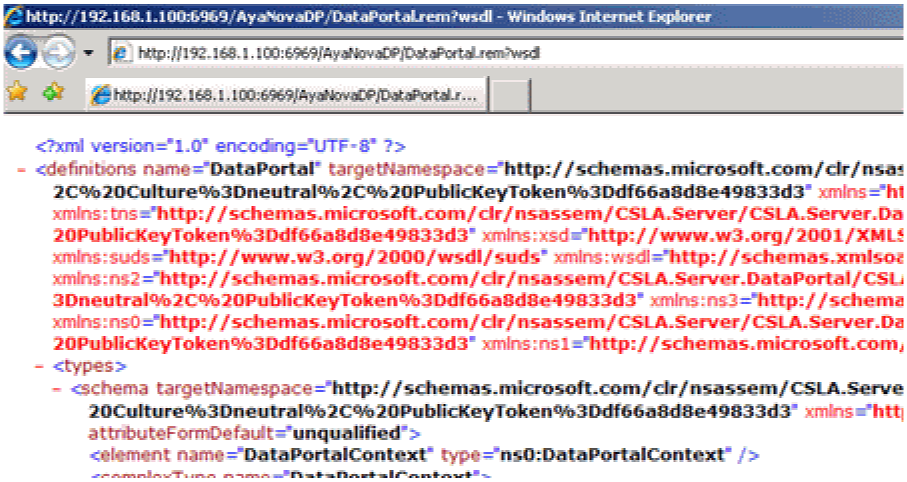
A. Test the connection via the data portal by opening Internet Explorer **on this server** where you have just performed the steps above, and typing in the URL where XXXX is the port number of your Default Web Site

http://localhost:XXXX/AyaNovaDP/DataPortal.rem?wsdl

and also test using the ip address of the server itself (where xxx.xxx.xxx.xxx is the private ip address of this server)

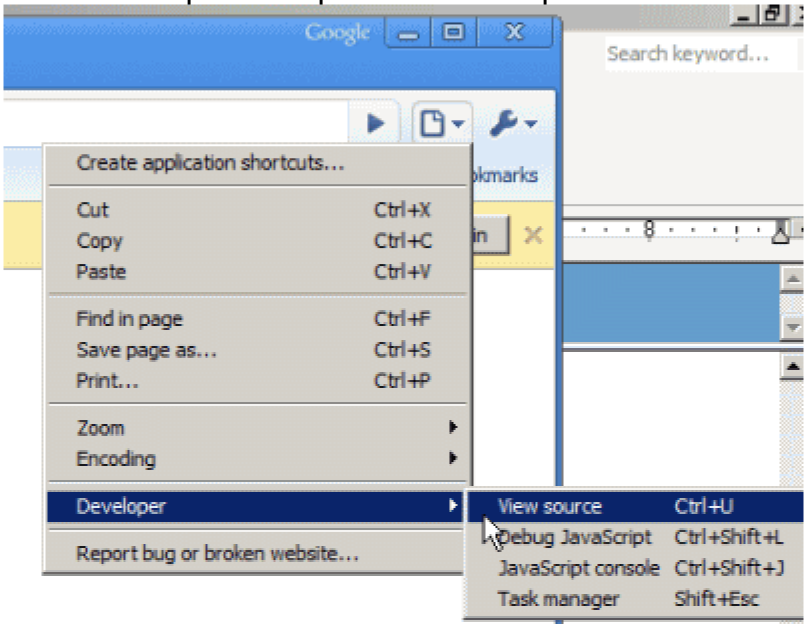
http://xxx.xxx.xxx.xxx:XXXX/AyaNovaDP/DataPortal.rem?wsdl

- For example, in the screenshot below, the port is 6969 so the URL and the private ip address of this server is 192.168.1.100 so the URL is http://192.168.1.100:6969/AyaNovaDP/DataPortal.rem?wsdl
- When using Internet Explorer, you will and you **do want** to see similar to below:



- All this is confirming, is that .NET is working correctly with your Data Portal. And is the most basic requirement.
- If you see similar to the screenshot above, then continue to the next step. If not, recheck all of your steps from the start.

- Note that not all web browsers for example such as Google Chrome may show the above unless you select its Control the current page -> Developer -> View source; and Opera won't show anything at all. Use Internet Explorer to perform this step.



B. Test connectivity from within the local area network

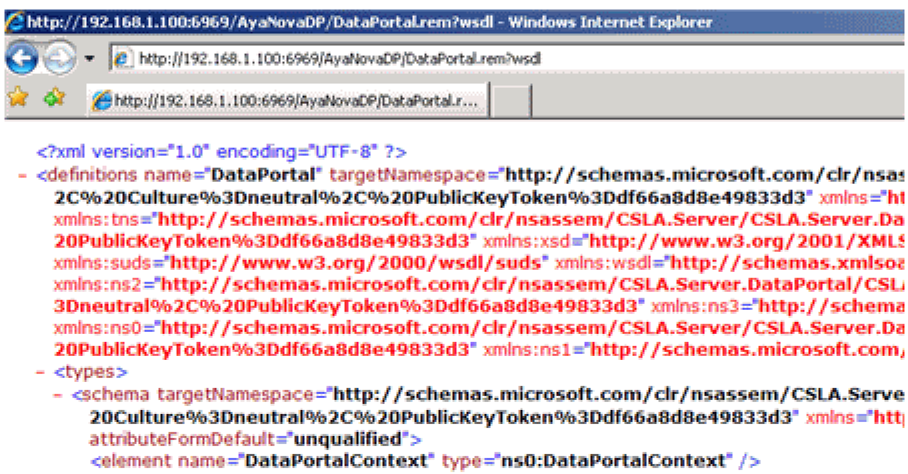
a. on a networked computer **within** the local area network, open a web browser and enter in the local ip of the server, the port number for the dataportal etc as below

http://*dataportalserverlocalip* :XXXX/AyaNovaDP/DataPortal.rem?wsdl

for example, if the local ip of the dataportal server was 192.168.1.100; and the port number you set for it was 6969, you would enter in:

http://192.168.1.100:6969/AyaNovaDP/DataPortal.rem?wsdl

- You **do** want to see similar to below:



- if you **do not** see as above, that means either one or more of the following is a problem and you need to recheck your steps:
  - the data portal site is not running - check your IIS manager
  - a firewall may be blocking access
  - you did not enter in the correct local ip of the data portal server
  - you did not enter in the correct port number for the data portal
  - you did not enter in the correct URL

b. once you have confirmed connectivity from within the local area network, then continue

c. Make a copy of the EXAMPLE_DATAPORTALconfig.txt from the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\Examples folder on the server

d. Move to the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova/examples*** folder on your Data Portal server

e. Make a copy of the ***EXAMPLE_DATAPORTALconfig.txt*** file and rename that copy to ***config.txt***

When you initially installed AyaNova onto your server selecting the default installation, it installed a number of example config files and the example snapshot batch file to the folder C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\examples.

If you do not have the Examples folder:

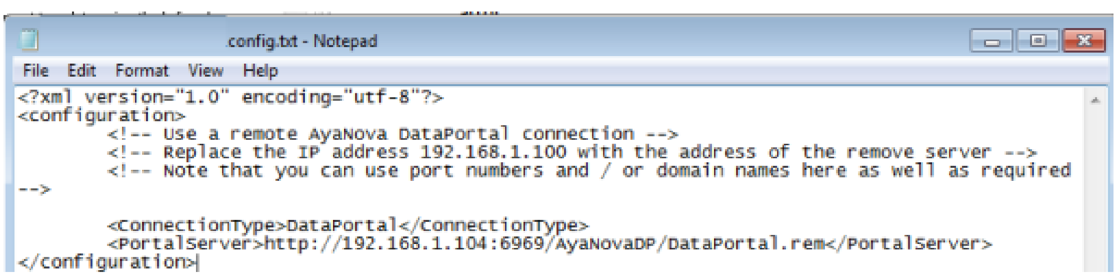
- Are you running the latest version of AyaNova?
- Re-run the AyaNova installation again
- Do note that this will uninstall the AyaNova program (but not your database) and then install again, so if you had previously installed the AyaNovaDP and Network Generator, do check to see if you need to install those again after.
- Be sure to click on No when it asks to overwrite your config.txt

f. Edit this config.txt using NotePad

- Do not use any other program but NotePad to edit this file

- Edit the example IP Address with the internal private IP address and the port number of the AyaNovaDP (this is the same ip address and port number you tested with above in B.a)

- For example, if your server's IP address is 192.168.1.104, and the port your Default web site is using is 6969 than config.txt would look like




```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
        <!-- Use a remote AyaNova DataPortal connection -->
        <!-- Replace the IP address 192.168.1.100 with the address of the remove server -->
        <!-- Note that you can use port numbers and / or domain names here as well as required
-->

        <ConnectionType>DataPortal</ConnectionType>
        <PortalServer>http://192.168.1.104:6969/AyaNovaDP/DataPortal.rem</PortalServer>
</configuration>
```

<ConnectionType>DataPortal</ConnectionType>

<PortalServer>http:// 192.168.1.104*:6969/AyaNovaDP/DataPortal.rem</PortalServer>*

- Save the file

g. on a local area networked computer that was previously connecting to the networked AyaNova database, replace its existing config.txt with this testing config.txt

h. Now run AyaNova

i. Confirm that you can load AyaNova

j. what this is doing is confirming that you can connect within your internal network running the dataportal.

If you can not connect and get an error, check the following:

- the data portal site is not running - check your IIS manager
- a firewall may be blocking access
- you did not enter in the correct local ip of the data portal server
- you did not enter in the correct port number for the data portal
- you did not replace the existing config.txt file

k. After have confirmed can connect, replace the testing config.txt with the correct local area network config.txt you were using before.

C. Test connection from outside of the network

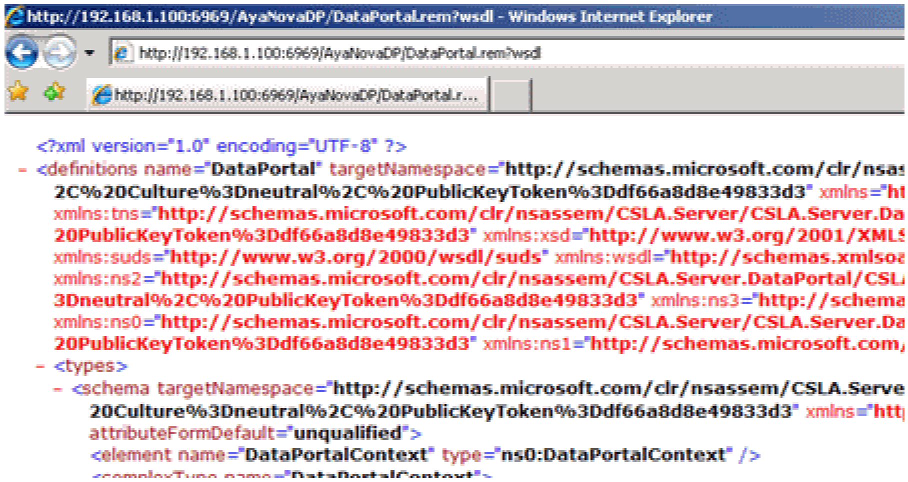
a. on a remote computer connected to the Internet, open a web browser and enter in the public external ip of the router/firewall, the port number for the dataportal etc as below

http://*publicexternalip* :XXXX/AyaNovaDP/DataPortal.rem?wsdl

for example, if the external public ip of your router is 222.333.66.23; and the port number you set for it was 6969, you would enter in:

http://222.333.66.23:6969/AyaNovaDP/DataPortal.rem?wsdl

- You **do** want to see similar to below:



- if you **do not** see as above, that means either one or more of the following is a problem and you need to recheck your steps:

  - the router/firewall may not be configured for port forwarding correctly - recheck your router/firewall help
  - the data portal site is not running - check your IIS manager
  - a router/firewall may be blocking access
  - you did not enter in the correct local ip of the data portal server
  - you did not enter in the correct port number for the data portal
  - you did not enter in the correct URL

b. once you have confirmed connectivity from outside of the local area network, then continue

C. Provide configuration for remote computer

a. Move to the ***C:|Program Files (x86)|Ground Zero Tech-Works Inc|AyaNova/examples*** folder on your Data Portal server

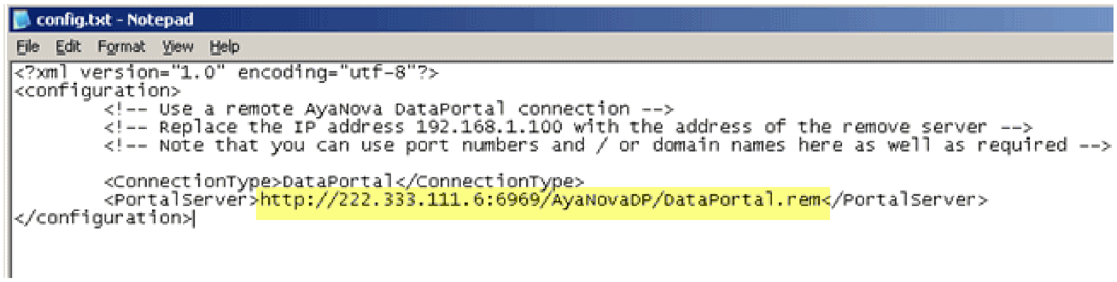
b. Make a copy of the ***EXAMPLE_DATAPORTALconfig.txt*** file and rename that copy to ***config.txt***

c. Edit this config.txt using NotePad

- Do not use any other program but NotePad to edit this file

- Edit the example IP Address with the router's external IP address and the port number (that you configured in step 1 for your router/firewall that is the same in the Default Web Site and also performed in the step C.a just above)

- For example, if your router's public IP address is 222.333.111.6, and the port your Default web site is using is 6969 (which is also the same port you configured in the router/firewall and for AyaNovaDP), that config.txt would look like



```
config.txt - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
	<!-- Use a remote AyaNova DataPortal connection -->
	<!-- Replace the IP address 192.168.1.100 with the address of the remove server -->
	<!-- Note that you can use port numbers and / or domain names here as well as required -->

	<ConnectionType>DataPortal</ConnectionType>
	<PortalServer>http://222.333.111.6:6969/AyaNovaDP/DataPortal.rem</PortalServer>
</configuration>
```

<ConnectionType>DataPortal</ConnectionType>
<PortalServer>http://222.333.111.6:6969/AyaNovaDP/DataPortal.rem</PortalServer>

- Save the file

d. Make that config.txt file accessible to your remote user - either give that config.txt file to your remote user by email or put it on a disk, etc) and have them save to a folder on their local hard drive

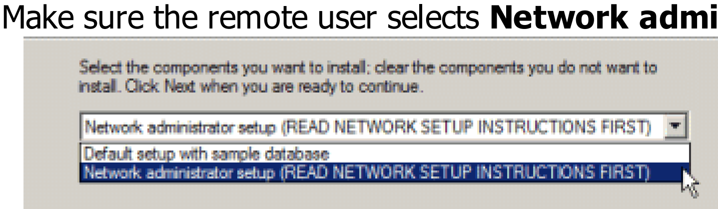
- For example, have them save it to C:\Temp

e. Have your remote user download the AyaNovaSetup.exe installation file and save to their local hard drive into that same folder

- For example, the C:\Temp folder will now have **both** the AyaNovaSetup.exe file and the special edited config.txt file.

f. Have that remote user run the AyaNovaSetup.exe file from that folder location that also has the edited config.txt in that same shared location.

- Make sure the remote user selects **Network administrator setup**



The AyaNovaSetup.exe will "see" that config.txt file in the same folder and automatically copy it to that computer's AyaNova program directory so no additional configuration is needed on that user's station.

The install will only install the AyaNova program files it has been told to install, will copy that config.txt file to the remote user's local hard drive workstations AyaNova program folder and will not install a trial database.

The AyaNova installation will place a desktop icon for AyaNova on the desktop as well as in the start menu.

g. Run AyaNova and confirm can log in. Also check the Help -> About AyaNova and you can see there the configuration used to connect.

8.7.7 DataPortal Common Issues

If an issue with the Data Portal, you first need to confirm at what point an issue **first** occurs. This means the first thing you do is **re-check every step in order**.

If continue to experience an issue, check the AyaNova Support Forum in the Data Portal section for a solution similar to your issue. You might also check out the WBI and MBI sections as may be similar issues as all have to do with IIS and .NET

If continue to experience an issue, either post the following on the AyaNova Support Forum or send via direct email to AyaNova support:

- Identify the issue you are having and what step it relates to - provide details of what exactly was done, possibly screenshots etc of the issue
- Confirm in your message each step performed in its order up to that point, and very importantly, provide details about each step that has been taken up to the point of the issue.
- This includes confirming exactly what you set as per Step #1: Installation; if you performed the Extra:; confirmation of each part of Step #2: Configuration; confirmation of each step of Step #3 - including what you typed in your URL, etc etc.
- Confirm that you have re-registered ASP.NET 4 with your IIS by running *"%windir%\Microsoft.NET\Framework\version\aspnet_regiis.exe" -i* where *%winver%* is the Windows directory for your operating system, and *version* represents the version number of the .NET Framework that you installed on your server (provide exactly what you entered where and confirm it completed successfully etc)

8.8 RI - optional responsive remote interface

8.8.1 What is RI?

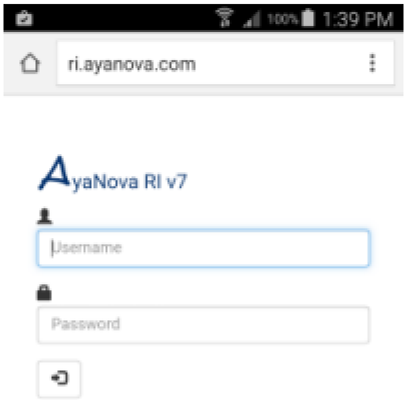


Image of RI login on mobile device

RI is our optional **R**esponsive **I**nterface web application that provides the ability for those with just a web browser and internet connection on any sized screen device to access many of the same features as that of the desktop AyaNova interface.

RI is not a replacement for the AyaNova desktop user interface, RI is an optional interface.

Doesn't matter what the operating system of your device is, nor does it matter what screen size your device has - RI is responsive to your screen size and is accessed by the remote user using most any HTML5 compatible web browser on any operating system.

A RI license is required to use this optional add-on.
Confirm your AyaNova database is licensed for RI by selecting Help -> License. If not licensed, and you would like to trial before purchase, contact us with your present licensing information.
And when ready, purchase the optional RI license via our website.

Quick overview of features and tasks accomplished via RI:

- Secure **log in**
  - Only your active AyaNova users can log in with their supplied login name and password
- **Search**
  - Enter in workorder or quote or PM number to bring up that record quickly
  - Wild card search to return record(s) that have that text entered such as a Unit's serial number, error message, etc.

- Wild card search to return client or unit record, so can easily select to view service history, quotes history, pms, client notes, follow ups, banked service, meter readings (for unit)
- **[Recent...]**
    - Lists records most recently viewed/edited so you can quickly access again
- **[Dashboard]**
    - quick access to **overdue service workorders** that were scheduled prior to today's present time and date as a reminder so that you do not forget to enter your labor, parts, etc as well as checkmark Service Completed.
    - quick access to **service workorders that are scheduled** after today's date and time
    - quick access to Schedule Markers and Follows Ups assigned to logged in user
    - quick access to unread internal memos
    - quick access to **not yet accepted CSRs** (Customer Service Requests created by the customer via WBI)
    - quick access to service workorders not yet assigned to any scheduleable resource specifically
- **[Service Workorders]**
    - Yes you **can create a new service workorder via RI** - review the steps in the tutorial [how to create a new service workorder via RI]!
    - access to the same fields of data as that of the Windows desktop AyaNova program interface
    - menu access to:
        - obtain and view existing **Signature** from client along with date obtained (once Service Completed checkmarked)
        - display service workorder **reports**
        - create new / edit existing **Follow Ups** for this service workorder
        - view existing **Wikipage**
        - upload/download **embedded files** associated with this workorder
    - **quick access to workorder client's address and phone information, popup notes, scheduleable user notes, and contract information**.
    - create new / edit existing workorder item(s)
        - menu access to:
            - **copy existing workorder item to another** workorder for same client
            - move existing workorder item to another workorder for same client
    - selection of **unit** being serviced
        - quick view of that selected unit's warranty information
        - menu access to:
            - **view existing / add meter reading**
    - add / edit existing Scheduleable User record
        - menu access to:

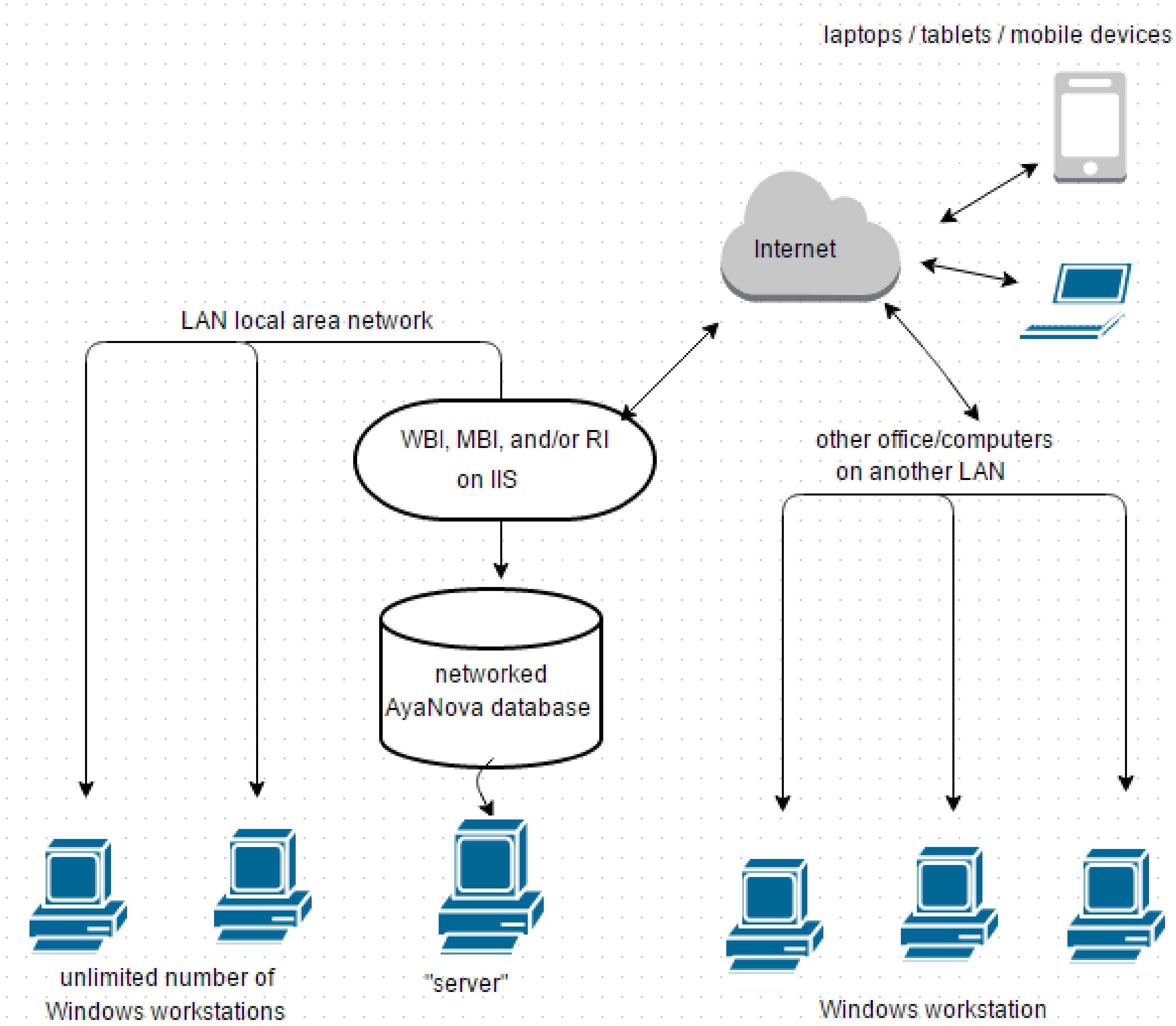
- **generate Labor record from the Scheduled User record**
  - add Tasks to the workorder item
    - edit these task's status (To Do, Completed, N/A)
  - add / edit existing Parts to the workorder item
    - serialized too!
    - **generate Part Requests** for quantity of a part not in stock
    - view at a glance if existing Part Requests are ordered yet, when ordered, how many received
  - add / edit existing Labor
    - menu access to:
      - apply to **banked service**
  - add / edit existing Travel
    - menu access to:
      - apply to **banked service**
  - add / edit existing Misc Expenses
  - add / edit existing Loans
  - enter / edit Outside Service details
  - enter / edit Custom Fields data
- **Quotes**
  - Yes you **can create a new quote via RI** - review the steps in the tutorial how to create a new service workorder via RI as follows the same steps to create a new quote!
  - access to the same fields of data as that of the Windows desktop AyaNova program interface
  - create new / edit existing quotes via the client or via the unit
  - manually generate a new service workorder from a quote
- **PMs**
  - Yes you **can create a new PM via RI** - review the steps in the tutorial how to create a new service workorder via RI as follows the same steps to create a new pm!
  - access to the same fields of data as that of the Windows desktop AyaNova program interface
  - create new / edit existing PMs via the client or via the unit
  - manually generate a new service workorder from a PM
- **Client**
  - Yes you **can** create a new client record via RI.
  - access to the same fields of data as that of the Windows desktop AyaNova program interface
  - menu access to:
    - existing service workorders for this client, and create new for this client from here too!
    - existing quotes for this client, and create new
    - existing PMs for this client, and create new
    - Banked Service entries and create new

        - CSRs made by this client (accepted as well as not yet accepted)
        - Units "owned" by this client (create new unit "owned" by this client from here too!)
        - existing Client Notes and create new
        - existing Follow Ups for this client and create new
        - view existing Wiki page for this client record (not editable via RI)
        - upload / download embedded files for this client record
        - create a new client
        - duplicate existing client to create new
- **Unit**
    - Yes you **can** create a new unit record via RI.
    - access to the same fields of data as that of the Windows desktop AyaNova program interface
    - menu access to:
        - service workorders for this unit (create new for this unit from here too!)
        - quotes for this unit
        - PMs for this unit
        - Banked Service entries
        - CSRs where this unit was specifically selected
        - Follow Ups for this unit
        - view existing Wiki page for this unit record
        - upload / download embedded files for this unit record
        - create a new unit
        - duplicate existing unit to create new
- **Unit Model**
    - access to the same fields of data as that of the Windows desktop AyaNova program interface
    - menu access to:
        - view existing Wiki page for this unit model record
        - upload / download embedded files for this unit model record
        - create a new unit model
- **Part**
    - Yes you **can create a new part via RI** by selecting +New from an existing part's menu. And you can also make adjustments to inventory onhand amounts!
    - access to the same fields of data as that of the Windows desktop AyaNova program interface
    - menu access to:
        - view existing Wiki page for this part record
        - upload / download embedded files for this part record
        - **create a new part**
        - duplicate existing part to create new
        - Part Inventory

- On Hand amt, Qty on Order Committed, Restock Level and/or Order Level details for each warehouse
- **Part Inventory Adjustment**
  - Add/remove quantities of this part to/from inventory

- **Schedule**
  - month/week/day view of scheduled workorder items, Schedule Markers and/or Follow Ups for individual scheduleable resource or non-assigned
  - just click on a scheduled workorder, Schedule Marker or Follow Up to open that form and its data
- **Memos**
  - view unread, reply to existing, forward existing, and/or create new memos
- **Override Timezone**
  - adjust for a remote user that is physically located in another time zone than where RI is installed
- **Logout**
  - use the Logout to release used resources at the IIS server (closing web browser will also do the same eventually)

8.8.2 RI Requirements



Above image is a representation of the web applications WBI, MBI, and/or RI installation configuration with IIS

The AyaNova RI (Remote Interface) is a web application installed on your Microsoft Internet Information Server (IIS) to provide web browser access to your networked AyaNova data.

Requirements before proceeding with RI setup:

- AyaNova requirements:
  - Latest version of AyaNova
  - AyaNova database must be networked
    - SQL Express or SQL Server is recommended if will be using any of the remote access options.

- AyaNova database licensed for RI

- Computer requirements:
  - Windows 7 with IIS 7 is minimum recommended, but will work on older versions down to Windows XP Pro with IIS 5
  - approximately 42MB of hard drive space
  - Computer can be the same server where your database is networked on, or it can be another computer within the same LAN
  - As with the AyaNova database server, the higher the hardware specifications, the better the performance. If you are encountering slow response, you will want to upgrade your hardware and/or operating system. Minimum hardware requirements would be that for the IIS version compatible with your Windows operating system.

- Network requirements:
  - Static external Internet IP address for your Internet router/firewall is recommended
    - Your router/firewall has a static external IP address
    - Your router/firewall configured for port forwarding of your IIS computer.

  NOTE: you can certainly use a dynamic IP address for your public router/firewall, but of course you are aware that as a dynamic IP address changes constantly, you and your staff would need to know what the changed IP address is every time it changes to be able to access via any AyaNova remote access option.

  OR

  If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

- Security requirements:
  - IIS / firewall / router security:
    - If you are not comfortable with configuring your IIS / firewall / router, it is recommended that you call in a local IT networking professional to do so.
    - Any additional IIS security settings other than what is set when your IIS is default installed is beyond the scope of the support we provide.
    - If you wish to implement additional security settings, we highly recommend you first follow the default settings for setting RI confirming you can successfully access, and only then make any changes, being sure to check after each change to see if affects RI adversely.
  - If your data is highly sensitive:

- Any information sent over the internet is susceptible to Man-In-The-Middle (MitM) Attacks and it is recommended if your data is highly sensitive, to implement Transport Layer Security, typically involving HTTPS, TLS and SSL.
- SSL / TLS is enabled at the Microsoft IIS web server, not via AyaNova WBI or RI or MBI or Dataportal which do not have any special requirements or settings for encryption as that happens a layer below AyaNova at the web server.
- How to procure and install an SSL certificate and enable SSL on an IIS web server is beyond the scope of the support we provide. A suggestion would be to search via Google https://www.google.ca/search?q=microsoft+How+to+implement+SSL+in+IIS
- Be aware that SSL certificates need to be purchased from a certificate issuing authority and can be pricey **however** there is a new industry sponsored certificate authority providing no charge certificates which has been started up recently in an attempt to get everyone to start using encryption that might be of interest: https://letsencrypt.org/

- Web browser requirements:
  - HTML 5 compliant web browser such as IE 9.0+, FIREFOX 3.0+, SAFARI 3.0+, CHROME 3.0+, OPERA 10.0+, IPAD 1.0+, IPHONE 1.0+, ANDROID 1.0+
  - Also review RI Browser Settings

8.8.3 Step #1: RI Installation

It is always recommend to read through all instructions first before proceeding.

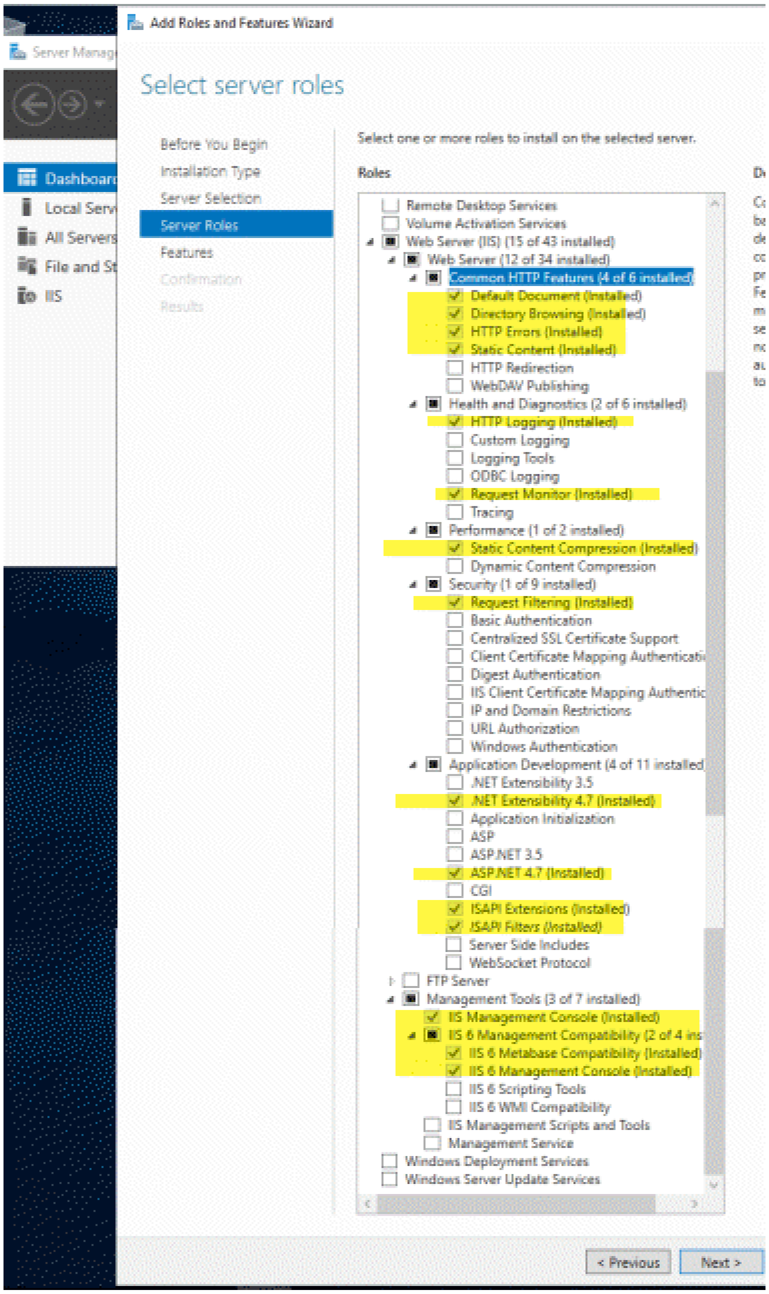
A. IIS (Internet Information Services) is installed on the computer you want to run RI on
B. AyaNova is networked and is the latest version
C. AyaNova is installed on this computer and successfully runs
D. Run the AyaNovaRI setup file to install RI

A. Is IIS (Internet Information Services) installed on the computer you want to run RI on?

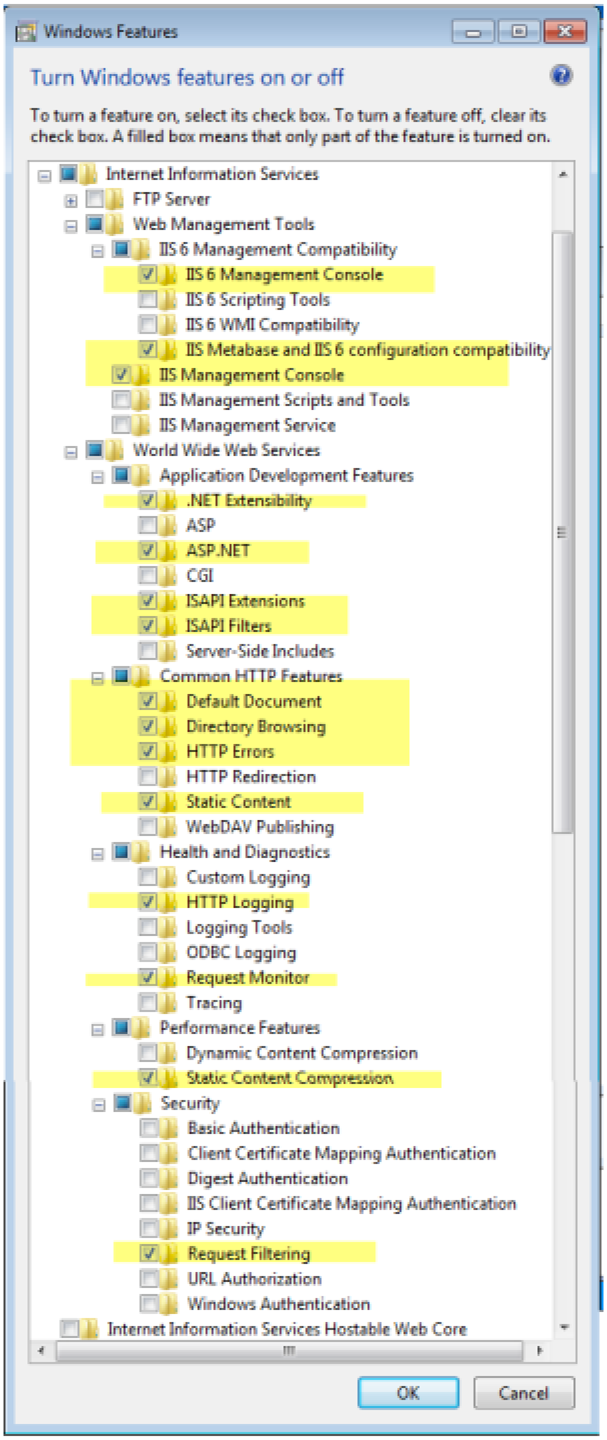
Depending on the your operating system, you might install the required IIS features by going to **Add/Remove Windows Components** or through **Turn Windows Features On or Off** or through **Server Manager**. If not sure how to add the IIS Windows feature components required onto your operating system, do a search online including your operating system version.

In the two screenshots below you will see that the specific IIS components that must be installed are the same regardless of which operating system - just how you get there, the order listed etc may not be the same depending on your operating system. We have included below an example from a Windows 2019 Server and a Windows 7 computer:

Example showing the IIS features selected for a Windows 2019 Server:

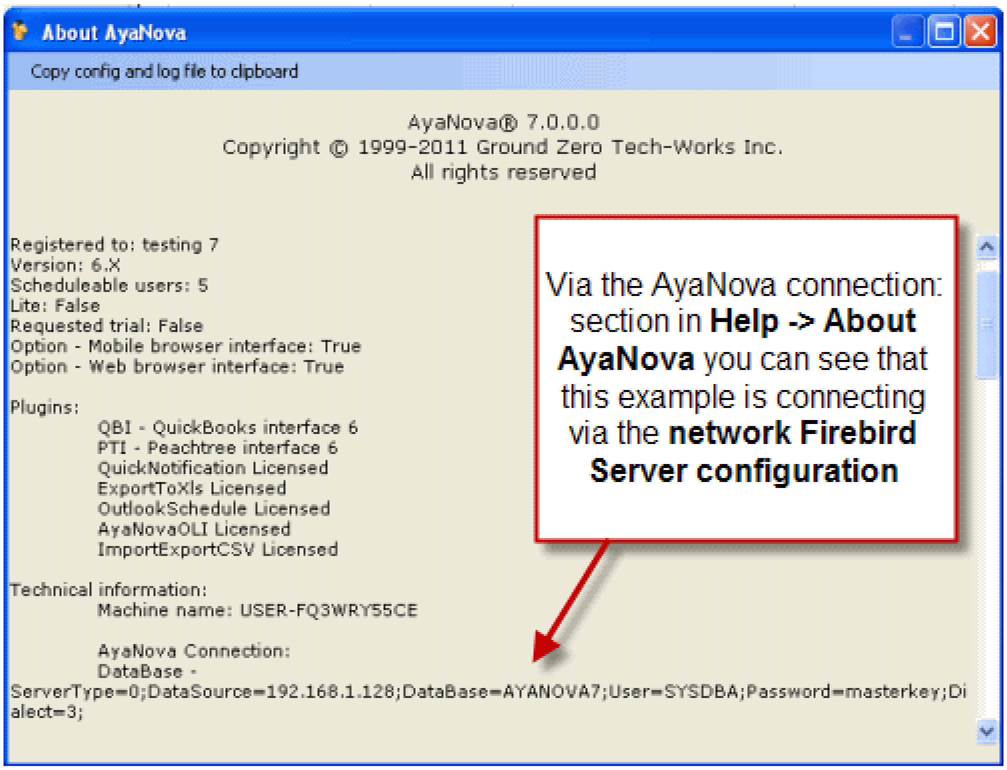


Example showing the IIS features selected for a Windows 7 64bit:



B. Confirm that your AyaNova is networked and is the latest version.

• AyaNova **must** be networked using either Firebird Server, SQL Express or SQL Server. RI will not run correctly if using the default stand-alone installation of AyaNova database.
• The recommendation is to use SQL (either SQL Express or SQL Server) if will be using any remote access options for best speed results.
• Refer to the AyaNova Help documentation section on networking AyaNova if you have not yet done so.



C. AyaNova is installed on to this computer and successfully runs

• Run AyaNova. Log in. Make sure you can log in successfully, and are connecting to your networked AyaNova database.

D. Download and run the RI setup file

a. Download the RI installation file **AyaNovaRISetup.exe** from http://www.ayanova.com/download.htm to the local hard drive of the computer where you will be installing.

b. Run the **AyaNovaRISetup.exe** file to begin the installation, read all messages and select **Next** where indicated until installation is complete

c. By default, RI will be installed to the folder C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI on a 64bit computer or C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaRI on a 32bit computer

d. Once installation is complete, continue with configuration and testing

If you encounter any errors or issues refer to RI Server Common Issues

8.8.4 Extra: if do not want to use Default Web Site

NOTE: If on your server you can not use a web site off of Default Web Site as per the Step #1 RI Installation steps, you can instead manually create a new virtual web site pointing to the AyaNova folder as per the following steps:

1. Perform all steps as per Step #1: RI Installation

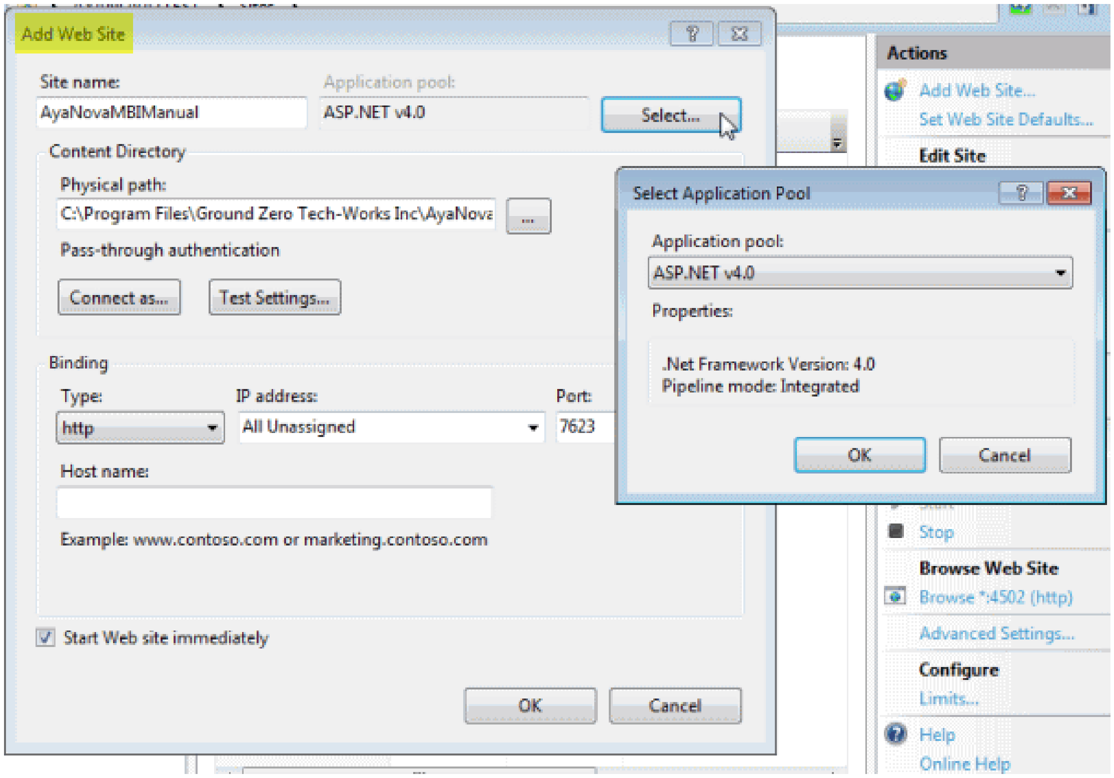
2. Now the additional steps:

   1. In IIS Manager, delete the installed web site AyaNovaRI under Default Web Site (this should not remove the installed files)

   2. In IIS Manager, create a new web site pointing to the existing and already installed C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI folder, setting its own port #

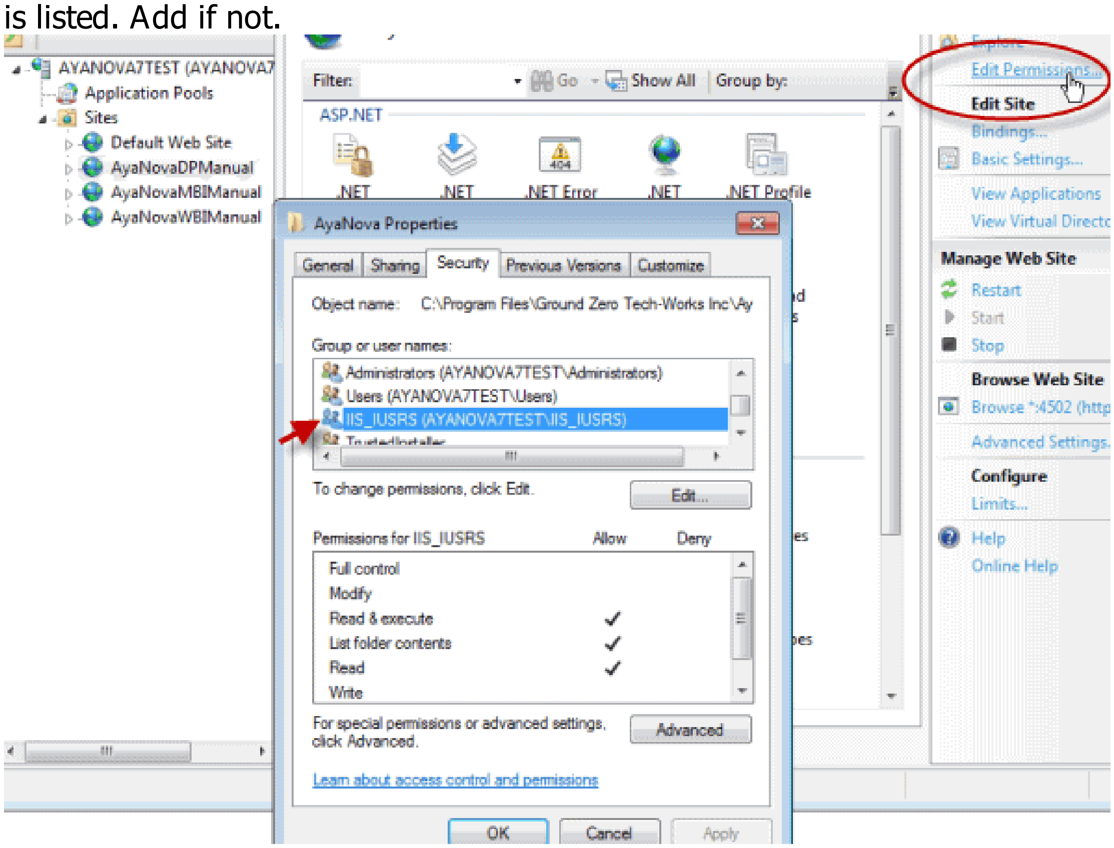
   <u>If using older OS such as Windows 2003:</u>
   - Allow anonymous access to the web site
   - The web site access permissions must be at minimum Read, Run scripts and Execute
   - Make sure .NET 4 is selected in the ASP.NET tab for this new site
   - You may or may not have to set the IP Address property of your new website to the computer's actual internal ip address instead of (All Unassigned)

   <u>If using Windows 7 and newer:</u>
   - Select **ASP.NET v4.0** application pool (uses Integrated managed pipeline mode)



although image above is for MBI, similar applies to RI

• Right-click on the newly created site, select Security tab, see that IIS_USERS is listed. Add if not.



3.Stop and Start this new web site that you just created

4.As the site is not under Default Web Site, note of course that the port # you set for your router in the Configuration steps would be for this new AyaNovaRI site itself, not for Default Web Site.

5.As the site is not part of Default Web Site, the URL for testing would now be ip address and port number such as http://xxx.xxx.xxx.xxx:XXXX/ where XXXX is the port number you gave when you manually created the site and xxx.xxx.xxx.xxx would be the ip address

8.8.5 Step #2: RI Configuration

Configuration of RI differs depending on the operating system in use.

Below are first the steps if using Windows 7 and newer; and than second after that are the steps if using an older OS such as Windows XP Pro or Windows 2003.

Steps to perform if Windows 7 and newer

A. After installation has completed, open the IIS Manager and confirm that AyaNovaRI is present

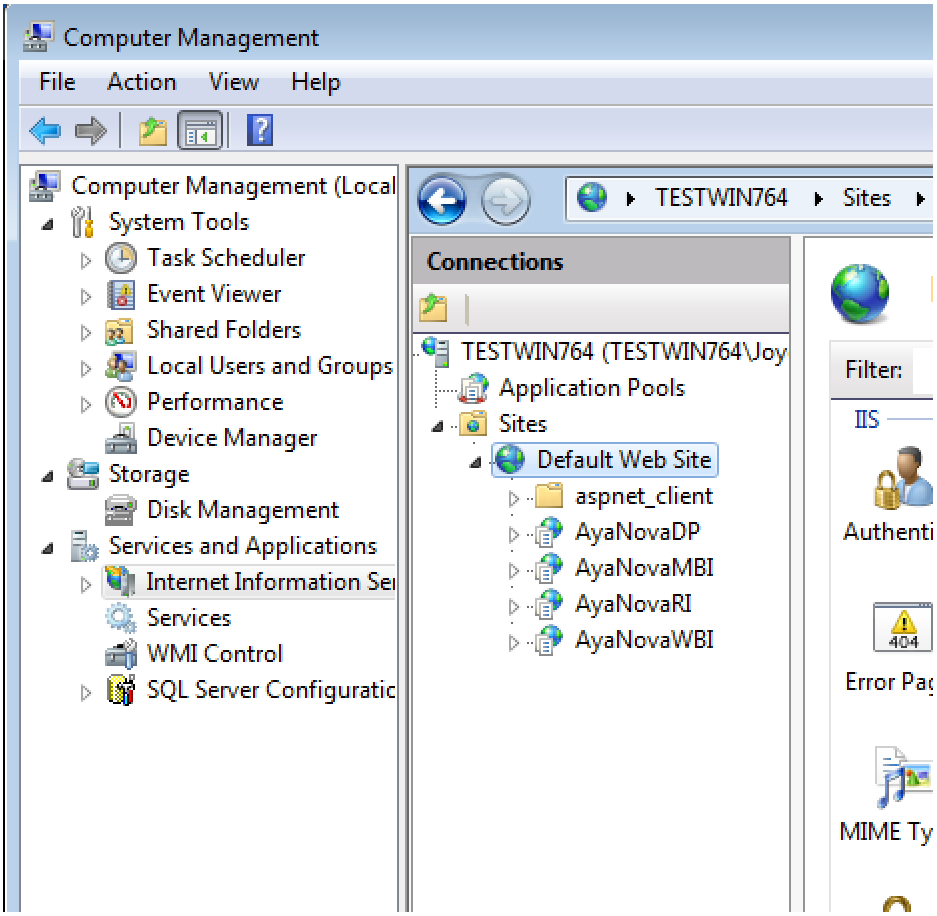


image displayed includes all remote access options installed following the basic steps. your layout under Default Web Site may be different.

B. Confirm what the <u>external static</u> IP address is for your router/firewall (as your remote users will use that ip address, not a private internal ip)

C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)

<u>Configure your router</u> to forward outside Internet requests to the IIS server

Every model router is different so we can not provide specific directions here.

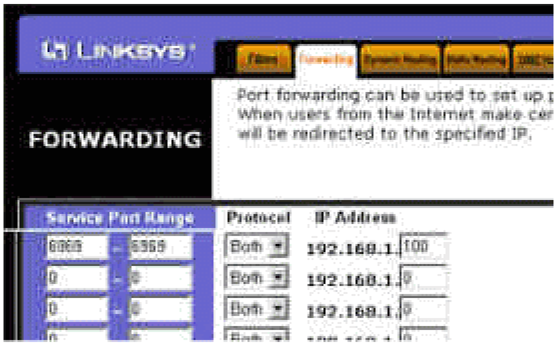
You will need to check your router documentation manual on how to configure forwarding

Basically, with most models you would bring up the software configuration for the router by connecting to the router via your web browser, go into Advanced settings, go into Forwarding settings, enter the internal IP address of the RI IIS server, enter the Port number outside Internet users would enter to be redirected to the RI IIS server (same port number the Default Web Site is set to use in Computer Management)

For example:

1. Your router's static Internet IP address is 333.222.101.12
2. The Default Web Site TCP Port is set to 6969
3. The RI IIS server's internal IP address is 192.168.1.100
4. You install and configure RI to this computer
5. You configure your router to forward port 6969 to 192.168.1.100
6. Remote Internet users would enter the URL of **http://333.222.101.12:8989/AyaNovaRI/** to bring up the login page for accessing via RI. If the port number is 80 (the default web server port) then it can be left off of the URL in the browser.

• in our example screenshot below for our example LinkSys router - the forwarding port we have set is 6969 for the database server's internal IP address of 192.168.1.100



C.2 If you only have dynamic IP

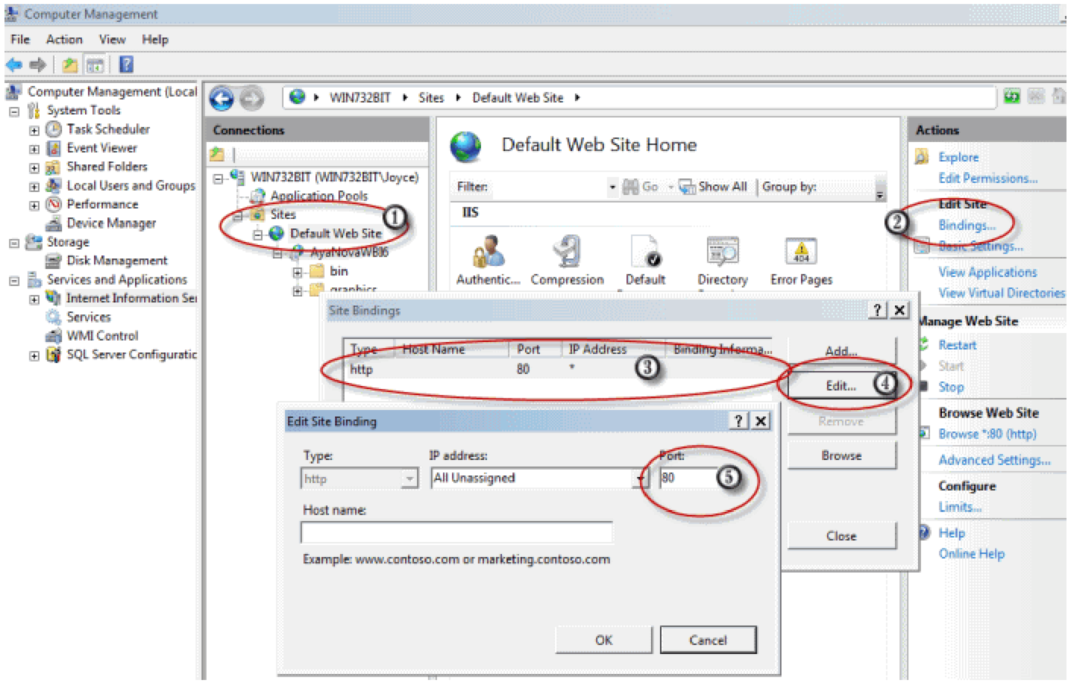
You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

D. Confirm that IIS is configured for this same port #

• In our **example screenshot below**, the Port is 80 for the Default Web Site.
• So would need to edit the port for the Default Web Site to 6969 to match that set for the router if using that port number of 6969.



E. Replace the sample config.txt installed by the RI setup with the same config.txt that your AyaNova program uses to connect to the networked database.

- a. Again confirm that the latest version of AyaNova is already installed and working connected to the networked AyaNova database (you can login and see your data) on this computer prior to installing RI. Check your version by select menu Help -> About AyaNova Once confirmed AyaNova and RI are the latest, then continue.

- b. Use Windows Explorer to open C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova folder, and copy the config.txt file

- c. Move to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI**bin** directory and paste the config.txt there

- d. You will be asked to confirm overwriting the existing config.txt, click Yes.

- e. **If you do not get asked to confirm overwriting**, this may mean you are pasting to the wrong folder - check your steps and redo.

F. Confirm that your Default Web Site and the AyaNova remote access application(s) just installed are associated with an application pool that uses the managed piped mode Integrated (not Classic) and uses .NET v4.0 (later versions may say version 4.2, 4.3, 4.5 etc)

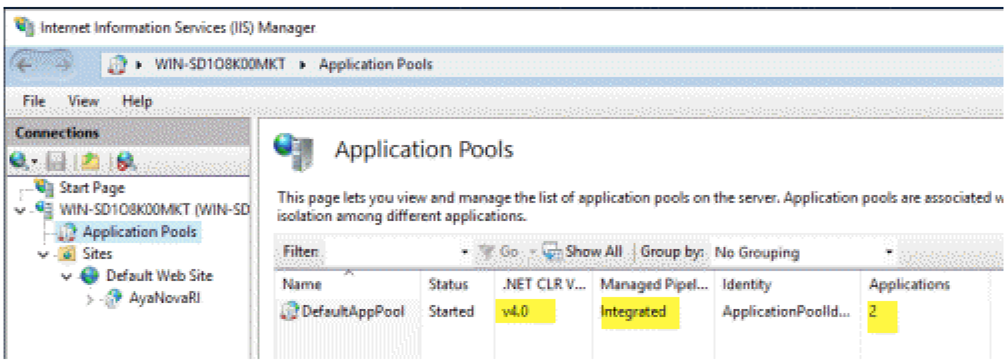
- This .NET v4.x application pools are **created automatically** for you when you installed the IIS components in Step #1 - RI Installation with .NET 4 installed

- The Your version of Windows may have named the application pool ASP.NET v4.0 or it may have been named some other name such as DefaultAppPool or some other name.

- The name doesn't matter - what matters is that the application pool is associated with your Default Web Site and the AyaNova remote access components has:
  - managed pipeline mode of **Integrated**
  - .NET 4 Framework

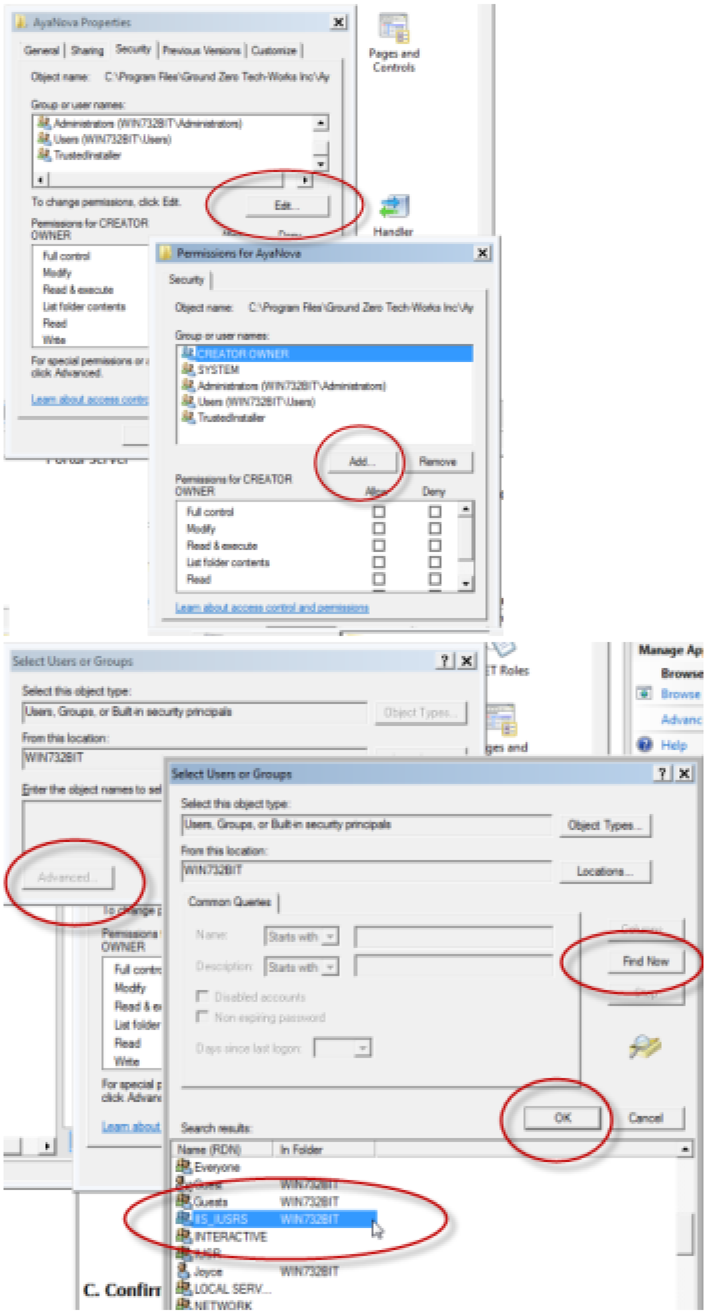
- Issue: your Application Pools via your IIS **does not** show an application pool with managed pipeline mode of Integrated and framework version of 4.x (x being whatever the latest version 4 that is available)
- Solution: this means that you need to reinstall (or check to make sure even is installed) the required IIS components as outlined in Step#1. A and redo your steps.

Example shown on a Windows 2019 Server - your Name may be different:

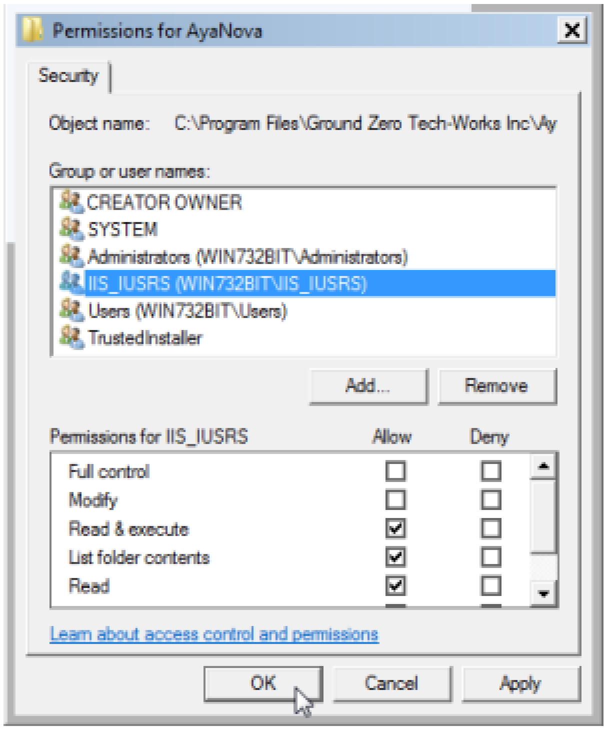


G. Check that IIS_Users has permissions

Right-click on **Default Web Site** -> Select **Edit Permissions**... -> Select the **Security** tab
If IIS_Users is not listed, do add.
Example screenshots taken such as click on Edit -> than Add... -> Advanced -> Find Now -> scroll down and click on IIS_USERS and OK till now showing.

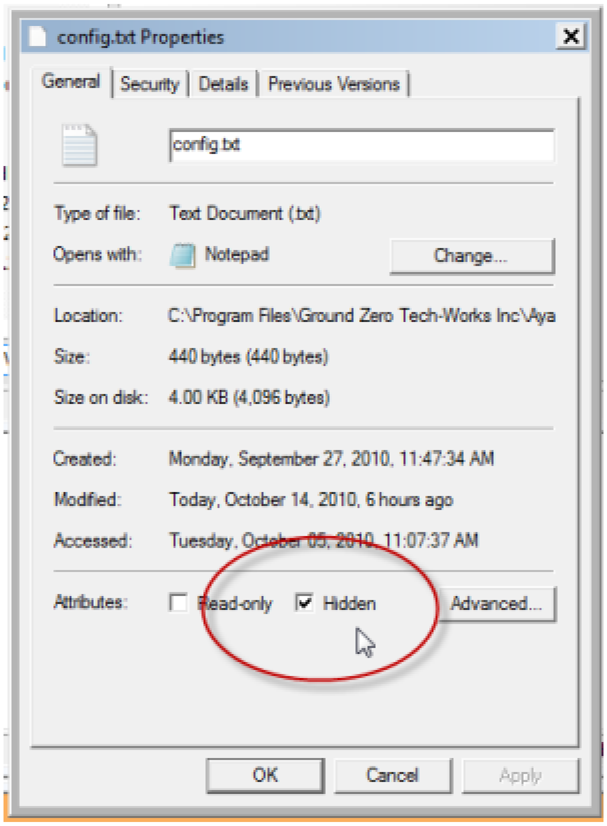


AyaNova Properties
General
Sharing
Security
Previous Versions
Customize
Object name: C:\Program Files\Ground Zero Tech-Works Inc\Ay
Group or user names:
Administrators (WIN732BIT\Administrators)
Users (WIN732BIT\Users)
TrustedInstaller
To change permissions, click Edit.
Edit...
Permissions for CREATOR OWNER
Full control
Modify
Read & execute
List folder contents
Read
Write
Pages and Controls
Handler
Permissions for AyaNova
Security
Object name: C:\Program Files\Ground Zero Tech-Works Inc\Ay
Group or user names:
CREATOR OWNER
SYSTEM
Administrators (WIN732BIT\Administrators)
Users (WIN732BIT\Users)
TrustedInstaller
Add...
Remove
Permissions for CREATOR OWNER
Allow
Deny
Full control
Modify
Read & execute
List folder contents
Read
Learn about access control and permissions
Select Users or Groups
Select this object type:
Users, Groups, or Built-in security principals
Object Types...
From this location:
WIN732BIT
Locations...
Advanced...
Manage Ap
Browse
Help
Common Queries
Name:
Starts with
Description:
Disabled accounts
Non expiring password
Days since last logon:
Find Now
OK
Cancel
Search results:
Name (RDN)
In Folder
Everyone
Guests
WIN732BIT
IIS_IUSRS
INTERACTIVE
Joyce
LOCAL SERV...
NETWORK

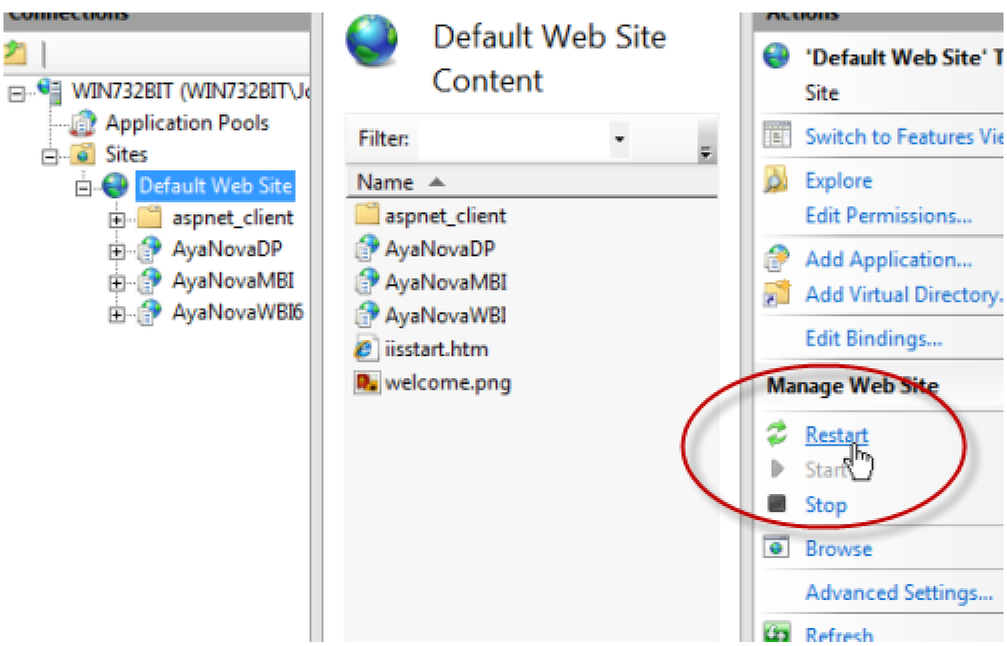


H. The following are additional rights settings you may want to set so that external users can not view the contents of the config.txt file

1. Switch to Content View for AyaNovaRI
3. Right-click on the config.txt file and edit permissions
4. Check-mark Hidden



I. Restart the default web site



J. Continue to the Step #3 - RI Testing for RI

Steps to perform if Windows XP Pro or Windows 2003

A. Open the IIS Manager and confirm that AyaNovaRI is present as an application site under Default Web Site

B. Confirm what the external static IP address is for your router/firewall (as your remote users will use that ip address, not a private internal ip)

C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)

Configure your router to forward outside Internet requests to the IIS server

Every model router is different so we can not provide specific directions here.

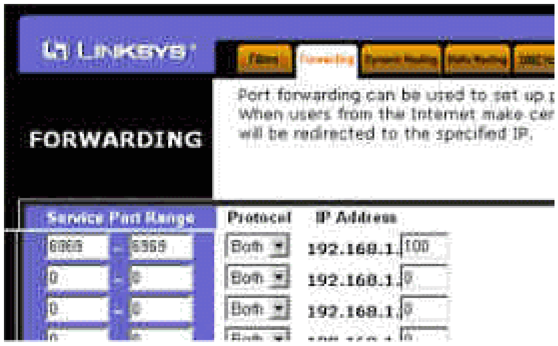
You will need to check your router documentation manual on how to configure forwarding

Basically, with most models you would bring up the software configuration for the router by connecting to the router via your web browser, go into Advanced settings, go into Forwarding settings, enter the internal IP address of the RI server, enter the Port number outside Internet users would enter to be redirected to the RI server (same port number the Default Web Site is set to use in Computer Management)

For example:

1. Your router's static Internet IP address is 333.222.101.12
2. The Default Web Site TCP Port is set to 6969
3. The RI IIS server's internal IP address is 192.168.1.100
4. You install and configure RI to this computer
5. You configure your router to forward port 6969 to 192.168.1.100
6. Remote Internet users would enter the URL of **http://333.222.101.12:8989/AyaNovaRI/** to bring up the login page for accessing via RI. If the port number is 80 (the default web server port) then it can be left off of the URL in the browser.

- in our example screenshot below for our example LinkSys router - the forwarding port we have set is 6969 for the database server’s internal IP address of 192.168.1.100



C.2 If you only have dynamic IP

You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

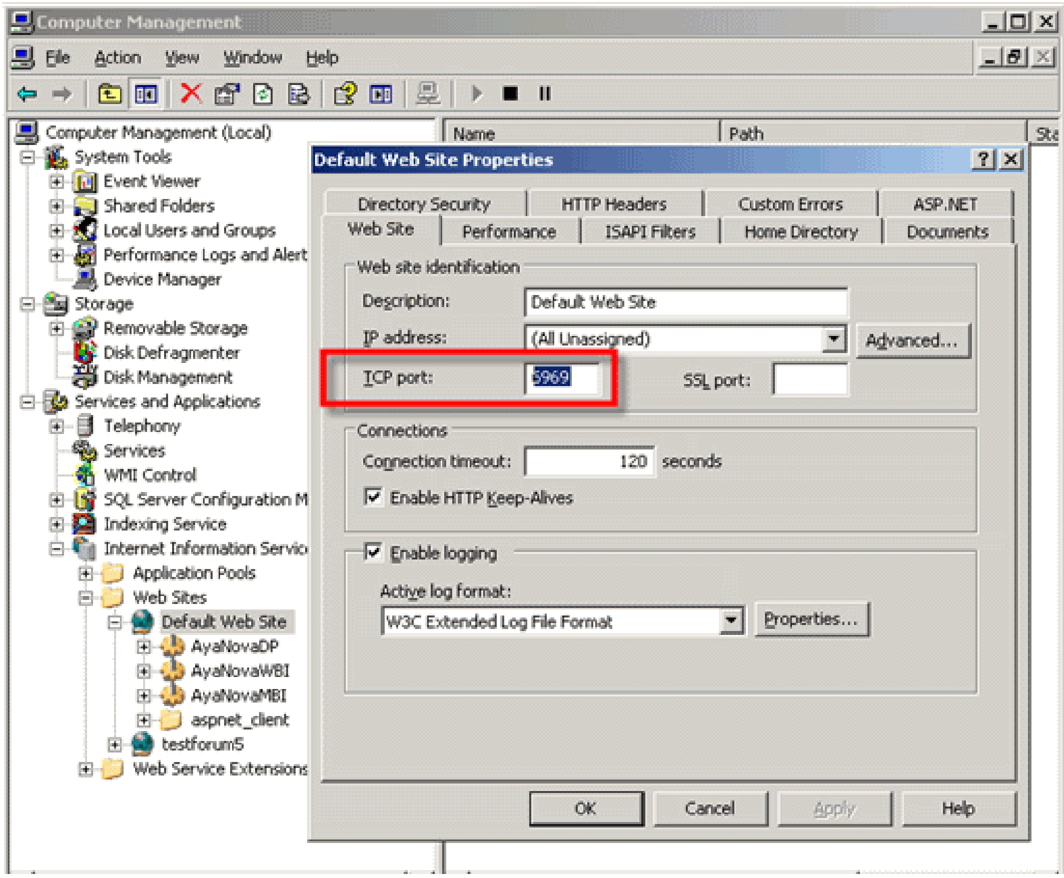
OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

D. Confirm that the Default Web Site in IIS is configured for this same port #

- In our **example**, we have the TCP Port as 6969 for the Default Web Site because as the above example, we want to have remote users forwarded to port 6969 onto the server.

- You do not have to use 6969 as the TCP Port and you can leave it at it's default of 80 - this is just an example.



E. Replace the sample config.txt installed by the RI setup with the same config.txt that your AyaNova program uses to connect to the networked database.

- a. Again confirm that the latest version of AyaNova is already installed and working connected to the networked AyaNova database (you can login and see your data) on this computer prior to installing RI. Check your version by select menu Help -> About AyaNova Once confirmed AyaNova and RI are the latest, then continue.

- b. Use Windows Explorer to open C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova folder, and copy the config.txt file

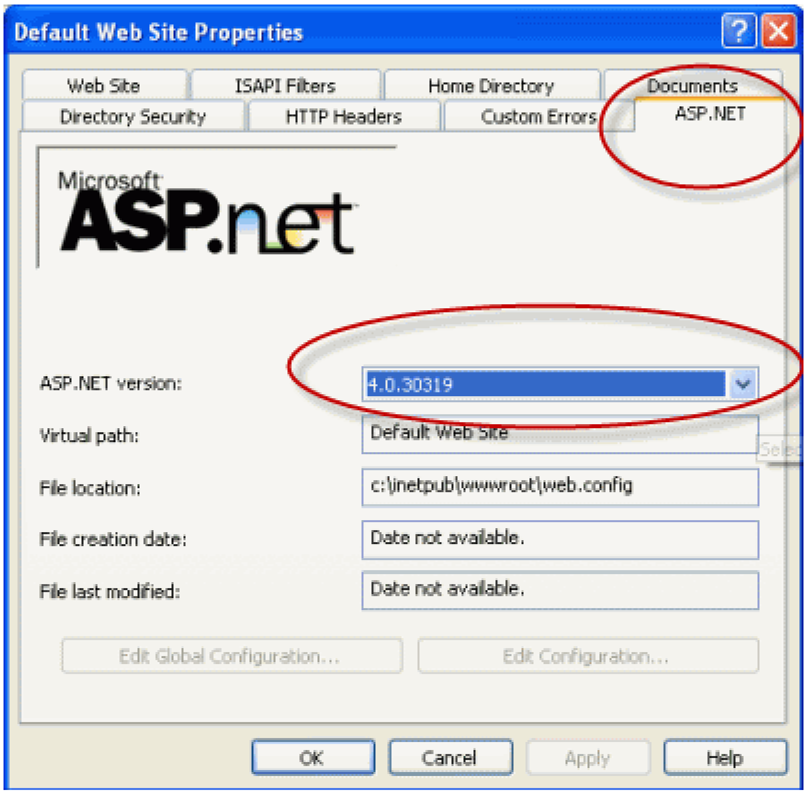
- c. Move to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI**bin** directory and paste the config.txt there

- d. You will be asked to confirm overwriting the existing config.txt, click Yes.

- e. If you do not get asked to confirm, this may mean you are pasting to the wrong folder - check your steps and redo.

F. Confirm that both the **Default Web Site** and the **AyaNovaRI site** are using Microsoft.NET Framework 4

Click on the ASP.NET tab of this **Default Web Site** and make sure the .NET Framework selected is 4



Right-click on the AyaNovaRI site, and select Properties

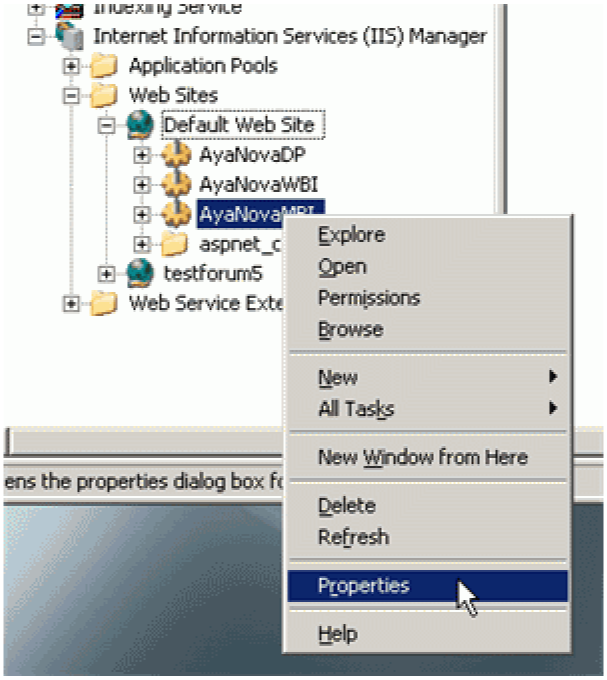


image is of right-clicking on AyaNovaWBI, just do the same for AyaNovaRI

View the ASP.NET tab and make sure the .NET Framework selected is 4

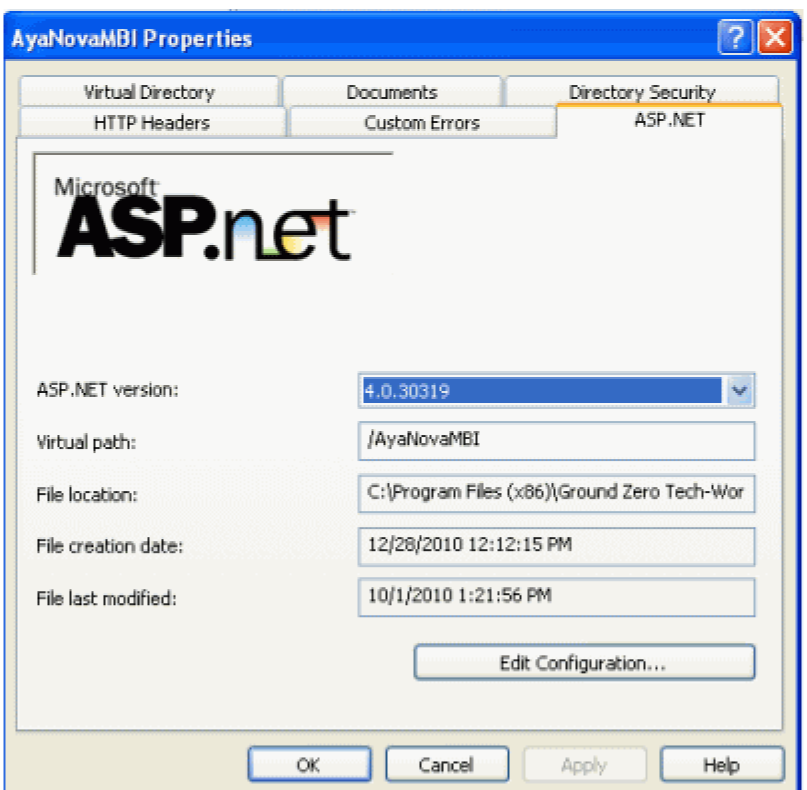
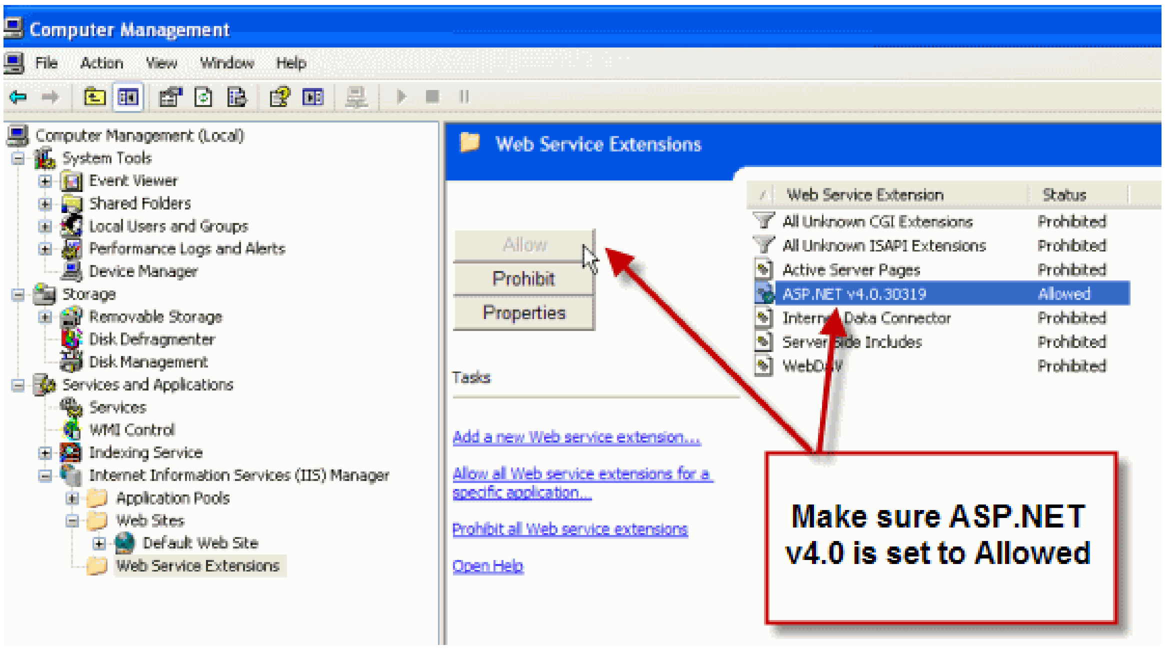


image is of right-clicking on AyaNovaWBI, just do the same for AyaNovaRI

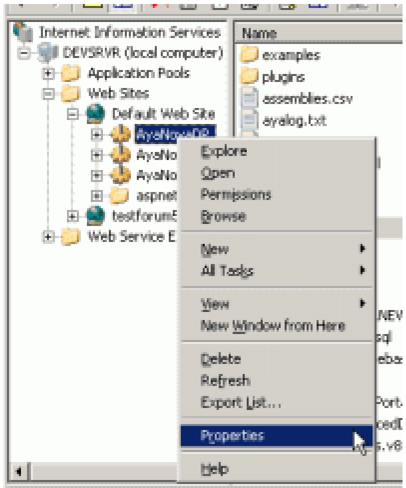
G. If using an older OS such as Windows 2003 or Windows XP 64 bit, select the Web Service Extensions and make sure is set to Allowed (*if not set to Allowed, will get 404 error Page Not Found when performing step N*)

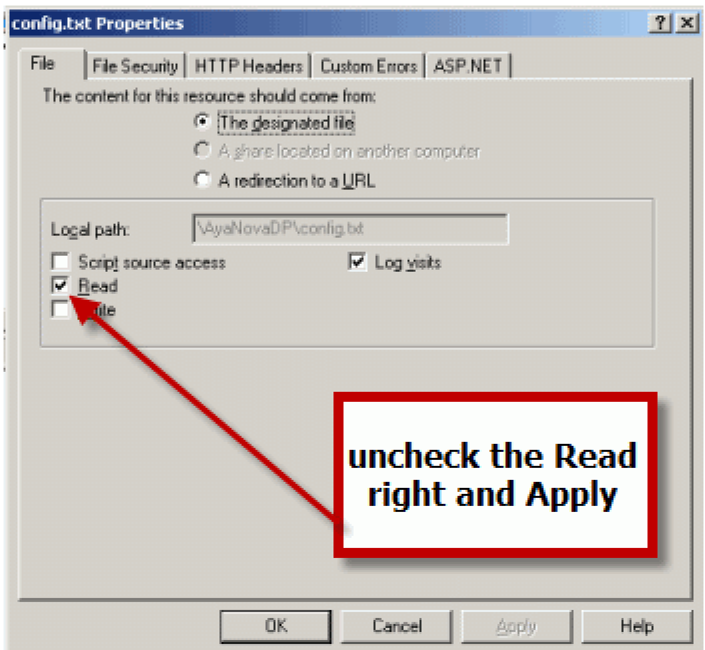
NOTE: If you do not see this extension listed, it may be because your ASP.NET needs to be re-registered to work with IIS again by running *"%windir%\Microsoft.NET\Framework\version\aspnet_regiis.exe" -i* where *%winver%* is the Windows directory for your operating system, and *version* represents the version number of the .NET Framework that you installed on your server. You must replace this placeholder with the actual version number when you type the command.



H. The following are additional rights settings you may want to set so that external users can not view the contents of the config.txt file

1. Open the IIS Manager or Computer Management
2. Right-click on config.txt that is within the folder of the AyaNovaRI site
3. Select Properties
4. Un-check the Read right, and save.





I. Stop and Start the default web site

J. Continue to the Step #3 - RI Testing for RI

8.8.6 Step #3: RI Testing

It is always recommend to read through all instructions first before proceeding.

A. Confirm AyaNova itself runs successfully on this server and AyaNova is networked
B. Determine the internal private IP address of this IIS server
C. Test RI on the computer (server) where you installed it
D. Test RI on a local area networked computer
E. Test RI on a remote computer

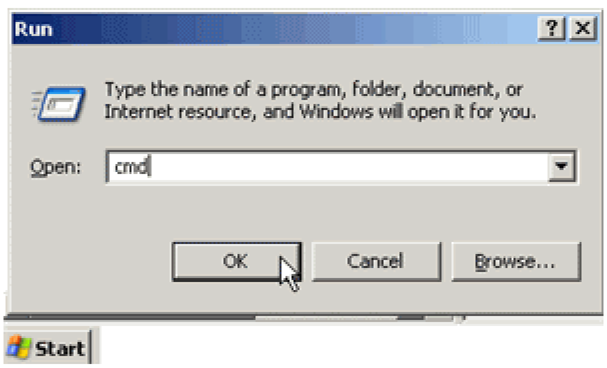
A. Confirm AyaNova itself runs successfully on this server and AyaNova is networked

Again confirm again before anything further that you **can** run the AyaNova program itself successfully on the RI IIS server and on local networked computers connecting to the networked AyaNova database first **before** proceeding.

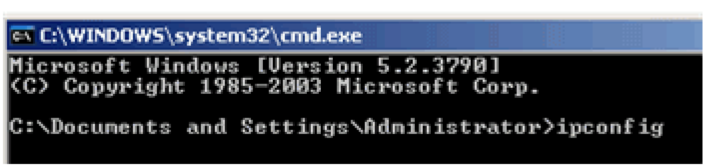
If any issues at this point, they **must** be resolved **before** proceeding with RI.

B. Determine the internal private IP address of this IIS server:

a. On this RI IIS server, open a DOS command prompt by selecting Start -> Run and typing in the following **cmd** and selecting OK

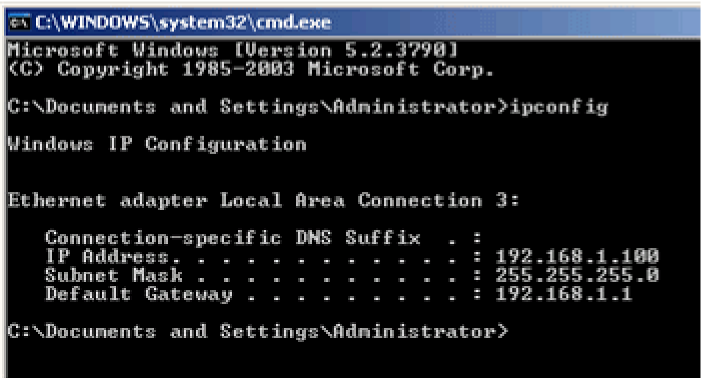


b. Type in the following **ipconfig** at the DOS prompt that appears



c. This will now display the Local Area Connection's IP Address as well as the Subnet Mask and Default Gateway.

d. Write down this IP Address as you will need this to perform **internal testing** and to identify which internal IP address to forward to via your router. In the screenshot below, the IP Address is 192.168.1.100 Your's will likely be different.



You can also check the IP Address set to a web site via IIS Manager. It is suggested to go through and familiarize yourself with the properties and settings in IIS.

C. First test RI at the IIS server:

a. Open up a web browser on the RI IIS server itself (where you installed RI)

b. Enter in the path ***http://localhost/AyaNovaRI*** if you have not specified a port or ***http://localhost:XXXX/AyaNovaRI*** where XXXX is the TCP Port number of your Default Web Site on this IIS server if you have specified a port other than the default of 80

(TCP Port determined from step B of IIS Server Configuration)

c. Confirm you can bring up the RI login screen

d. Confirm you can log in using a valid AyaNova User username and password

e.Now test entering in this local computer's private IP address instead of *localhost*

(Local area connection private IP address determined from step B above)

For example, if the local area IP address is 192.168.1.100 and the TCP Port number of your Default Web Site of IIS is 9632, you would enter in the URL address line in the web browser on the IIS server itself
http://192.168.1.100:9632/AyaNovaRI

f. If the RI login screen does not display, you need to double-check your previous Prior Requirements, Installation, and Configuration steps

- If you encounter a 404 error bringing up the RI login page when performing this testing on the server itself, check out the forum topic https://forum.ayanova.com/t/if-receive-page-not-found-or-404-error-or-400-error-testing-wbi/1125

IMPORTANT: Save yourself time - if any issues, refer first to the solutions listed in RI Server Common Issues

D. Second - test connecting to RI via a local network computer:

a. Open up a web browser on a computer on the same **internal** network as the RI IIS server

b. Enter in the path ***http://xxx.xxx.xxx.xxx:XXXX/AyaNovaRI*** where xxx.xxx.xxx.xxx is the **internal** local area connection IP address of the RI IIS server and XXXX is the TCP Port number of the Default Web Site on this RI IIS server

(Local area connection IP address determined from step B above)

For example, if I installed RI to a computer on my network that has an internal IP address of 192.168.1.100, and the TCP Port of the Default Web Site on this computer is 9632, I would enter ***http://192.168.1.100:9632/AyaNovaRI*** as the URL address.

c. If the RI login screen does not display, but it did in the first two tests above:

- you may be entering an incorrect local IP address for the RI IIS server. Re-check.
- **or** your RI IIS server may have a firewall enabled that is preventing access. Re-check.

E. Third - test connecting to RI via a remote Internet connection:

a. On a computer that is connected to the Internet, open up a compatible web browser

b. Enter in the path ***http://xxx.xxx.xxx.xxx:XXXX/AyaNovaRI*** where xxx.xxx.xxx.xxx is the public IP address **of your router** and XXXX is the forward port you have configured on your router (which is also the same as the TCP Port number of the Default Web Site on the IIS server)

For example, if the router's static IP address is 222.333.777.12 and the forwarded port configured for the IP address 192.168.1.100 that I set up in the router's configuration is (and that is also the TCP Port for the Default Web Site) is 9632, I would enter ***http://222.333.777.12:9632/AyaNovaRI*** into the web browser URL address.

c. If the RI login screen does not display, but it did in the first three tests above, you may not have configured your router correctly. Review and edit your configuration - don't forget to reset after.

8.8.7 Step #4: Client RI Configuration & Testing

It is always recommend to read through all instructions first before proceeding.

Will you be providing remote access for your AyaNova clients to **log in to request service and/or view their workorders**?
If so, do note the following:

A. NOTE: Your Client RI URL will be different than your staff RI URL
B. To actually log in as an AyaNova client, you will need to set your Client RI configuration and Client RI Header/Footer if applicable

A. NOTE: Your Client RI URL will be different than your staff RI URL:

If so, once have completed your successful testing of bringing up and logging in via your localhost URL and your IP URL, then test bringing up your Client RI login page.

1. Testing on your server

Test using localhost and port
http://localhost:port/AyaNovaRI/Customer/Login

Test using your server's private ip address and port
http://xxx.xxx.xxx.xxx:XXXX/AyaNovaRI/Customer/Login (of course using your own ip address and port number)

2. Testing on local area networked computer

   Test using your server's **private** ip and port ***http://xxx.xxx.xxx.xxx:XXXX/AyaNovaRI/Customer/Login*** (i.e. http://192.168.1.100:9632/AyaNovaRI)

3. Testing for remote access

   Test using your **public** ip and port ***http://xxx.xxx.xxx.xxx:XXXX/AyaNovaRI/Customer/Login*** (i.e. http://200.200.200.100:9632/AyaNovaRI)

B. To actually log in as an AyaNova client, you will need to set your Client RI configuration and Client RI Header/Footer if applicable:

1. Set your Client RI configuration

2. Set up your Client RI custom Header and/or Footer

8.8.8 IIS restart if any changes to Global, licensing, user account, security

Due to the nature of a web application, some changes will require that you need to restart your IIS so that your RI will display appropriately:

- if you make a change to your AyaNova database's global settings (Use Inventory, Signature settings, SMTP, etc)
- and/or apply new licensing to your AyaNova database
- and/or edit localization
- and/or adjust security group rights
- and/or make changes to a user's account
- and/or make changes to the Client RI customization features

You can restart your IIS a few different ways, depending if you have other web applications running that you also want to restart or not:

If your IIS computer only has your AyaNova web applications:

Two ways of restarting:

A. Restart the computer itself

1. Restart the entire IIS computer by shutting down the computer and starting it back up again.

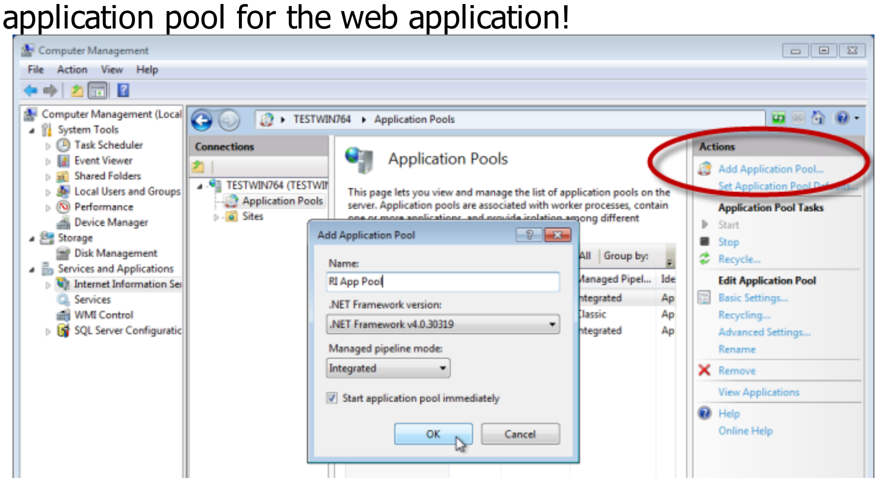
B. Restart IIS

1. Click Start, click Run type IISReset (which will bring up iisreset.exe), and then click OK.
2. A Command Prompt window opens displaying the status of the IISReset command.
3. You should read the status at the command prompt to make sure that IIS stops and restarts.

If you want to only restart specific web applications:

Two ways of restarting:

A. Restart the specific Application Pool used only by the specific web application

1. Identify the specific Application Pool(s) used by the web application(s) you want restarted.
    i. NOTE: restarting an Application Pool affects **all** web sites associated with that Application Pool so if you have multiple web applications that are from different databases and programs, a suggestion would be to create a new Application Pool for each web site so that you can specifically stop and stop those that are needed. Just use the same settings as the ASP.NET v4.0 application pool. Don't forget to select that new application pool for the web application!
    ii. 

2. Stop the Application Pool for the appropriate web applications.
3. Wait 30 seconds.
4. Start that Application Pool again.

i. NOTE: if you Start right away, you may get an error because not everything has finished unloading. Just wait a few more seconds, then Start again.

B. Edit the web.config file

1. Run NotePad as an administrator
2. Open the RI web.config file from the AyaNovaRI folder using this administrator run Notepad
3. Edit adding a space within an existing comments section (i.e. a line that starts with <!--)
4. Save
5. The act of saving will cause IIS to recyle and restart that specific web application.

8.8.9 RI Common Issues

If you encounter an issue installing or trying to access RI, please review ALL below as these are common reasons (along with solutions to resolve) why you may be unable to use your RI.
If you still experience an issue after confirming all are correct, make sure to provide ALL requested so we can help right away

The following is a list of common reasons why you maybe unable to use RI - check each and confirm not your issue:

1. Your AyaNova database must be configured for network access:
You can **only** access via RI if your AyaNova database has been successfully networked following the networking steps outlined.
Refer to the AyaNova Help documentation on configuring for network access using network Firebird, SQL Express or SQL Server.

2. Your computer must be using Microsoft.NET Framework 4:
To check current version of .NET framework, look in C:\Windows\Microsoft.NET\Framework (or equivalent on your computer) and you will see directories that indicate the current version of the framework you have installed - you should have a v4 listed

3. IIS must be registered to use Microsoft.NET Framework 4:
On your computer, click Start, and then click Run.

In the Open text box, type **cmd**, and then press ENTER.
At the command prompt, type the following, and then press ENTER:

"C:\Windows\Microsoft.NET\Framework\v4.0.3.319\aspnet_regiis.exe" -i

The above assumes you have confirmed you **DO** have .NET 4 installed - and this re-registers ASP.NET 4 with your IIS (it is very common for IIS to need this done).
The above assumes the Windows location
The above assumes that is the version of 4 you have installed - confirm what yours actually is.

4. If you encounter an error message installing RI - make sure that you do have a **Default Web Site** in your IIS (Internet Information Services) - see the forum topic https://forum.ayanova.com/t/unable-to-install-wbi-because-default-web-site-is-no-longer-in-iis/1791 - this topic applies to RI, WBI, MBI and/or data portal.

5. If you encounter a 404 error bringing up the RI login page when performing step #2 of testing on the server itself, check out the forum topic https://forum.ayanova.com/t/if-receive-page-not-found-or-404-error-or-400-error-testing-wbi/1125 - this topic applies to RI, WBI, MBI and/or data portal.

6. If your RI login page is missing graphics / RI forms are missing graphics

If your RI login page does **not** correctly show graphics like the screenshot below (the stylized A is missing, the logo is missing):

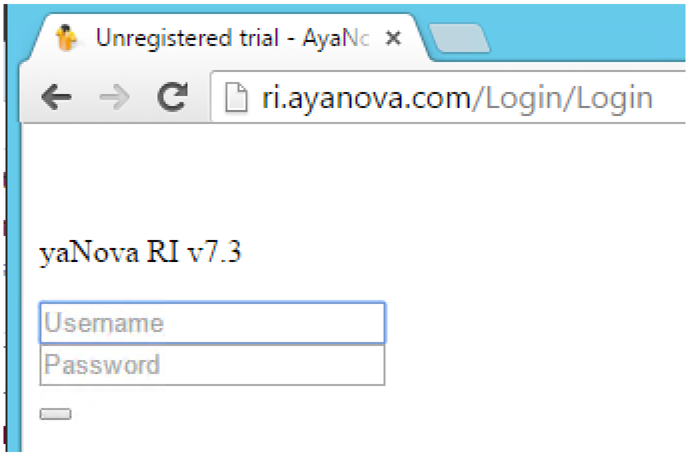
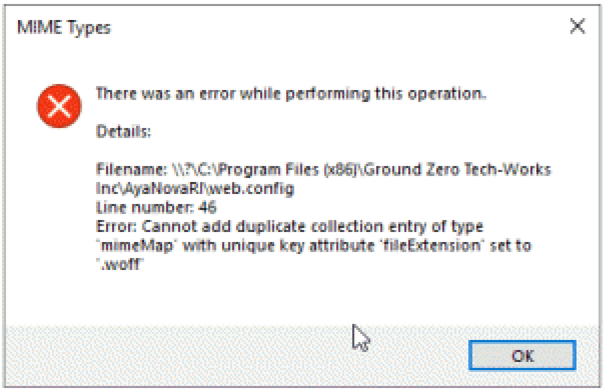


image example of RI login page when issue with MIME TYPES

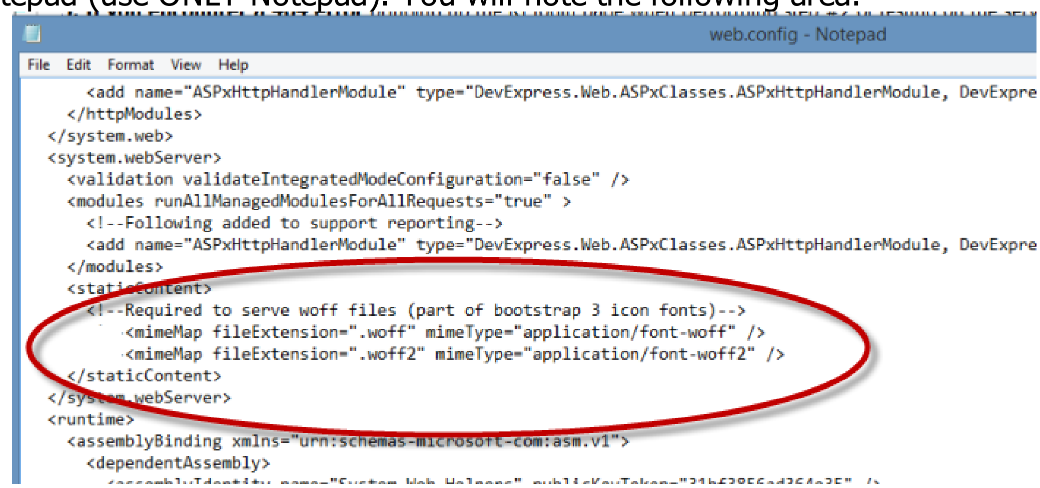
And via your IIS Manager, when you attempt to click on MIME Types (listed as one of the Features on the right in your IIS Manager) you get the following message:

Cannot add duplicate collection entry of type MimeMap with unique key attribute fileextension set to .woff

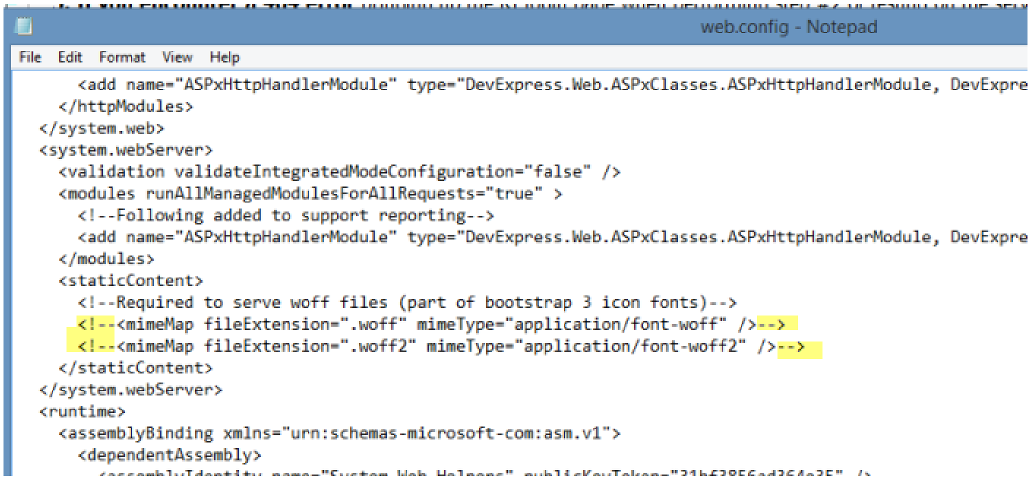


If so, you may need to edit your RI web.config file's MIME TYPES, commenting out what is not needed.

1. Open your existing web.config file in your AyaNovaRI folder using Notepad (use ONLY Notepad). You will note the following area:



2. Add the <!-- to the start of the two lines and --> to the end of the two lines, so they are commented out as per (yellow highlights it for your attention only):




```
      <add name="ASPxHttpHandlerModule" type="DevExpress.Web.ASPxClasses.ASPxHttpHandlerModule, DevExpre
    </httpModules>
  </system.web>
  <system.webServer>
    <validation validateIntegratedModeConfiguration="false" />
    <modules runAllManagedModulesForAllRequests="true" >
      <!--Following added to support reporting-->
      <add name="ASPxHttpHandlerModule" type="DevExpress.Web.ASPxClasses.ASPxHttpHandlerModule, DevExpre
    </modules>
    <staticContent>
      <!--Required to serve woff files (part of bootstrap 3 icon fonts)-->
      <!--<mimeMap fileExtension=".woff" mimeType="application/font-woff" />-->
      <!--<mimeMap fileExtension=".woff2" mimeType="application/font-woff2" />-->
    </staticContent>
  </system.webServer>
  <runtime>
    <assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
      <dependentAssembly>
```

3. Save the file.

3. [Restart your IIS]

4. Refresh your AyaNovaRI login page (you may need to empty cache too) and confirm that now the graphics display correctly:

5. If still experiencing issues with RI graphics, do provide via email to support, a copy of your edited web.config file from your AyaNovaRI folder, plus a screenshot of your MIME TYPES for your AyaNovaRI showing what woff, woff2 types are there OR not.

7. The Port used, has to be configured on your router to be forwarded to your RI IIS server:

If you are able to perform the internal network testing using the local IP address of the RI IIS server and port number, but remote Internet users outside of your local network are not able to connect, that may indicate that you have not configured your router to forward outside requests to the correct IP address

Every model router is different so we can not provide directions here.

You will need to check your manual for your router on how to configure to forward

Basically, most models you bring up the software configuration by connecting to the router via your web browser, go into Advanced settings, go into Forwarding settings, enter the internal IP address of the RI IIS server, enter the Port number outside Internet users would enter to be redirected to the RI IIS server (same port number the Default Web Site is set to use in Computer Management)

For example:

Your router's static Internet IP address is 333.222.101.12
The Default Web Site TCP Port is set to 8989
The RI IIS server's internal IP address is 192.168.1.100
You install and configure RI
You configure your router to forward port 8989 to 192.168.1.100
Remote Internet users would enter the URL of
http://333.222.101.12:8989/AyaNovaRI to bring up the login page for accessing via RI

8. Do check your IIS logs for possible details that can help point towards a resolution.
Open Internet Information Services (IIS)
Right-click on Default Web Site and select Properties
On the Web Site tab, at the bottom is the Active Log Format; select the properties button next to it
You'll now have a box that contains the **log file directory** and the **log file name**. Together they make the full log path.
Open your Windows Explorer to that folder and that file name and than you can view that log file as it might also provide information on what the issue is a result of; or provide error messages that you can than search for online.

If you encounter an issue and HAVE confirmed that all the above are correct:

1. If you encounter an issue, double-check that <u>all</u> requirements have been met, and then to go through the installation and configuration steps again.

2. If you encounter an issue, and are unable to determine the cause after confirming every single step and the solutions above, check out the AyaNova Support Forum for similar issues and solutions posted by other AyaNova users.

3. If you have confirmed each of your steps, and do not find a solution on the AyaNova Support Forum post a topic on the AyaNova Support Forum in the Remote

Access section with **ALL** of the following information or email support@ayanova.com with the following information:

1. Operating system of your RI IIS server

2. Are any of the other remote access options also installed on this same server? WBI, MBI and/or Data Portal? And do those successfully work? Provide your URL to these if so.

2. Exact point where the issue occurs
Identify the exact step you are at if in the process of configuration.
Identify each step you have performed up to that point and the information from those steps (i.e port number, path location of installation, etc)
Identify what you expected to happen and what does actually happen.
If any messages, be sure to provide all text and the order the appear in.

3. Copy of your config.txt file from the RI server attached to your message and the exact path where you copied it from (i.e. C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI\bin)

4. Copy of your AyaNova Details - log into AyaNova, select menu Help -> About AyaNova. Copy all details to a NotePad document, save and attach

5. In relation to the AyaNova database, where is AyaNova RI installed? (i.e same computer where database is installed or computer within the same local network as the AyaNova database server)

6. Confirmation of the internal ip address of your RI IIS server

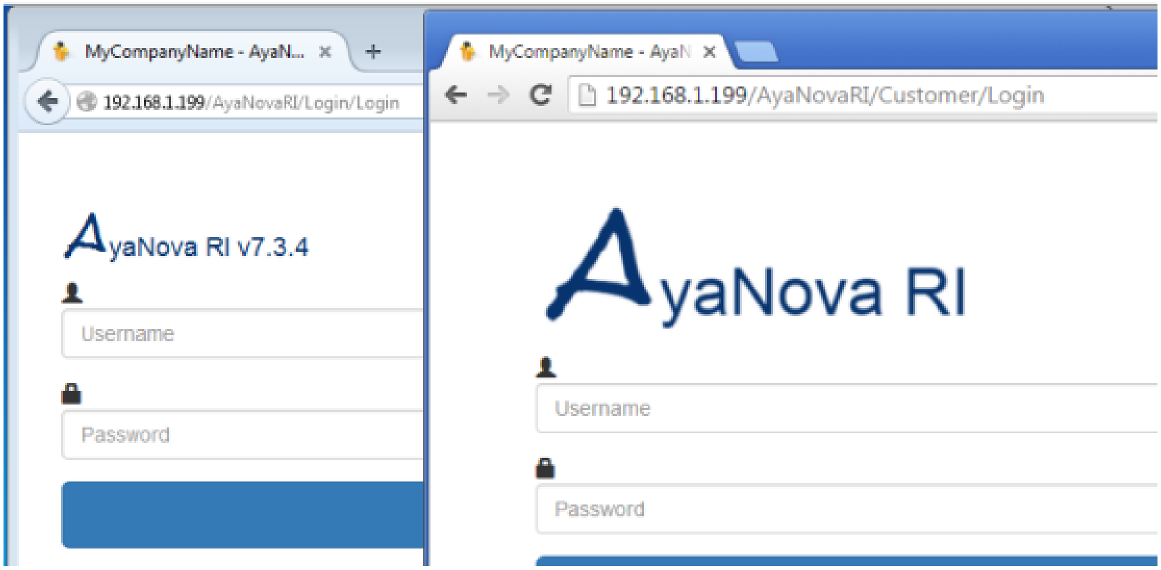
7. The exact URL address you are entering in your web browser when using localhost, and the exact URL used when using the internal ip - and is this web browser on a computer on your internal network, or a remote computer?

8. Copy of your IIS log file.

9. Confirmation that you have run the reregistry of ASP.NET 4 with IIS using aspnet_regiis.exe and **that it specifically stated it was successful**.

8.8.10 Client RI configuration & customizations

8.8.10.1 Client RI login



Your Client RI URL will be different than your staff RI URL:

Once have completed your successful testing of bringing up and logging in via your localhost URL and your IP URL, do test bringing up your Client RI login page.

1. Testing on your server

   Note the difference in the URL

   Test ***http://localhost/AyaNovaRI/Customer/Login***

   Test ***http://192.168.1.100:9632/AyaNovaRI/Customer/Login*** (of course using your own ip address and port number)

   NOTE: to actually log in as an AyaNova client, you will need to set your Client RI configuration first.

2. Testing on local area networked computer

   Test ***http://192.168.1.100:9632/AyaNovaRI/Customer/Login*** (of course using your own ip address and port number)

3. Testing on a remote computer

   Test ***http://192.168.1.100:9632/AyaNovaRI/Customer/Login*** (of course using your own ip address and port number)

8.8.10.2 Client RI configuration

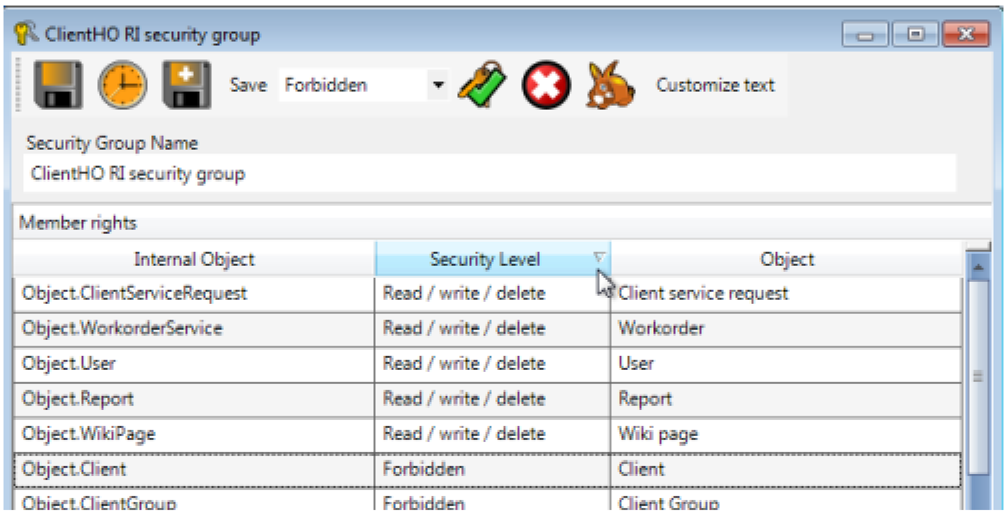
Configuring an AyaNova client so they can log in via RI is similar to doing so for an AyaNova user - but with a few major differences that makes AyaNova recognize the client logging in as a client.

There are five major steps that must be performed:

1. **Via the AyaNova program - configure security groups for clients/head offices**
2. **Via the AyaNova program - create user accounts for clients/head offices**
3. **Via RI - Client User - configure the Default Client Login Workorder Report**
4. **Via RI - Client User - configure the Client info service request info text field**
5. **Via RI - Client User - set ability to see Wikipage of the service workorder**

1. Via the AyaNova program - configure security groups for clients/head offices

There are **FIVE** possible Security Group setting objects that can be set that affect what features your client has access to when logged in via your Client RI:

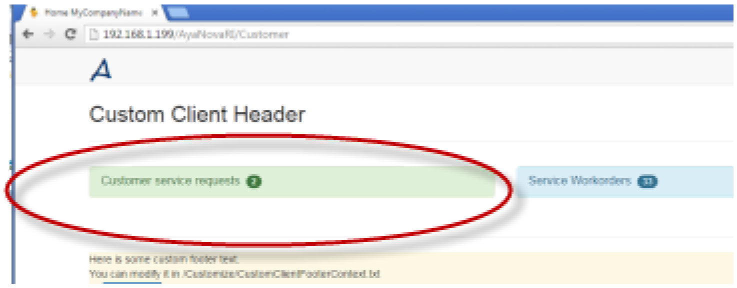


i. the Object.ClientServiceRequest

i) Set to Read Only if you want the client/head office to only be able to view existing customer service requests

ii) Set to Read/Write if you want the client / head office user to be able to view existing service requests **and** to create new service requests.

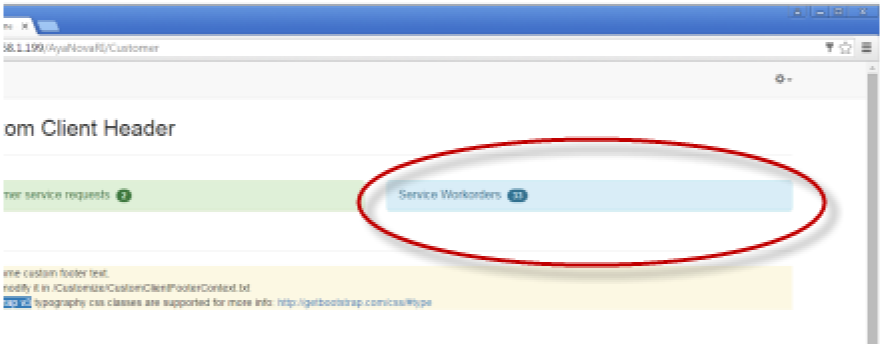
iii) Set to Read/Write/Delete if you want the client/head office user to be able to view existing service requests, **and** create new service requests **and** delete service requests that have not been accepted or rejected (Open).



ii. the Object.WorkorderService

i) Set to minimum Read Only to allow the client/head office to view that client's Service Workorder list

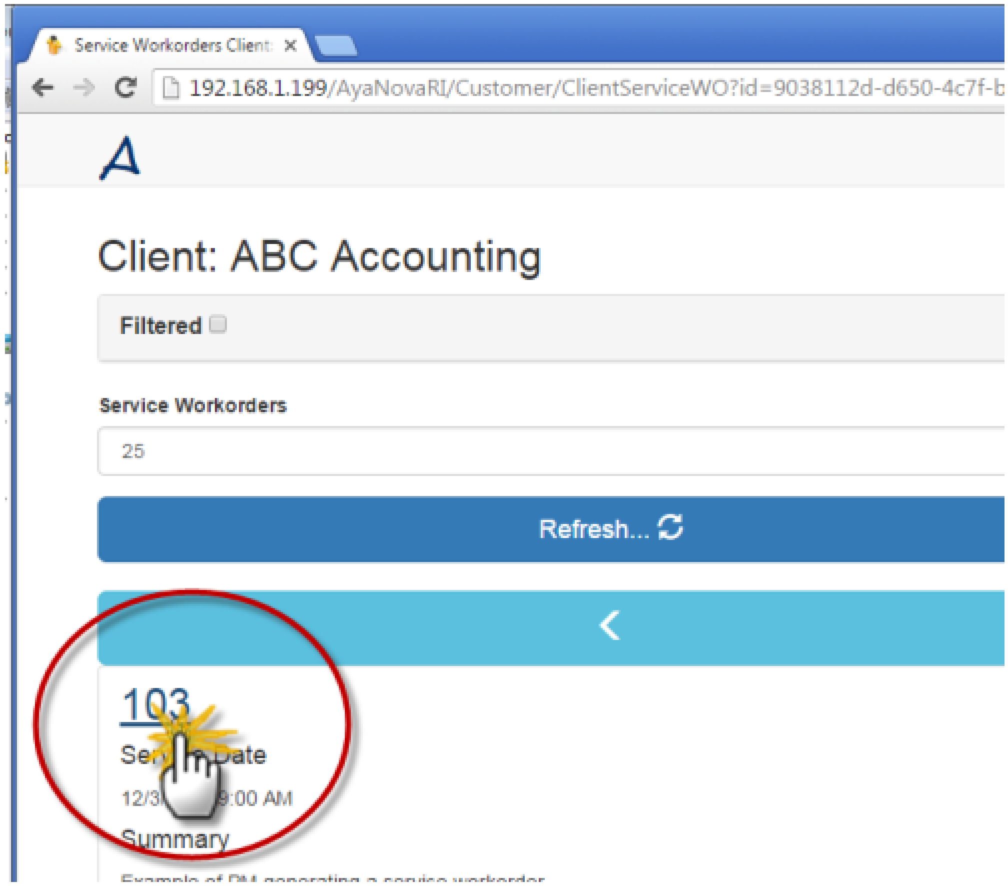
NOTE: even if you set this Object key to a higher security group right, the client/head office will only ever be able to view, not edit.



iii. the Object.Report

i) Set to minimum Read Only to allow the client/head office to select to display the report for the specific service workorder

NOTE: even if you set to a higher security group right, the client/head office will not be able to ever edit or delete.

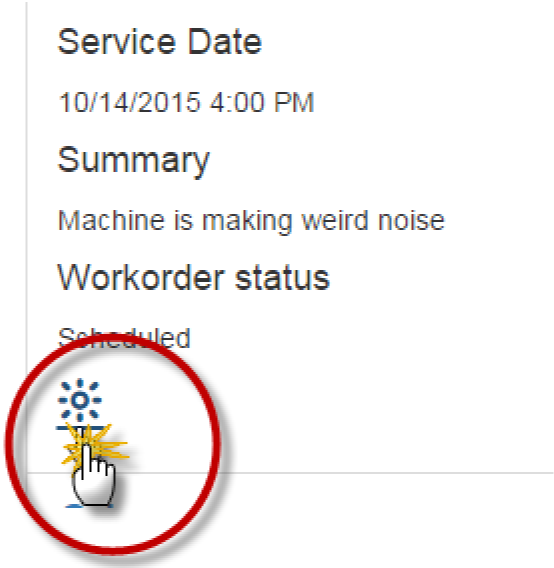


iv. the Object.Wikipages

i) Set to minimum Read Only to allow the client/head office to view the Wiki page associated with the service workorder.

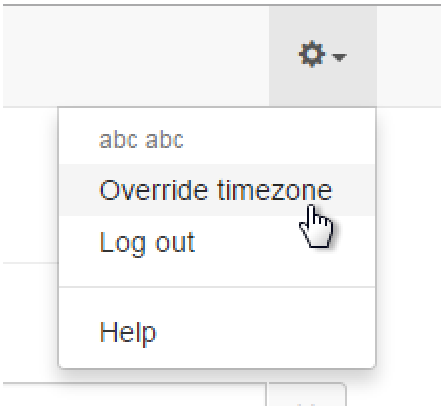
ii) AND #5 below must be checkmarked and saved.

NOTE: even if you set Object.Wikipages to a higher right, the client will only be to view and can not edit.



v. the Object.User

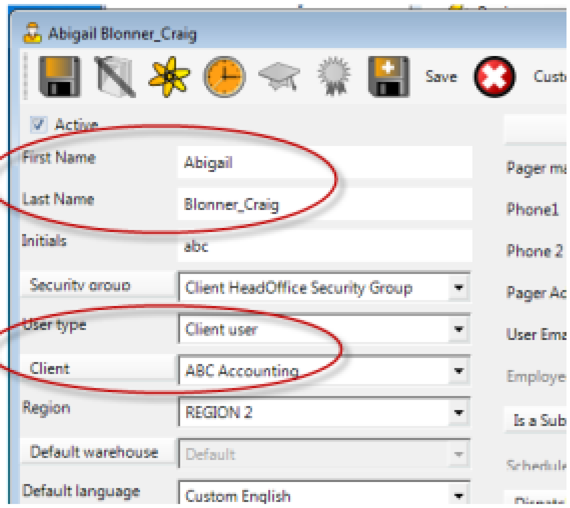
i) Set to minimum Read/Write to allow the client to set their own TimeZone

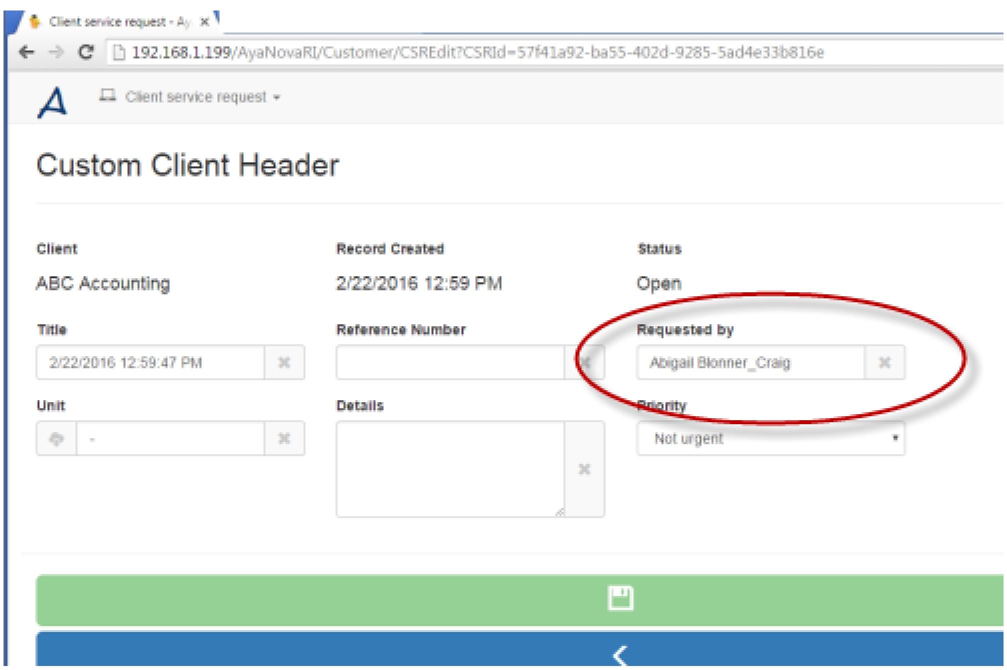


The suggestion would be to keep all other Objects to a security right of Forbidden so you can see at a glance which Objects have rights set or not (even if you set other Objects to other rights to something else, client/head office will not have the ability to access)

2. Via the AyaNova program - create user accounts for clients/head offices

a. What you enter in the First Name and Last Name will display automatically in the Requested By: field in the Customer Service Request entry screen (note of course, user can still edit what is in the Requested By field (i.e. if multiple people share the same login they might edit entering their own name) is there automatically for them)



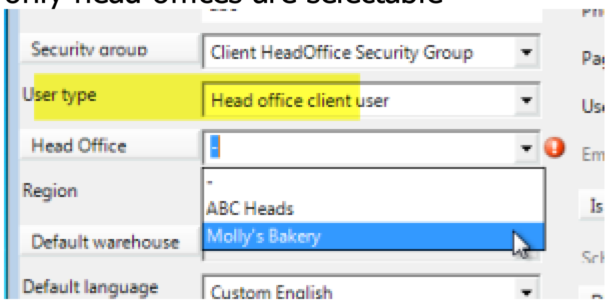


b. Select the **Security Group** relevant for this client / head office.

c. Select either **User Type** of *Client user* or *Head Office client user* and tab off (or click elsewhere) so that the field below it for selecting either the Client or the Head Office is activated

i. If you select **User Type** of *Client user*, the field directly below it will display with the label Client, and when you drop down, only clients are selectable

ii. If you select the **User Type** of *Head office client user*, the field directly below it will display with the label Head Office, and when you drop down, only head offices are selectable



e. Continue entry of a first name, last name, initials (initials will display for the client in their list of service requests in the event a client has multiple client users that log in via Client RI to be able to distinguish who made the service request), and other fields, including login name and password

f. Save the User entry screen.

g. Test by logging in via your Client RI URL using this newly created username and password for your client, and ensure access before giving your client the login information.

[Reminder: your Client RI URL has a different URL path then your staff would use]

A User Type of Client user or Head office client user is not able to log in via the AyaNova program - only via your Client RI url.
If a client/head office attempts to log in via your staff RI url, nothing will occur.
If a client/head office attempts to log in via the AyaNova program, they will receive the following message:

A **User Type** of *Head office client user* will have the ability to view existing service requests, create new service requests and delete existing Open service requests **for each of its clients**.

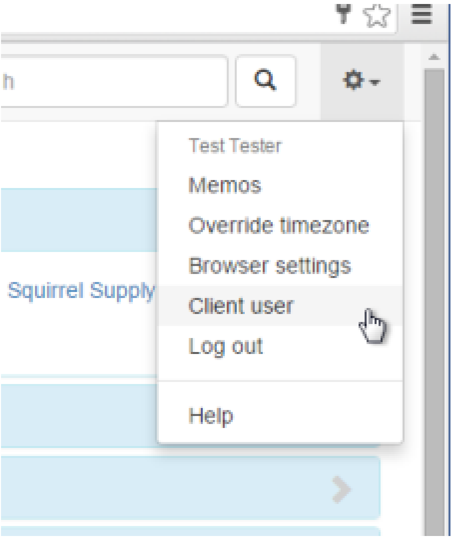
It is suggested to log in as a head office user so you can see the difference between a client log in and a head office login.

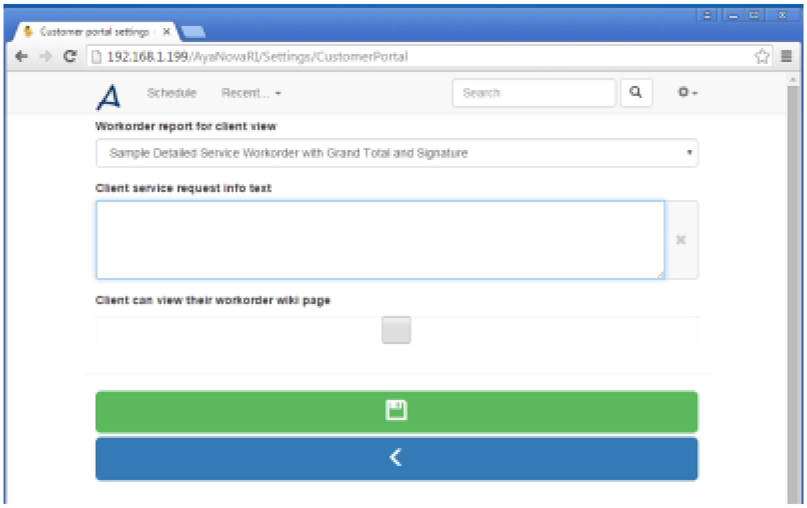
3. Via RI - Client User - configure the Default Client Login Workorder Report

when logged in as a **User Type of** *Administrator user* via staff RI

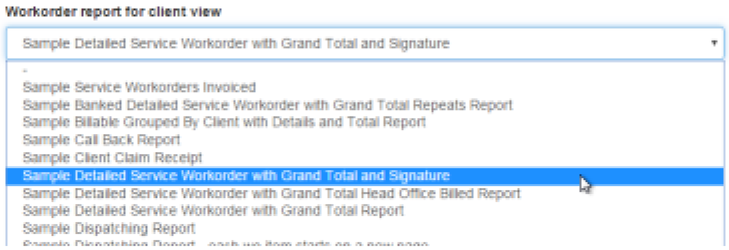
a. Log in via your staff RI (as the option to set these settings is not available via the AyaNova program) as the AyaNova Administrator user or a user that is of User Type Administrator user

b. Select the Client User menu option via your cog





c. Drop down the list of available service workorder report templates and select the report template that client's will view individual service workorders by (your list of selectable reports may differ of course)



i. Select a report template that will show details to your client - for example, the Sample Detailed Service Workorder with Grand Total and Signature that has been customized with your company name and information.

ii. You have total control over what the client does and does not see of the service workorder as you can customize an existing report template or create a new report template specifically for clients when viewing their service workorders via RI.

iii. The report template selected applies to all clients/head offices that have the security group right to view their workorders.

d. Select the Save button

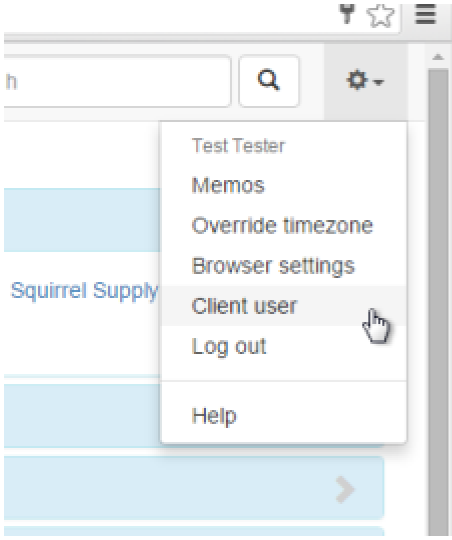
e. Close the web page (it will not auto-close by itself)

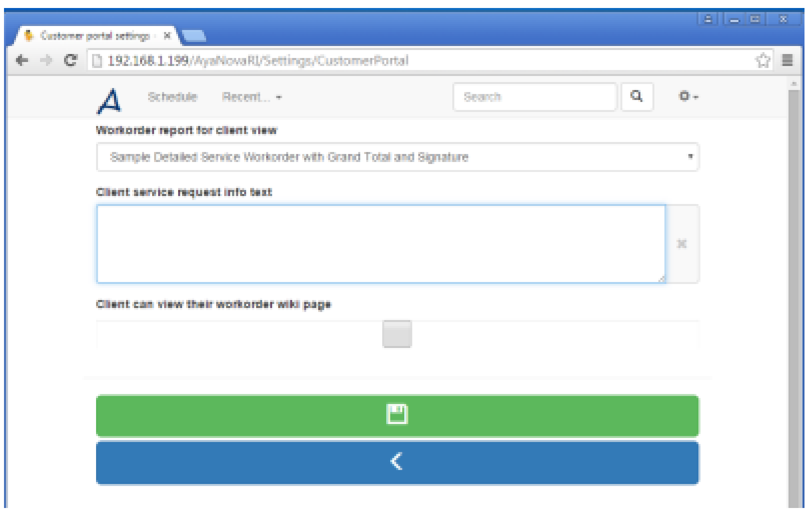
f. Log in as a client user via your Client RI url to their Dashboard, select the Service Workorders panel, select a service workorder hyperlink and confirm displays using this report just selected.

4. Via RI - Client User - configure the Client info service request info text field

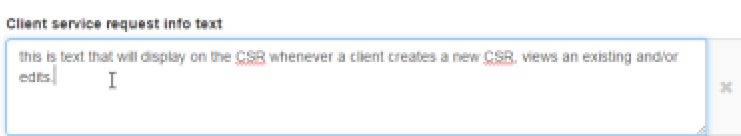
a. Log in via your staff RI (this option is not available via the AyaNova program) as the AyaNova Administrator user or a user that is of User Type Administrator user

b. Select the Client User menu option via your cog



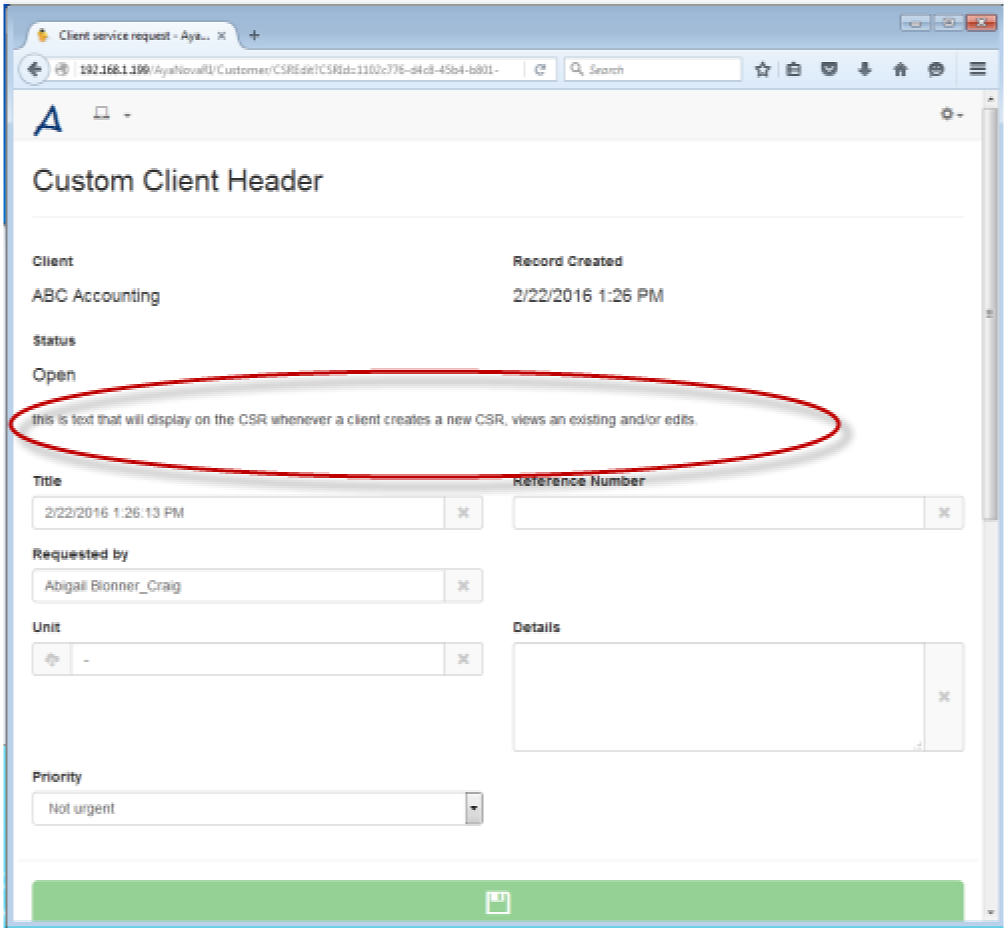


c. Enter in text (or raw HTML) that you want to have displayed on the Customer Service Request form that all RI Clients will see.



d. Select the Save button to save any changes you enter here.

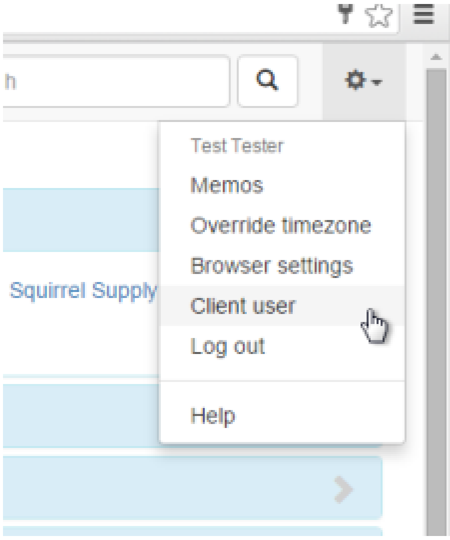
e. What you enter in that field will then show in the Customer Service Request entry form for the client when next logs in - for example, if have edited the Client service request info text: field as per the example above, the following will display in the Client's service request entry screen:

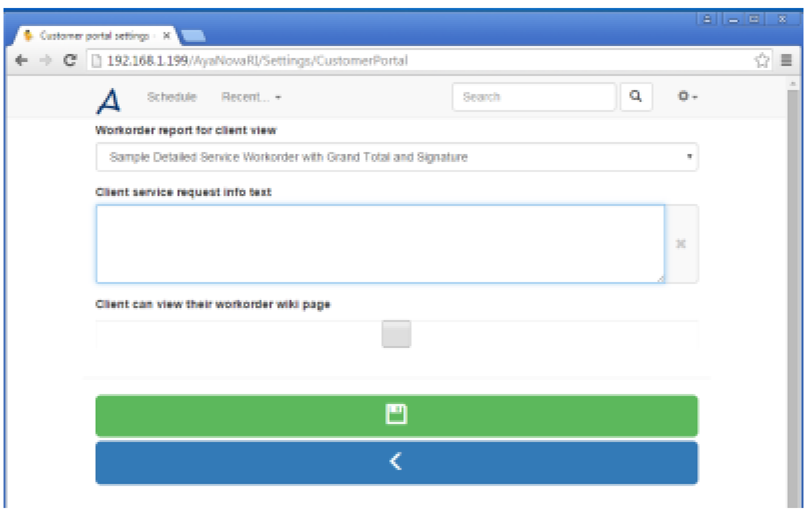


5. Via RI - Client User - set ability to see Wikipage of the service workorder

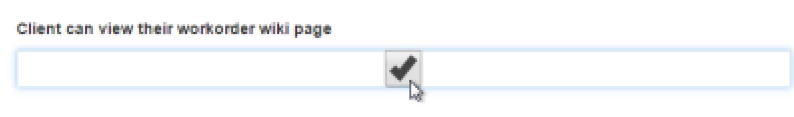
a. Log in via your staff RI (this option is not available via the AyaNova program) as the AyaNova Administrator user or a user that is of User Type Administrator user

b. Select the Client User menu option via your cog



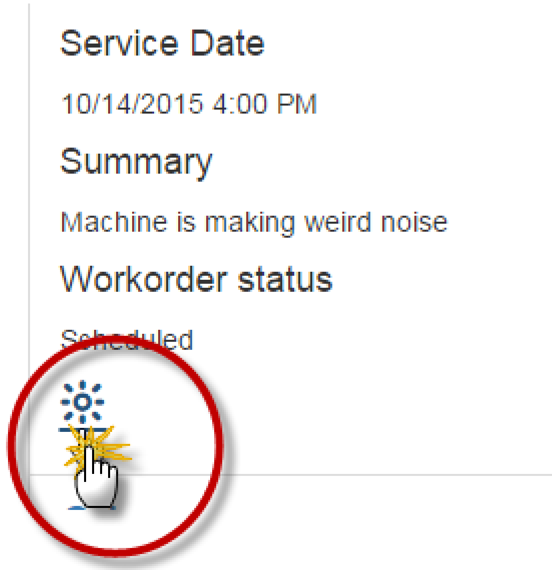


c. Checkmark the field Client can view their workorder's wiki page



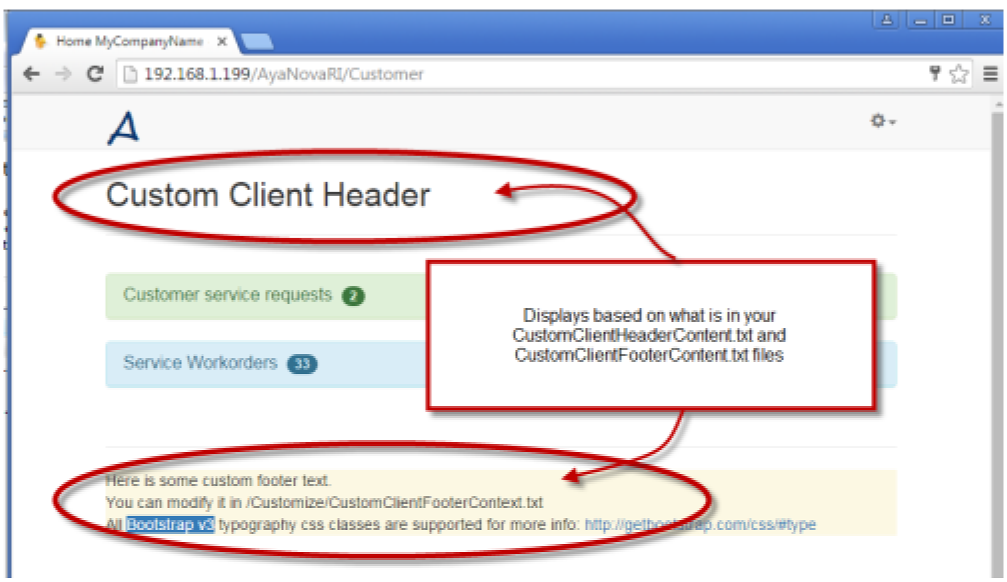
d. Select the Save button to save any changes you enter here.

e. Now the client when next logged in will be able to view the Wiki page if associated with the service workorder



8.8.10.3 Client RI Custom Header Footer

You can include additional text on the header of your Client RI pages or the footer of these pages or both header and footer, or not show at all.



For example, you might want to include in the header of each of these pages your company logo and your telephone number to provide assurance to your client they are logged into the correct website and to display additional means of contact if they have any questions.

1. **How to edit**

2. How to not show

1. How to edit:

The RI setup file has installed two example files to your AyaNova program folder (i.e. on a 64bit computer would be C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI\Customize):

CustomClientHeaderContent.txt
CustomClientFooterContent.txt

1. Edit either of these files using Notepad.
2. Restart your IIS
3. It would be suggested to make a copy of your edited files, so in the future when running the AyaNovaRI setup file again to update to the latest version which will overwrite your existing Custom text files, you can just replace with your backup copy.

If your Client RI sees a file specifically called CustomClientHeaderContent.txt located in its Customize folder, it will load that file's HTML code as the header for your Client RI
The default text is:

<h2 class="text-left ">Custom Client Header</h2>
<hr/>

If your Client RI sees a file specifically called CustomClientFooterContent.txt located in its Customize folder, it will load the file's HTML code as the footer for your Client RI.
The default text is:

<hr/>
<p class="bg-warning">
*Here is some custom footer text.
*
*You can modify it in /Customize/CustomClientFooterContext.txt
*

All Bootstrap v3 typography css classes are supported for more info:
http://getbootstrap.com/css/#type
</p>

2. How to not show:

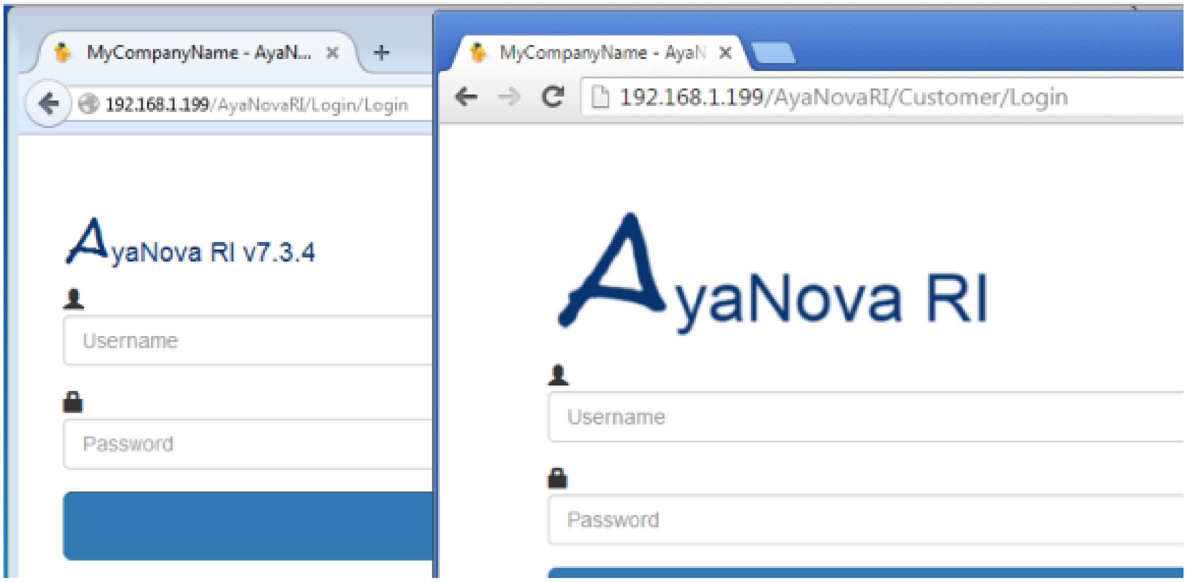
If you do not want either of these to show:

1. Rename the appropriate file (we would suggest NOT to delete, in the event you want to use at a later date)
2. Restart your IIS

8.8.10.4 Client RI custom company logo

Your Client RI URL is different than your staff RI URL.

By default when you enter in your Client RI URL, the page shown will display your Client RI login screen with a default "banner" showing the RI logo that you can customize to display your own company logo or whatever you wish to display.



• You can have your own banner display by replacing the existing loginbanner.png file in the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI\Customize folder

• It is recommended that your banner image be nor more than 300 pixels by 100 pixels

How to use your own custom logo for your Client RI login page:

1. Create a png format image file, with dimensions no wider than 300 pixels and no higher than 100 pixel.

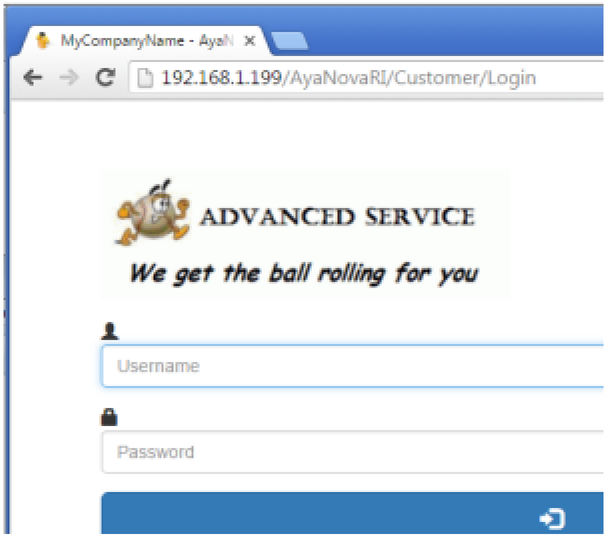
2. Save your file with file format of png and with file name loginbanner.png

3. In the folder C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI\Customize delete the existing sample file loginbanner.png

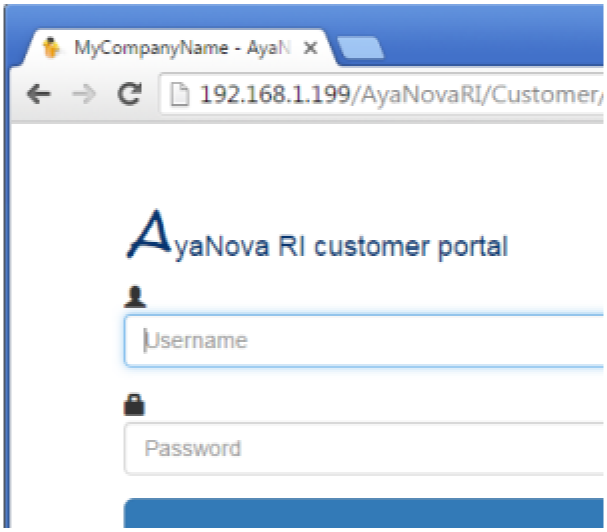
4. Copy your custom loginbanner.png image file to your C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaRI\Customize folder

5. Delete the cache for your browser (as some browsers will not automatically get the latest image file even if set to do so via the browser properties)

6. Bring up your Client RI login page to confirm your new logo is using your customized loginbanner.png



7. If you instead you see as per below, that indicate a problem with your file. Either not named correctly, or not a png format or not the correct location. Recheck your steps.



8.8.11 RI Feature Details

8.8.11.1 IIS restart needed if any changes to Global, licensing, user accounts, localization

Due to the nature of a web application, some changes will require that you need to restart your IIS so that your RI will display appropriately:

- if you make a change to your AyaNova database's global settings (Use Inventory, Signature settings, SMTP, etc)
- and/or apply new licensing to your AyaNova database
- and/or edit localization
- and/or adjust security group rights
- and/or make changes to a user's account

You can restart your IIS a few different ways, depending if you have other web applications running that you also want to restart or not:

If your IIS computer only has your AyaNova web applications:

Two ways of restarting:

A. Restart the computer itself

1. Restart the entire IIS computer by shutting down the computer and starting it back up again.

B. Restart IIS

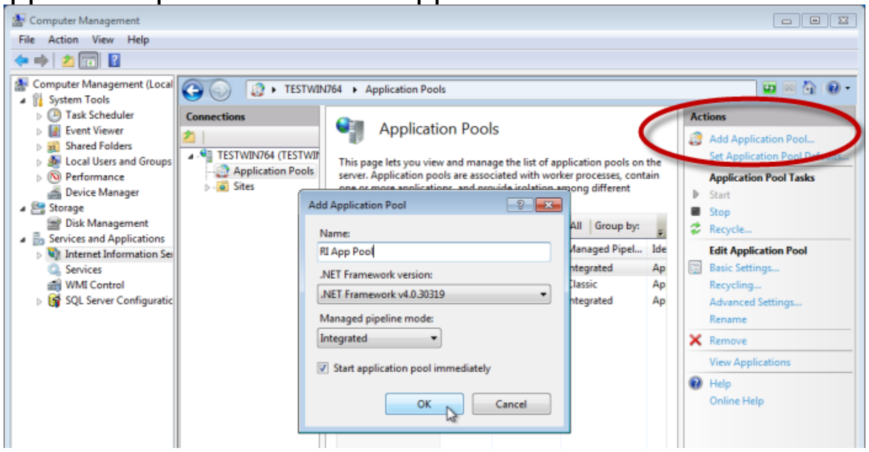
1. Click Start, click Run type IISReset (which will bring up iisreset.exe), and then click OK.
2. A Command Prompt window opens displaying the status of the IISReset command.

3. You should read the status at the command prompt to make sure that IIS stops and restarts.

<u>If you want to only restart specific web applications:</u>

Two ways of restarting:

<u>A. Restart the specific Application Pool used only by the specific web application</u>

1. Identify the specific Application Pool(s) used by the web application(s) you want restarted.
   i. NOTE: restarting an Application Pool affects **all** web sites associated with that Application Pool so if you have multiple web applications that are from different databases and programs, a suggestion would be to create a new Application Pool for each web site so that you can specifically stop and stop those that are needed. Just use the same settings as the ASP.NET v4.0 application pool. Don't forget to select that new application pool for the web application!
   ii. 

2. Stop the Application Pool for the appropriate web applications.
3. Wait 30 seconds.
4. Start that Application Pool again.
   i. NOTE: if you Start right away, you may get an error because not everything has finished unloading. Just wait a few more seconds, then Start again.

<u>B. Edit the web.config file</u>

1. Run NotePad as an administrator
2. Open the RI web.config file from the AyaNovaRI folder using this administrator run Notepad
3. Edit adding a space within an existing comments section (i.e. a line that starts with <!--)

4. Save
5. The act of saving will cause IIS to recyle and restart that specific web application.

8.8.11.2 RI Login Logout

Log in via RI
Logout via RI

Log in via RI

1. Obtain the URL address from the person who has configured RI for you, and enter it in the address bar of your web browser on your device (computer, laptop, mobile, tablet, etc).

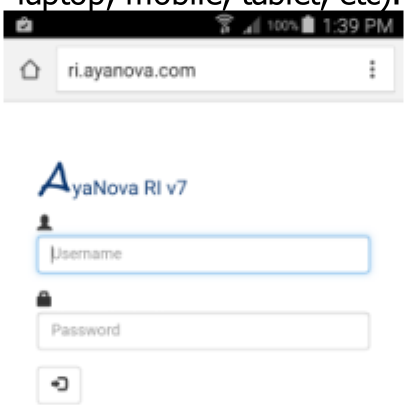


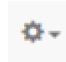
Image of RI login on mobile device - your URL WILL be different.

2. If your AyaNova database is the sample AyaNova database with sample data and users, log in using one of the many sample AyaNova users
   i. NOTE you will need to change the default login name and password for the AyaNova Administrator if your AyaNova database is registered for RI (temporarily or purchased licenses)

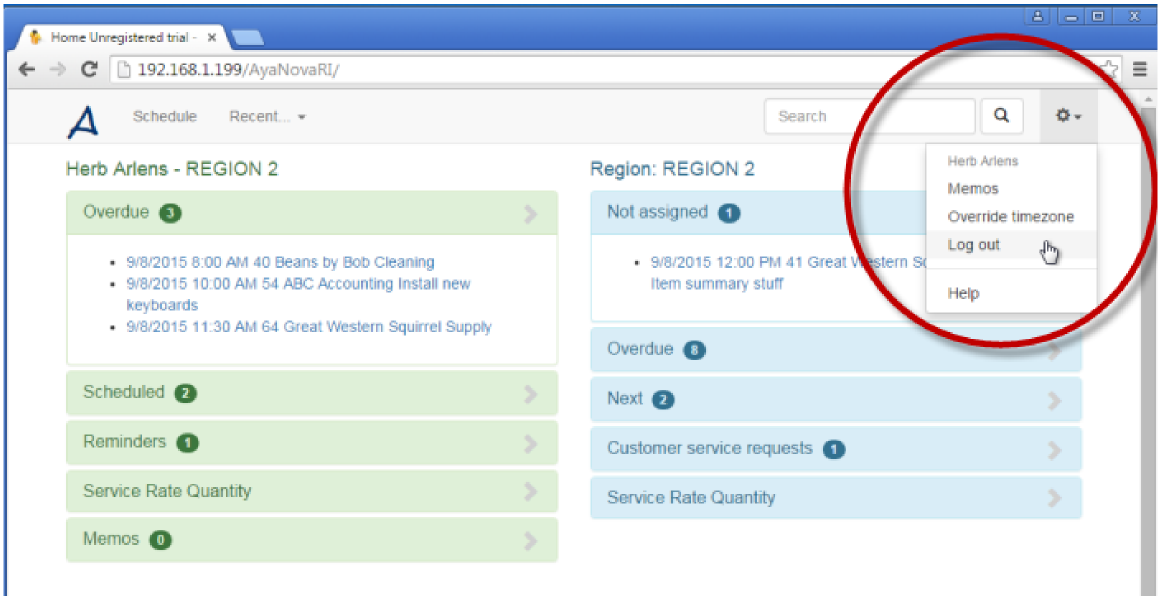
3. Otherwise log in using your assigned login name and password (access to features depends on your security group rights)

4. The RI Dashboard for the user logged in as will now display - start using RI!

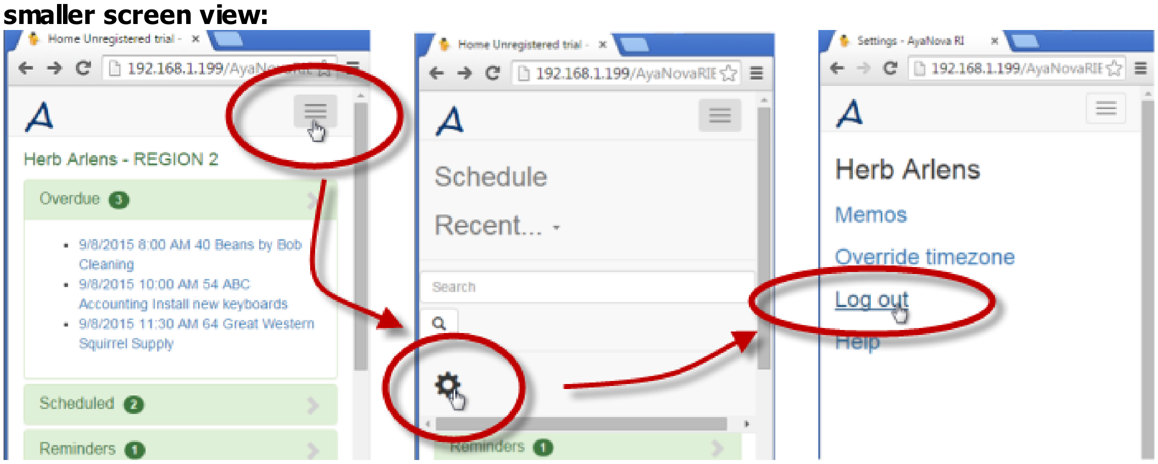
Logout via RI:

To log out of your RI session, select the cog  and then Log out

wider screen view:

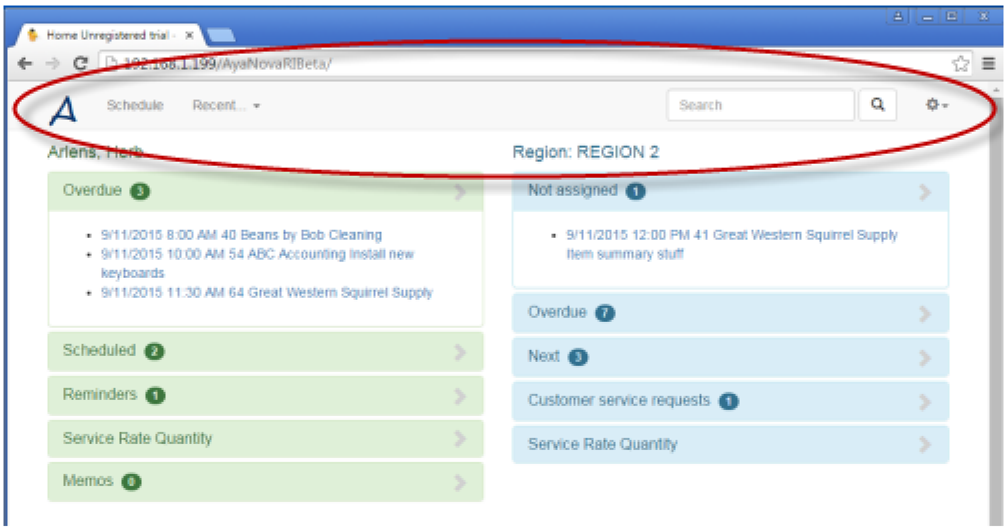


smaller screen view:

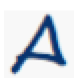


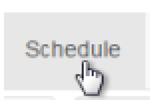
You can also just close your web browser.
Closing your browser is functionally identical to logging off from your view.
There are some resources that will not be released until the session times out at the IIS server, but are considered insignificant and not an issue, and are expected as most users will just close the browser.

8.8.11.3 Navigation menu for RI



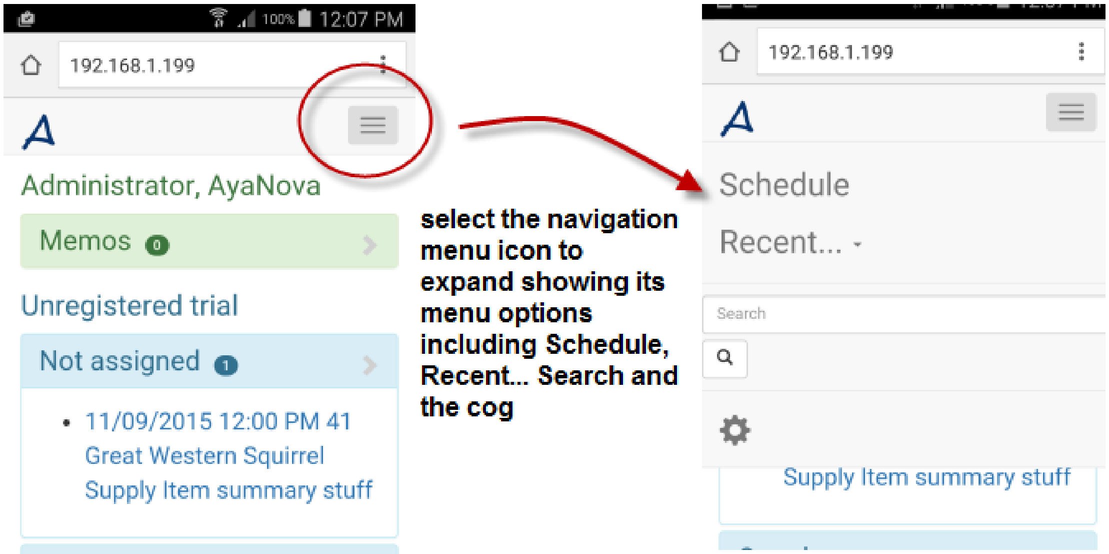
RI's navigation menu provides access to the Dasboard, Schedule, Recent..., Search, who is logged in, Memos, Override timezone and Logout options:

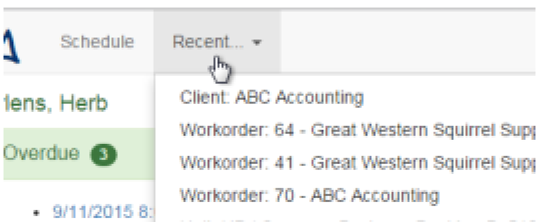
 Selecting this at any time will return you to your Dashboard



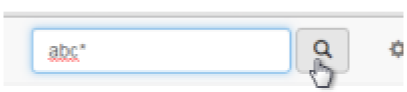
Selecting the Schedule navigation menu option at any time will move you to the graphical Schedule screen

Below is an example of access Schedule when using a smaller screen device with RI:

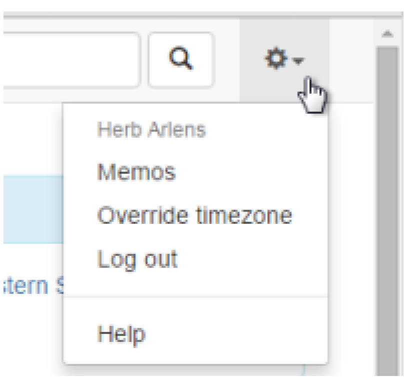


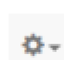


Selecting Recent at any time will display a list of most recently accessed records by your user account

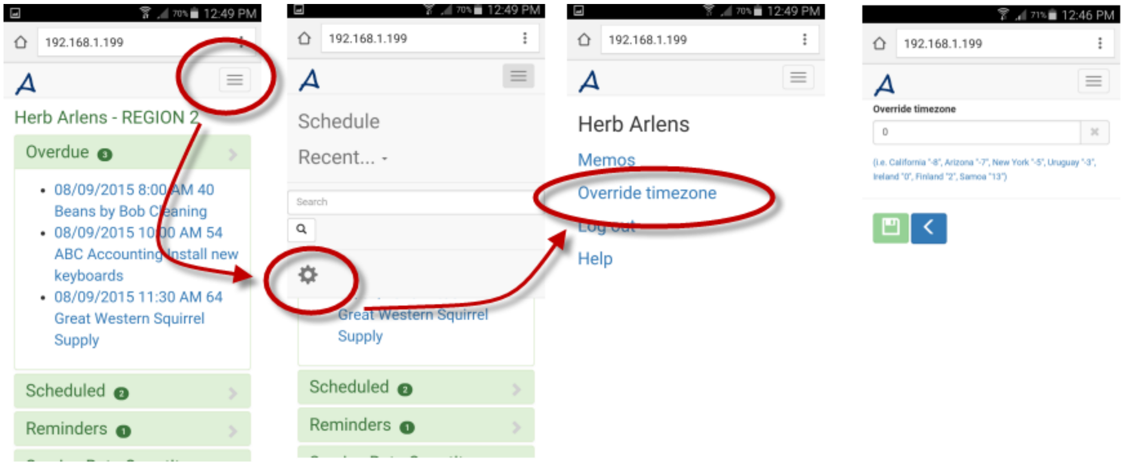


Enter wildcard searches or your workorder number to quickly bring up Search results to get to the record you need!



Select the cog  symbol to drop down access to your Memos, Override timezone, to Log out and for RI Help.

Below is an example of accessing the cog when using a smaller screen device:



8.8.11.4 Menu options for records via RI

Menu options within RI are for quick access in regards to that specific form being viewed.

For example, when viewing the overall workorder form, select the workorder navigation menu for this workorder, and menu options for this workorder as a whole are available for selection, such as the Signature menu option, Follow ups for this workorder, Wiki page for this workorder, Wiki embedded files for this workorder, access to reports for this workorder, and view the Record History for this specific workorder.

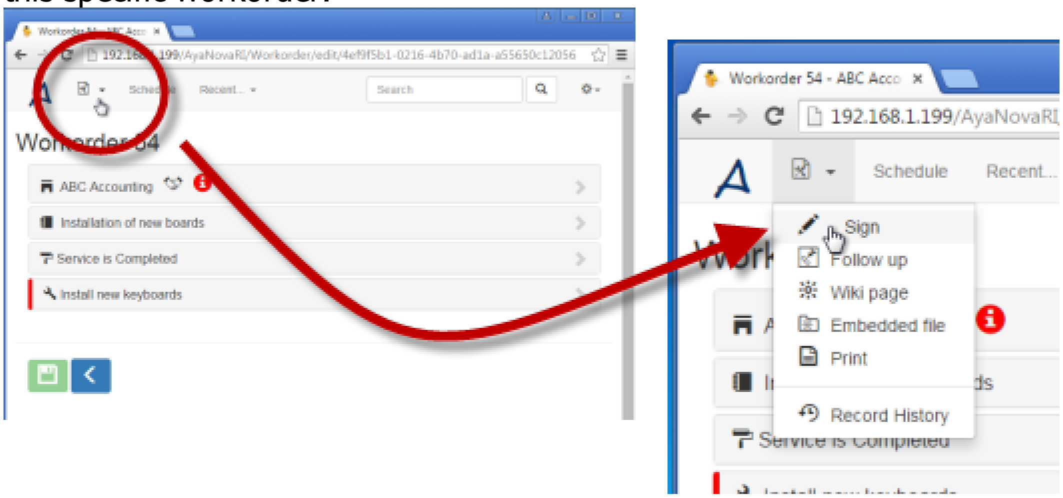


image of laptop browser view of service workorder and accessing this workorder's menu

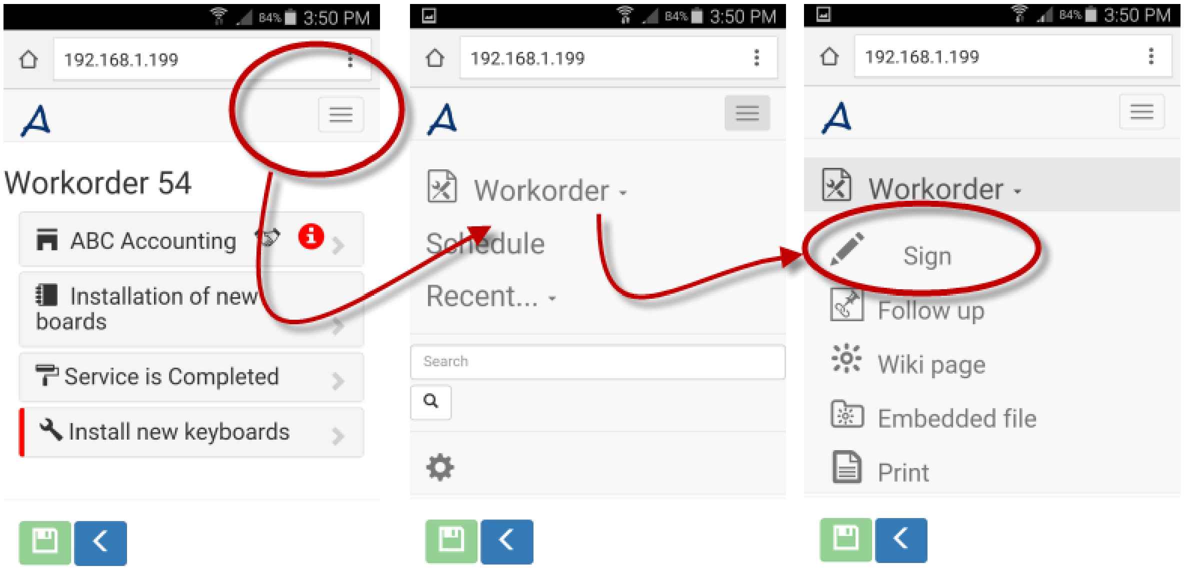
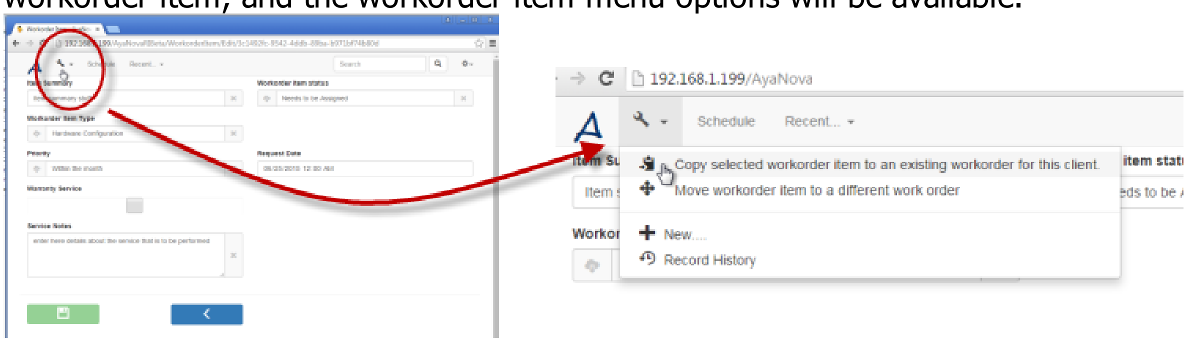
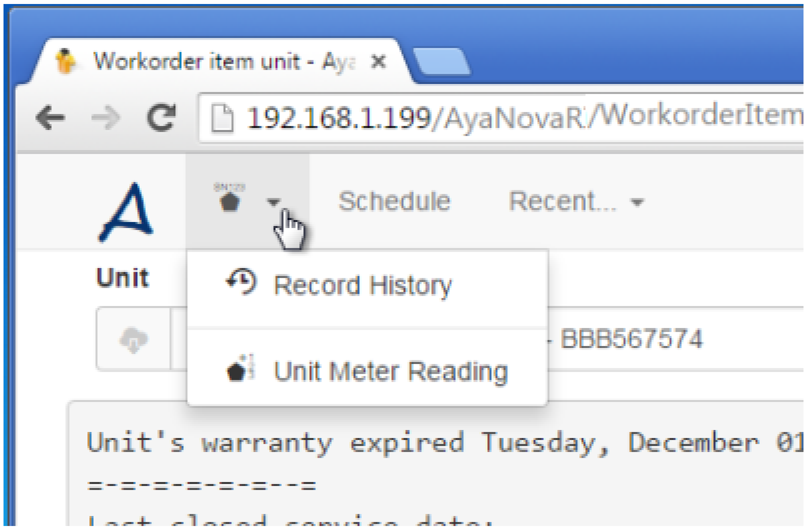


image of mobile browser view of same service workorder and accessing this workorder's menu

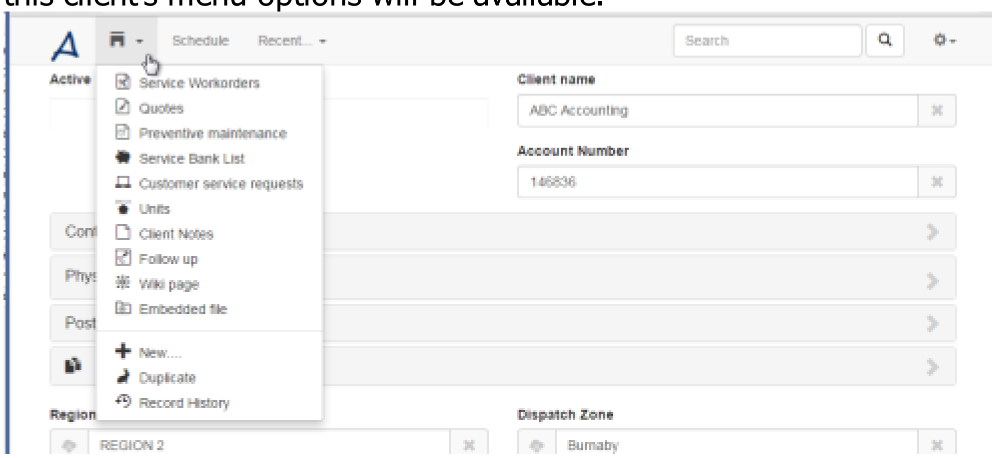
Same applies for the menu options for the workorder item.
When viewing the workorder item form, select the navigation menu for this workorder item, and the workorder item menu options will be available.



Same applies for the menu options for the Workorder Item Unit.
When viewing the Unit form of the workorder item, select the Unit navigation menu for this Unit subsection of the workorder item, and the Unit menu options will be available.



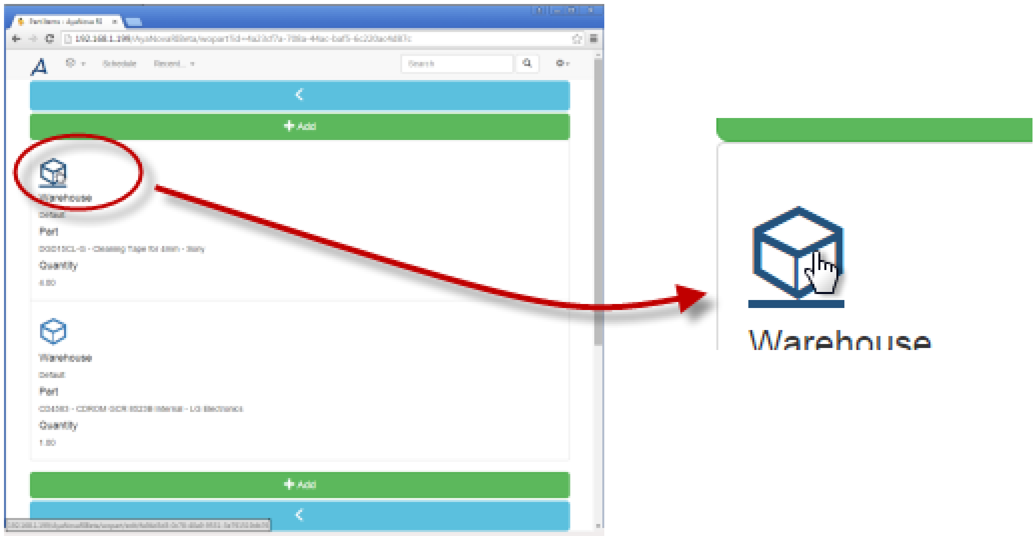
Same applies for the menu options for the Client record.
When viewing the Client form, select the client navigation menu for this client, and this client's menu options will be available.



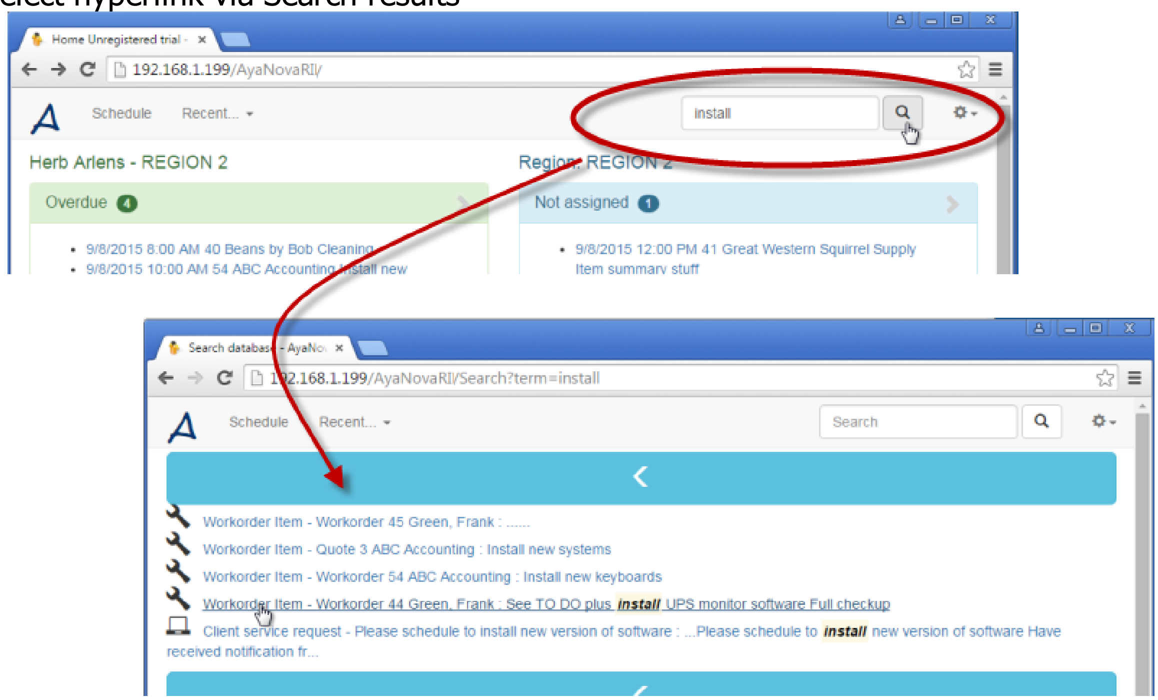
8.8.11.5 Viewing and editing existing records via RI

To view an existing record via RI (i.e. an existing service workorder record, an existing client record, an existing quote), select its hyperlink which will open to that record's form on its own page via RI.

Select hyperlink from list

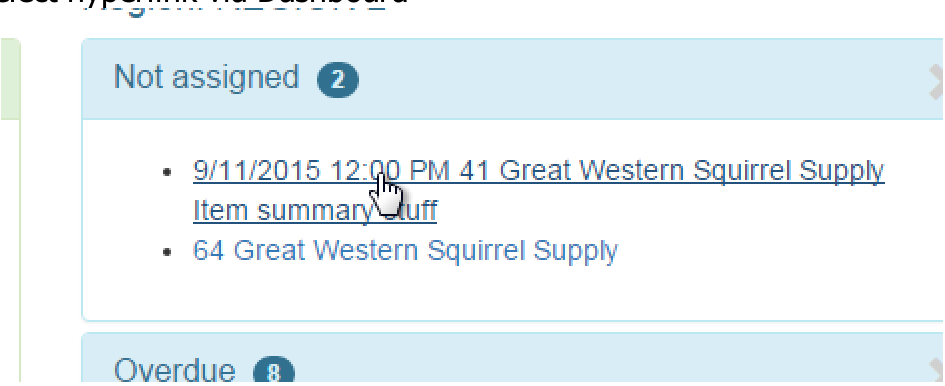


Select hyperlink via Search results



Select hyperlink via Recent...

Select hyperlink via Dashboard



8.8.11.6 Creating new records via RI

New records via RI are created by selecting +New via a list of that type of record, and/or selecting +New or Duplicate if creating a new unit, client, part, unit model, head office, memo, follow up,

Examples of creating a new unit:
Examples of creating a new service workorder:
Examples of creating a new client:

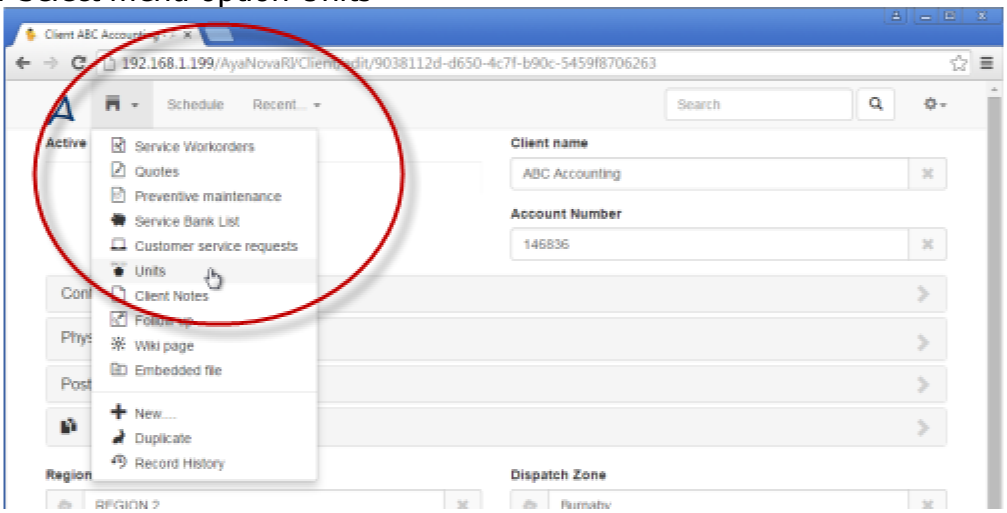
Examples of creating a new unit:

Let's say you are at a client's site providing service for an existing scheduled workorder, and want to identify the specific unit being serviced but it is not yet entered into your AyaNova database so can be selected in this service workorder. No problem!

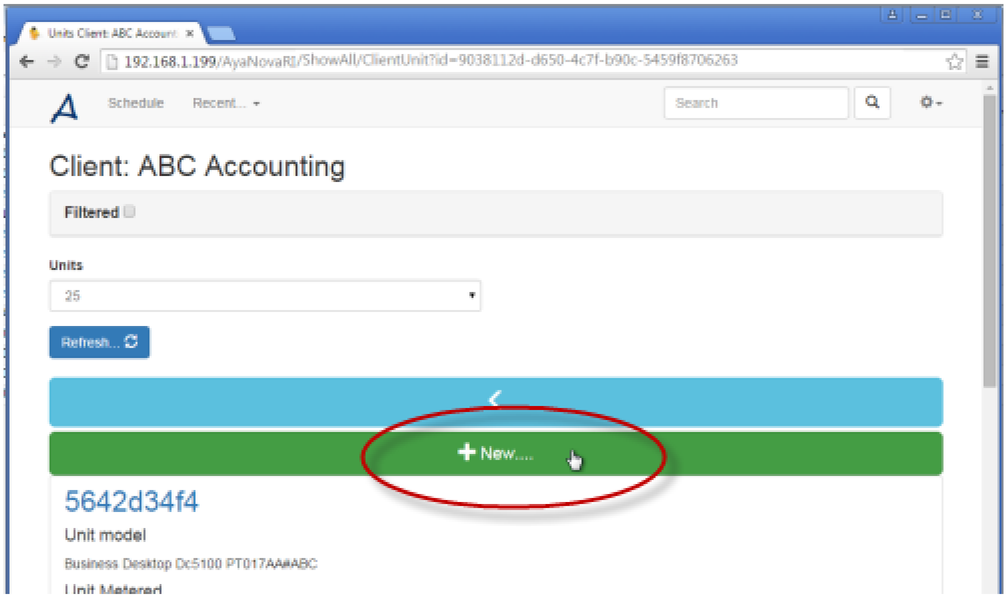
There are 3 ways to create a new unit so can then be selected in the workorder, either via the list of existing units for this client, or via the menu option +New or Duplicate for an existing unit:

1. Create a new unit via the list of units for this client

1. Go to this client's form
    a. Check to see if have recently accessed this client's record form by viewing your Recent.... list. If have, great - select it!
    b. Otherwise type in the client's name or some text (wildcard can be used!) from its client record into Search, so that you can select this client record from the resulting Search results.
2. Select menu option Units



3. This client's list of existing units will display.
4. Select +New



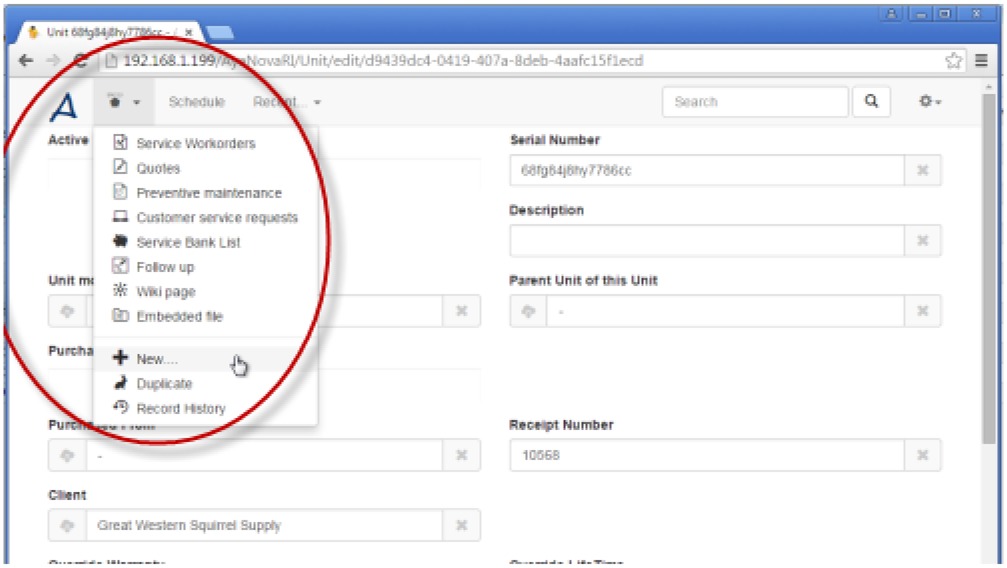
5. And a new empty unit record form will display with this client pre-selected.

2. Create a new unit via menu option +New while viewing details of an existing unit

1. Go to any unit's form
    a. Check to see if have recently accessed any unit record form by viewing your Recent... list. If have, great - select it!
    b. Otherwise type in a unit's serial number or some text (wildcard can be used!) from its unit record into Search, so that you can select this unit record from the resulting Search results
2. Select menu option +New
3. And a new empty unit record form will display with the same client pre-selected as that of the unit was just viewing.

3. Create a new unit via menu option Duplicate while viewing details of an existing unit

1. Go to any unit's form
    a. Check to see if have recently accessed any unit record form by viewing your Recent... list. If have, great - select it!
    b. Otherwise type in a unit's serial number or some text (wildcard can be used!) from its unit record into Search, so that you can select this unit record from the resulting Search results
2. Select menu option Duplicate
3. And a new unit record form will display saved with the same serial number, selections and text. Edit as needed and save.



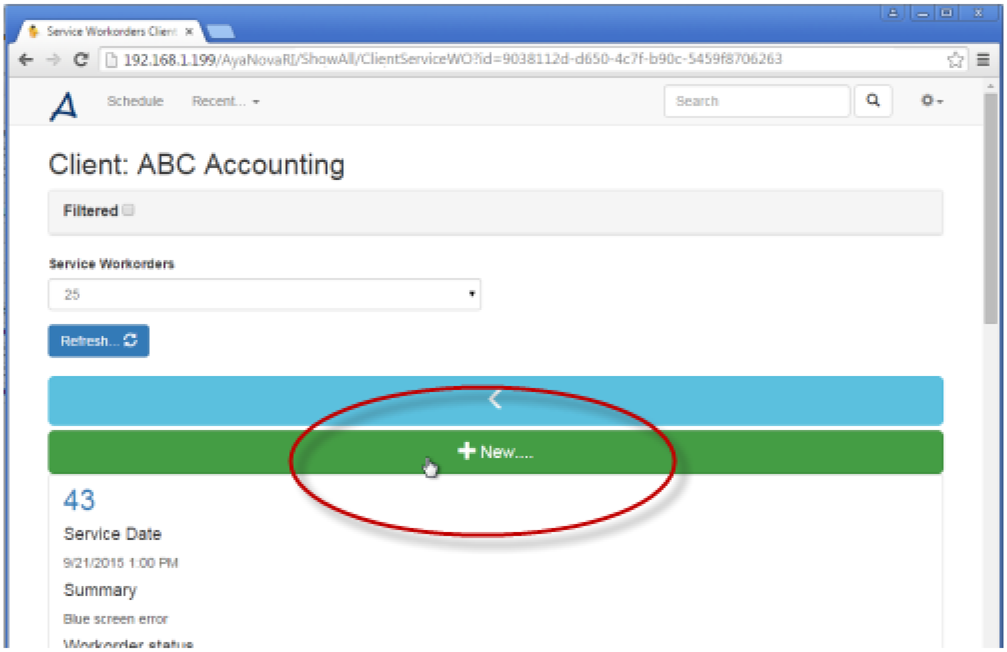
Examples of creating a new service workorder:

Let's say you are at a client's site providing service for an existing scheduled workorder, and want to create a new and separate service workorder. No problem!

There are 2 ways to create a new service workorder, either via the client's list of service workorders or via the unit's list of service workorders:

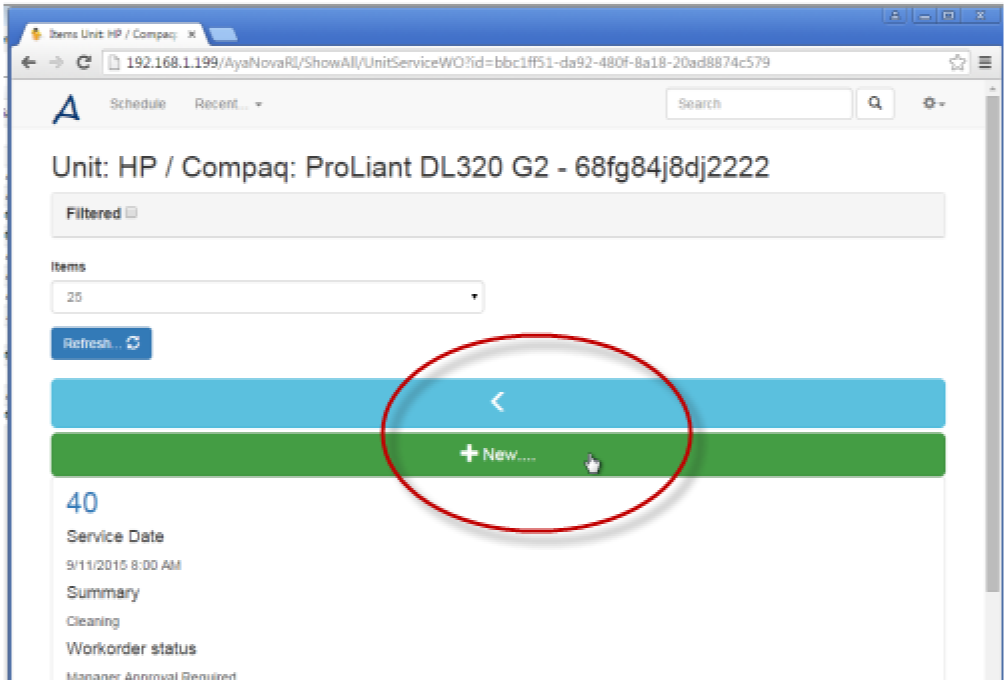
1. Create a new service workorder via the client's list of service workorders

1. Go to this client's form
    a. Check to see if have recently accessed this client's record form by viewing your Recent.... list. If have, great - select it!
    b. Otherwise type in the client's name or some text (wildcard can be used!) from its client record into Search, so that you can select this client record from the resulting Search results.
2. Select menu option Service Workorders
3. This client's list of existing service workorders will display.
4. Select +New
5. And a new empty service workorder record form will display for this client.



2. Create a new service workorder via the unit's list of service workorders

1. Go to this unit's form
   a. Check to see if have recently accessed this unit's record form by viewing your Recent.... list. If have, great - select it!
   b. Otherwise type in the unit's serial number or some text (wildcard can be used!) from its unit record into Search, so that you can select this unit record from the resulting Search results.
2. Select menu option Service Workorders
3. This unit's list of existing service workorders will display.
4. Select +New
5. And a new empty service workorder record form will display for this client that owns this unit, as well this unit will be automatically selected in its workorder item.



Examples of creating a new client:

Let's say you are out on the road away from the office, and want to create a new client so you can create a new workorder

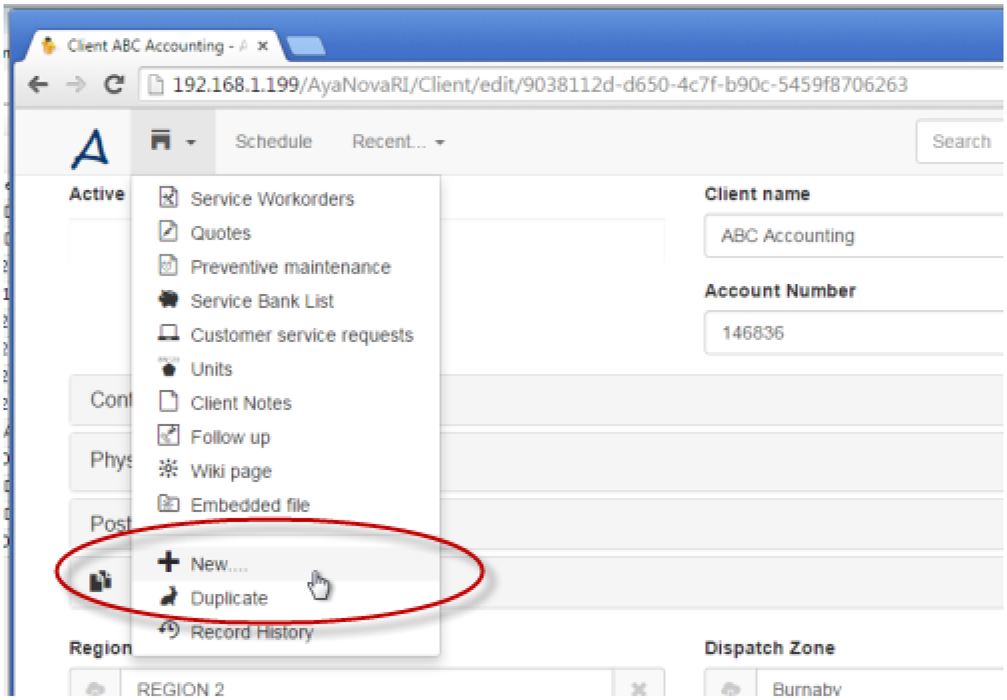
There are 2 ways to create a new client, via an existing client's menu options +New or Duplicate :

1. Create a new client via an existing client's menu option +New

1. Go to any existing client's form
2. Select menu option +New
3. A new empty client record form will display

2. Create a new client via an existing client's menu option Duplicate

1. Go to any existing client's form
2. Select menu option Duplicate
3. A new client record form will display with same selections and text other than the client name. Edit as needed and save.

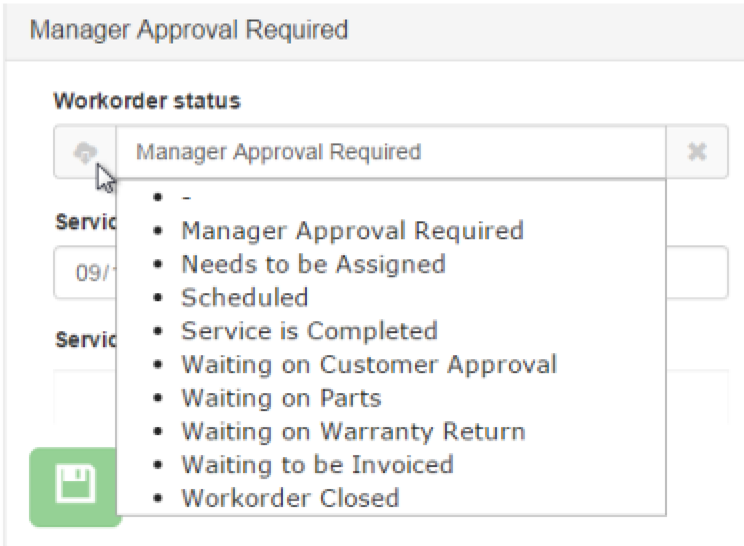


8.8.11.7 Drop down selections via RI

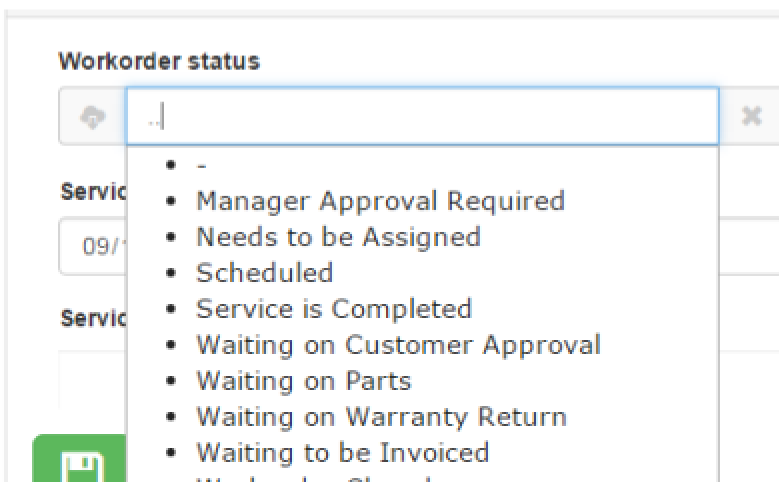
Due to the differences with a web application vs a desktop application, drop down selection fields via RI (such as Priority, Workorder Status, User, etc) have a couple different ways of accessing depending on your device.

Drop down selection

Select the control to drop down the list of available selections for this field.



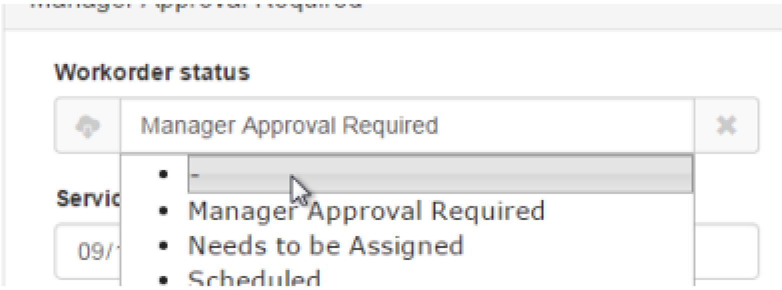
You also can just type in two periods and the drop down selection will show



Existing drop down selection removal

To remove an existing selection, either select the which will then populate the selection field with the -

Or select the -



8.8.11.8 RI Dashboard

When first log in to your AyaNova database via RI, you will load to your Dashboard.

What shows on your Dashboard display depends on:

- whether the account you are logged in as is a User Type of Schedulable resource or not (set in your User entry screen),
- what your security group rights are to Service Workorders, Schedule Markers, Memos, and Customer Service Requests,
- and whether your account is restricted to a specific region or not.

Due to the nature of a web application, your Dashboard wil not automatically refresh itself.

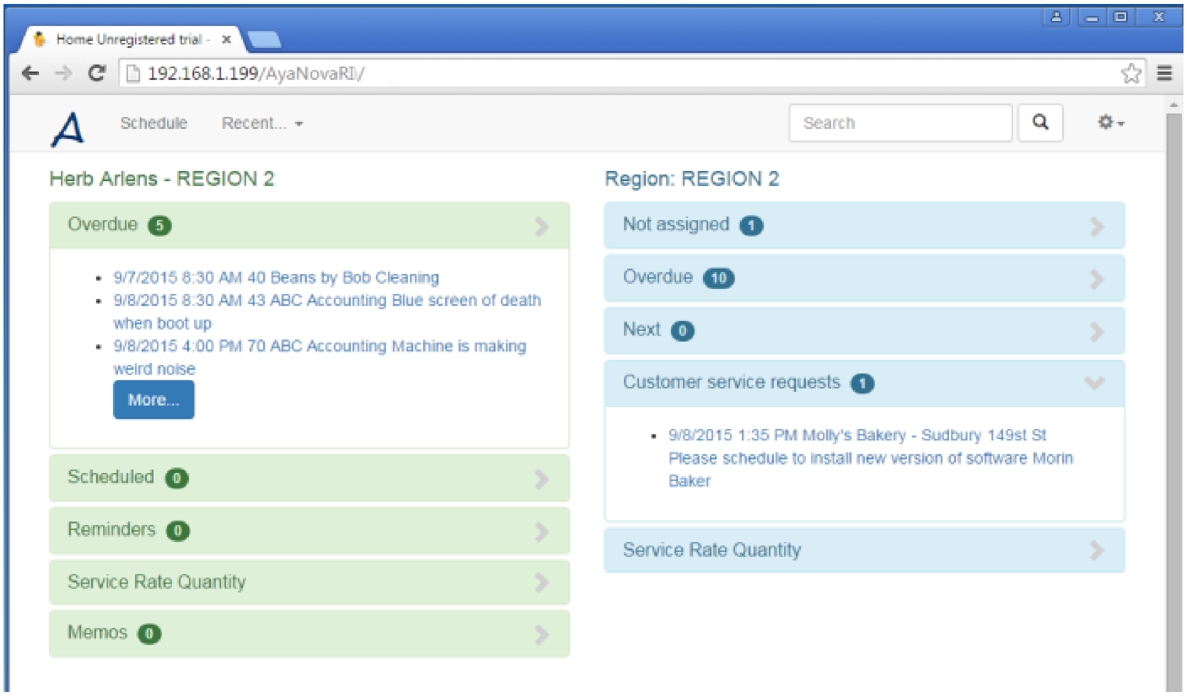
If you leave your browser sitting at the Dashboard, new reminders or workorders will not show until you move elsewhere in your RI and then come back to the Dashboard.

A simple click/select of the will cause your Dashboard to recheck in with your database to display the latest information.

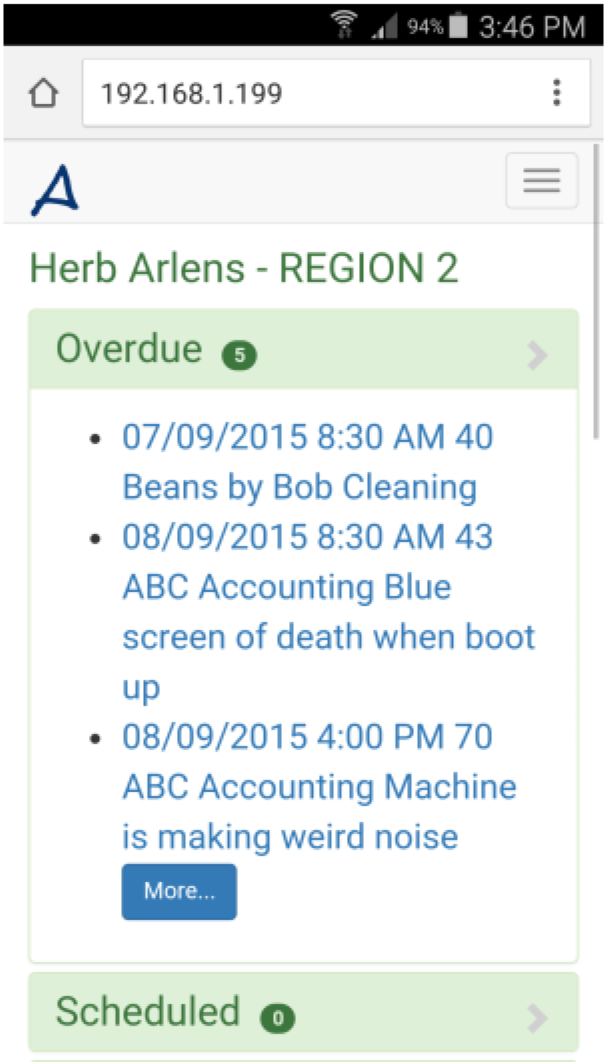
Via RI's **Dashboard**, you have quick access to:

- Unread **Memos**
- **Overdue** workorders
- **Scheduled** workorders
- **Service Rate Quantity**
- **Reminders**
- **Not Assigned** workorders
- Not yet accepted/rejected **Customer Service Requests** (CSRs)

wider screen view:



smaller screen view:



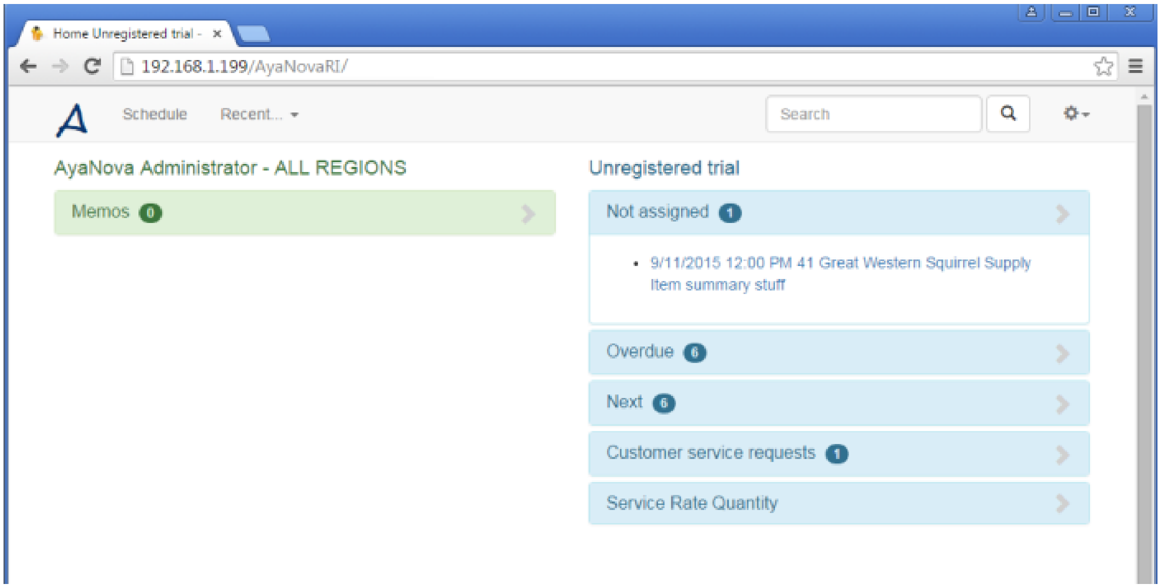
If logged in as a user that is a schedulable resource, the Dashboard is where you can quickly see at a glance, as well as access:

- Overdue provides links to service workorders that were scheduled prior to today's present time and date as a reminder so that you do not forget to enter your labor, parts, etc as well as checkmark Service Completed.
- Scheduled provides links to service workorders that are scheduled after today's date and time
- Service Rate Quantity shows at a glance totals for today, yesterday, current week, current month and current year of your Labor hours (or whatever the unit charge is that you use). The label text Service Rate Quantity is taken from your Labor subsection of your service workorder entry screen.
- Reminders provide links to the next three future dated Schedule Markers or Follow Ups assigned to you as a schedulable resource.

Otherwise quick access for the user logged in to:

- Unread Memos. Note too that all memos can be accessed via the Memos menu option under the cog
- Not assigned provides links to service workorders for clients of the same region as the logged in user, that have not yet been assigned to any schedulable resources.
- Overdue provides links to service workorders that were scheduled to schedulable resources of this company/specific region prior to today's present time and date. Very useful as a reminder for both the dispatch manager and schedulable resources
- Next provides links to service workorders that are scheduled after today's date and time for schedulable resources of this company/specific region
- Service Rate Quantity shows at a glance totals for today, yesterday, current week, current month and current year of schedulable resources of this company/specific region Labor hours (or whatever the unit charge is that you use). The label text Service Rate Quantity is taken from the Labor subsection of your service workorder entry screen.
- Customer Service Requests provides links to the next three not yet accepted customer service requests.

Below is example of what could show when logged in as an adminstrative user - just unread Memos on the left side.



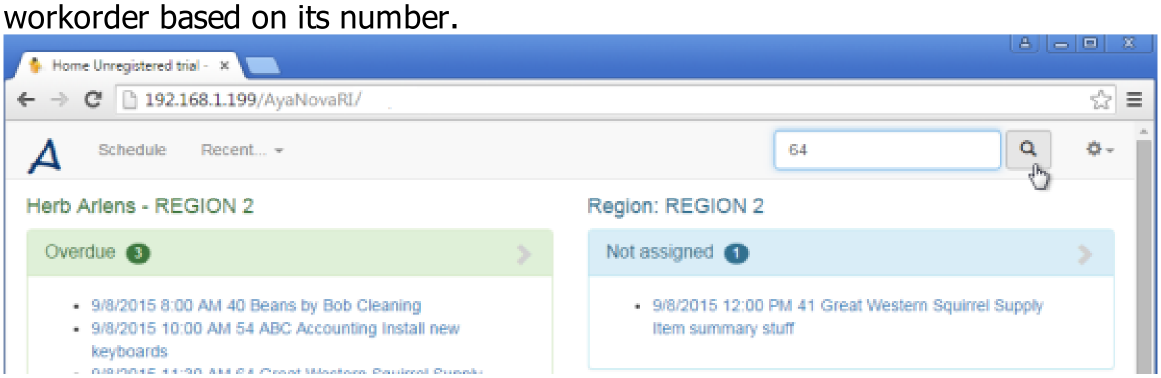
8.8.11.9 RI Search

Via RI's **Search** you can:

1. **Quickly access any workorder, quote, pm by its number**
2. **Quickly access any workorder, quote, pm, part, client, unit, unit model, head office by full or wildcard* text entered in one or more of its fields**
3. **Quickly access service history, quotes, PMs, CSRs, banked service, client notes, follow ups for a client by searching for any text (i.e. name, phone number, address, etc) entered in that client's entry screen to bring up that client and selecting its appropriate menu option**
4. **Quickly access service history, quotes, PMs, CSRs, meter readings, follow ups for a unit by searching for any text (i.e. serial, notes, etc) entered in that unit's entry screen to bring up that unit and selecting its appropriate menu option**

1. **Quickly access any workorder, quote, pm by its number**

Enter in a workorder number (or a quote's number, or PM's number).
RI will return search results of any workorder, quote or PM with that whole number, as well as search results of records that have that specific number entered as text.
If you only have one record that has that number (i.e. only have a service workorder with workorder number 14333), RI will skip the search results list and open to that workorder record directly!
NOTE: number entered must be the whole number. I.e. if want to open workorder 4065, you must enter 4065. Entering 40* will NOT return a workorder based on its number.



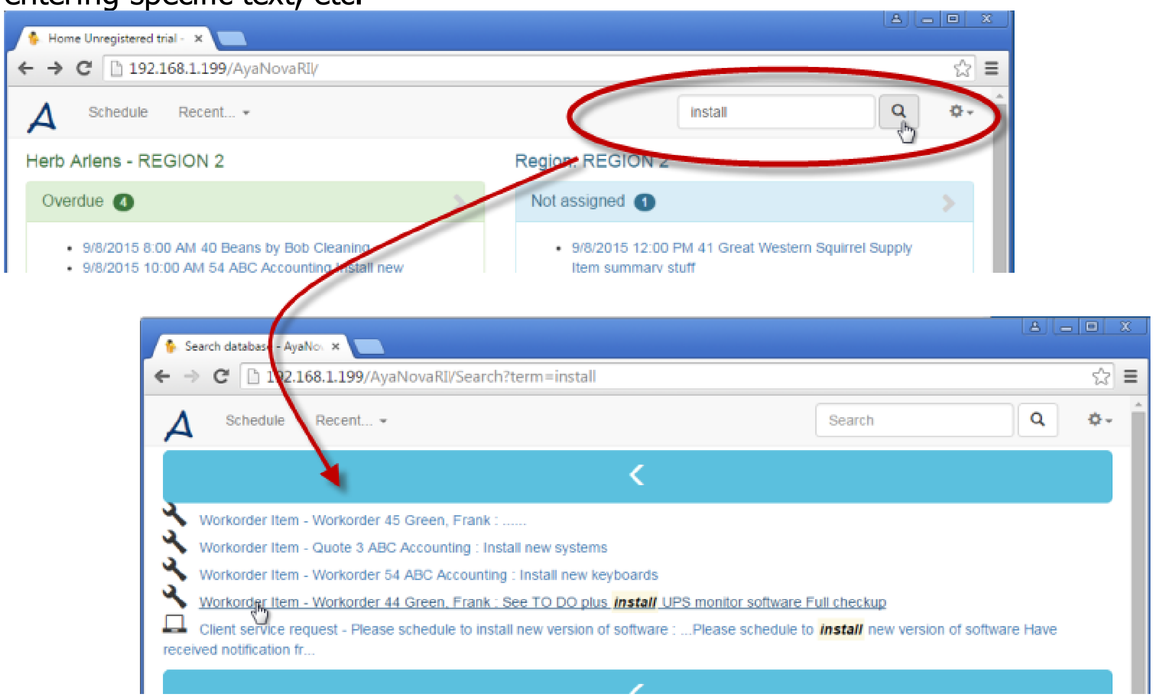
2. **Quickly access any workorder, quote, pm, part, client, unit, unit model, head office by text entered in one or more of its fields**

Enter any text that was entered and saved in a record, to return search results of all records where that text has been entered.

Either enter in the full text or wildcard text using the * symbol.

For example, if you enter the text *install* , all records that have the complete text *install* will be returned.
Whereas if you enter the text *install** , all record that have the complete text *install* will be returned as well as *installation*, *installameter*, *installs* etc
Whereas if you enter the text _*install_ , all records that have the complete text *install* will be returned, as well as *parainstall*, *uninstall*, *reinstall*

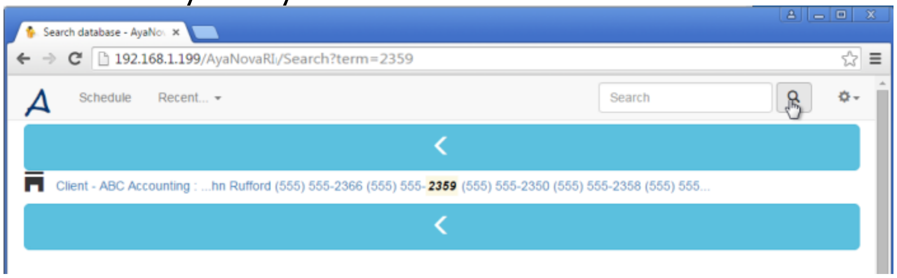
Searching for specific text is very useful for quickly finding details on how to service a specific error code, to find a specific record where you remember entering specific text, etc.

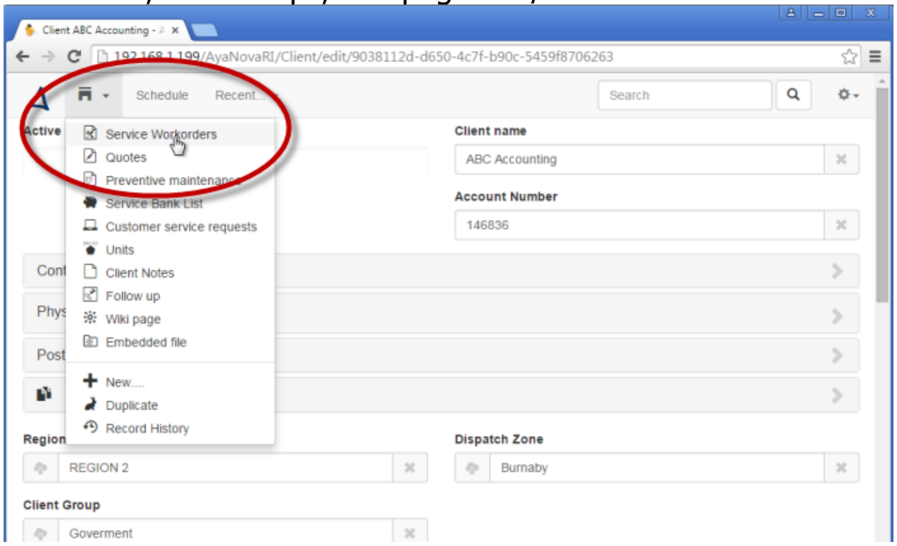


3. **Quickly access service history, quotes, PMs, CSRs, banked service, client notes, follow ups <u>for a client</u> by searching for any text (i.e. name, phone number, address, etc) entered in that client's entry screen to bring up that client and selecting its appropriate menu option**

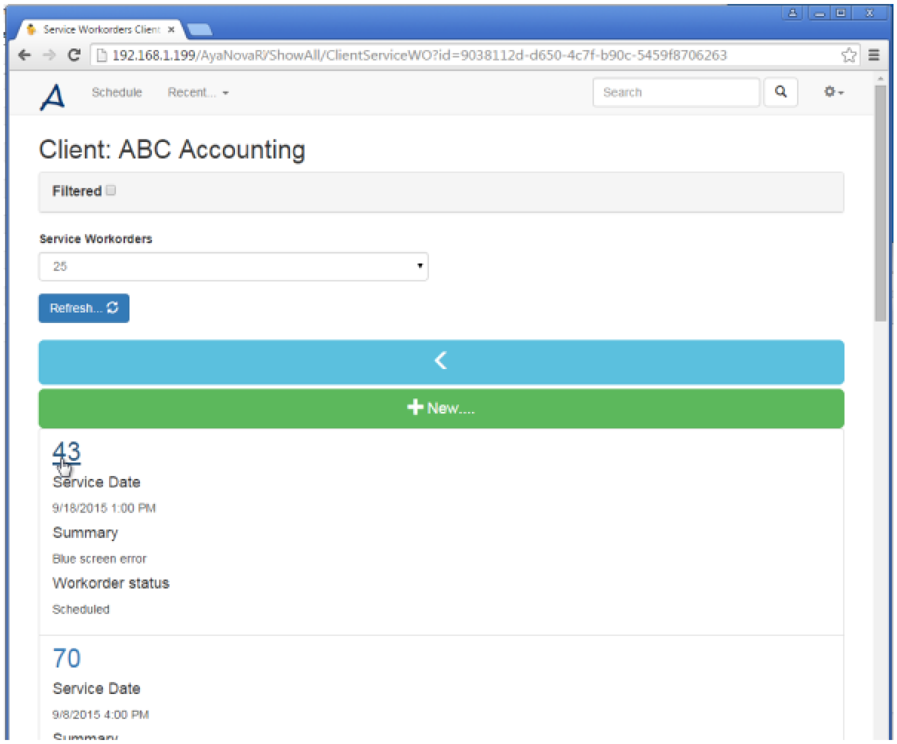
Either enter in the full text or wildcard text using the * symbol.
For example, if you enter the text *2359* , all records that have the complete text *2359* will be returned.
Whereas if you enter the text *2359** , all record that have the complete text *2359* will be returned as well as *2359565*, *2359-1045 St* , etc
Whereas if you enter the text _*2359_ , all records that have the complete text *2359* will be returned, as well as (555)555-*2359* , 104-*2359*, *etc*

Let's say you want to quickly look up service history for a client (or specific service history based on Service Date, Workorder Status, and/or whether Service Completed or Closed is checkmarked or not) while you are out on the road and using RI - just do the following!

1. Perform a search for this client so that you can easily and quickly go to its record
    1. Perform your search based on the clients company name, phone number, street address etc. For example, below is screenshot of searching for the last four digits of a clients phone number as entered into your AyaNova record for that client.
    2. 

2. Once viewing the client's form, then select this client's menu option Service Workorders. You can instead select Quotes, PMs, Service Bank list, CSRs, Units, Client Notes, Follow Ups, Wikipage and/or its Embedded files.
    1. 

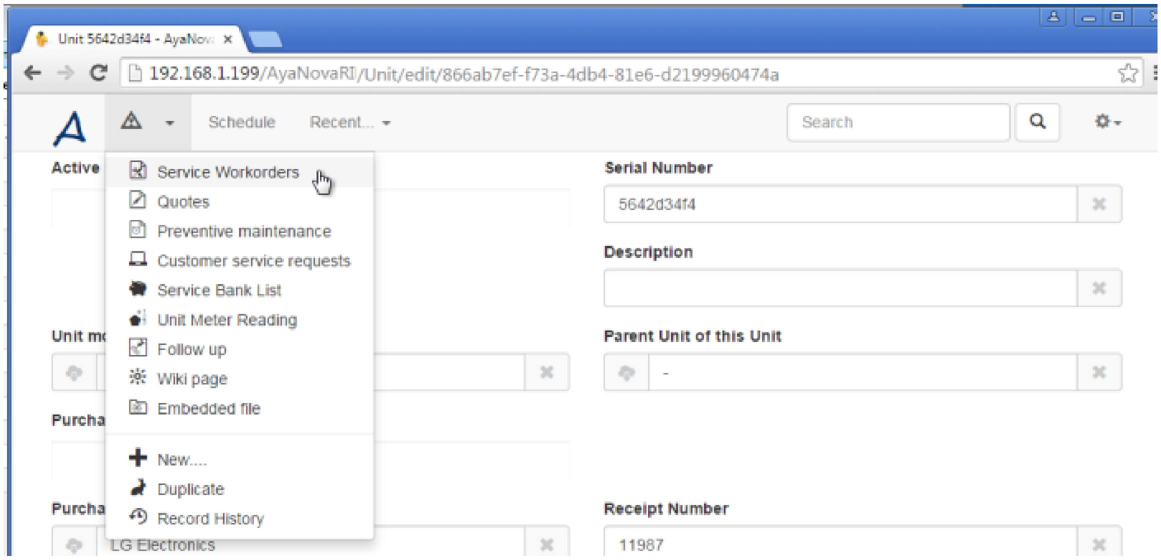
3. Which then lists all service workorders for this client, listing the most recent (by Service Date) first.

1. 

4. See more in the [RI How do I...? on using a list's filters to narrow down what displays]

4. **Quickly access service history, quotes, PMs, CSRs, meter readings, follow ups <u>for a unit</u> by searching for any text (i.e. serial, notes, etc) entered in that unit's entry screen to bring up that unit and selecting its appropriate menu option**

1. Same as with a client, perform a search of text (wild card or complete) entered in that unit's record to bring up that unit's form in the search results - such as its full serial number _5642d34f4_ or partial serial number _5642*_ or _*4f4_ .
2. All records that have that text will be displayed in the search results, where you can then select which you want to view.
3. Select the unit, which opens to its form.
4. Then select to view the appropriate list from that unit's menu options



8.8.11.10 RI Recent...

Via RI's **Recent**.... you can quickly access records you were just recently viewing/editing.

This saves you time so you can get to the record you need!

For example, let's say that you were just at a client's site, have entered in details of the service performed into the scheduled workorder, set it to Closed, and then logged out of RI.
Now as a Closed workorder does not show on your Schedule view, nor does a Closed workorder show on your Dashboard view, you can just drop down the **Recent...** list and select from the list of records you recently were viewing and/or editing.

NOTE: it is expected that a user is logged into your AyaNova database via one interface at a time - i.e. via RI OR via WBI OR via desktop AyaNova

If the user account you are using is logged in via multiple AyaNova programs (i.e. desktop AyaNova and RI at the same time), what was viewed via the desktop AyaNova will not necessarily show in the RI's Recent... until that user logs out of via the desktop AyaNova and re-logs in via RI

It is highly recommended that each user have their own account. Non-scheduleable users and Administrative users DO NOT require a license. Besides ensuring that Recent... is correct, also Record History can be referred to for who created and when, and who last modified and when.

8.8.11.11 RI Schedule

Via RI's **Schedule**, you can:

1. **view at a glance scheduled items** (workorders, Schedule Markers and Follow Ups) assigned to scheduleable resources within same region as that of the user logged in
2. **view at a glance not yet assigned scheduled items** for clients within the same region of the user logged in
3. **view Month** (default view), **Week** or **Day** view for the selected schedulable resource
4. select a scheduled item which opens to its form so that additional details may be viewed, data entered, etc.

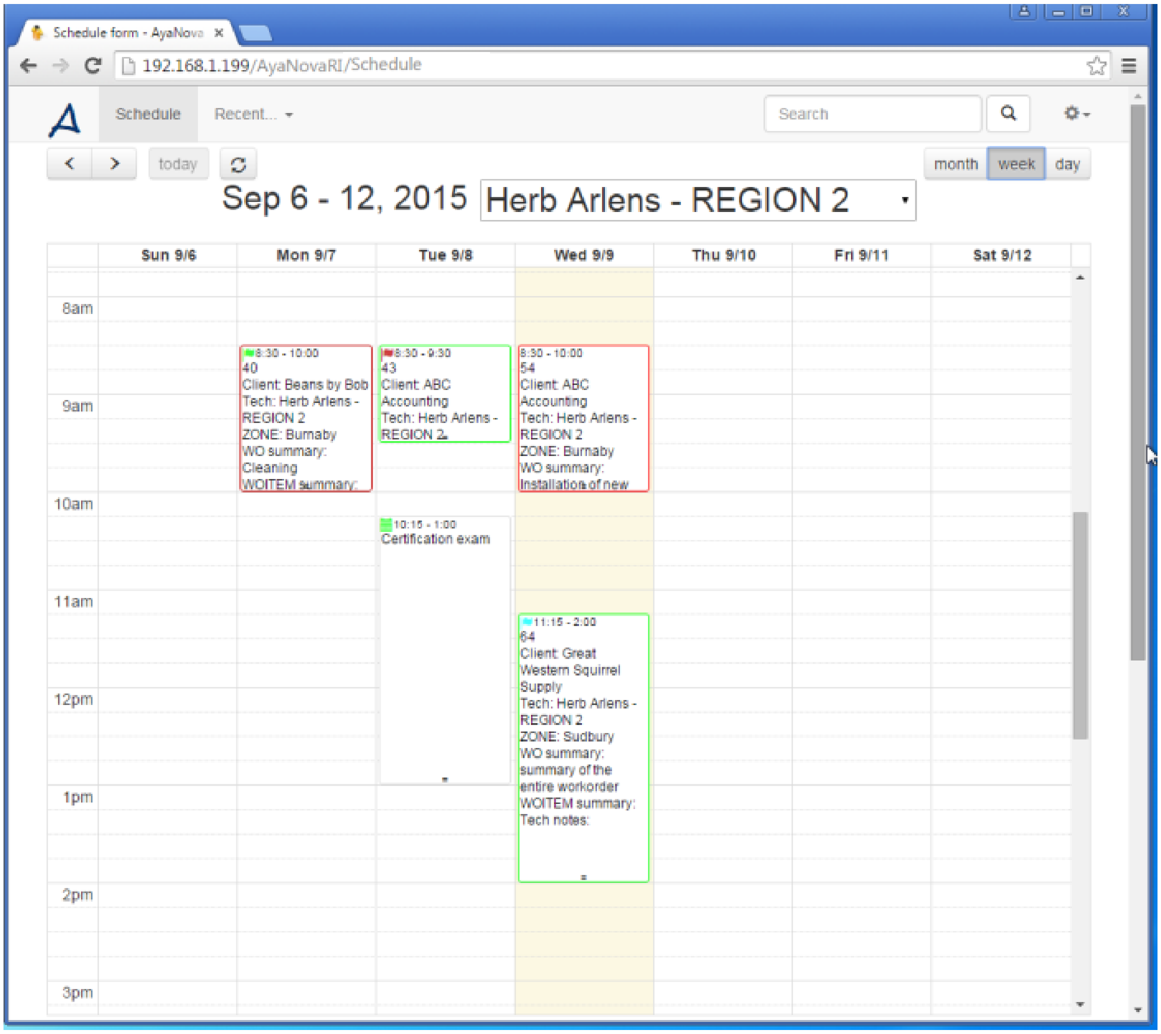
When you first view your Schedule via RI on a device via a web browser, your RI Schedule will default to Month view.

Then what view you had last selected in your RI Schedule will be saved to your browser's localStorage object, so that the next time you log in and view your Schedule on this same device using this same browser, that view will instead show.

If the user logged in is themselves a User Type of Scheduleable user, the schedule for this same scheduleable user will by default be shown.
If the user logged in is not a User Type of Scheduleable user (is instead a Non-scheduleable user or Administrative user), then the Not Assigned schedule will by default be shown.

There is not an option to create a new workorder from the Schedule form itself. To create a new workorder, select the Service Workorders menu option for the specific client, and select +New.

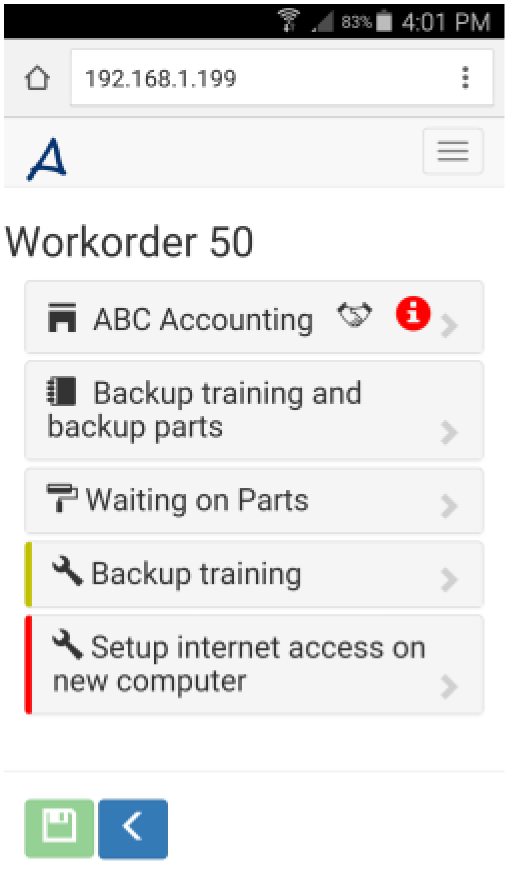
Depending on the web browser and device (i.e. Chrome on a Windows desktop) scheduled workorder items, scheduled Schedule Markers and/or Follow Ups can be easily moved to another time or date for the same user just by dragging.
Or just select the scheduled workorder item, scheduled Schedule Marker/or Follow Up from the Schedule form to open to its form so you can manually edit the Start and/or Stop date/time.

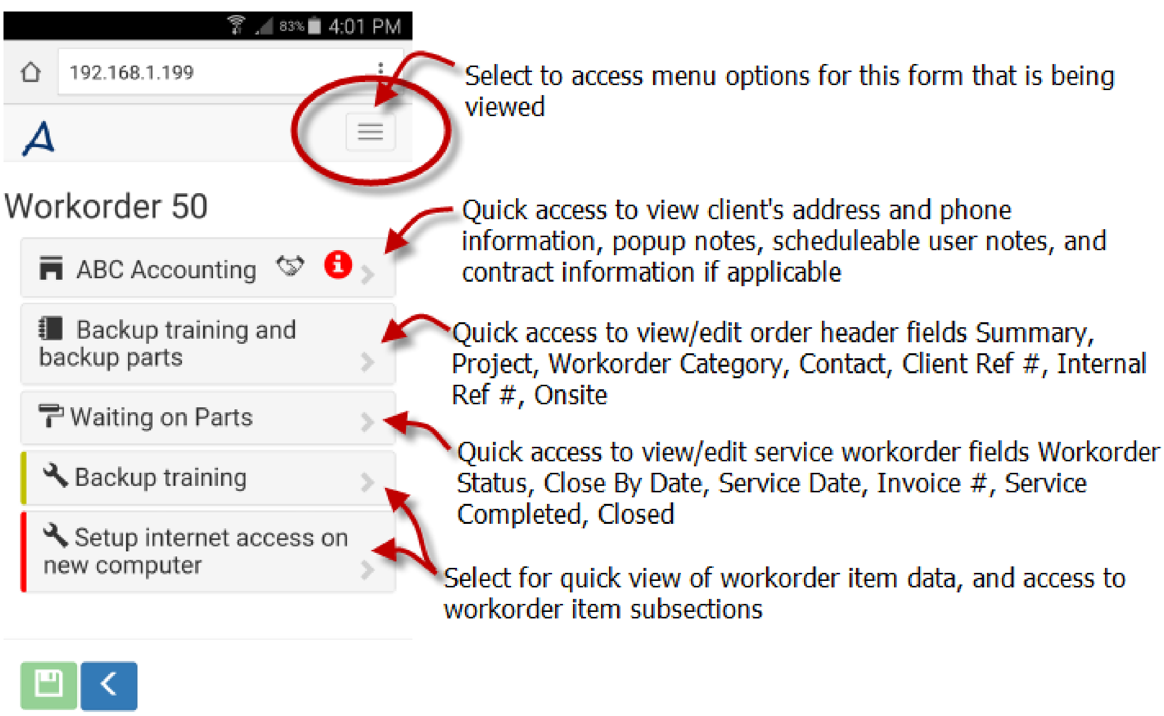


8.8.11.12 RI Service Workorder

RI gives you full access to AyaNova service workorder's features

initial view of service workorder on a small screen device


83% 4:01 PM
192.168.1.199
Workorder 50
ABC Accounting
Backup training and backup parts
Waiting on Parts
Backup training
Setup internet access on new computer


83% 4:01 PM
192.168.1.199
Workorder 50
ABC Accounting
Backup training and backup parts
Waiting on Parts
Backup training
Setup internet access on new computer
Select to access menu options for this form that is being viewed
Quick access to view client's address and phone information, popup notes, scheduleable user notes, and contract information if applicable
Quick access to view/edit order header fields Summary, Project, Workorder Category, Contact, Client Ref #, Internal Ref #, Onsite
Quick access to view/edit service workorder fields Workorder Status, Close By Date, Service Date, Invoice #, Service Completed, Closed
Select for quick view of workorder item data, and access to workorder item subsections

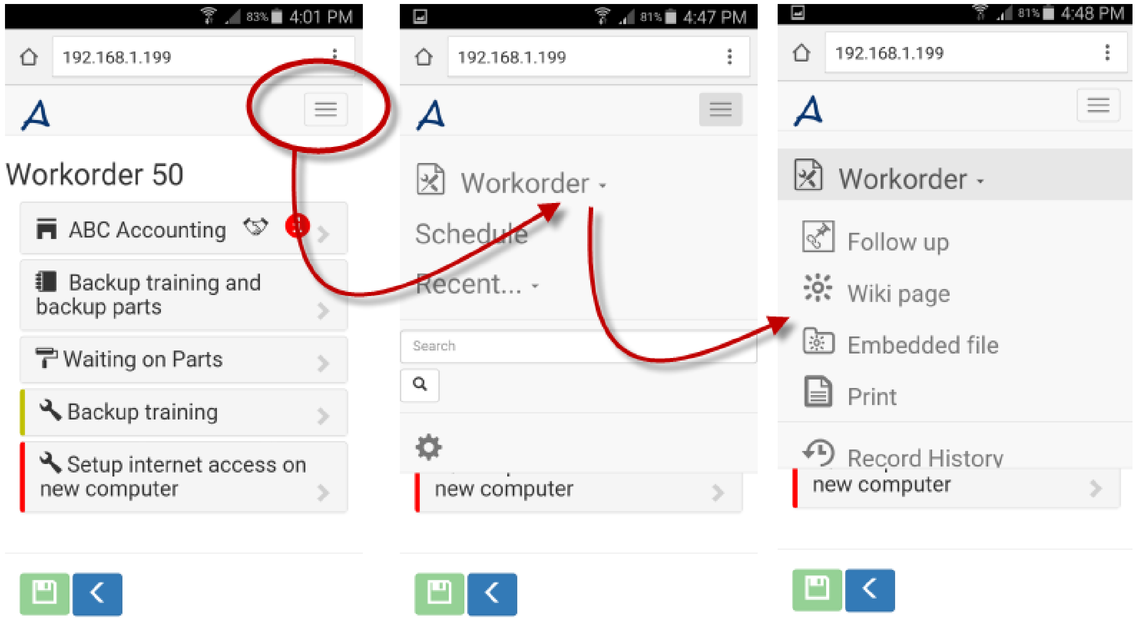
The service workorder via RI:

Menu access for this workorder's Signature, reports, Follow Ups, Wikipage, Embedded Files, Record History and Delete option

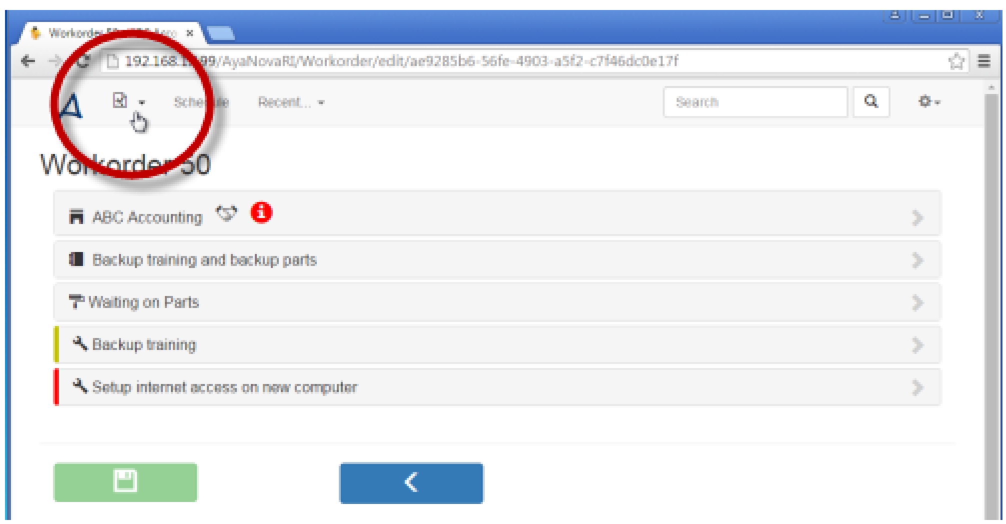
The RI service workorder is laid out with menu access via the navigation menu at the top, expandable panels for the client information, workorder header fields, service header fields (if viewing a quote would be viewing quote header fields, if viewing a PM via RI would be viewing PM header fields here), and the forms that display as the logged in user would "drill down" into as needed.

Menu access for this workorder (Signature, reports, Follow Ups, Wikipage, Embedded Files, Record History and Delete menu option)
Quick access to view client information (client's address and phone information, popup notes, scheduleable user notes, and contract information if applicable)
Quick access to view/edit order header fields (Summary, Project, Workorder Category, Contact, Client Ref #, Internal Ref #, Onsite)
Quick access to view/edit service workorder fields (Workorder Status, Close By Date, Service Date, Invoice #, Service Completed, Closed)
Quick view of workorder item data, and access to workorder item subsections
- **Selecting workorder item panel displays that workorder item form for view/edit**
  - Workorder item's Unit
  - Workorder item's Scheduleable Users
  - Workorder item's Tasks
  - Workorder item's Parts
  - Workorder item's Part Requests
  - Workorder item's Labor
  - Workorder item's Travel
  - Workorder item's Expenses
  - Workorder item's Loans
  - Workorder item's Outside Service
  - Workorder item's Custom Fields

Main menu for service workorder accessed from navigation menu area



view of service workorder's menu options on responsive small screen device

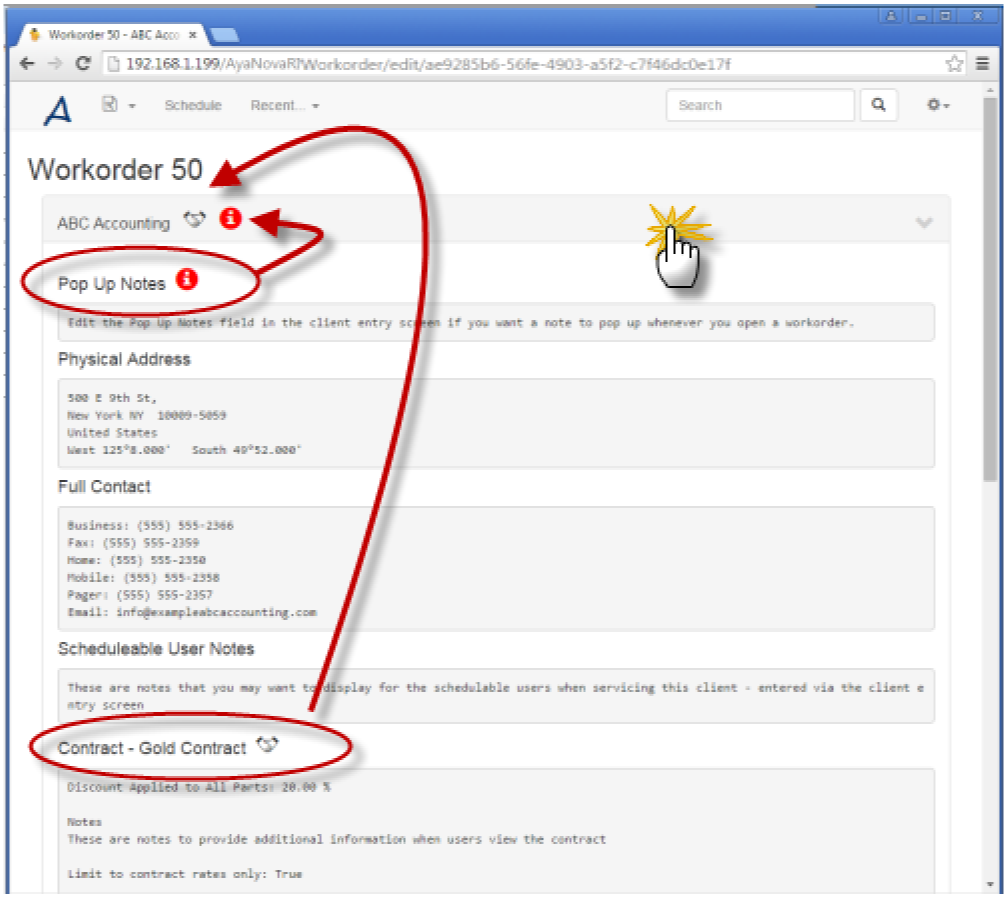


view of service workorder's menu options on responsive larger screen device

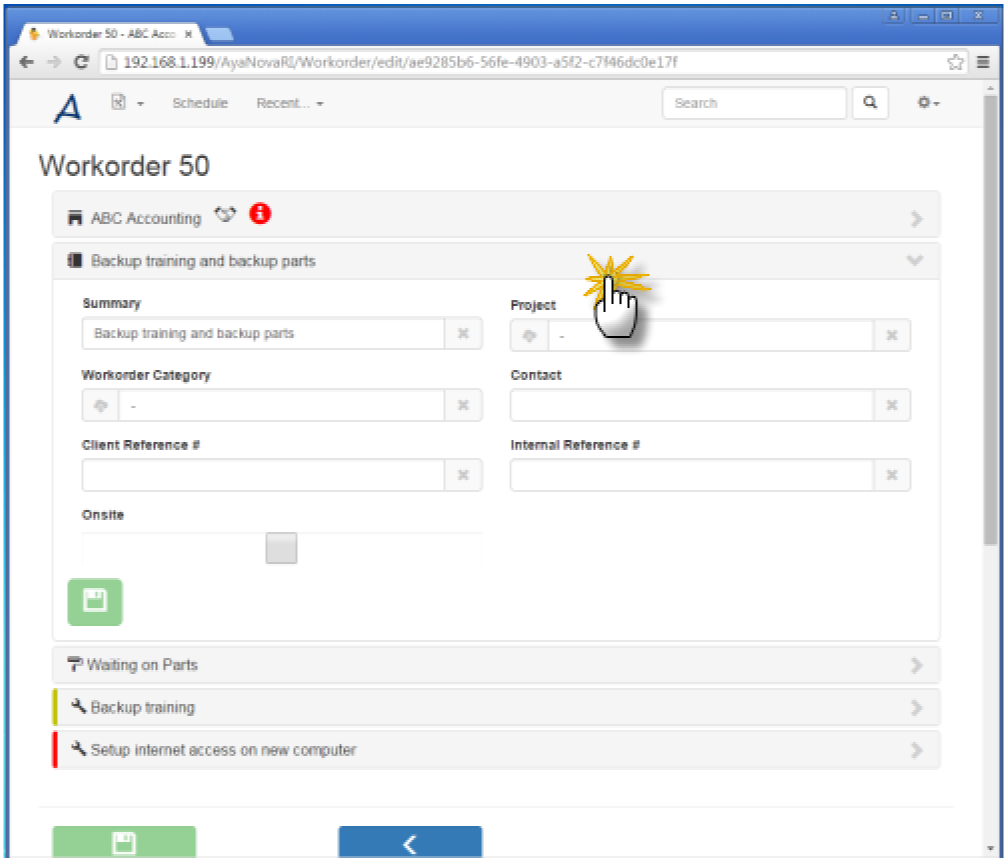
Quick access to view client's address and phone information, popup notes, scheduleable user notes, and contract information if applicable

Select the panel to expand so you can quickly view

Icons on the panel let you know at a glance whether this client has a Popup notification, whether this client has a Contract



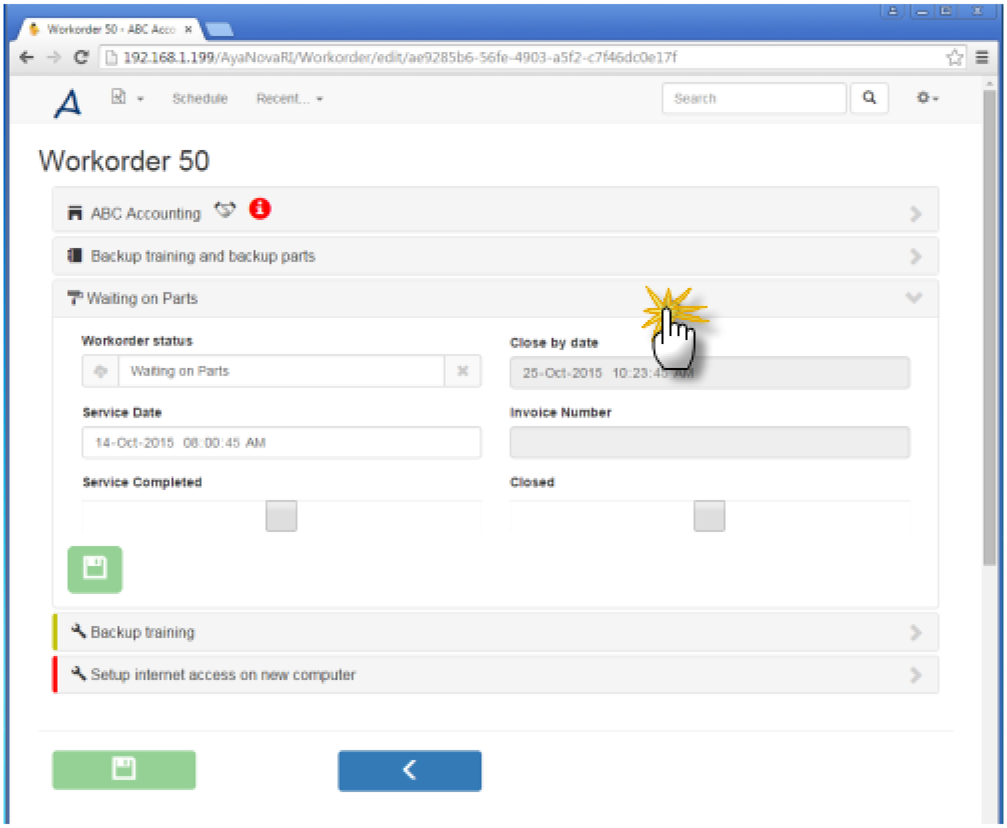
Quick access to view/edit order header fields Summary, Project, Workorder Category, Contact, Client Ref #, Internal Ref #, Onsite



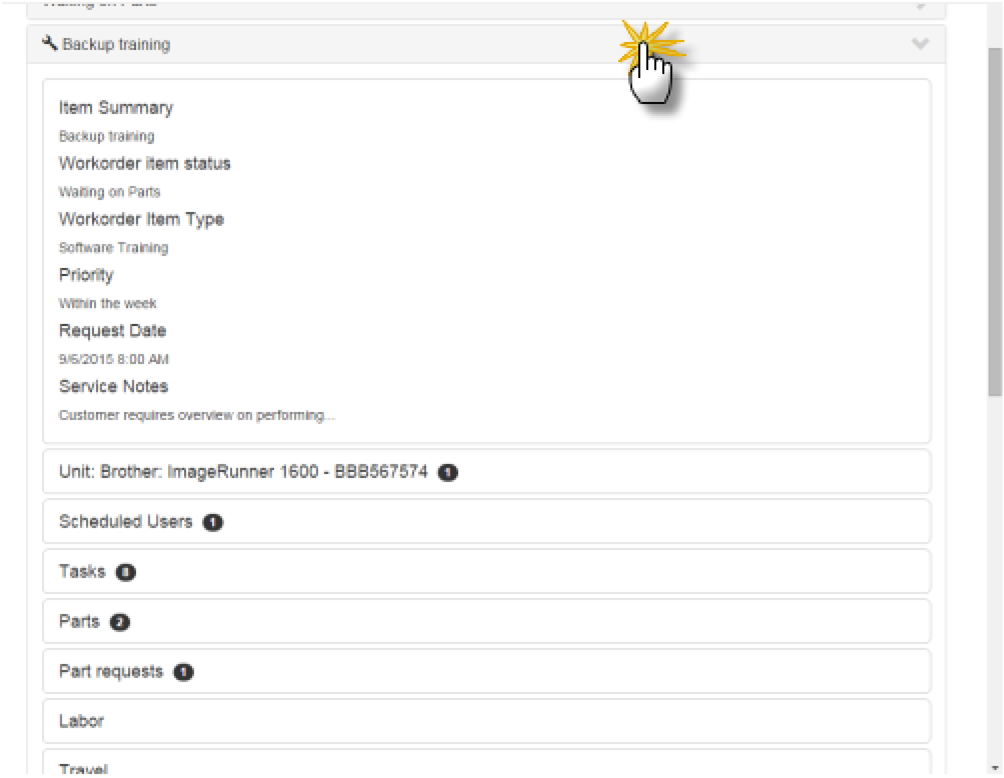
Quick access to view/edit service workorder fields Workorder Status, Close By Date, Service Date, Invoice #, Service Completed, Closed

If viewing a Quote, here is where quote specific fields are displayed

If viewing a PM, here is where PM specific fields are displayed

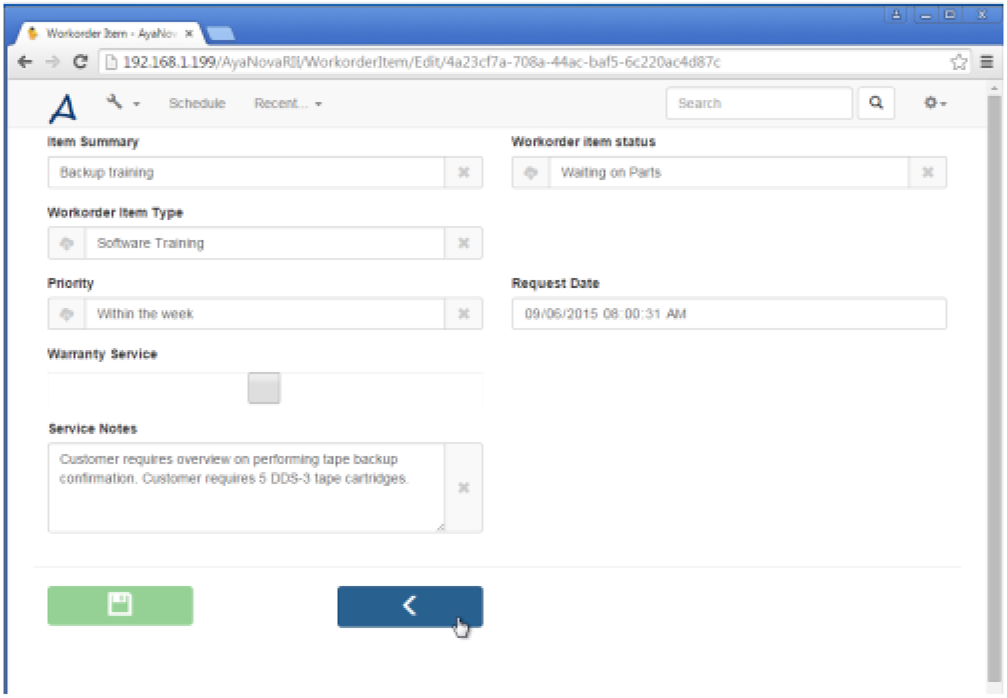


Quick non-editable view of workorder item data, panel access for editing workorder item, panel access for the workorder item subsections (i.e. Parts, Tasks, Labor etc) with identification whether subsections have data or not



If a subsection has records already, the panel will display how many records.
For example with the image above, there is 1 Scheduled Users record, 9 Tasks, 2 Parts, 1 Part request and 0 Labor records saved with this workorder item so far.

Selecting workorder item panel displays that workorder item form for view/edit, where can view/edit workorder item form fields Item Summary, Workorder item status, Workorder item type, Priority, Request date, Warranty service, Service notes



Menu access for workorder item options to create a new workorder item, Copy this workorder item to another workorder for the same client, Move this workorder item to another workorder for this same client, create a +New workorder item for this workorder, Delete this workorder item

Each form has its own menu accessed from the navigation menu at the top

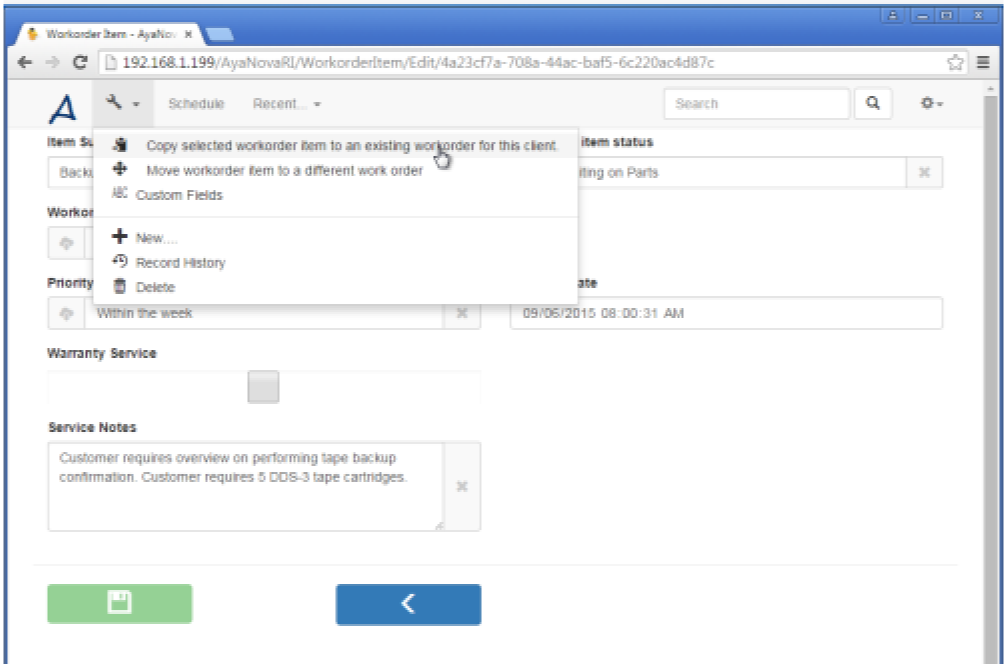
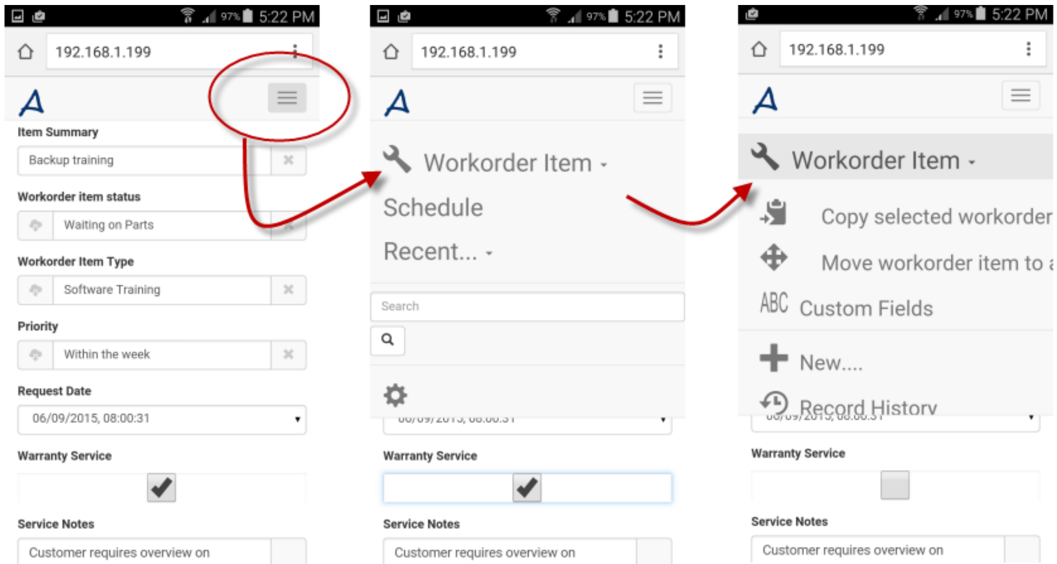
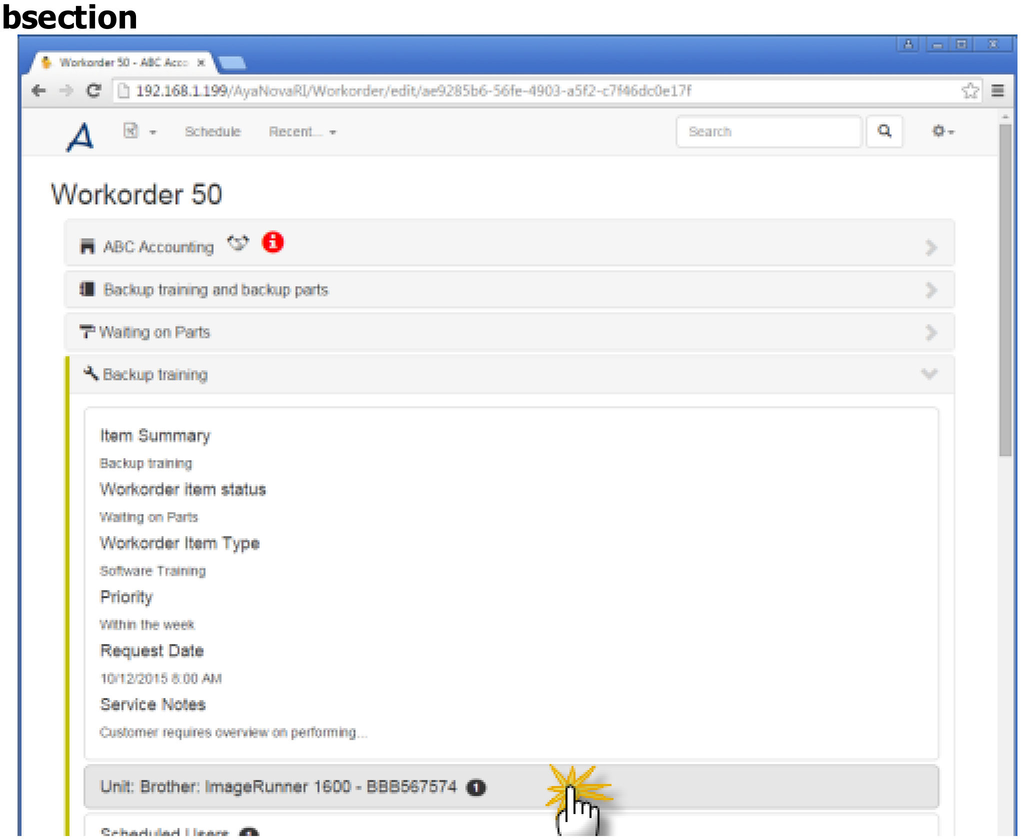


image of accessing a workorder item's menu when viewing that workorder item form.

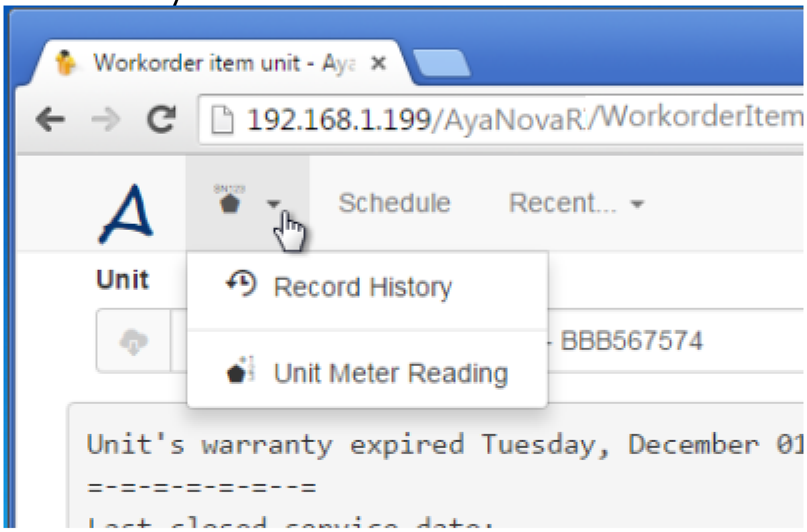
image of accessing the same workorder item's menu when viewing that workorder item form via a smaller screen device



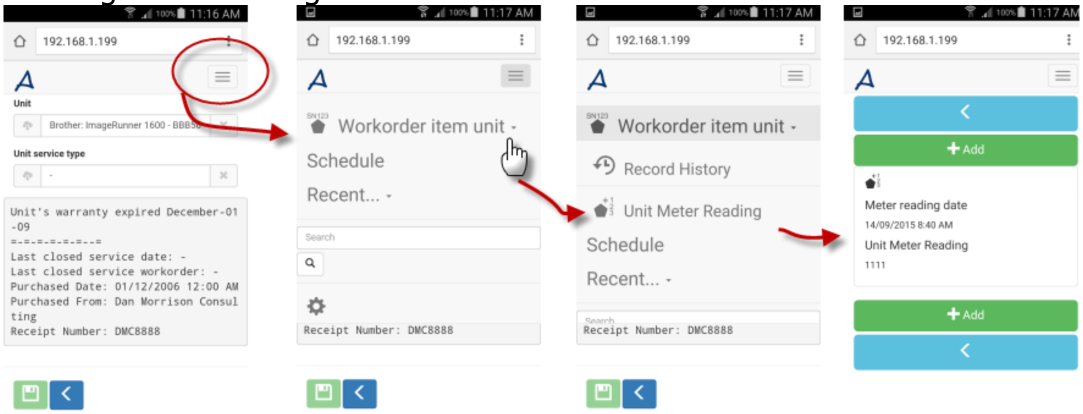
Selecting Workorder Item Unit panel header accesses that Unit subsection



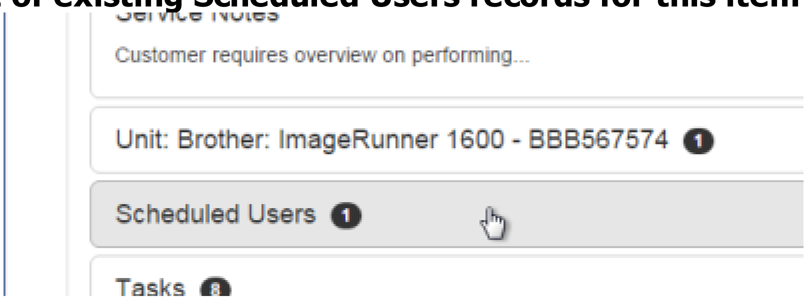
Menu access for the saved selected Unit to view/enter Meter Reading, view Record History



Example image of menu access for saved selected Unit to view/enter Meter Reading when viewing via small screen device



Selecting workorder item Scheduled Users panel header accesses the list of existing Scheduled Users records for this item



Displays list of existing Scheduled Users records for this workorder item, +Add a new Scheduled User record, select an existing record to view/edit, return to the workorder

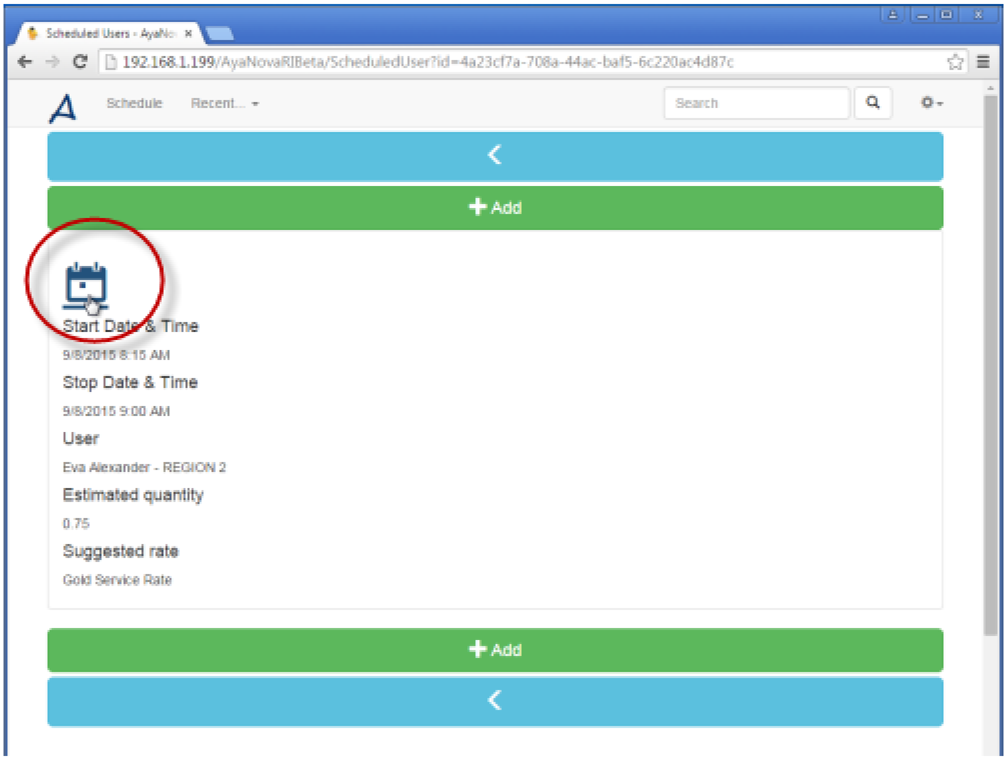
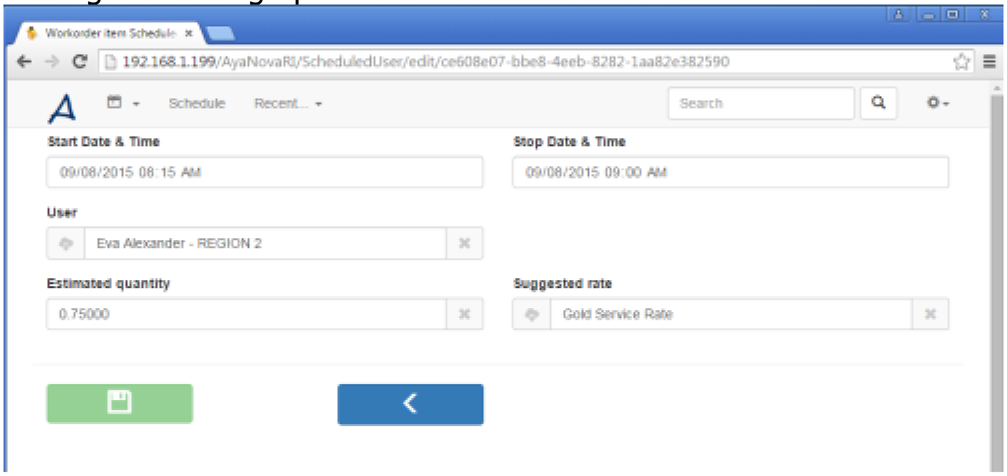
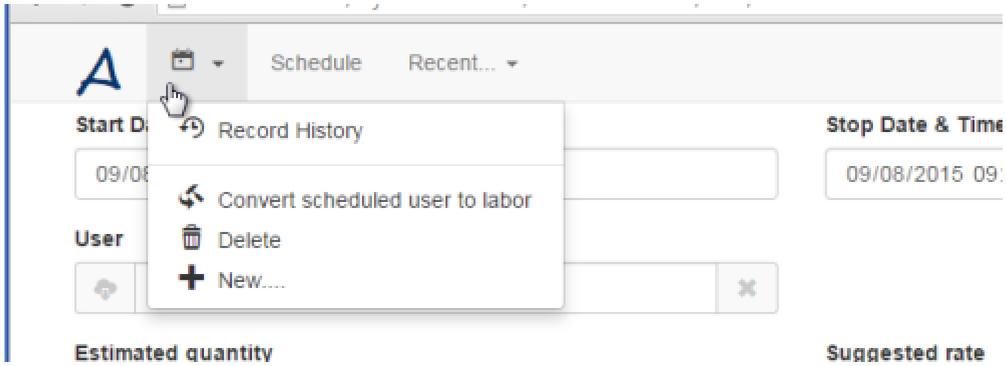


image is of list showing a single Scheduled User record, select the hyperlink image to view that record's form

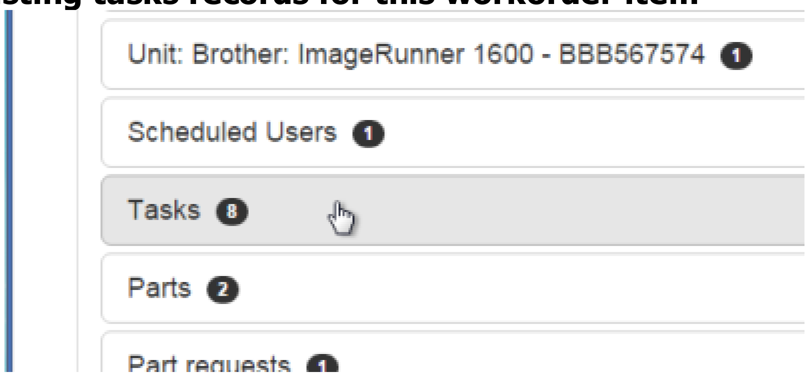
Selecting an existing opens to that Scheduled Users record



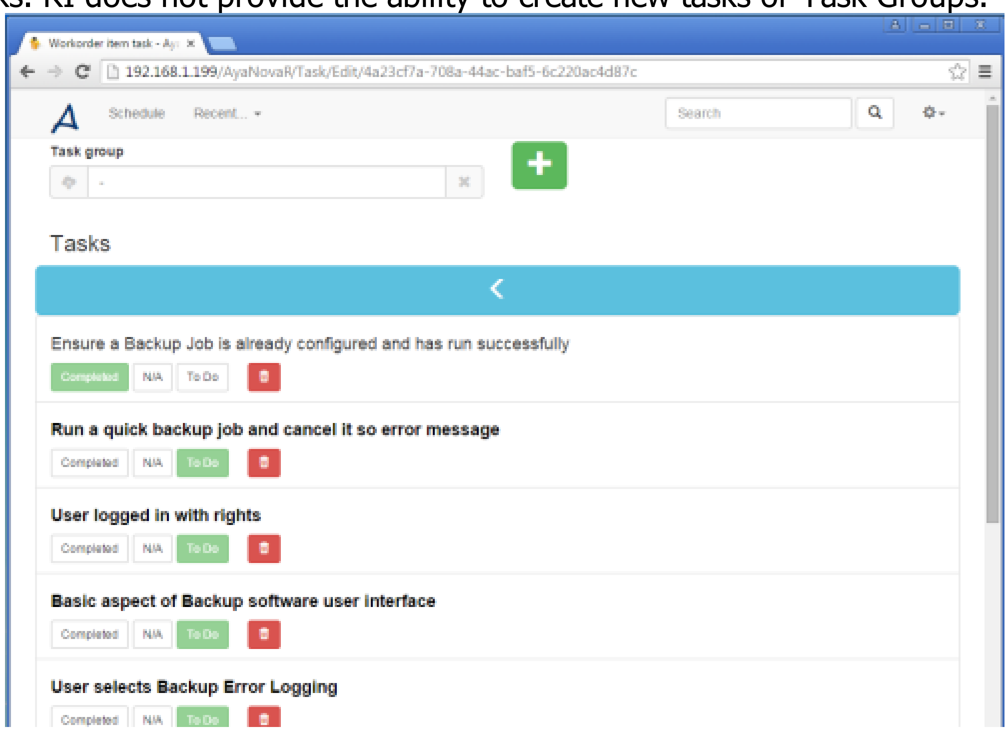
Menu access for Scheduled User record to convert scheduled user record to Labor record, to view Record History, to create a +New Scheduled User record, to Delete existing Scheduled User record



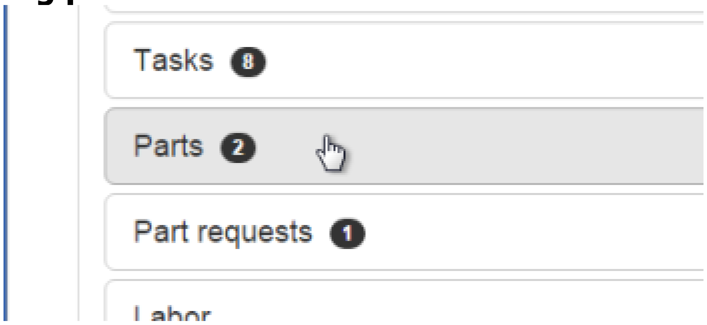
Selecting workorder item Tasks panel header accesses the list of existing tasks records for this workorder item



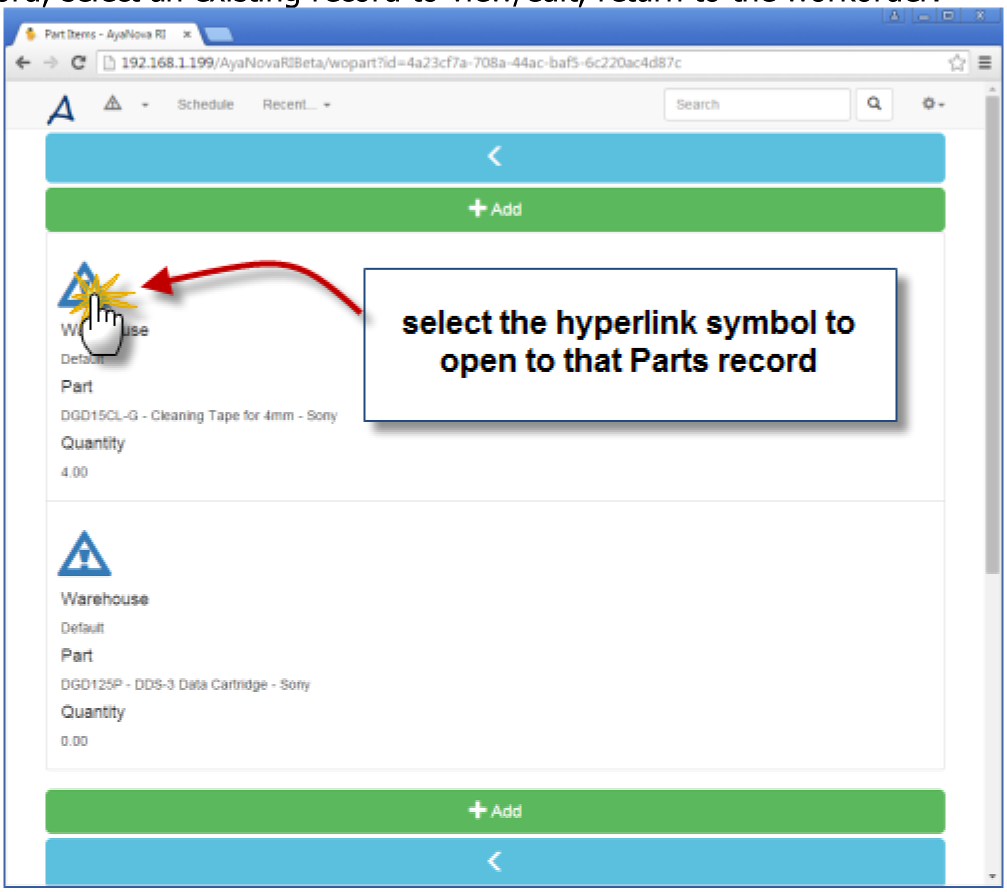
Displays list of existing tasks for this workorder item where can add tasks of an existing Task Group, edit status of existing tasks, and delete existing tasks. RI does not provide the ability to create new tasks or Task Groups.



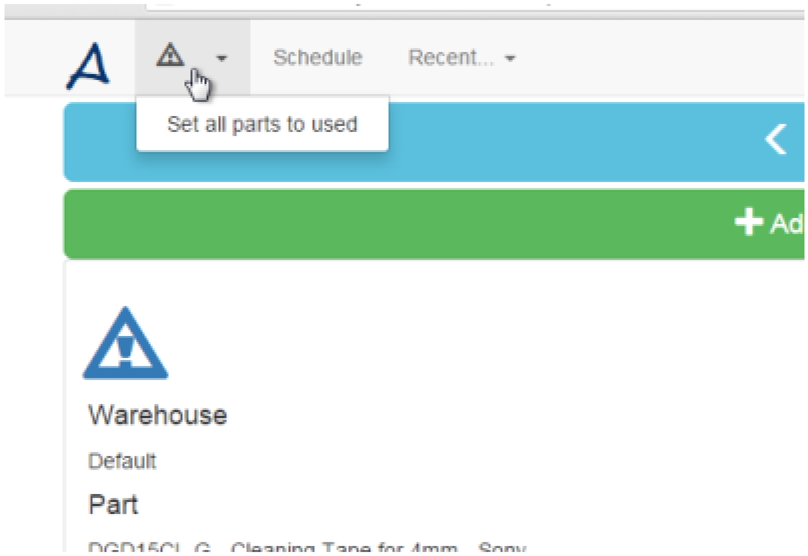
Selecting workorder item Parts panel header accesses the list of existing parts records for this workorder item



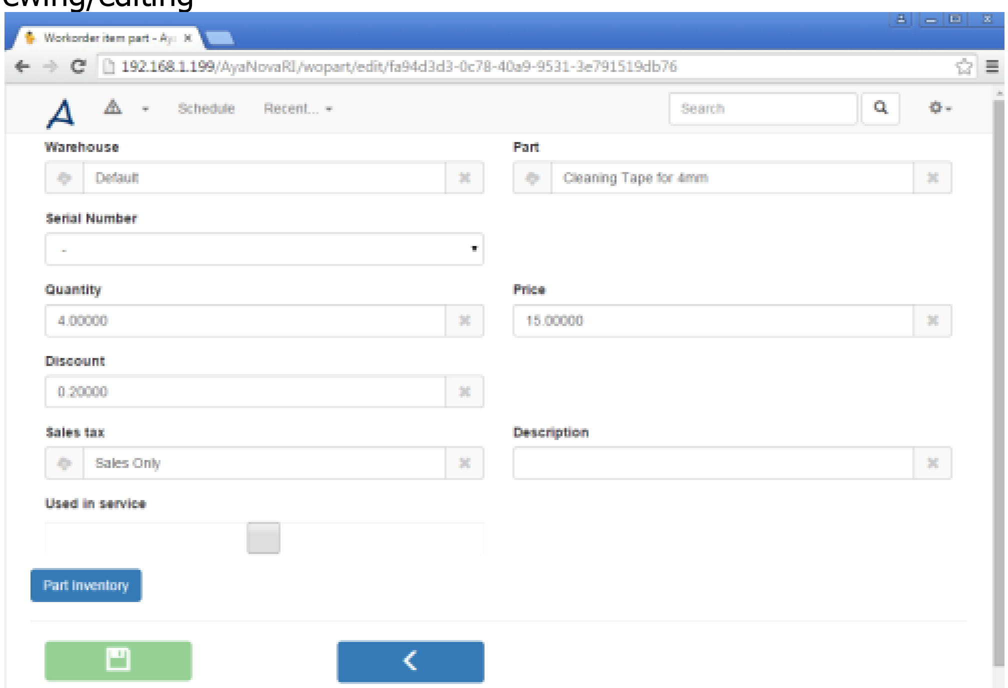
Displays list of existing Parts for this workorder item, +Add a new part record, select an existing record to view/edit, return to the workorder.



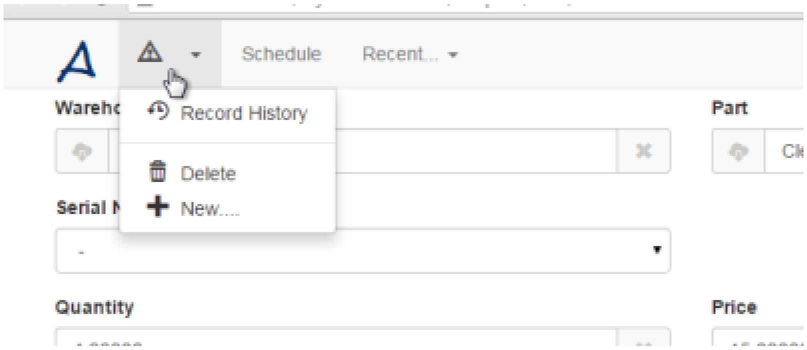
Menu access for the list of Parts records of Set all Parts to Used



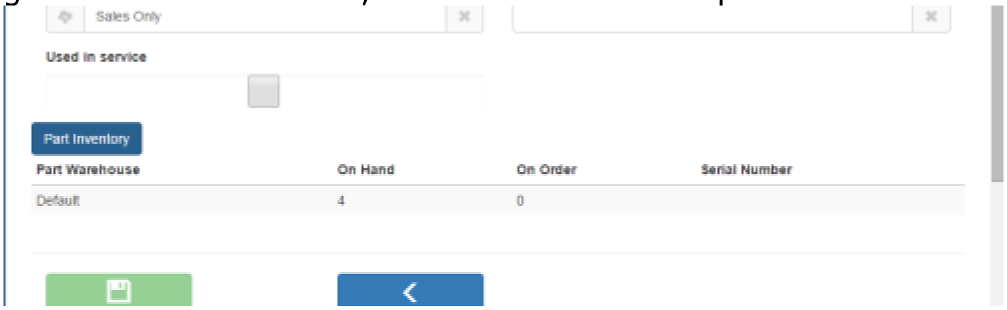
Select +Add to create a new Parts record for this workorder item
Selecting an existing Parts record (select the hyperlink image on the list of part records for this workorder item) opens to that Parts record form for viewing/editing



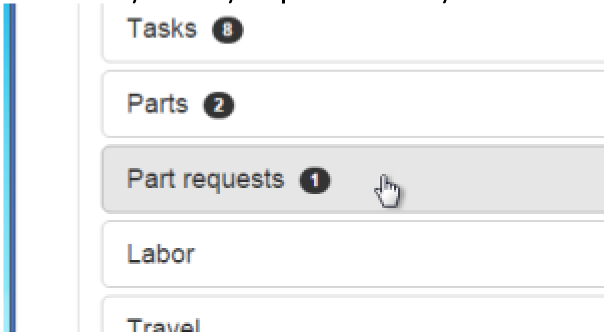
Menu access for Parts record to view Record History, to create a new Parts record for this workorder item, to Delete existing part record in this workorder item.

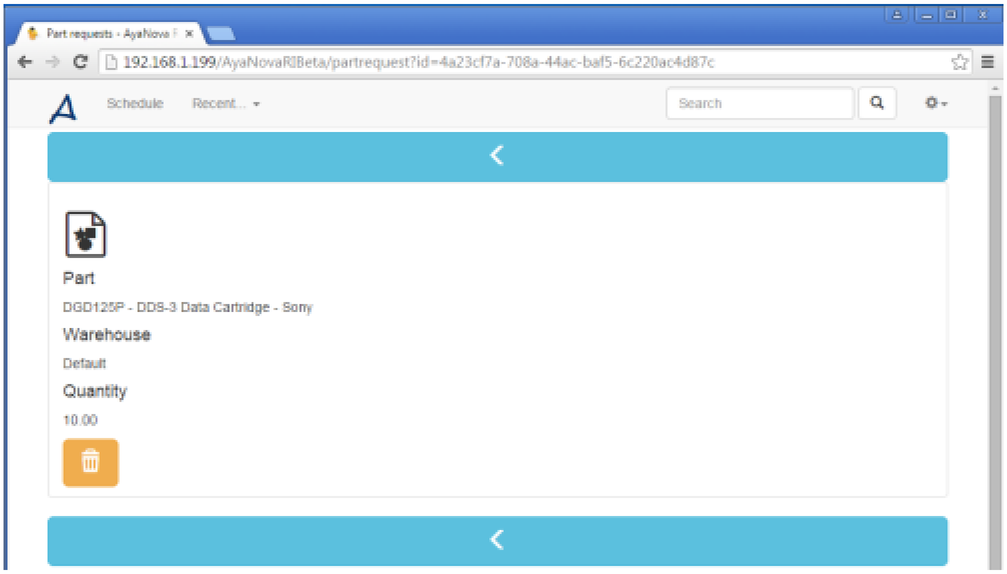


Once a part is selected and the record saved, a Part Inventory button is made available so you can see at a glance this part's inventory at the time this form was first viewed.
If you set this part to Used in Service and save, due to the nature of web applications (data is not updated from server until specifically requested) be aware that the Part Inventory is NOT updated until you go back to the workorder, and then back into that part record

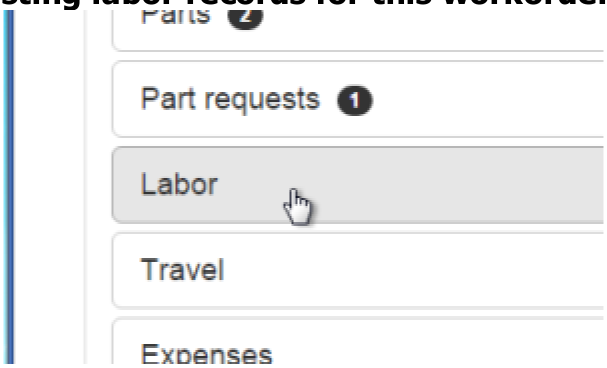


Selecting workorder item Part Requests panel header displays the list of existing Part requests records for this workorder item including identifying each existing Part Request's quantity, warehouse, ordered date, PO #, expected date, received date.

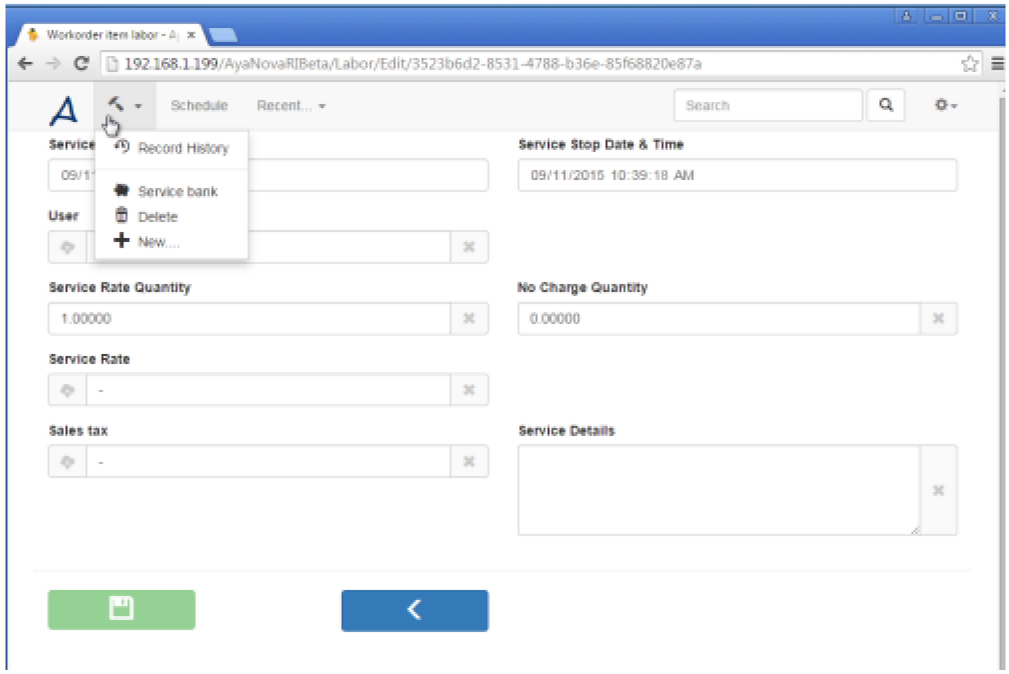




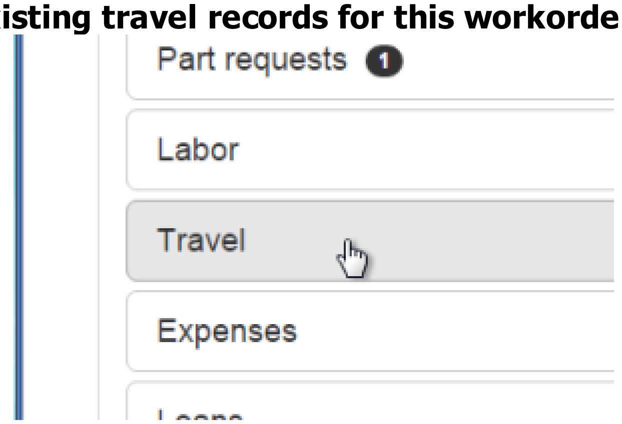
Selecting workorder item Labor panel header accesses the list of existing labor records for this workorder item



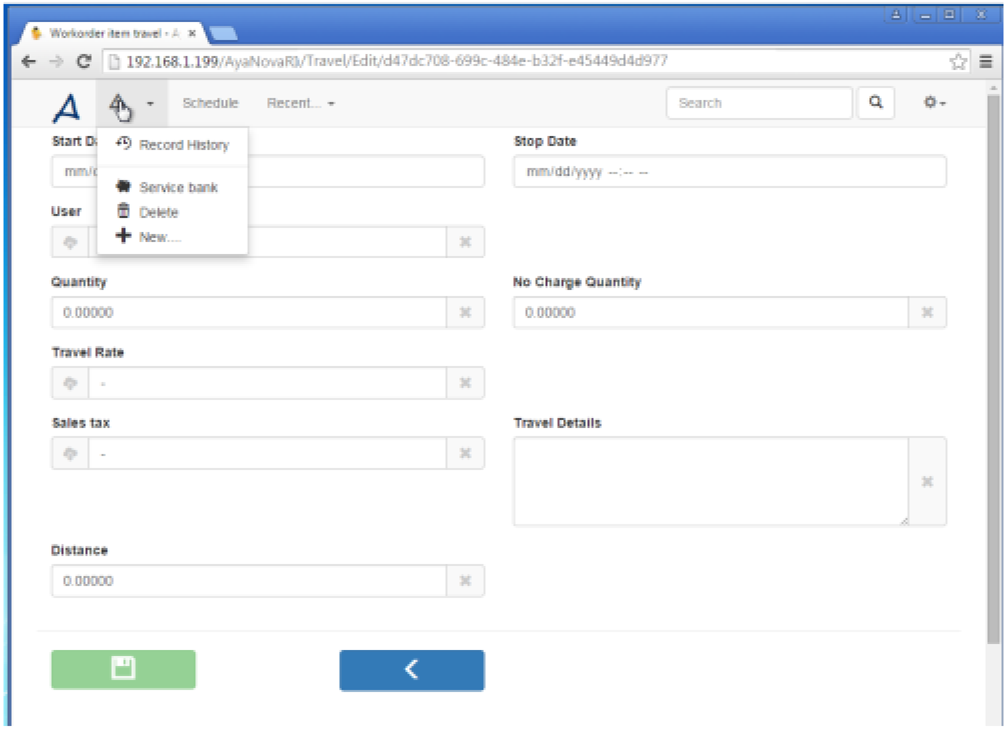
Displays list of existing labor for this workorder item, +Add a new labor record for this workorder item, select an existing record to view/edit, return to the workorder.
Click on +Add to create a new Labor record.
Selecting an existing opens to that labor record form for viewing/editing
  Menu access for Labor record to apply to Banked Service, to view Record History, to create a new labor record, to Delete existing labor record



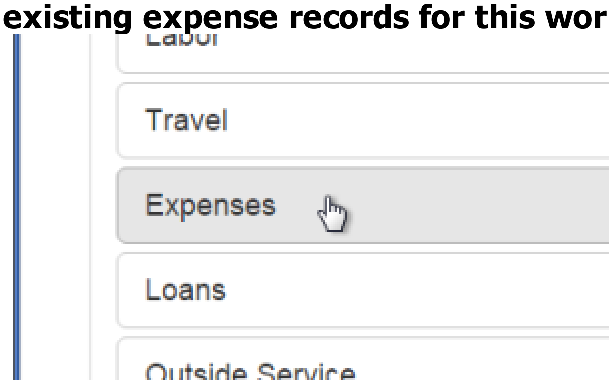
Selecting workorder item Travel panel header accesses the list of existing travel records for this workorder item



Displays list of existing travel for this workorder item, +Add a new travel record, select an existing record to view/edit, return to the workorder.
Click on +Add to create a new Travel record.
Selecting an existing opens to that travel record form for viewing/editing
Menu access for Travel record to apply to Banked Service, to view Record History, to create a new travel record for this workorder item, to Delete existing travel record



Selecting workorder item Expenses panel header accesses the list of existing expense records for this workorder item

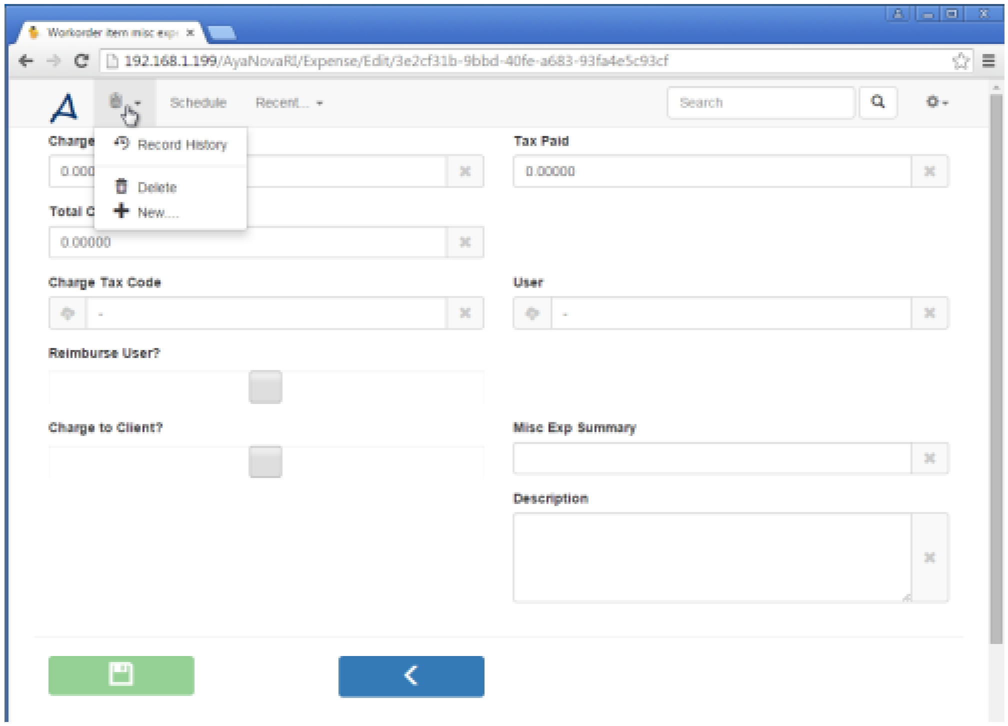


Displays list of existing expenses for this workorder item, +Add a new expense record for this workorder item, select an existing record to view/edit, return to the workorder.

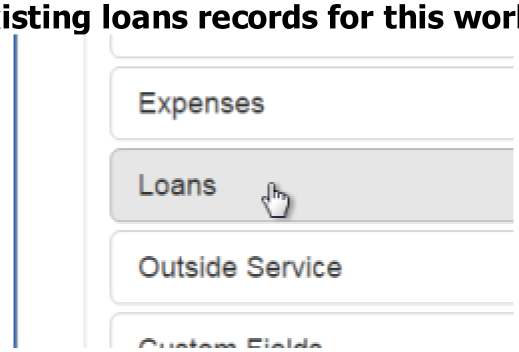
Click on +Add to create a new Expenses record.

Selecting an existing opens to that expense record form for viewing/editing

  Menu access for Expense record to view Record History, to create a new expense record for this workorder item, to Delete existing expense record

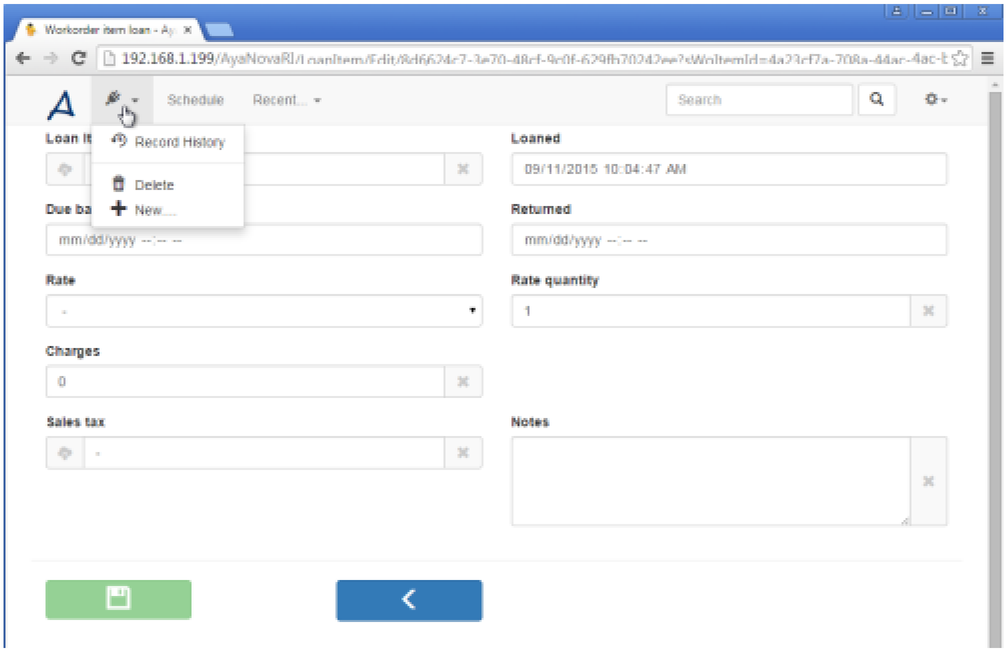


Selecting workorder item Loans panel header accesses the list of existing loans records for this workorder item

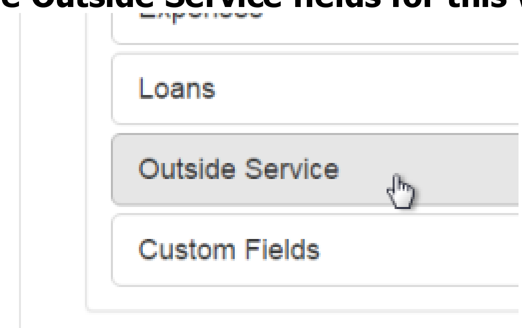


Displays list of existing loans for this workorder item, +Add a new loans record for this workorder item, select an existing record to view/edit, return to the workorder.
Click on +Add to create a new loans record.
Selecting an existing record by its hyperlink symbol opens to that loans record form for viewing/editing

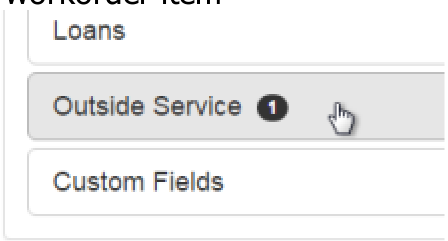
Menu access for Loans record to view Record History, to create a new loans record for this workorder item, to Delete existing loans record

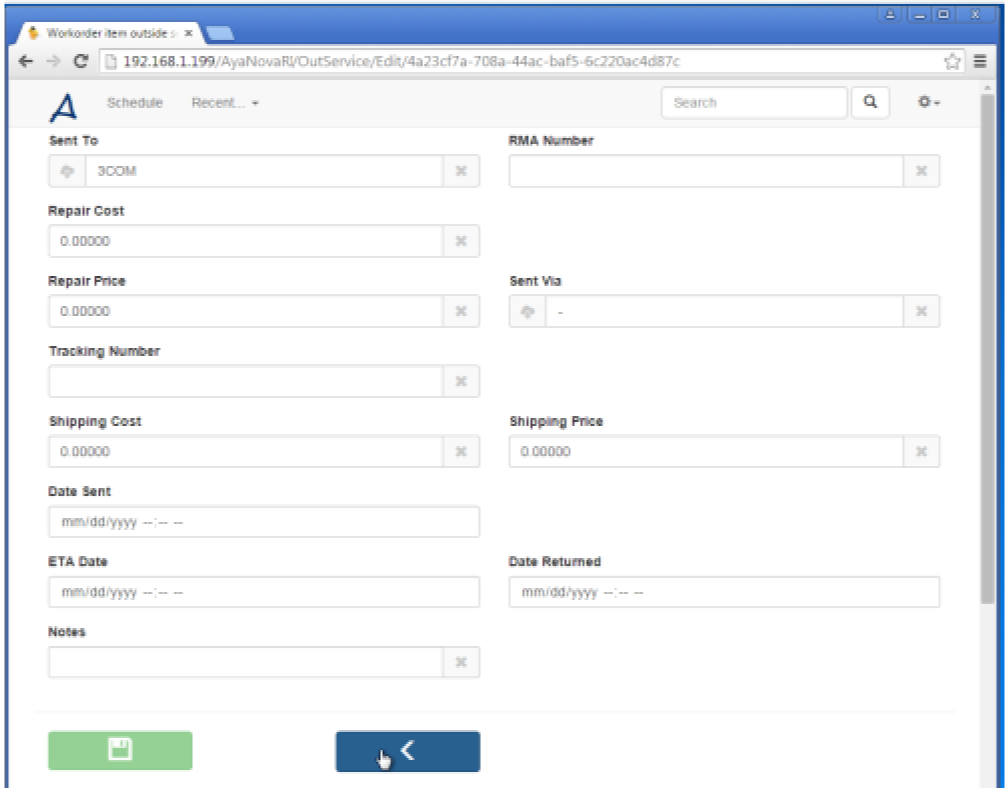


Selecting workorder item Outside Service panel header accesses the Outside Service fields for this workorder item

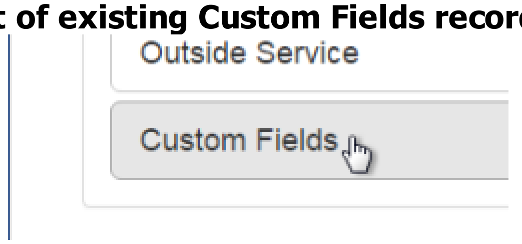


If Outside Service has at minimum the Sent To: datafield selected with a manufacturer or repair center, then Outside Service panel will show the number 1 to indicate that data is entered in this Outside Service record for this workorder item





Selecting workorder item Custom Fields panel header accesses the list of existing Custom Fields records for this workorder item



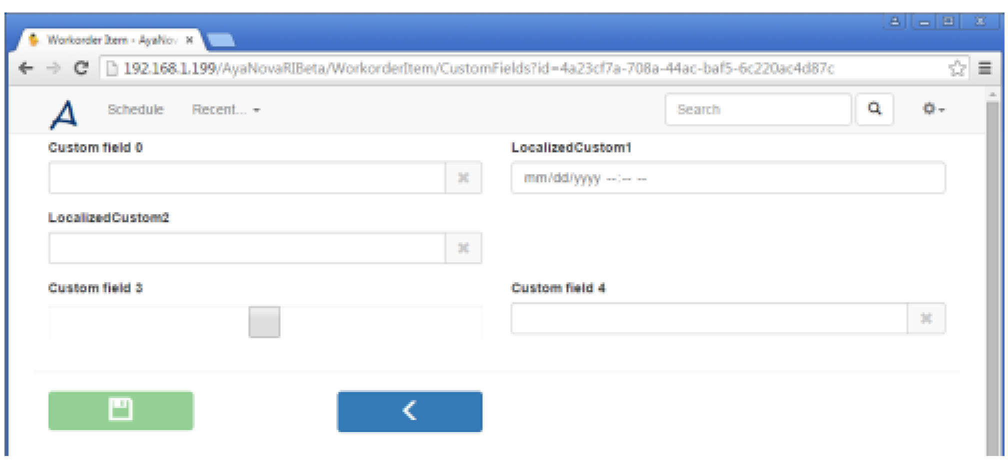
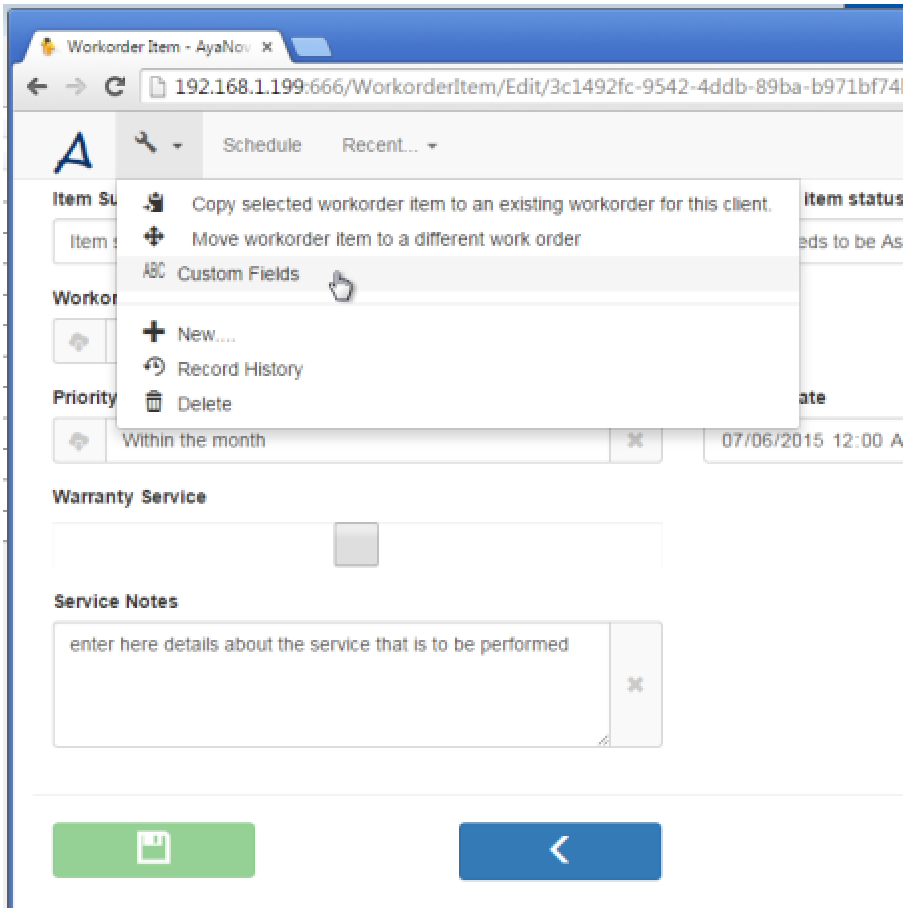


image displayed will not neccesarily be what your Custom fields datatype or localization is set to.

Custom Fields for a workorder item via RI can also be accessed from your RI's workorder item menu



Refer to [Custom Field Designer]() for more details on how to setup Custom Fields so they display whether logged in via desktop AyaNova interface, WBI or RI

8.8.11.13 RI Print & Export to file

Via RI, you can print preview any of your service workorder reports, print the report, and/or export the report to a file.

[Print preview a service workorder report]()
[Print a service workorder report]()
[Export a service workorder report to a file]()

Print preview a service workorder report

1. From the service workorder's menu, select menu option **Print**

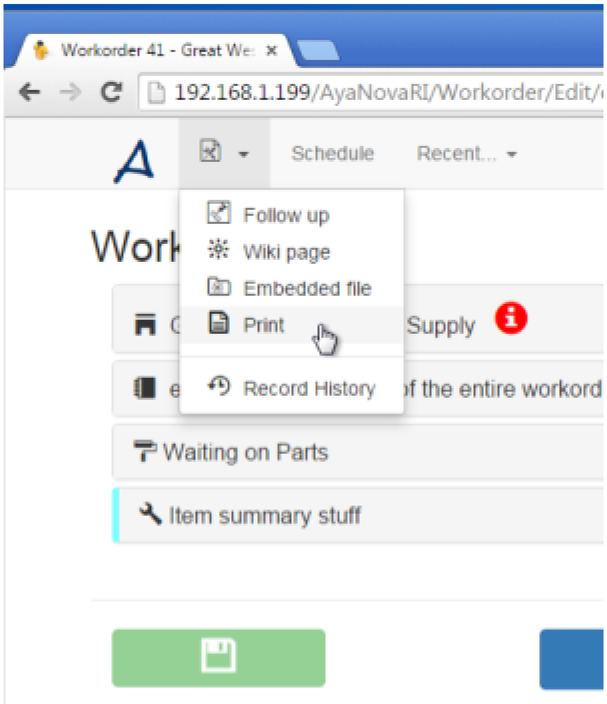


image of RI service workorder menu selection via a desktop web browser

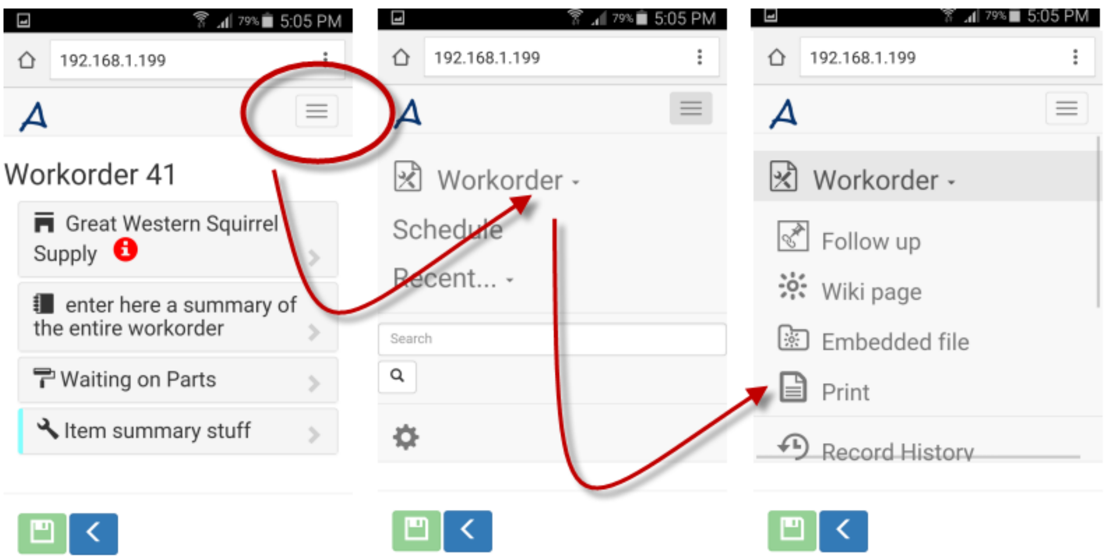
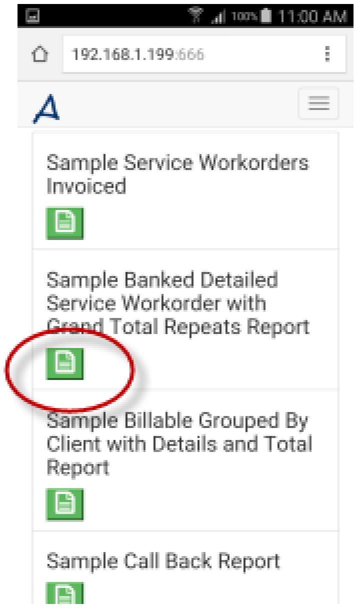


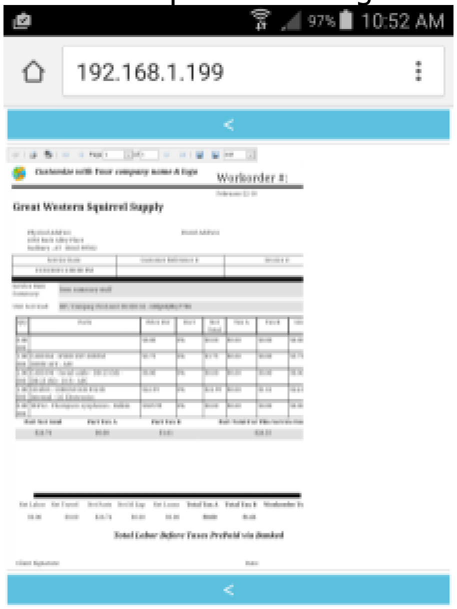
image of RI service workorder menu selection via mobile device

2. Your list of available service workorder report templates will be listed. Select the report you wish to view.



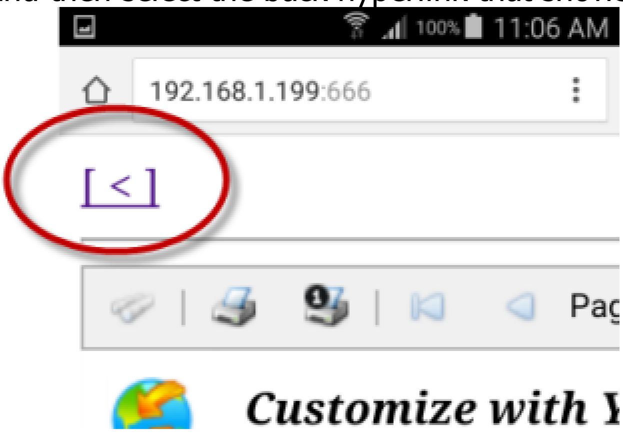
3. The report will show. Default size will adjust based on your devices screen size.

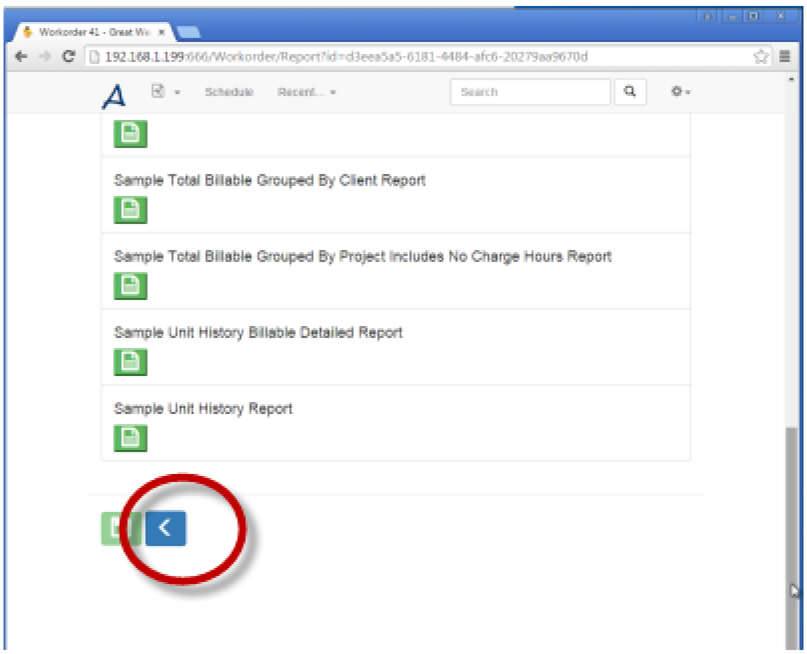
For example on a small screen device, the entire page will display so obviously it will be small to view. Just use your fingers as you normally would to expand the image.



**When a report is selected for viewing, RI will return you to the report template selection page within 5 minutes after showing the report preview, to clear the report temp files from cache.

If you are returned to the report template selection page, and you need to preview or print or export the report, just select the report again, this time previewing or printing or exporting before the 5 minutes elapse.
4. To return to the service workorder, select the print preview back hyperlink, and then select the back hyperlink that shows with your list of available reports.





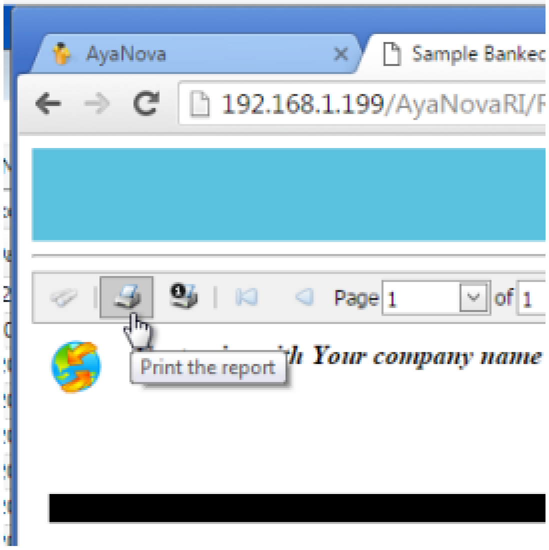
Print a service workorder report

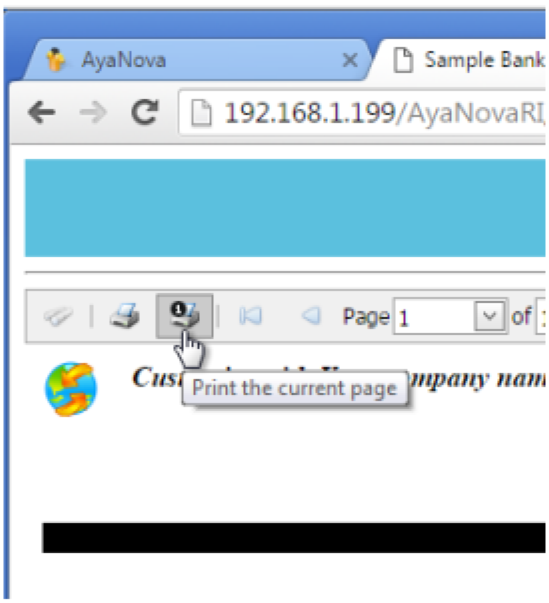
1. From the service workorder's menu, select select menu option **Print** (see above for image examples)

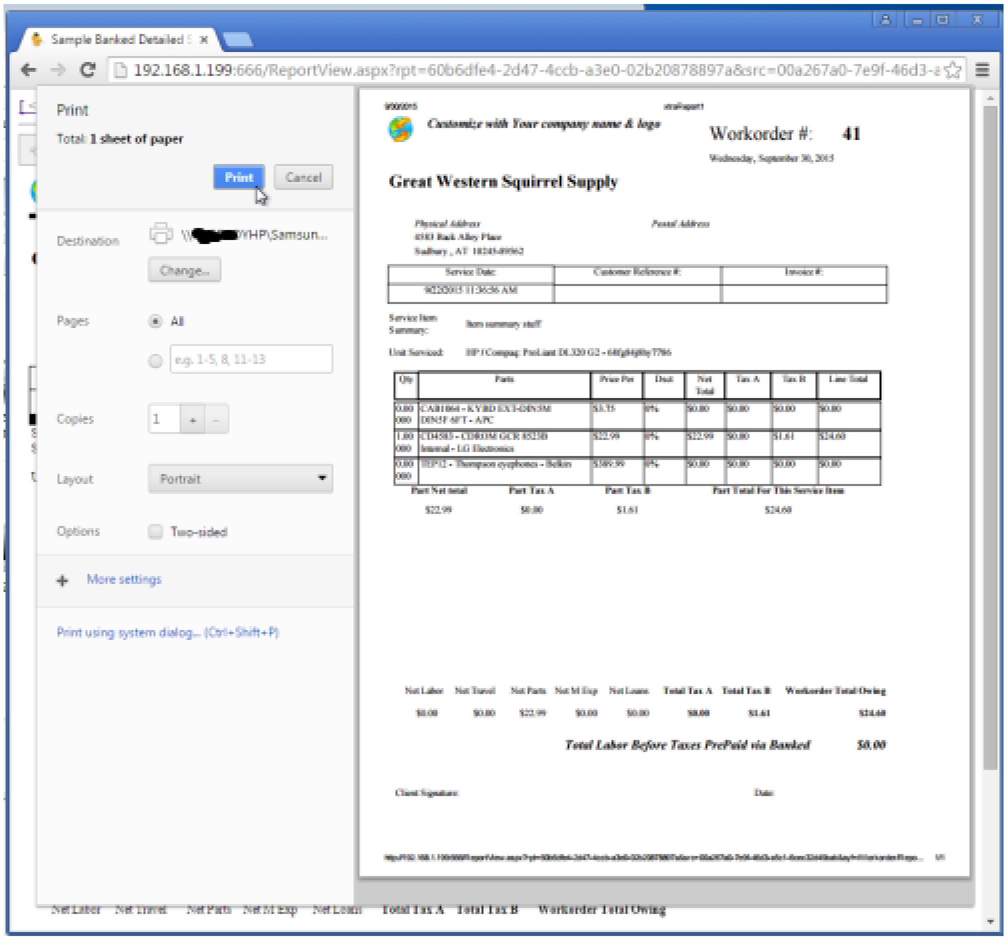
2. Your list of available service workorder report templates will be listed. Select the report you wish to view (see above for image examples)

3. The report will show (see above for image examples)

4. Select **Print** or **Print the current page**, depending which you want to do. The job will than be sent to your device's printer driver.

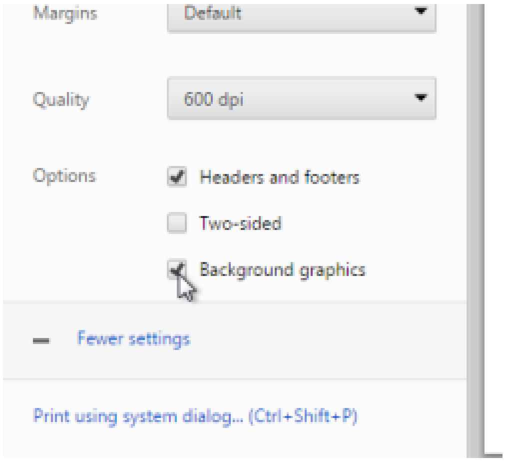






**Cache will automatically clear itself ** When a report is selected for viewing, RI will return you to the report template selection page within 5 minutes after showing the report preview, to clear the report temp files from cache.
If you are returned to the report template selection page, and you need to preview or print or export the report, just select the report again, this time previewing or printing or exporting before the 5 minutes elapse.

Logos and color may not show until settings are changed in your browser Some browsers, such as Chrome, will not show colors, logos, images etc in a print job unless specifically enabled to do so. If you go to print to your printer and realize its preview does not show your logo or other aspects, check to see what settings are set such as if Background images are checkmarked. MAKE SURE IF YOU DO checkmark, to reload the report AGAIN and select to Print again after checkmarking!



5. To return to the service workorder, select the print preview back hyperlink, and then select the back hyperlink that shows with your list of available reports. (see above for image examples)

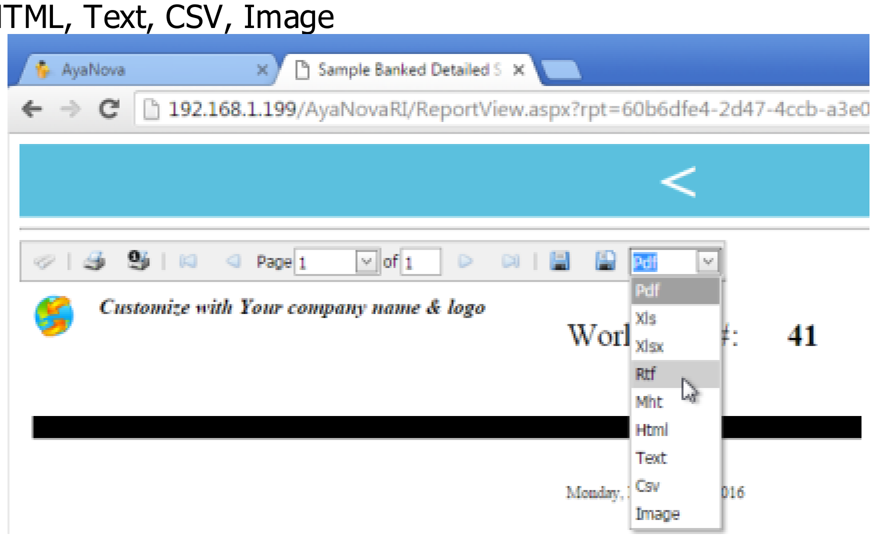
Export a service workorder report to a file

1. From the service workorder's menu, select select menu option Print (see above for image examples)

2. Your list of available service workorder report templates will be listed. Select the report you wish to view (see above for image examples)

3. The report will show (see above for image examples)

4. Select what type of file you want exported to - i.e. PDF, XLS, XLSX, RTF, HTML, Text, CSV, Image



5. Select either to **Export a report and save to disk**

**When a report is selected for viewing, RI will return you to the report template selection page within 5 minutes after showing the report preview, to clear the report temp files from cache.
If you are returned to the report template selection page, and you need to preview or print or export the report, just select the report again, this time previewing or printing or exporting before the 5 minutes elapse.

To be able to use **Export a report and show it in a new window be aware that your device must have a program that can view and open that exported file for this to fully work (the saved file will be saved regardless whether can view or not).
For example, if you select XLS and you do not have a program such as MS Excel Viewer on your device, then the file won't open in a new page. The file will still be exported to disk, just won't be able to be opened in a new browser window.

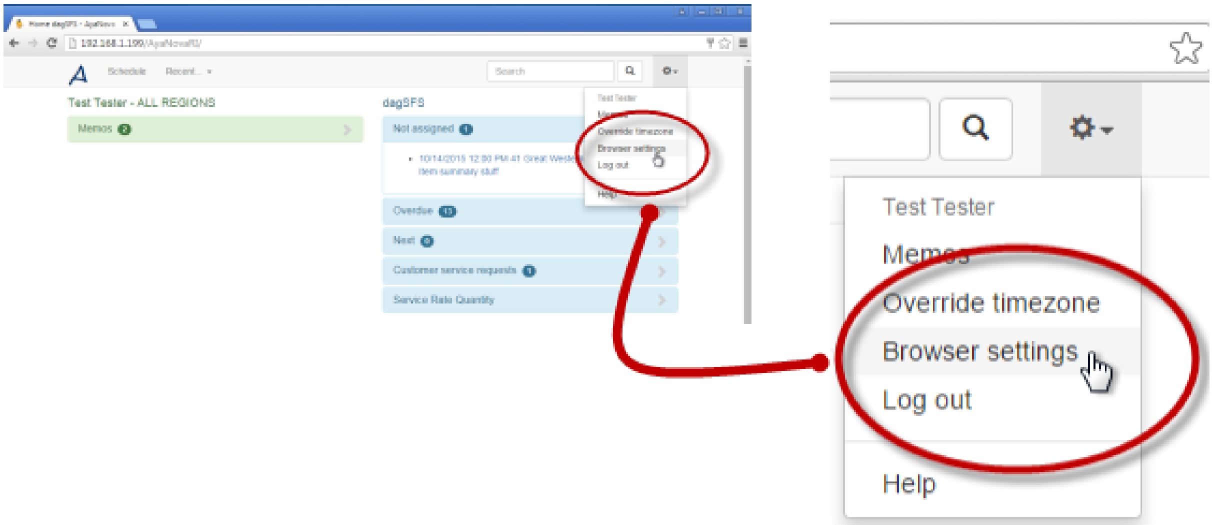
6. To return to the service workorder, select the print preview back hyperlink and then select the back hyperlink that shows with your list of available reports. (see above for image examples)

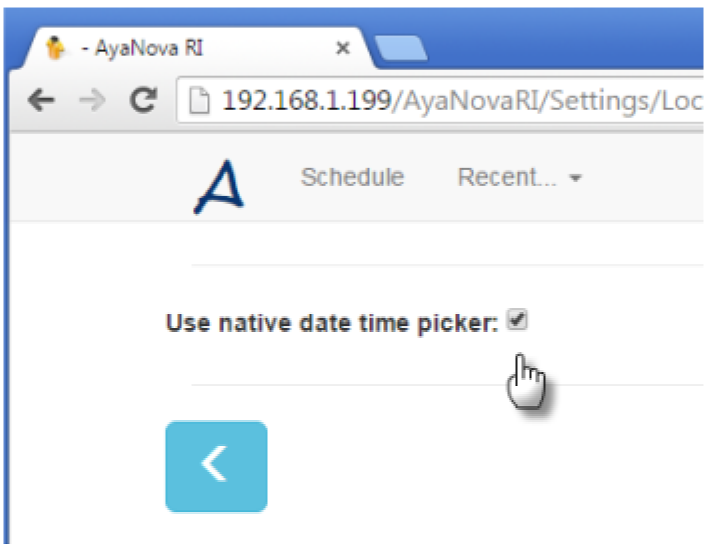
8.8.11.14 RI Browser Settings

Not all web browsers are created equal.

You may find that some web browsers date/time picker may not provide a year selection, may not provide a time selection, may not provide the ability to select AM or PM.
And you may find some web browsers will display a date/time picker very different than the same web browser but on a different type of device.

If your device's web browser does not provide a date/time picker that provides the ability to select all date/time aspects, the suggestion would be to **uncheck** the **Use native date time picker** in the Browser Settings menu option.
When unchecked, RI will force the web browser to use a generic date/time picker component instead.
When checked (the default) RI will use the browsers own date/time picker.





8.8.11.15 Override Timezone in RI

Time zones and their relation to how you have connected to the AyaNova database:

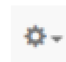
All dates/times in the AyaNova database are stored in GMT (Greenwich Mean Time) format.
How date/times display to the user depends what time they are in relation to GMT.

By default, the time zone of that user's computer is used if connecting via a direct network connection configuration to your AyaNova database.

Whereas if connecting to your AyaNova database via anything else (RI, WBI, MBI, data portal) than the time zone where the IIS server for that RI, WBI, Data Portal, and/or MBI is run on.

If a user is in a different time zone than where the IIS server is set for and the user wants to view date/times based on where he actually is, then:

1. the AyaNova Administrator will want to edit that user's Override TimeZone field in that user's entry screen in the Windows AyaNova application to account for the different time zone

2. **<u>or</u>** the user can edit themselves via RI in their cog area  if have Read/Write to Object.User in their security group.

For example:

• The AyaNova database is configured for network use in an office in California (Pacific Time Zone).
• The time right now is 12:00PM (noon) Pacific Time Zone on November 12 2015 on the server where the AyaNova database resides.

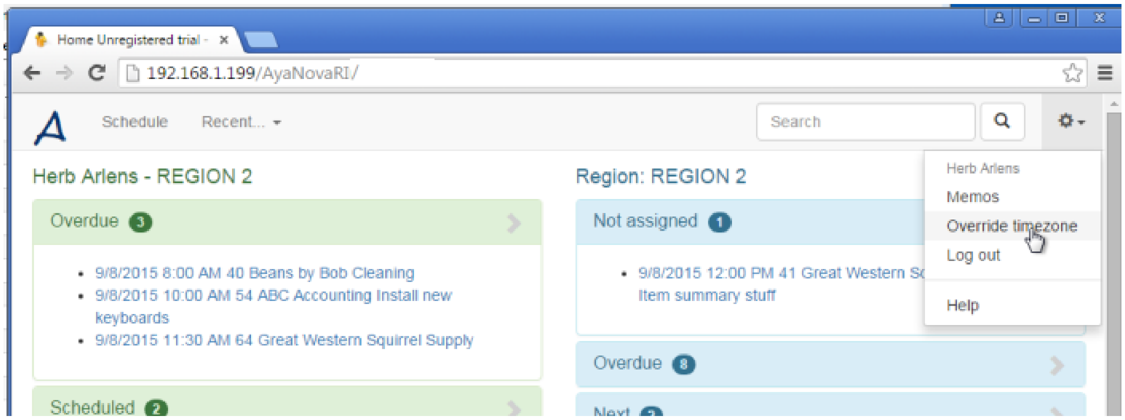
• Bob the dispatcher is connecting to the AyaNova database **from within the local area network** of this office in California using the network SQL connection configuration in his config.txt file. His workstation also says 12:00PM as he is of course on the same time time zone and the same time as the server being in the same local area network.
• Bob's user entry screen field Override TimeZone <u>does not</u> need to be edited as he will be using the same time zone as the server:
  • Bob creates a new workorder and enters the Request Date/Time as today 12:00PM (noon) and saves the workorder.
  • Do note that although Bob has entered 12:00PM into this field, it is actually saved in the AyaNova database as 7:00PM GMT so that it can be converted from GMT to whatever time zone any other user is using.

• Hank is another AyaNova user that connects to this same database, but is located in New York (Eastern Time Zone) where it is 3:00PM right now on his computer (its 12:00PM in California where the server is)
• Hank **connects over the internet** to the AyaNova database by logging in **via RI**
  • Hank views this same just created workorder
  • The Request Date/Time will show as 12:00PM because the IIS server for RI is running on the California server that is using Pacific Time Zone, but he wants to see what the time would be for him in relation to where he actually is.

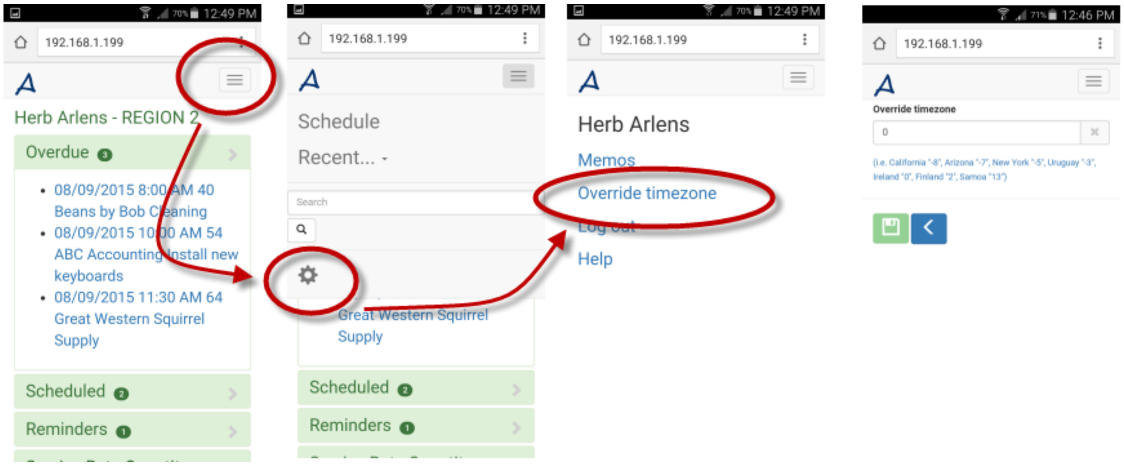
• Hank will want to edit his username's Override TimeZone setting in RI entering and saving -5 (as Standard Time Zone is 5 hours behind GMT at this time of the year) •

NOTE: The security group the user belongs to must have Read/Write access to Object.User to be able to edit the Override TimeZone via RI
NOTE: It is not possible to test editing and saving this setting via RI while using an evaluation database registered to Unregistered trial. Your database must be licensed to your company, whether via temporarily licenses or purchased licenses, to be able to successfully edit and save the Override TimeZone via RI.

wider screen view:



smaller screen view:



8.8.11.16 Global Settings & RI

Due to the nature of a web application, not all Global Settings can be enforced via RI.

NOTE: if you make a change to your Global Settings, to restart your IIS web application so it will be enforced if enforceable.

Global Settings that are enforced that are used with RI:

- *Default service sales tax* - when a new Labor record is created, this default will be selected for its Sales Tax field
- *Default parts sales tax* - when a new Part record is created, this default will be selected for its Sales Tax field
- *Service Template* - when a new service workorder is created via RI, this template will be used automatically. Unless the client or the logged in user has their own preset default service workorder template.
- *Workorder closed status* - when a service workorder is Saved after checkmarked Closed, viewing this workorder you will see that its Workorder Status has been changed to this default.
- *Workorder stale age (minutes)* - presets the Close By Date field of the newly created service workorder.
- *Part display format* - sets how a part is displayed
- *Unit display format* - sets how a unit is displayed
- *User display format* - sets how a users name is displayed
- *Signature Footer, Signature Header, Signature Title* - sets preset text that displays in the Signature form in RI

Global Settings that are not enforceable due to the nature of a web application:

- *Scheduled / Labor Default Minutes*
  - When using the AyaNova desktop interface, when you tab to the next field after entering a service workorder Scheduled Users or Labor's Service Start Date & Time, the Service Stop Date & Time will be automatically populated based on this Global Setting.
  - Please note that when using RI, RI is not capable of automatically populating while you are in the form. Instead, edit the Service Stop Date & Time as you need it.
  - **NEW FOR RI ONLY: Leave the Stop Date & Time empty and when you save this record via RI, RI will fill in the Stop Date & Time for you** based on this Global Setting
    - for example:
    - Your Global Settings for your Scheduled/Labor Default Minutes is set to 75.
    - When you create a Scheduled Users record via RI, enter in the Start Date & Time of Sept 23 2015 10:00AM
    - Save, leaving the Stop Date & Time empty.
    - You will notice that as soon as you save, the Stop Date & Time is populated with 75 minutes after the Start Date & Time, populated to Sept 23 2015 11:15AM
- *Scheduled Default Time*

- o When using the AyaNova desktop interface, when you select the date of a Scheduled Users record, this default setting will be applied automatically for the Start Time.
- o Please note that when using RI, RI is not capable of automatically filling in the time as the field is a combined field of date and time. Instead, edit the Time as you need it.

• *Travel Default Minutes*

- o When using the AyaNova desktop interface, when you tab to the next field after entering a service workorder Travel's Start Date & Time, the Travel Stop Date & Time will be automatically populated based on this Global Setting.
- o Please note that when using RI, RI is not capable of automatically populating while you are in the form. Instead, edit the Travel Stop Date & Time as you need it.
- o **NEW FOR RI ONLY: Leave the Stop Date & Time empty and when you save this record via RI, RI will fill in the Stop Date & Time for you** based on this Global Setting

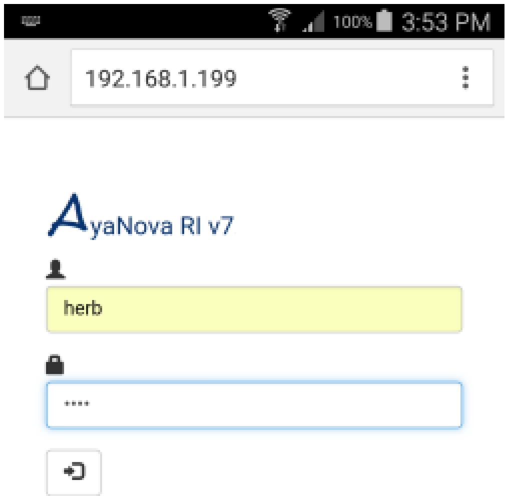
8.8.12 RI How do I...?

8.8.12.1 Create a new workorder / quote / PM via RI

- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to create and view workorder records, and view client records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

To create a new workorder, either do so via the menu option for an existing client or the menu option for an exiting unit.
In this tutorial we will follow the steps for creating a new service workorder for an existing client.

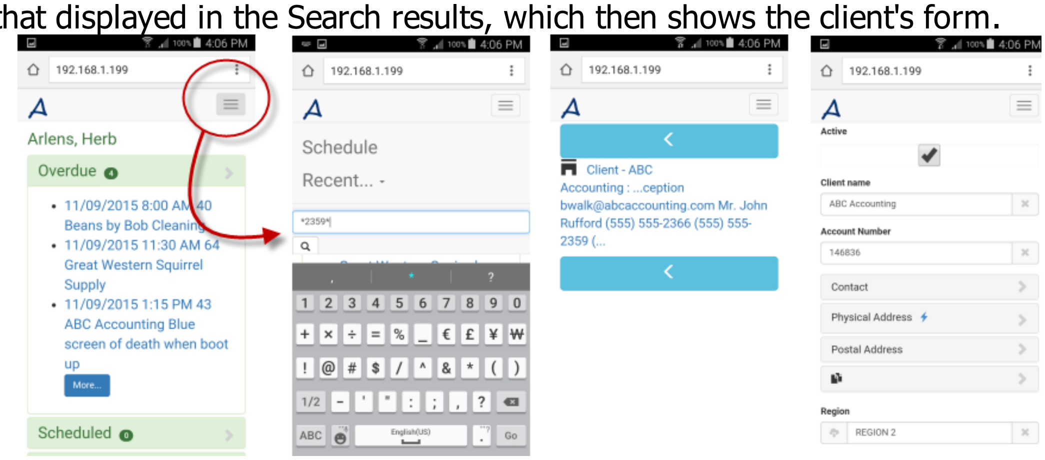
1. Enter your URL for your RI that connects to your AyaNova database
2. Log into your AyaNova database via your RI



3. Go to the client record of the client that you want to create the workorder for

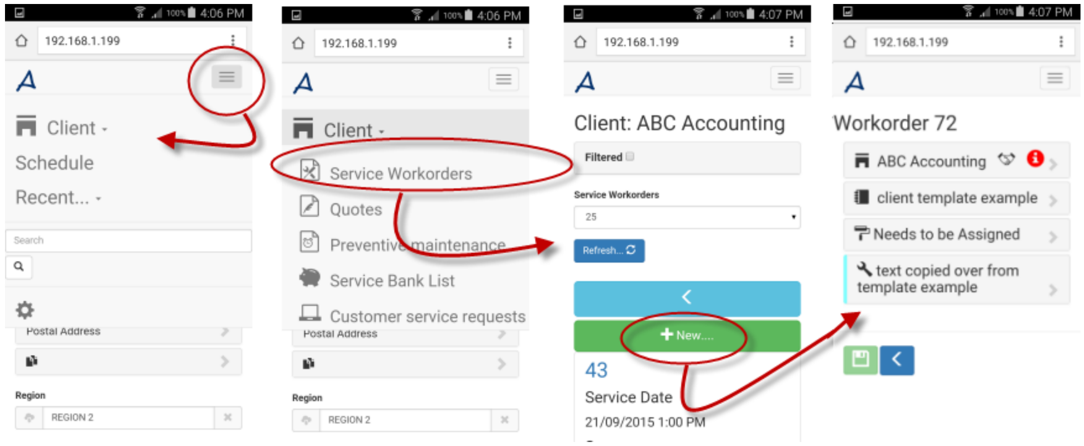
Either via Recent... or via Search results

Below is example of via Search results. In this example, we entered in the wildcard *2359 as the clients phone number, selected the client record that displayed in the Search results, which then shows the client's form.



If the client is not yet an entered record in your AyaNova database (you can't find it via Search), that just means you just need to create it! Create a new client by viewing an existing client, select its menu +New or select its menu Duplicate, edit as needed, and save.

4. Now select the client's menu, selecting **Service Workorders**
5. List of existing service workorders display for this client
6. Select **+New**



7. New service workorder for this client is created and saved for you. Now edit as needed. Don't forget to save!

8.8.12.2 Add a serialize Part to workorder via RI

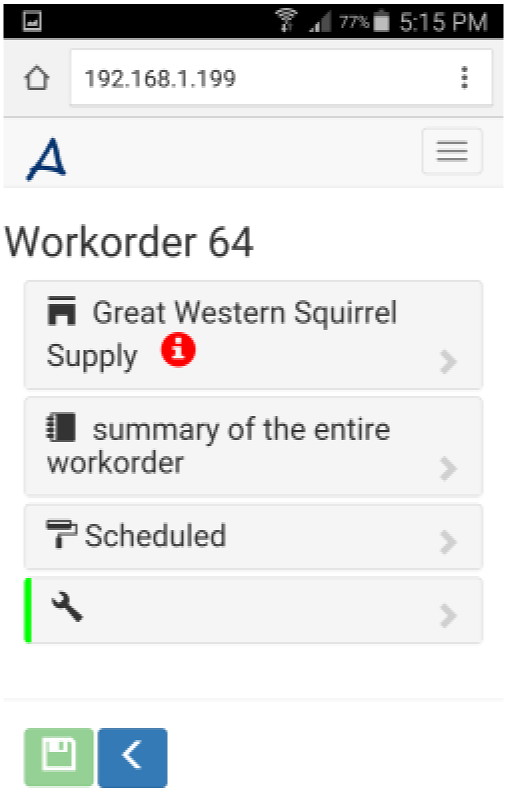
- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit service workorder records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

In this tutorial example we will walk through adding a serialized part to your workorder.

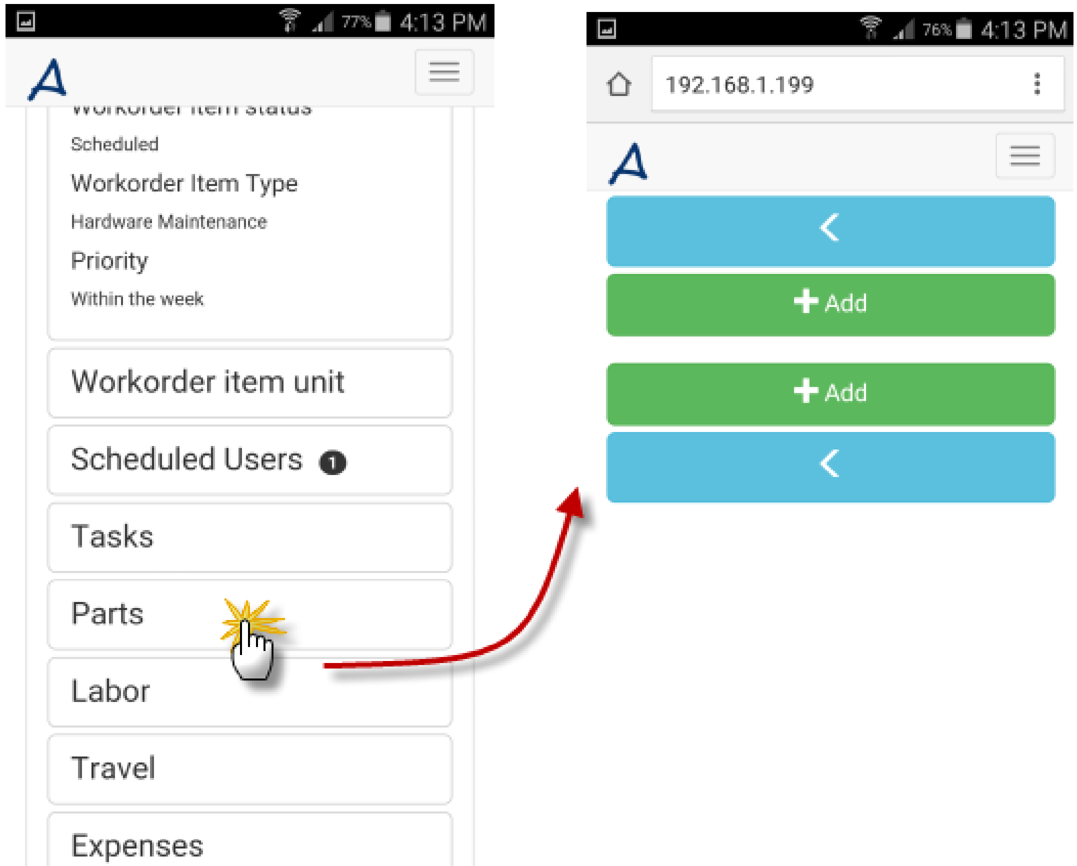
1. We will assume that you have logged in via your RI as a user that has rights to view and edit service workorder records.

2. Open a service workorder to its form. In our example, we will open service workorder 64.

You might select via your Dashboard, or via Recent... or via Search. Up to you!

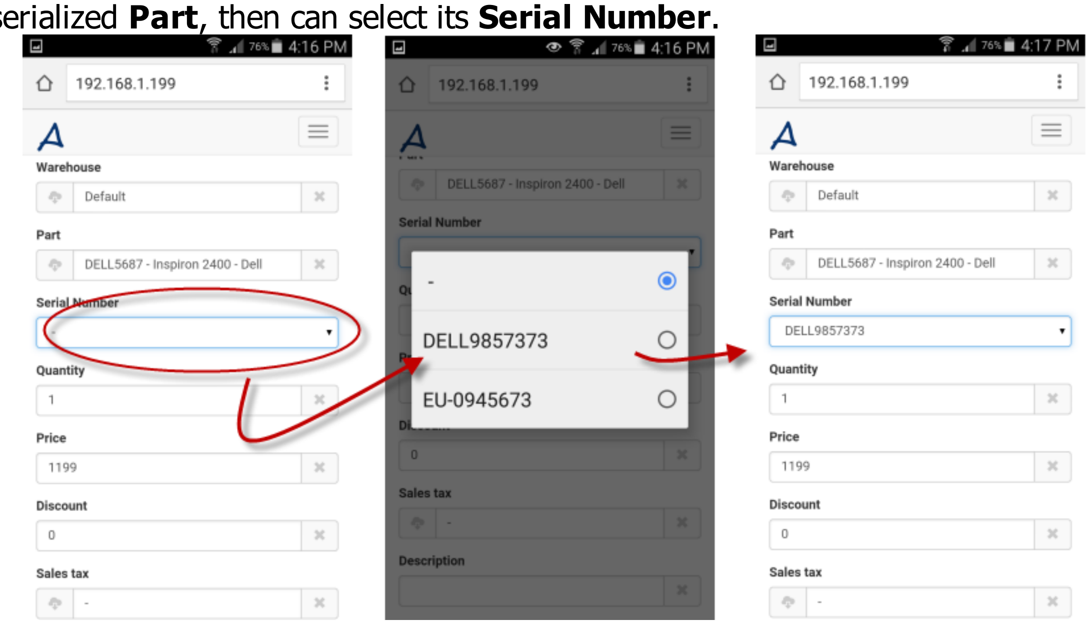


3. Drill down to the **Parts** subsection of the workorder item and select



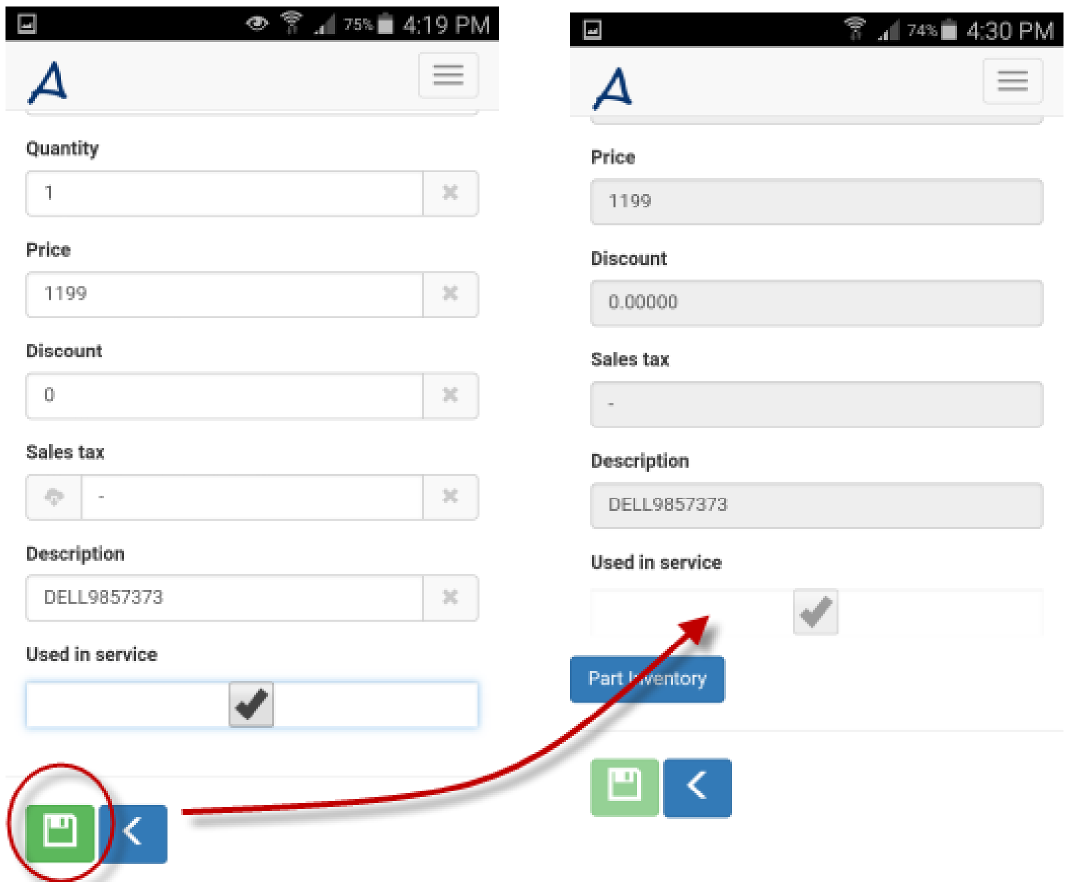
4. Click on **+Add** which will open a new parts form for this workorder item

5. Select **Warehouse** that has this serialized part in stock, select the serialized **Part**, then can select its **Serial Number**.



6. Checkmark the **Used In Service**. As if you know the serial number and have added it to the workorder, this means this specific part with this specific serial number is actually physically taken out of inventory, so you should indicate so by checkmarking Used in Service!

Once saved with Used In Service, this part record can no longer be edited.



If you need to edit, you first need to delete this part from this workorder.

Delete via this part's form menu (via the navigation menu ) Deleting will return the quantity (and serial number if serialized) to inventory in AyaNova so it can be selected again. Then you would perform the steps again to select this part, this time being sure to enter and edit all details needed before checkmarking Used in Service.

7. **Part Inventory** button will display when a part has been saved to a service workorder. Via this you can see what the inventory amounts are for this part.

Note that the inventory amounts are those at the time of opening to the Parts screen. If changes have been made (i.e. set to Used in Service, someone else has used, etc), return to the workorder and then open the Parts again.

8.8.12.3 Cause a Part Request to be created when adding an out of stock part to workorder via RI

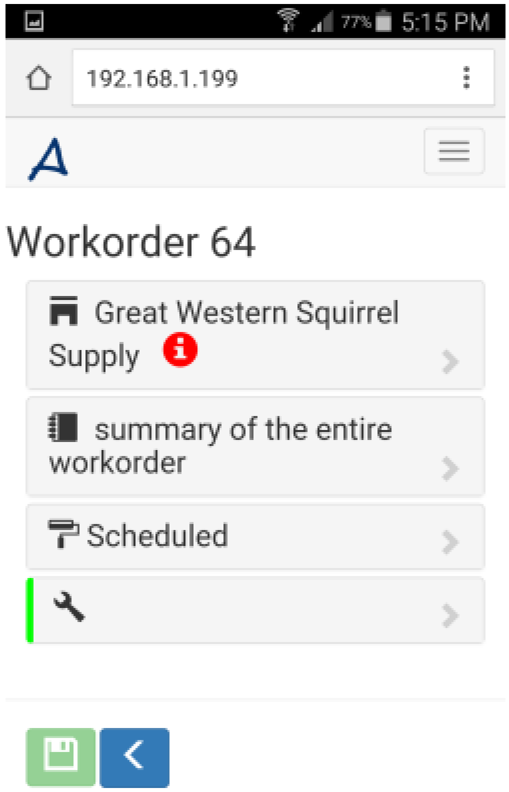
- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit service workorder records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

In this tutorial example we will walk through causing a Part Request to be created for your workorder

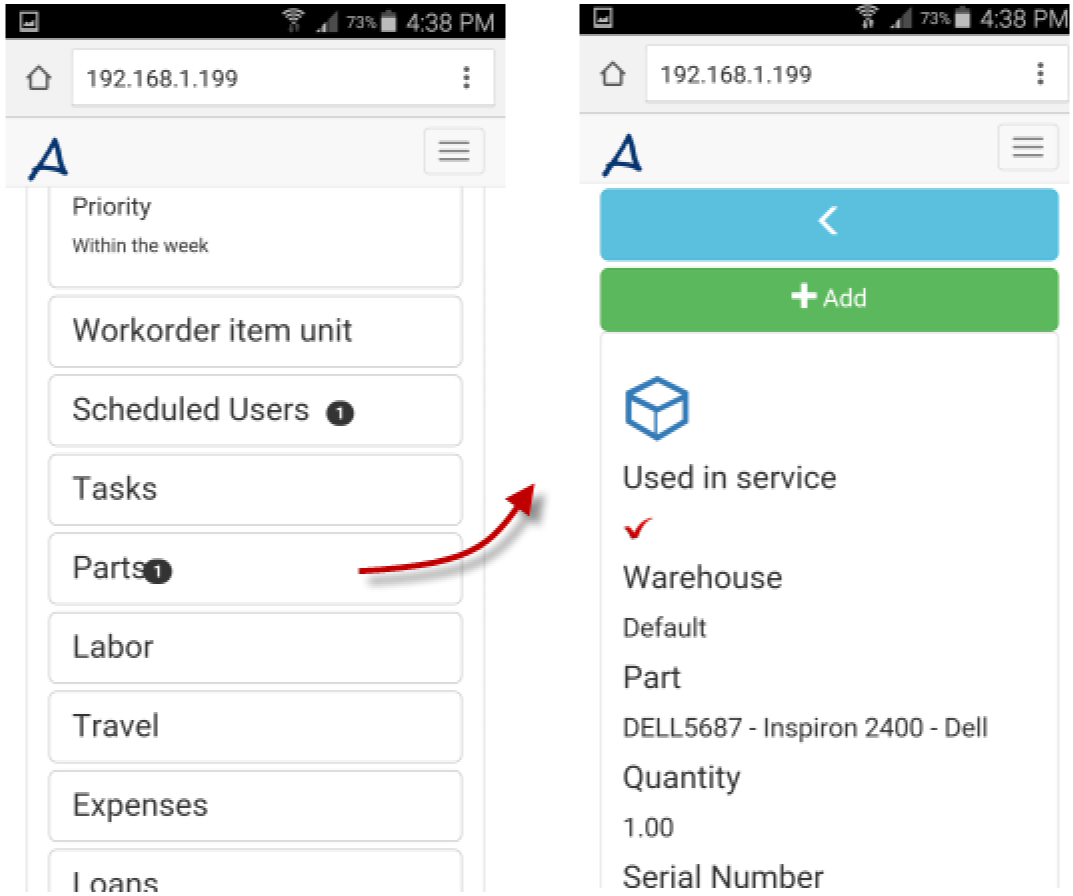
1. We will assume that you have logged in via your RI as a user that has rights to view and edit service workorder records.

2. Open a service workorder to its form. In our example, we will open service workorder 64.

   You might select via your Dashboard, or via Recent... or via Search. Up to you!

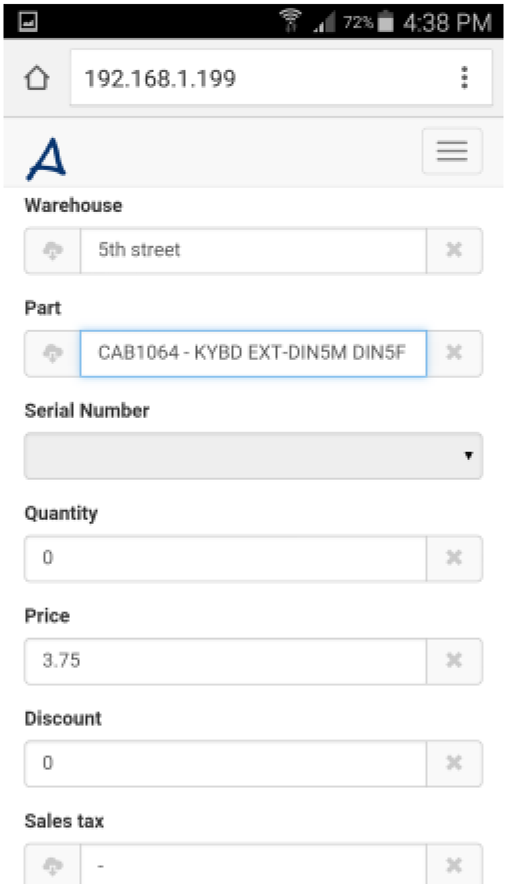


3. Drill down to the **Parts** subsection of the workorder item and select



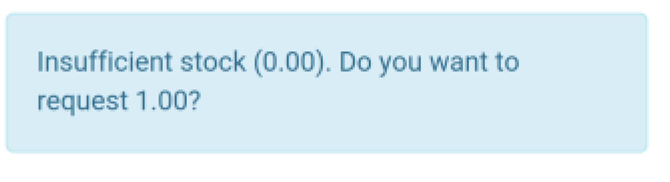
4. Click on **+Add** which will open a new parts form for this workorder item

5. Select the **warehouse** and a **part** that you know is not in stock - in our example, we will select 5th Street warehouse, and the part CAB1064. When you do so, you will note that the **Quantity** displayed at this point is still 0



6. Edit the **Quantity** to 1 and then select in the next field (i.e. Price)

7. When you do so, you will note that a message displays, letting you know there is insufficient stock. You may have to scroll to see, depending on your screen size.

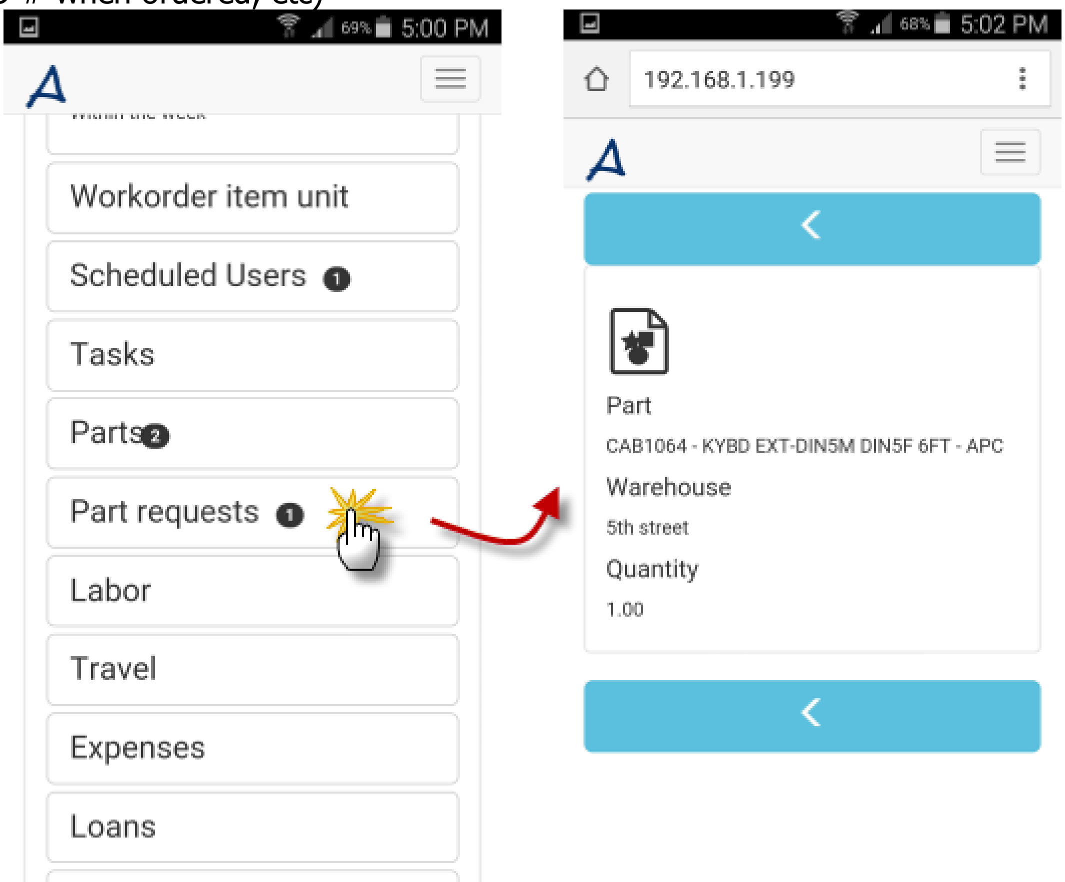


8. If this warehouse and part is NOT what you want, then make changes - first the warehouse, then the part.
If you do want a Part Request made, select **Save** at this point.

9. You will note once you saved, that the form changes the Quantity automatically to 0 again. This is as expected, as AyaNova continues to have this part in the Parts section but with a quantity of 0.

10. Return to the workorder

11. Now select **Part Requests** in this workorder item to see the part request that was just created.
12. Your **Parts Request** list for this workorder item will list all parts requested, and its status if ordered (i.e. when was ordered, when received, PO # when ordered, etc)



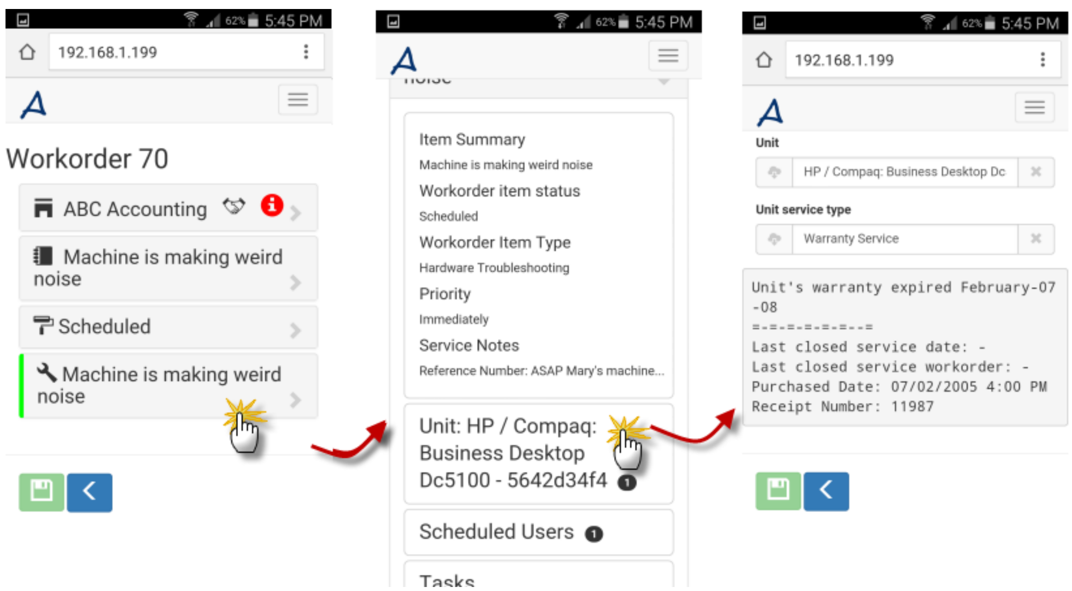
8.8.12.4 Enter Meter Reading for a Unit via a service workorder via RI

- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit service workorder and unit records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

In this tutorial example we will walk through entering a unit's meter reading via a service workorder while using RI

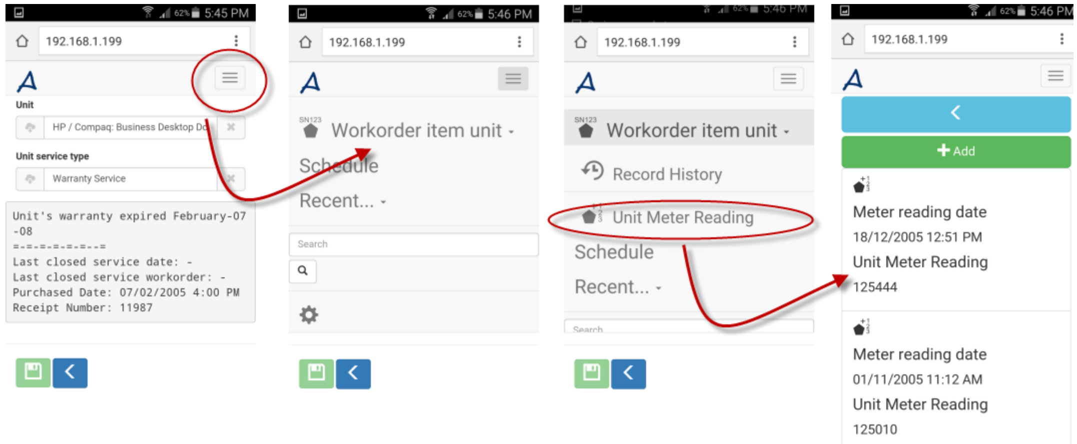
1. We will assume that you have logged in via your RI as a user that has rights to view and edit service workorder and unit records.

2. View your service workorder that has the Unit with Meter Reading enabled selected and saved in that service workorder.
In this example we will work with service workorder #70 that has unit serial number 5642d34f4 selected

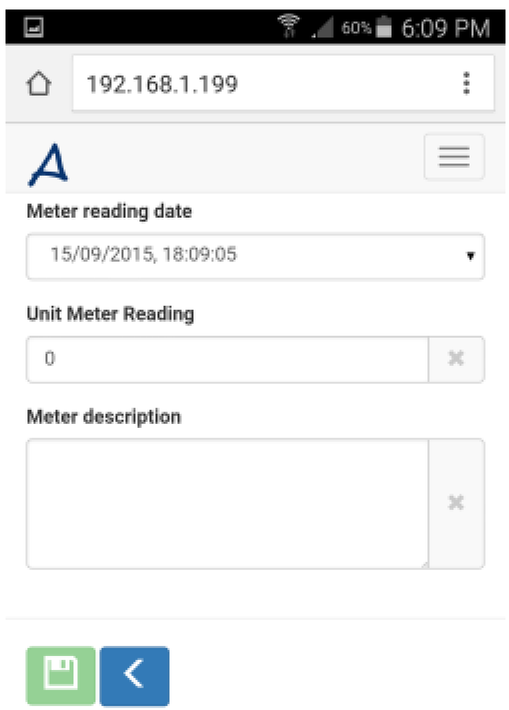


Note that the format your Unit displays in is based on your Global Settings for Unit display format.
And if you make a change to your Unit display format in your Global Settings, you need to save your Global Settings AND reset your IIS.

3. Select the menu option **Unit Meter Reading** for this Unit in this service workorder

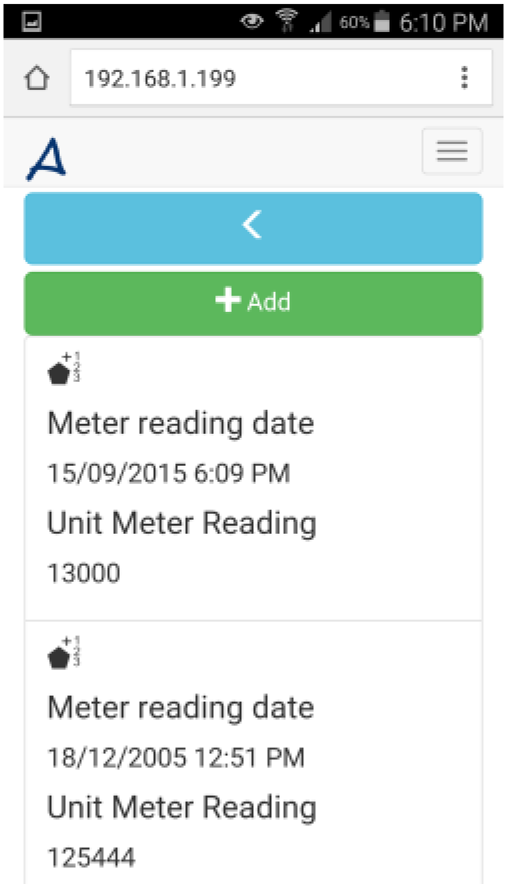


4. Select +Add which will cause a empty new meter reading form for this unit to display.



5. Save.

6. You will be returned to the Unit Meter Reading list, where you can see the meter reading just added.



8.8.12.5 Upload files/images to a service workorder via RI

- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit service workorder records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps using your own data.

In this tutorial example we will walk through how to upload a file/image via RI so is embedded into your database and can be accessed by others too.

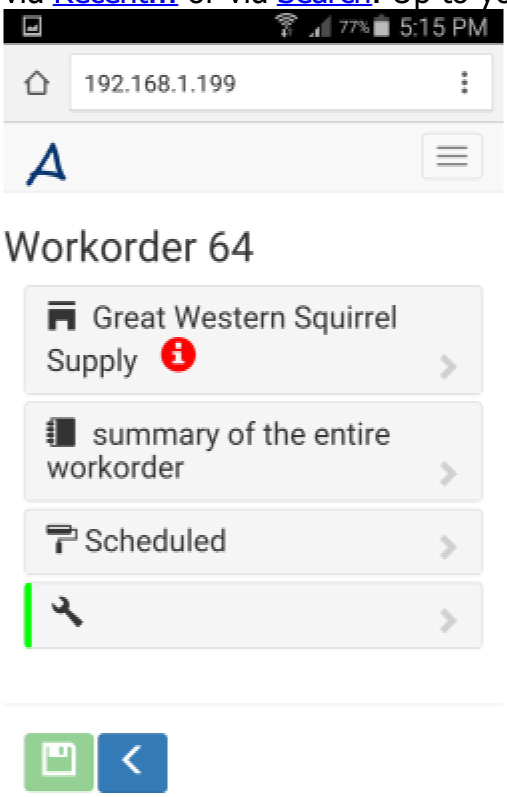
The uploaded embedded file may be a image taken by your phone camera at the time of, or it could be an image or file created previously.

For example, you might take a picture before you perform the service, and take a second picture after service is completed. And upload both to your workorder so that you and your staff can access at any time via AyaNova.

1. We will assume that you have logged in via your RI as a user that has rights to view and edit service workorder records.

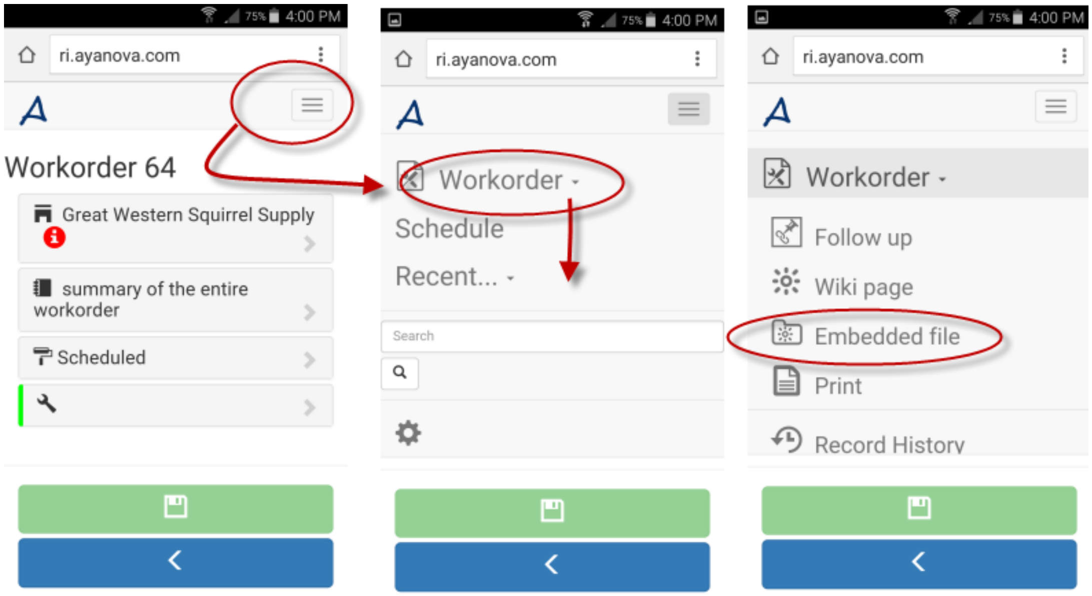
2. Open a service workorder to its form. In our example, we will view service workorder 64.

You might view your workorder via selecting it from your Dashboard, or via Recent... or via Search. Up to you!

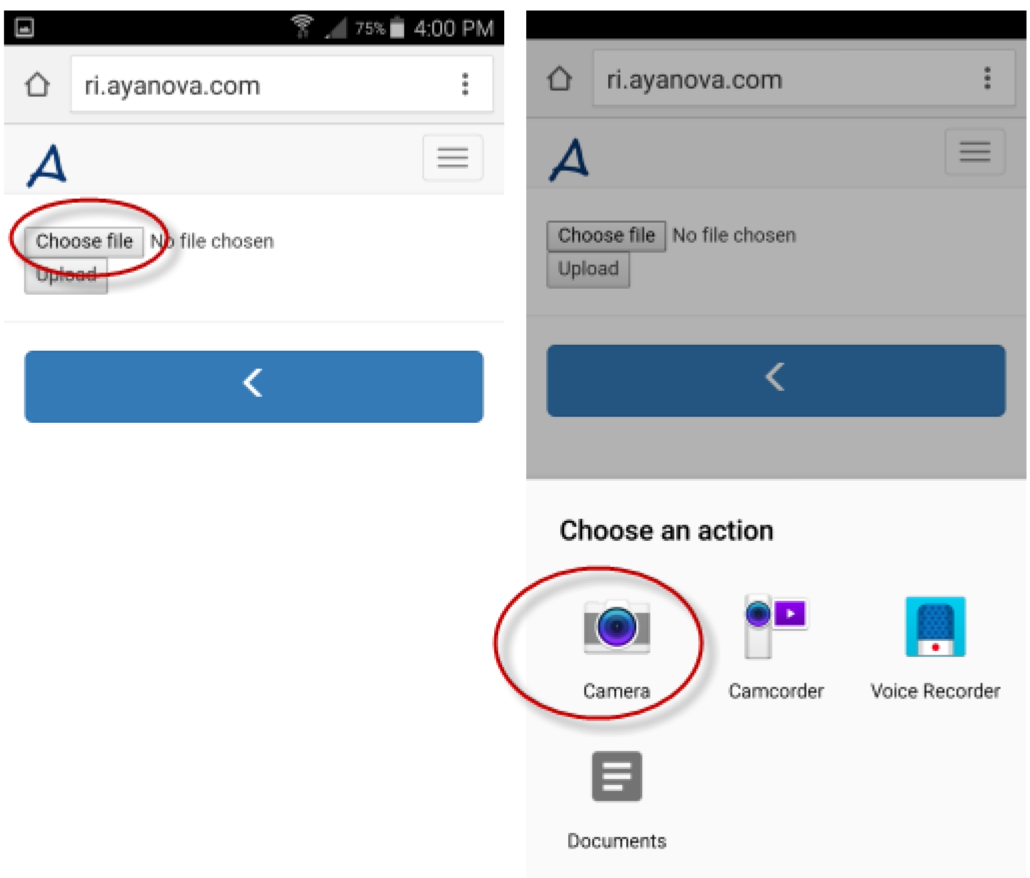


3. Uploading a picture taken at the time of:

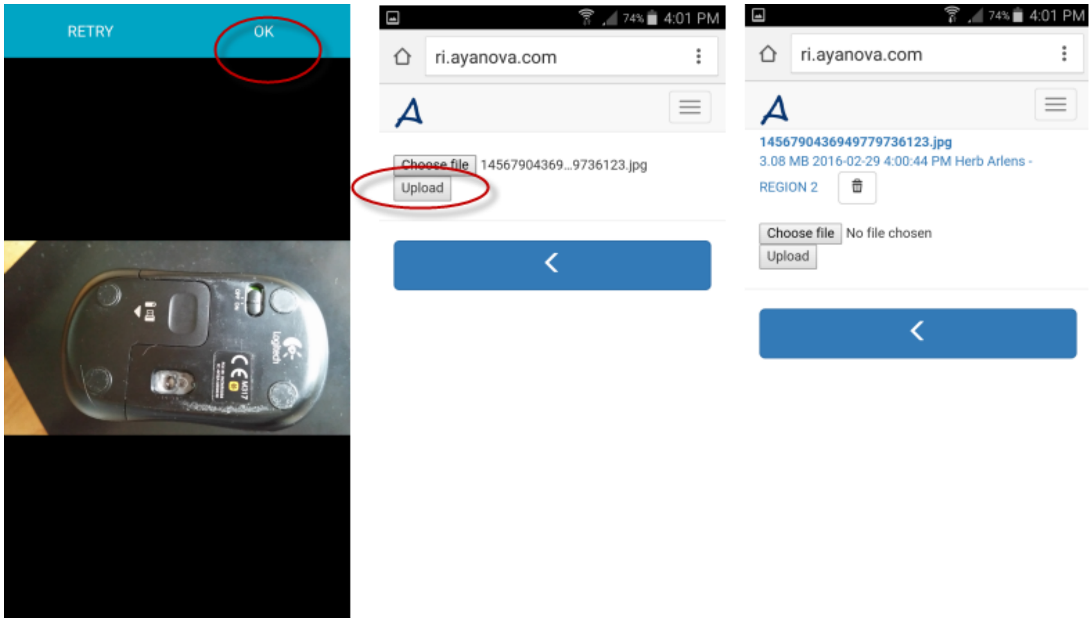
a. From the service workorder drop down menu, select **Embedded file** to open to the Embedded file page



b. Embedded file page opens. Select **Choose file**. Your phone will display available options - in this example, I am going to select **Camera** as I want to take a picture and upload it.



c. Take the picture, click on its **OK**. It is automatically chosen. Select **Upload**. Once uploaded, will show in hyperlink the file name, size, when uploaded and who uploaded.

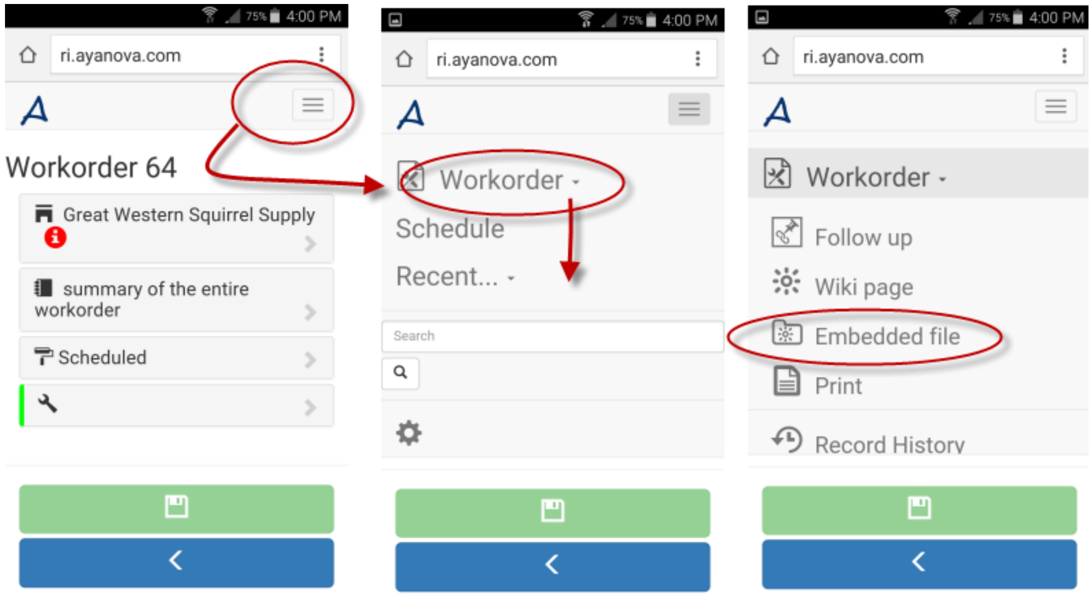


d. Select the **Back**  to return to the service workorder.

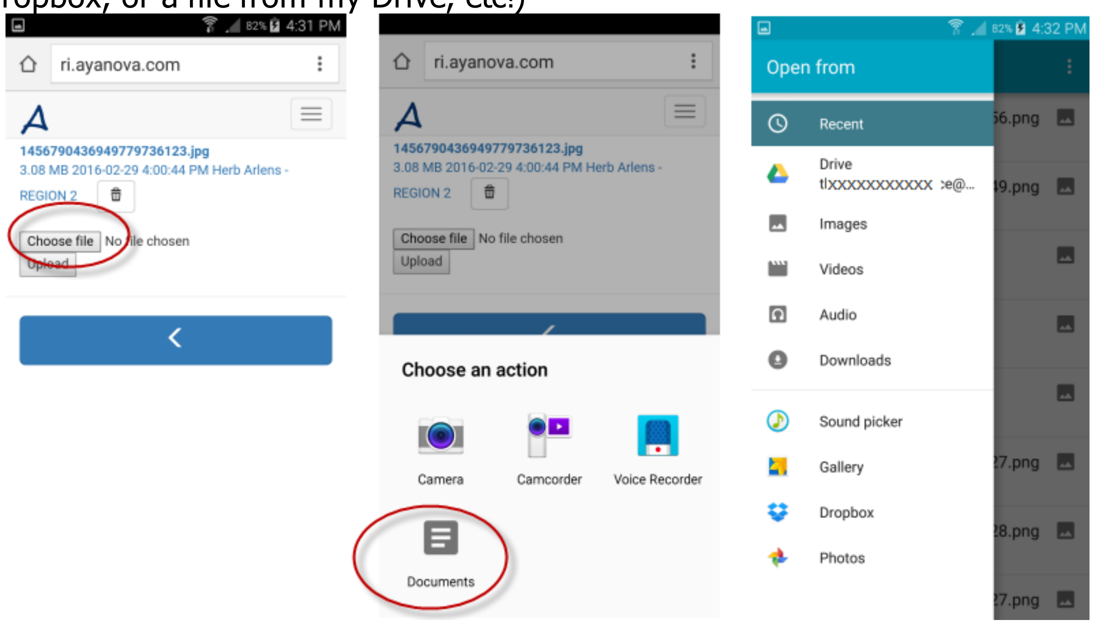
4. Upload a picture taken previously

a. These steps would be taken whether uploading an existing image or existing document.

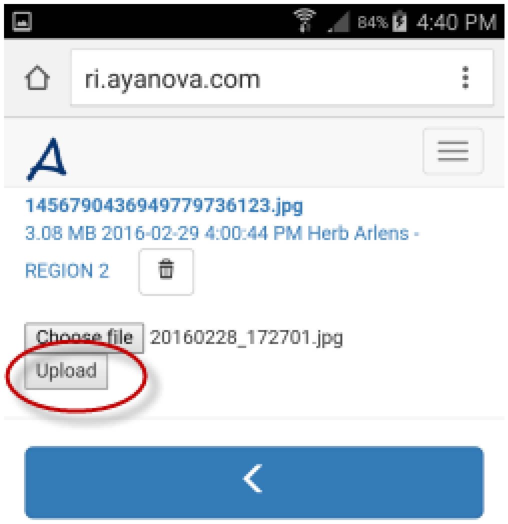
b. From the service workorder drop down menu, select **Embedded file** to open to the Embedded file page

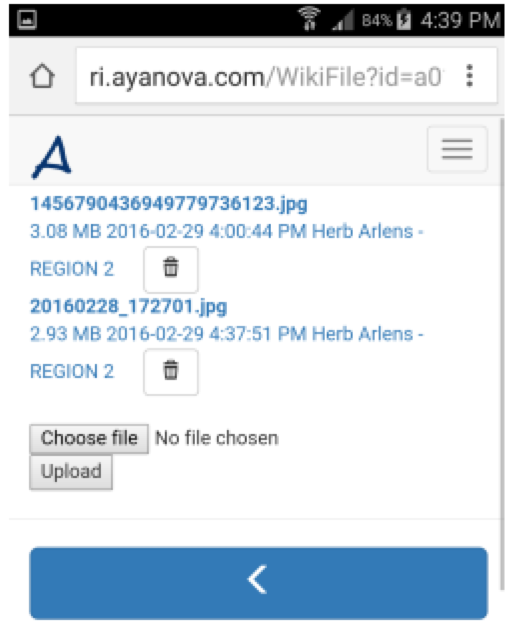


c. Embedded file page opens. Select **Choose file**. Your phone will display available options - in this example, I am going to select **Documents** as I want to upload an existing image from my Gallery (or a file from my Dropbox, or a file from my Drive, etc!)



d. Select **Upload** to upload the chosen file.





e. Once uploaded, will show in hyperlink the file name, size, when uploaded and who uploaded.

f. Select the **Back**  to return to the service workorder.

8.8.12.6 Create an additional workorder item for a service workorder via RI

- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit service workorder records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps using your own data.

A service workorder can have one or more workorder items.

In this tutorial example we will walk through how to create an additional workorder item for a service workorder via RI.

For example, while at a client's site you might determine service is also needed for a different unit and you have the time to do it now rather than scheduling for a future date.

By creating a second workorder item in the same workorder, you separate the service, being able to select the other specific unit in the additional workorder item that is created.

To create an additional workorder item in a service workorder, you would do so by selecting the **+New...** from an existing workorder item menu option for that workorder.

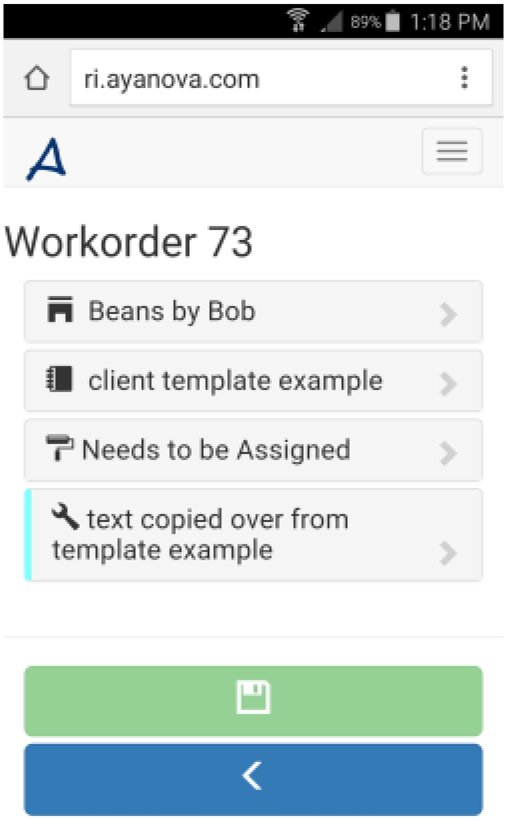
Just like the same steps you would follow when creating a new client - you do so by selecting +New... from the menu of an existing client.

Just like the same steps you would follow when creating a new unit - you do so by selecting +New... from the menu of an existing unit.

Just like the same steps you would follow when creating a new part - you do so by selecting +New... from the menu of an existing part.

1. We will assume that you have logged in via your RI as a user that has rights to view and edit service workorder records.

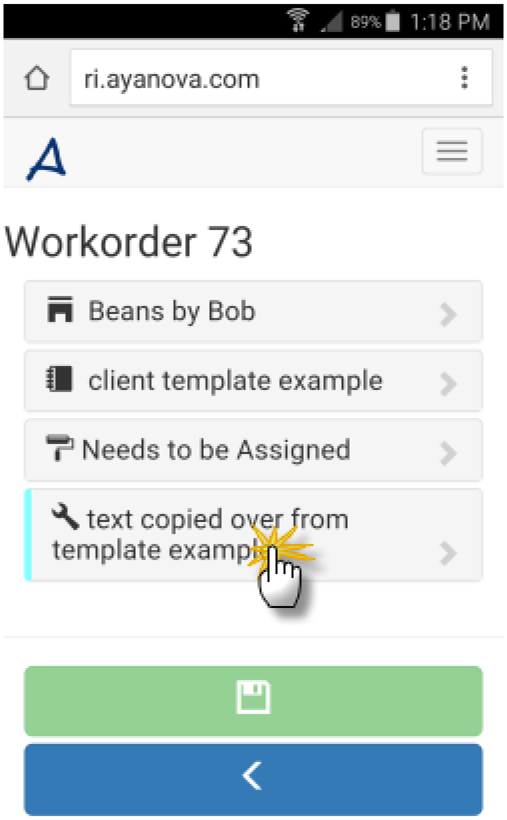
2. Open an existing service workorder to its form. In our example, we will view service workorder 73.



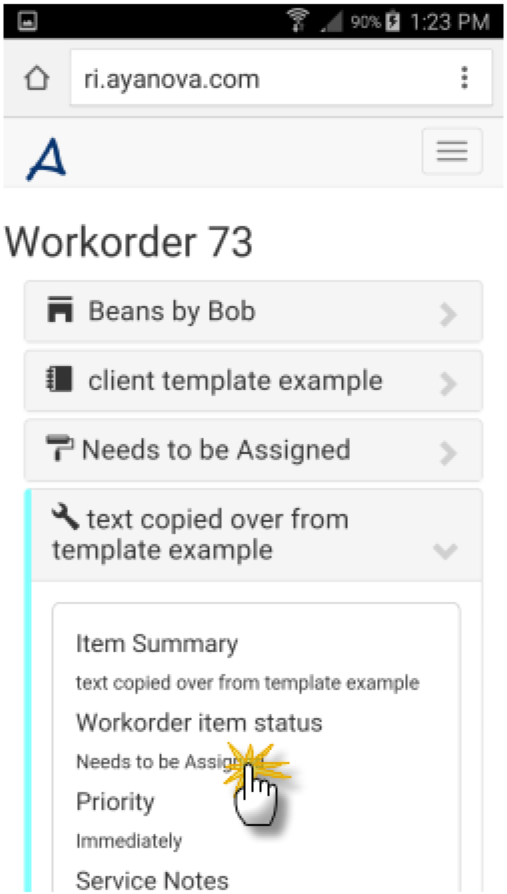
Note that an additional workorder item can be added at any point - whether having just created a new service workorder or for an existing service workorder.

3. Now to create a new workorder item we need to be viewing the existing workorder item so we can reach its menu _New...

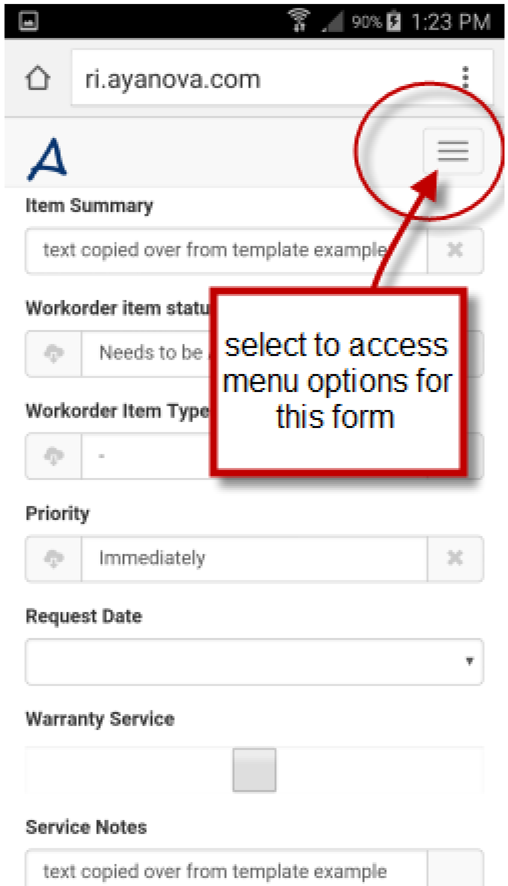
3.a Select to expand the workorder item section

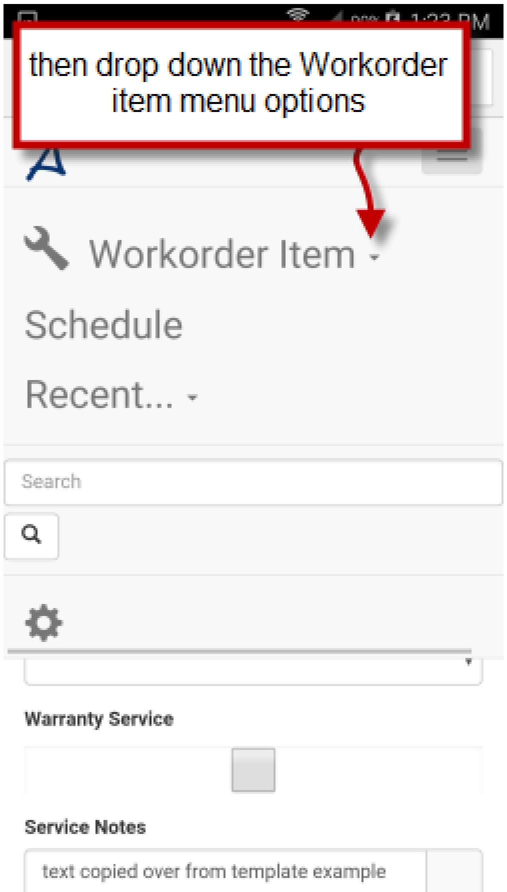


3.b Now you can see the details of the workorder item, as well as the sections for Scheduled Users, Tasks, Parts, etc.
Select on the workorder item display

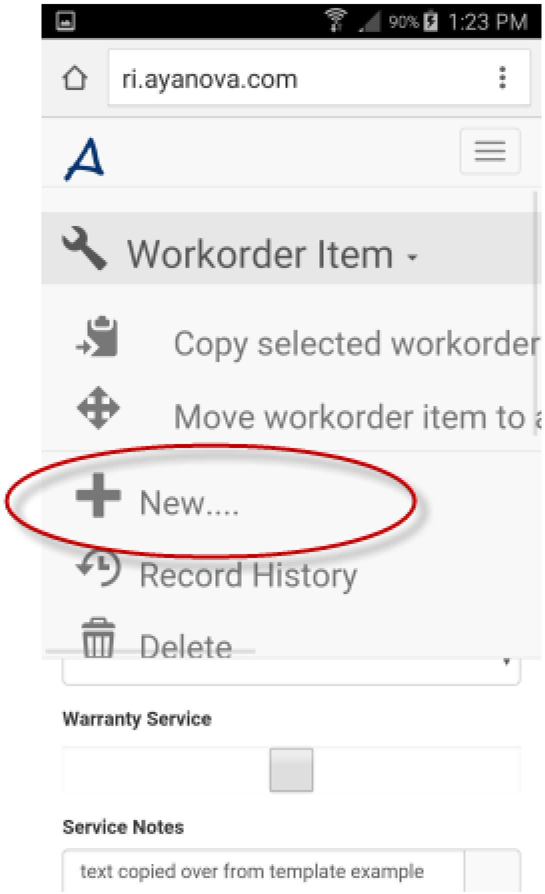


3.c By selecting, you will now be viewing that workorder item form. Select the workorder item menu for this workorder item.

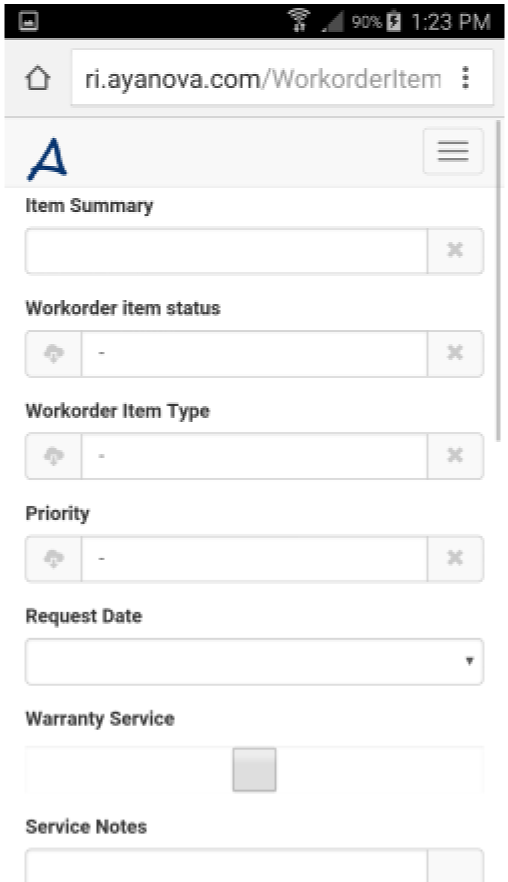

1:23 PM
ri.ayanova.com
Item Summary
text copied over from template example
Workorder item statu
Needs to be
Workorder Item Type
select to access menu options for this form
Priority
Immediately
Request Date
Warranty Service
Service Notes
text copied over from template example



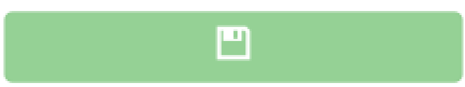
3.c Select +New...



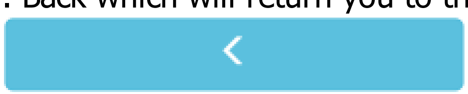
3.d A newly created empty workorder item page now displays.



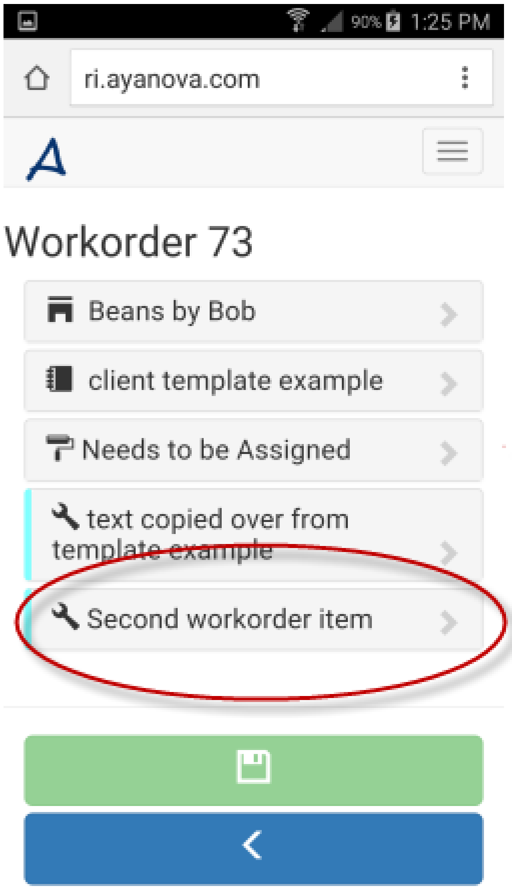
4. Enter in details for this newly created workorder item. Save.



5. Back which will return you to the previous workorder item page



6. Back again, which will return you to the service workorder page where you can now see there are two workorder items - the original plus the one you just created!



8.8.12.7 Obtain Client's signature for a workorder via RI

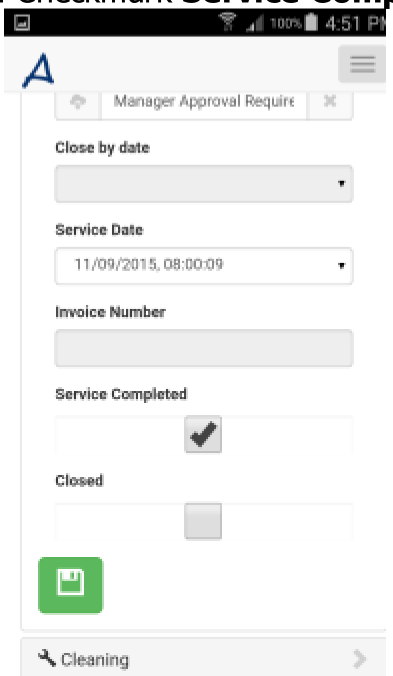
- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit a service workorder record.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

In this tutorial example we will walk through obtaining the client's signature for a service workorder that has been set to Service Completed:

1. We will assume that you have logged in via your RI, and have entered in details of service provided in a specific workorder. In our example, this will be sample workorder #40

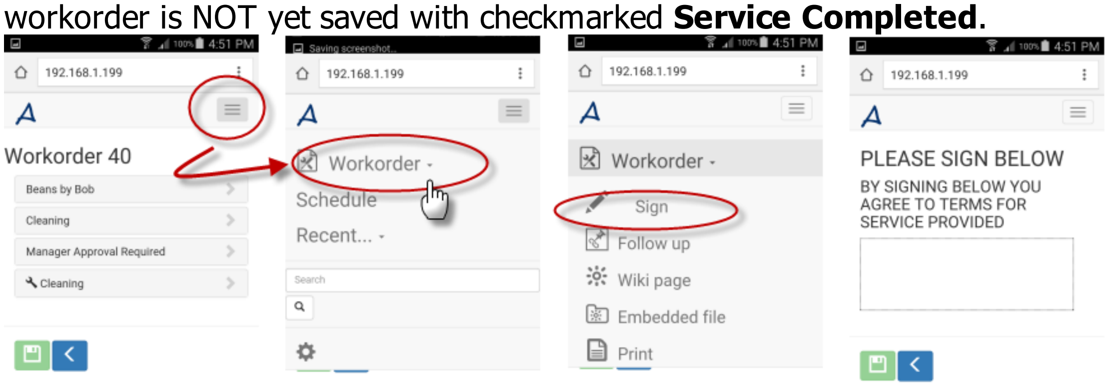
2. Save the workorder if not yet.

3. Checkmark **Service Completed** and save.



4. If you wish, you can show the client the service provided, billables, etc whatever you want them to see, by selecting the appropriate report that will show the data you want.

5. To have the client sign off, select the workorder's menu, selecting **Sign**. If you do not see the menu option **Sign**, that would be because your workorder is NOT yet saved with checkmarked **Service Completed**.

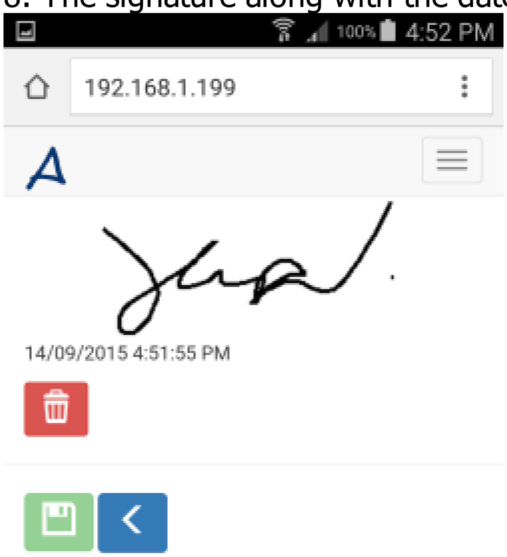


6. Pass your device to your client to sign

What shows as the signature header, footer and/or title is set in your Global Settings. Don't forget to reset your IIS if you make changes before logging back into RI.

7. **Save**

8. The signature along with the date taken will display.



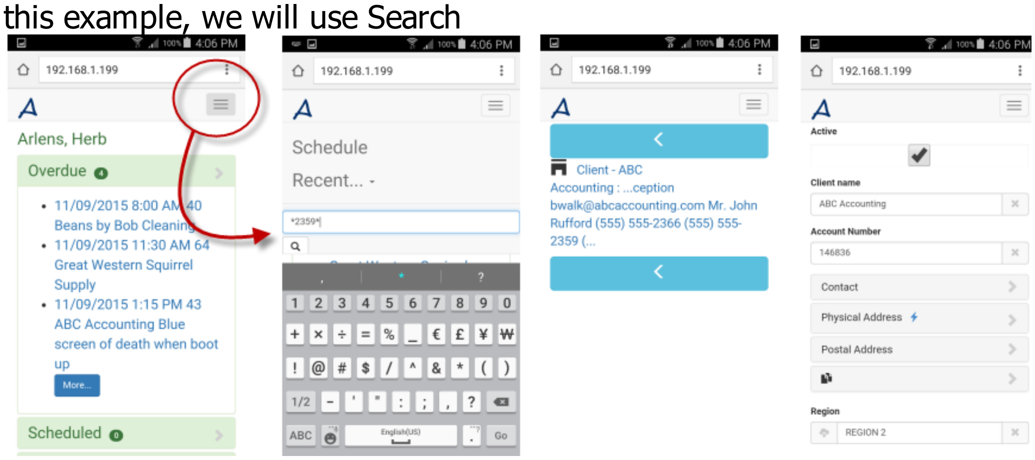
8.8.12.8 Use filters to display specific workorders, quotes or PMs

- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view service workorder records and client records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

In this tutorial example we will walk through using RI's filters to display specific workorders of a client, that matches those filters.

1. We will assume that you have logged in via your RI as a user that has rights to view service workorder records and client records
2. Go to the client record form that you want to view and/or edit details of, using either Recent... or Search .

   In this example, we will use Search

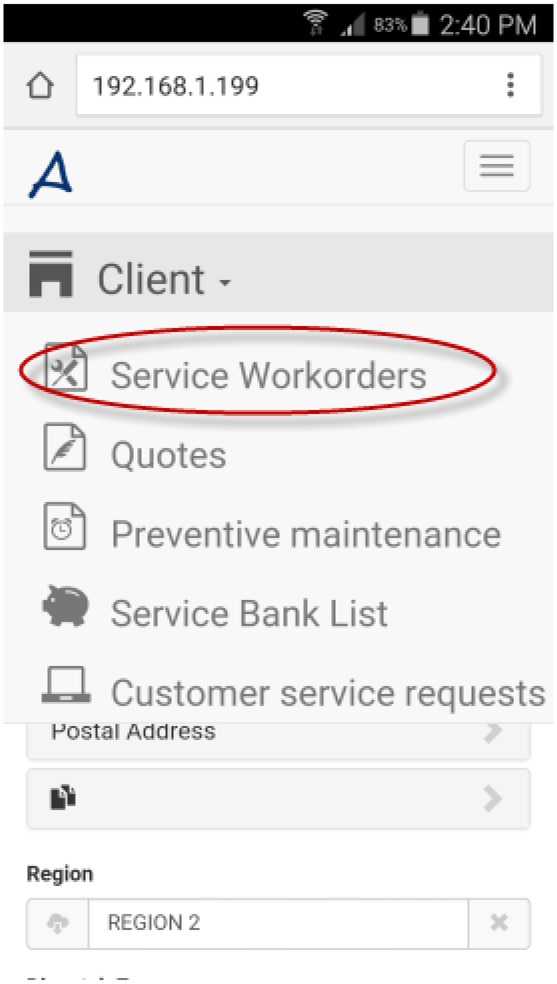


3. View the list of existing service workorders by selecting this client's menu option **Service Workorders**

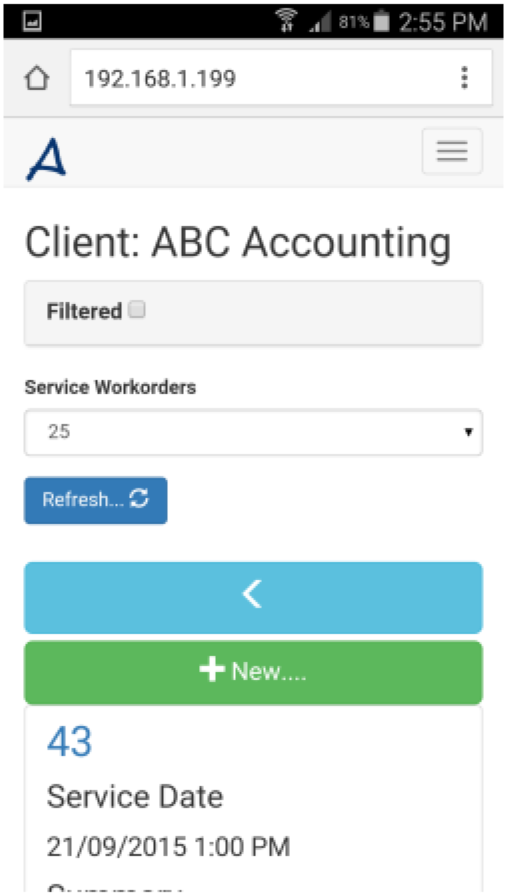
   As with all record forms via RI, to select the menu for this record form you would:

   - select the 
   - which drops down displaying the navigation bar menu
   - select the menu for this form - in this case, **Client**

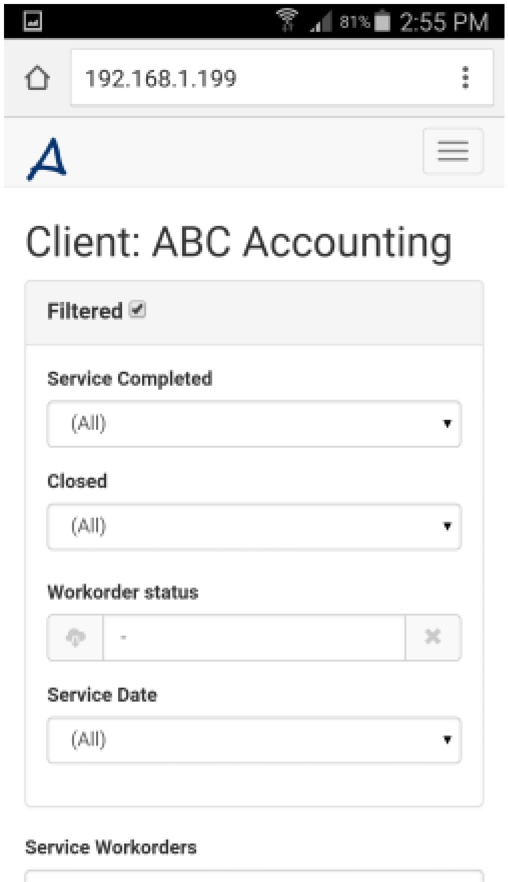
- select **Service Workorders**



4. The list of existing service workorders display



5. Select to checkmark the **Filtered**, which when do so, will expand the available filters for this list

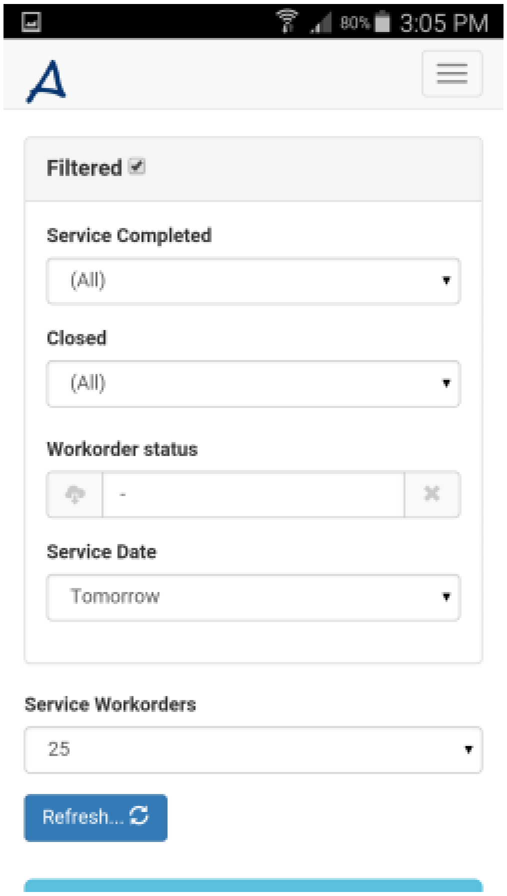


6. For Service Workorders list via RI, the available filters are:
   - **Service Completed** (All, True, or False)
   - **Closed** (All, True, or False)
   - **Workorder Status** (any or a specific)
   - **Service Date** (All, or preset defaults such as Yesterday, Week-Next, Month-Current)

   If a filter is not shown, that means it is not available via RI.

   For this tutorial, we want to see only service workorders that have a Service Date of tomorrow. So we leave Service Completed with (All) selected, Closed with (All) selected, Workorder Status with nothing selected, and select Tomorrow in the Service Date field.

   Then select Refresh



7. Now only workorders with a Service Date of tomorrow display in the filtered Service Workorders list for this client.

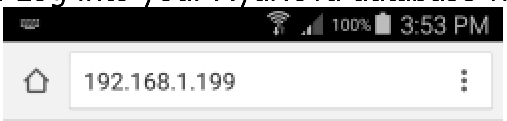
8.8.12.9 Edit details of an existing Client

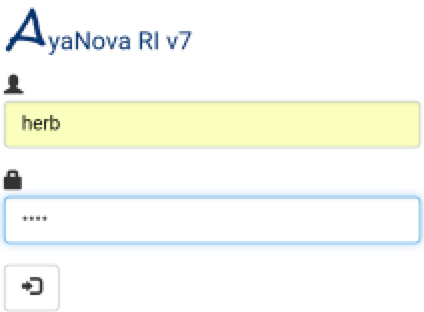
- Tutorial displays example screenshots from a small screen device
- Tutorial is based on expectation that user logged in has rights to view and edit a client record.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

In this tutorial example we will walk through editing details of an existing client via RI:

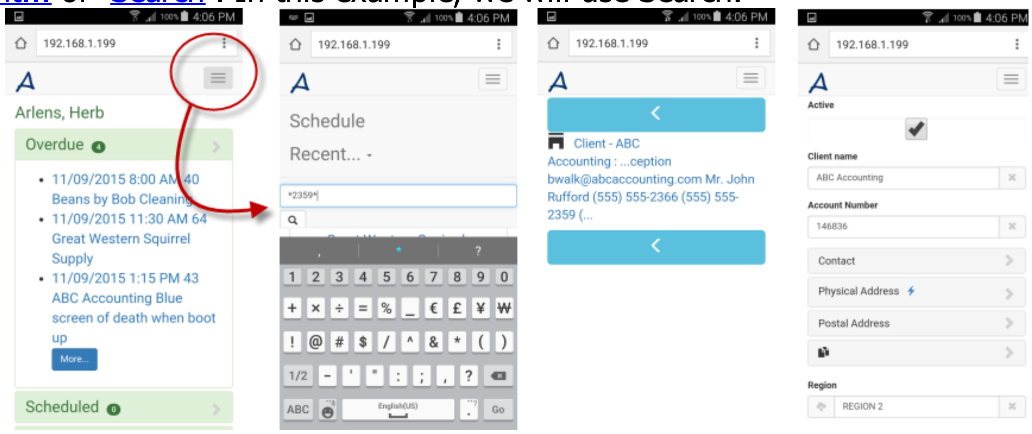
1. Enter your URL for your RI that connects to your AyaNova database

2. Log into your AyaNova database via your RI





3. Go to the client that you want to view and/or edit details of using either Recent... or Search . In this example, we will use Search.



4. Now view and/or edit as needed.

5. Don't forget to save!

8.8.12.10 Edit Part Inventory via RI

- Tutorial displays example screenshots from a small screen device

- Tutorial is based on expectation that user logged in has rights to view and edit part and part inventory records.
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

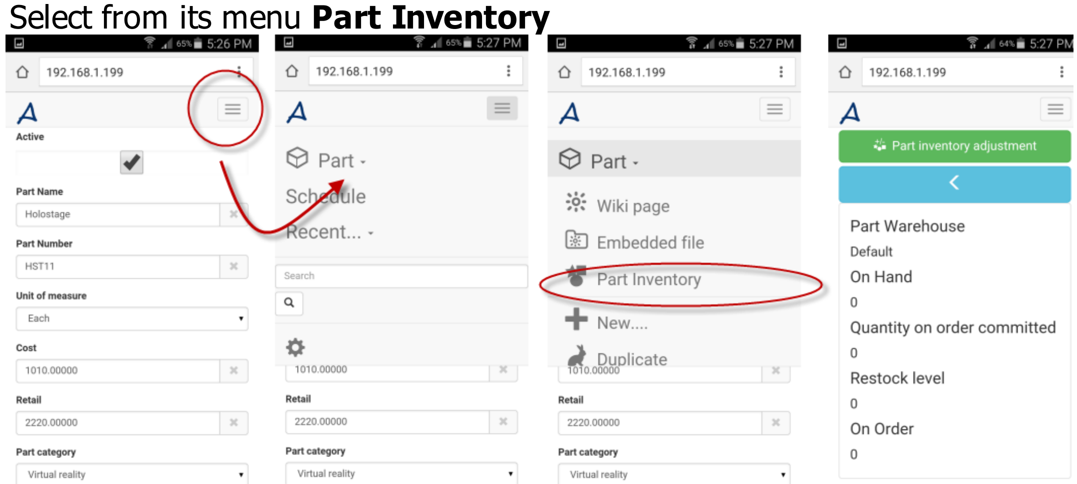
In this tutorial example we will walk through editing On Hand Stock amounts for your part inventory with a Part Inventory Adjustment while using RI

1. We will assume that you have logged in via your RI as a user that has rights to view and edit part and part inventory records.

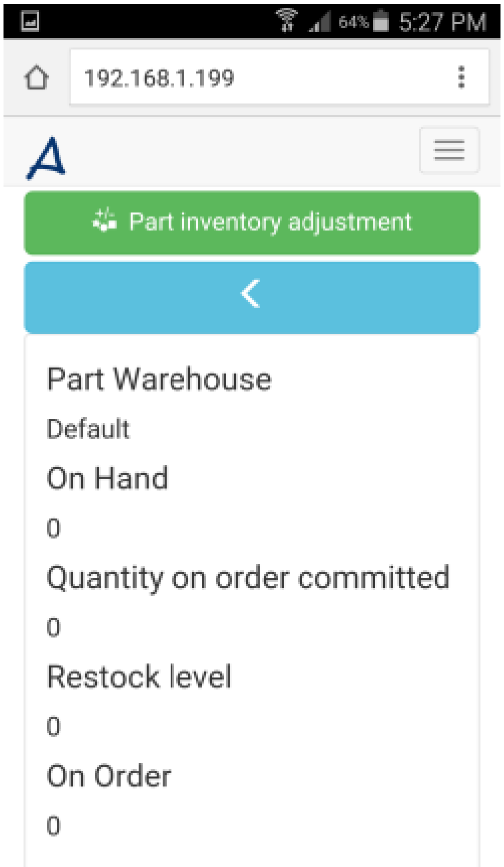
2. Go to the part that you want to view and/or edit part inventory for, using either [Recent...](#) or [Search](#)
   In this example, we will use **Search** entering in a wildcard of a part number such as HST*

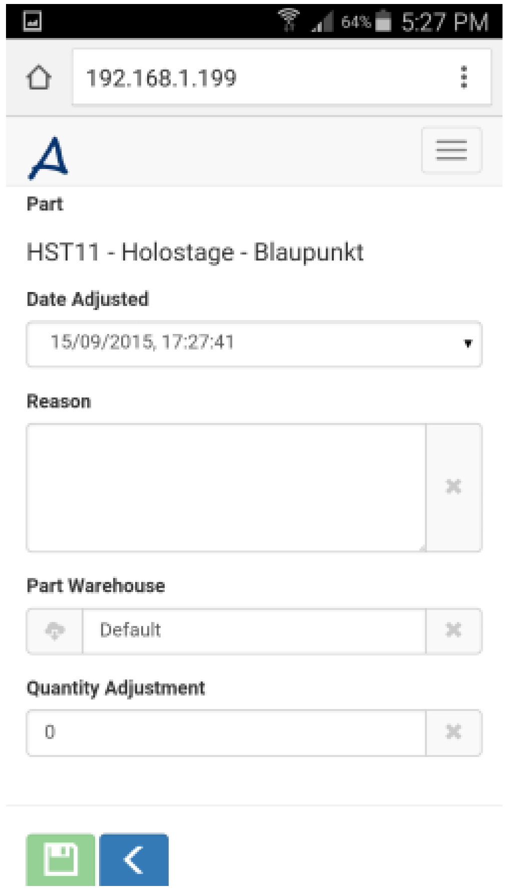
3. Open the part to its parts record form

4. Select from its menu **Part Inventory**

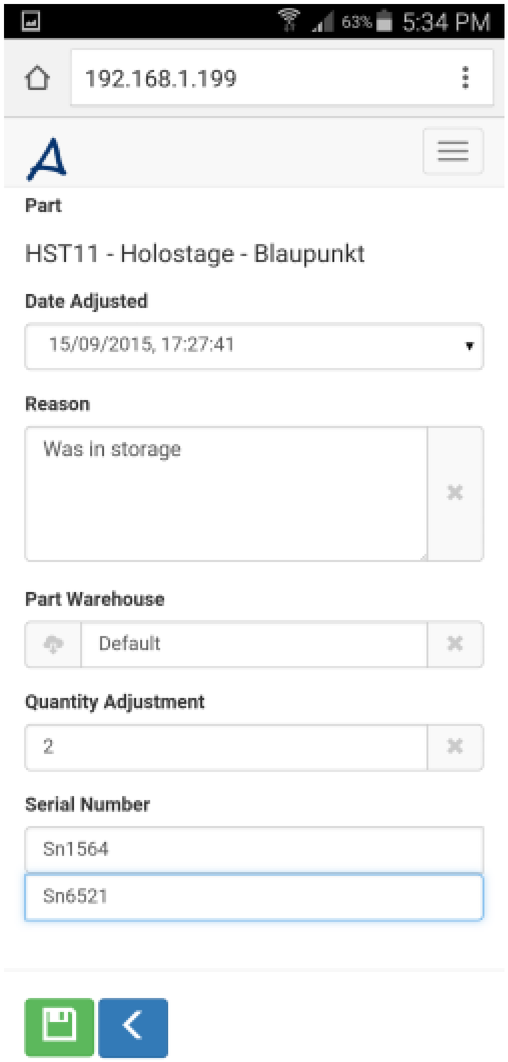


5. Select the **Part Inventory Adjustment** button to open to the Part Inventory Adjustment form for this part



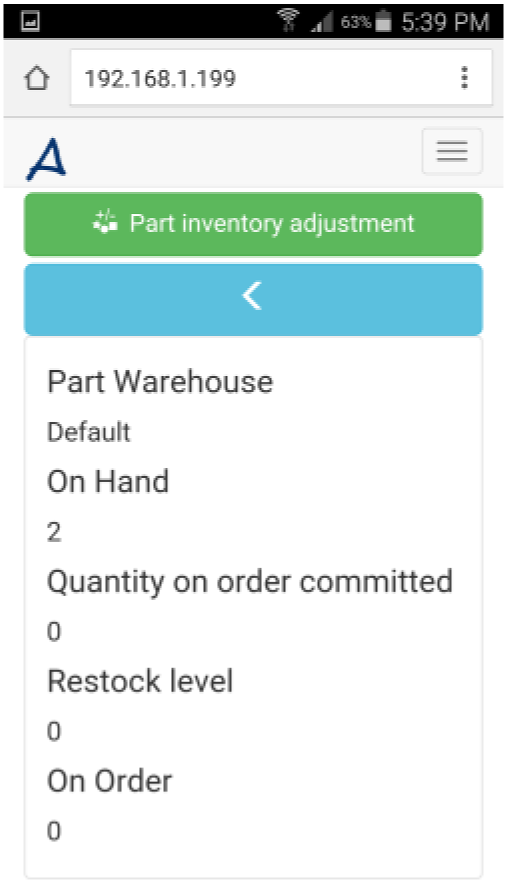


6. Edit as needed.
   Enter a negative number to remove from inventory.
   Enter a positive number to add that quantity of On Hand to inventory.
   In our example, we are going to add a quantity of 2, and as this part is serialized, also enter the serial numbers.



7. **Save** the Part Inventory Adjustment

8. Now your On Hand Amount is increased for this part in this warehouse.



8.8.12.11 Use 3rd-party mobile credit card processing to get paid faster

- Tutorial displays example screenshots from a small screen device
- Although these tutorials are based on sample data in the sample AyaNova database, you can certainly follow similar steps when using your own data.

Don't just bill out faster.... get paid faster too!

See http://www.ayanova.com/creditcardprocessing.htm for suggested list of some of the credit card processing solutions that are available.

This tutorial example is to show how quickly and easily you can process credit cards using one of the many available mobile credit card processing solutions now available.

In this tutorial example, we are assuming a completed sign up with Square, have received the no-charge card reader in the mail, and have set up the basics in the Square dashboard (i.e. company name, company logo)

1. Service for a customer has been completed.

   For example: Onsite at ABC Accounting for sample workorder #70, entering todays date and time to return the loaner.

2. Customer has been advised of the total charges.

   3 ways customer could be advised:

   1) Your Client Notifications have been configured so that AyaNova automatically emails the customer a detailed report.
   2) Client logs in via their Customer RI or Customer WBI, and views details of their service.
   3) Bring up the report on your device, and show to your customer

Net Labor	Net Travel	Net Parts	Net M Exp	Net Loans	**Total Tax A**	**Total Tax B**	**Workorder Total**
$0.00	$0.00	$0.00	$0.00	$800.00	**$56.00**	**$56.00**	**$912.00**

3. Customer wants to make payment now.

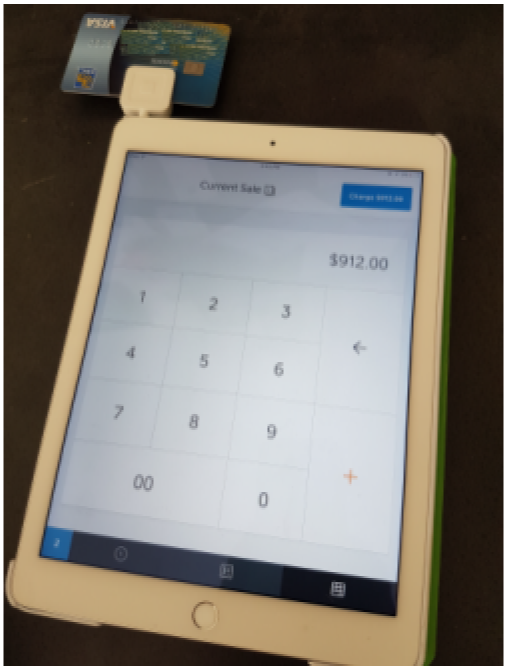
4. On your mobile device, connect to your card reader.

   In this example with Square, the card reader is inserted into the headphone jack. Some card readers connect via Bluetooth.

5. Load the mobile app for the card reader.

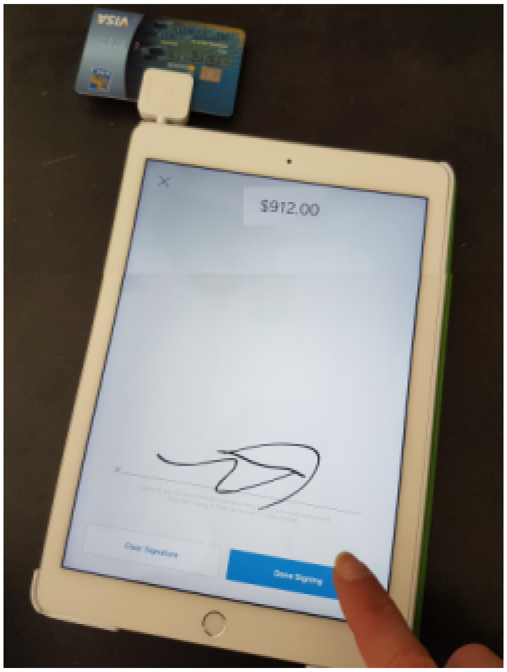
   Square's mobile app is available via Apple Store or via Google Play Store for download at no charge.
   Check with your credit card processing solution.

6. Enter in the total amount due.



7. Swipe the customer's card.

8. Pass over the device for the customer to sign. Customer signs.



9. Submit and that's it! Your credit card processing partner will deposit your funds, no need to wait 30 to 60 days to get paid!

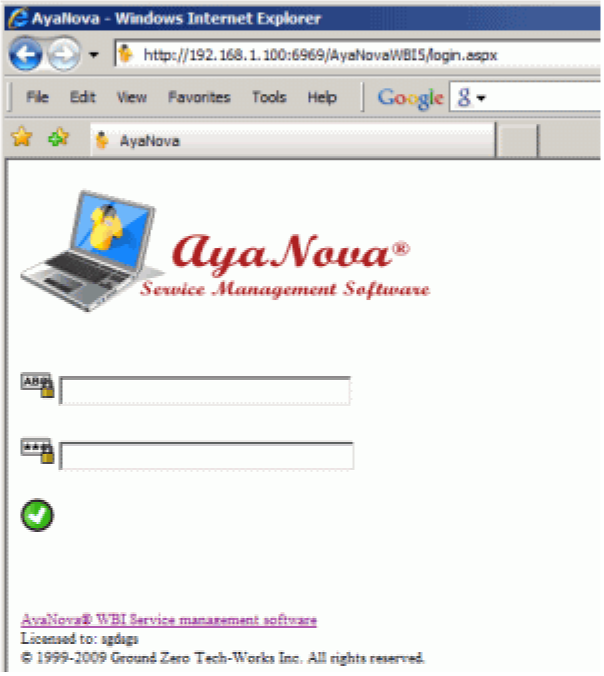
We suggest entering the confirmation # received from the payment processed into the Invoice # field of the service workorder.

Check out more features of your your credit card processing application including:

- send an immediate payment receipt via email to your customer
- print a payment receipt if your device has the capability
- and more

We encourage you to explore and check them out!

8.9 WBI - optional web browser interface



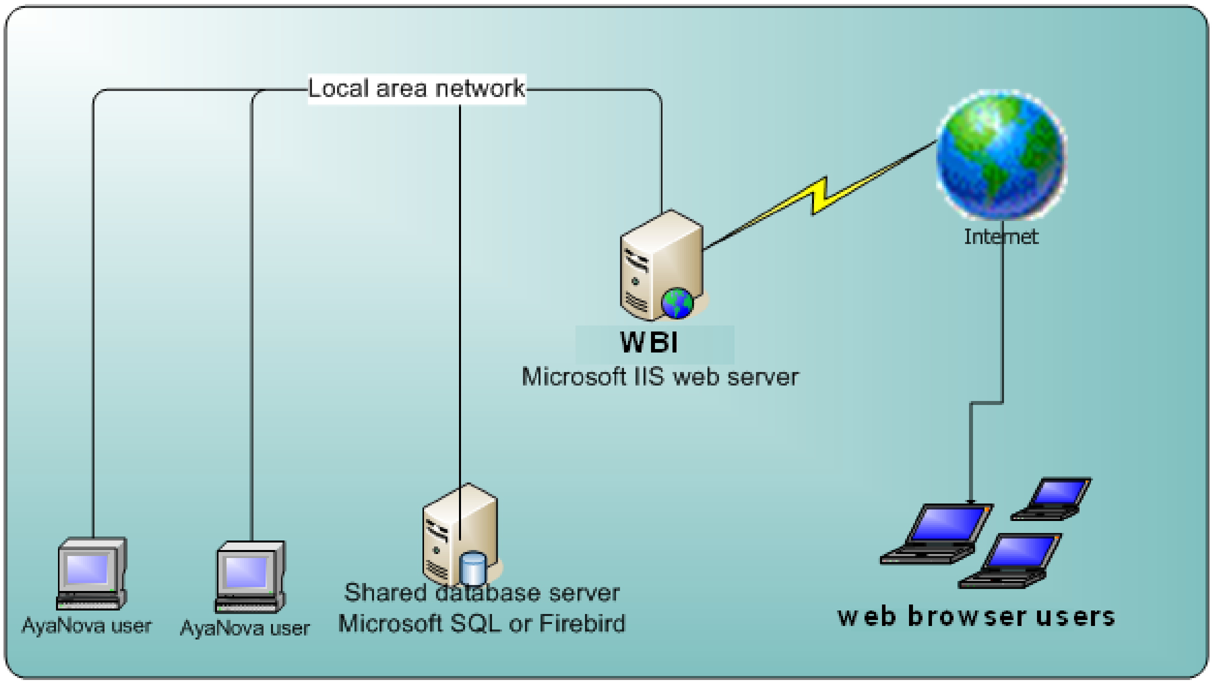
Above image is example showing WBI login screen that remote users would see

WBI is an optional add-on for AyaNova for remote users using just an Internet connection and a regular web browser to access AyaNova data live.

Your AyaNova users can log in with the same rights to features as via the AyaNova desktop interface.
Also too, your clients can log in via WBI to request service, view their requests and view their workorders.

A WBI license is required to use this optional add-on

Please refer to the WBI Help file for installation, configuration and use of WBI for the AyaNova user such as scheduling, creating and editing workorders, obtaining reports, and more; and the WBI Client Help file for use of WBI by a client for requesting service, viewing their requests and viewing their workorders.


Local area network
Internet
WBI
Microsoft IIS web server
AyaNova user
AyaNova user
Shared database server
Microsoft SQL or Firebird
web browser users

8.10 MBI - optional minimal browser interface

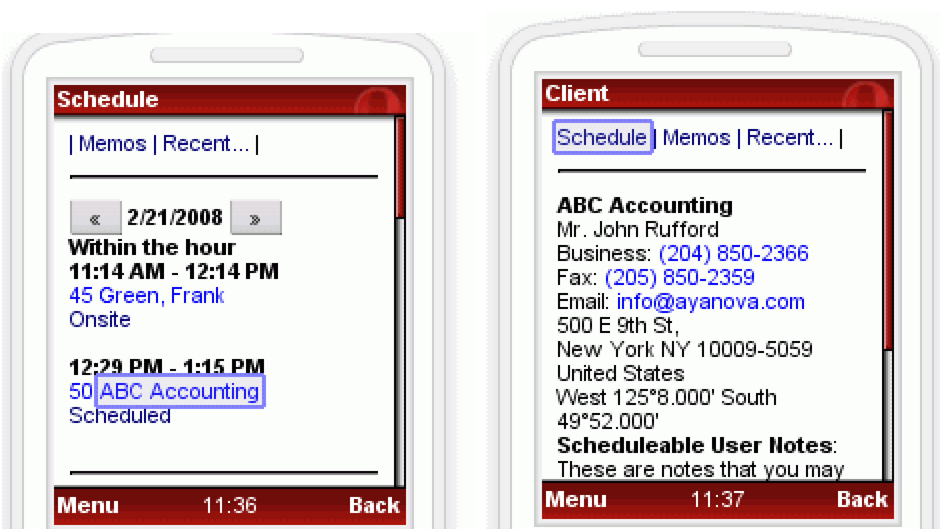
8.10.1 What is MBI?

MBI is an AyaNova interface designed to support cell phones, pda's, Blackberries and other small screen wireless devices equipped with a web browser and internet connection.

MBI stands for "Minimal Browser Interface"

This is a web interface designed to meet the needs of small screen devices and users who need fast access to essential information while on the road. It's designed to be accessed from any modern wireless device that supports the minimal web browser standards as well as regular PC web browsers.

With this interface remote users will be able to quickly check their schedule view and update work orders and schedule markers, view client and vendor details (with phone dial enabled links), read and send memos, and obtain a client signature.



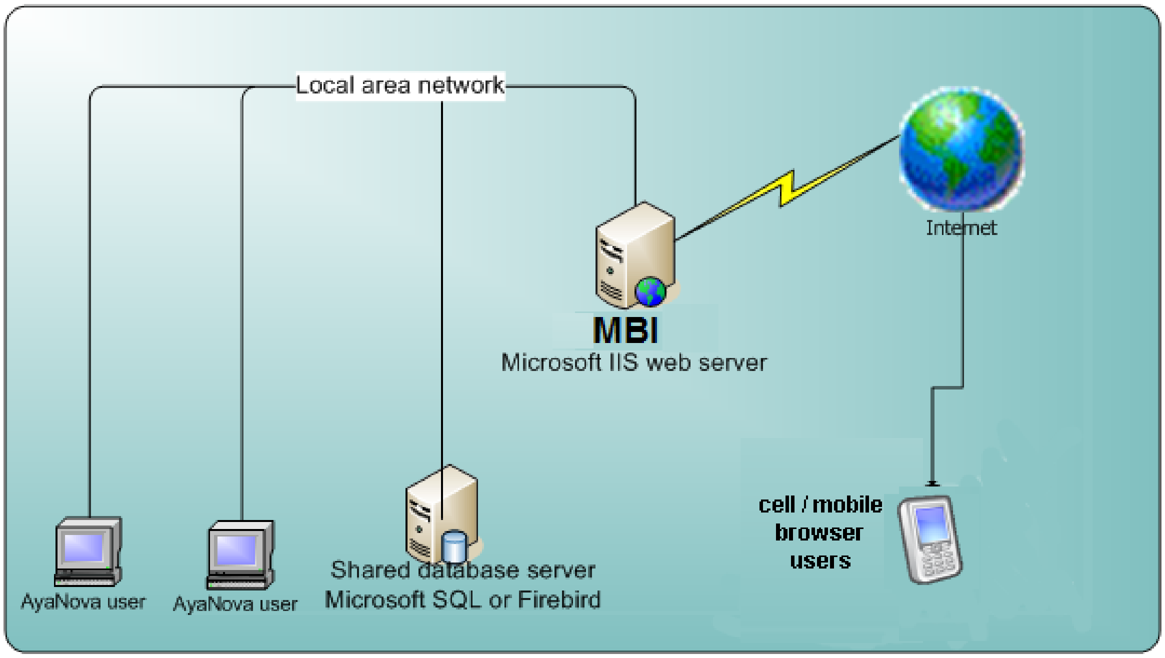
Above images show example viewing the Schedule and example viewing client contact details

The interface is designed for small size screens with pared down pages to save wireless web access fees. MBI features makes every effort to ensure that a user can get to the information they need as quickly as possible without taking time or space for anything that isn't absolutely required.

MBI is not intended to be a replacement for the much more full featured WBI web browser remote access add-on product which is more appropriate for full fledged PC or netbook based web browsing, or for the upcoming RI remote interface add-on.

MBI is targeted specifically for small screen devices.

A MBI license is required to use this optional add-on



Requirements before proceeding:

The AyaNova MBI (Minimal Browser Interface) works with Microsoft Internet Information Server (IIS) to provide web browser access to small screen devices

The MBI Server requirements are as follows:

Additional software on this computer:

- IIS 5 or higher installed
- Microsoft .NET Framework 4

Minimum Hardware for this computer:

- As with the AyaNova database server, the higher the hardware specifications, the better the performance. If you are encountering slow response, you will want to upgrade your hardware. Minimum hardware requirements would be that for IIS

- The AyaNova MBI server files takes approximately 6.5MB of hard drive space

- Static external Internet IP address for your Internet router/firewall

- Your router/firewall has a static external IP address *(you can not use a dynamic IP address as that means it constantly changes, and therefore your remote users won't be able to connect as won't know what IP address to use)*

- Your router/firewall configured for port forwarding for the IIS computer.

Security:

IIS / firewall / router security:

If you are not comfortable with configuring your IIS / firewall / router, it is recommended that you call in a local IT networking professional to do so.

Any additional IIS security settings other than what is set when your IIS is default installed is beyond the scope of the support we provide.
If you wish to implement additional security settings, we highly recommend you first follow the default settings for setting up MBI confirming you can successfully access, and only after confirming the default setup is successful then make any changes, being sure to check after each change to see if affects MBI adversely.

If your data is highly sensitive:

Any information sent over the internet is susceptible to Man-In-The-Middle (MitM) Attacks and it is recommended if your data is highly sensitive, to implement Transport Layer Security, typically involving HTTPS, TLS and SSL.

SSL / TLS is enabled at the Microsoft IIS web server, not via AyaNova WBI or RI or MBI or Dataportal which do not have any special requirements or settings for encryption as that happens a layer below AyaNova at the web server.

How to procure and install an SSL certificate and enable SSL on an IIS web server is beyond the scope of the support we provide. A suggestion would be to search via Google https://www.google.ca/search?q=microsoft+How+to+implement+SSL+in+IIS

Be aware that SSL certificates need to be purchased from a certificate issuing authority and can be pricey **however** there is a new industry sponsored certificate authority providing no charge certificates which has been started up recently in an attempt to get everyone to start using encryption that might be of interest: https://letsencrypt.org/

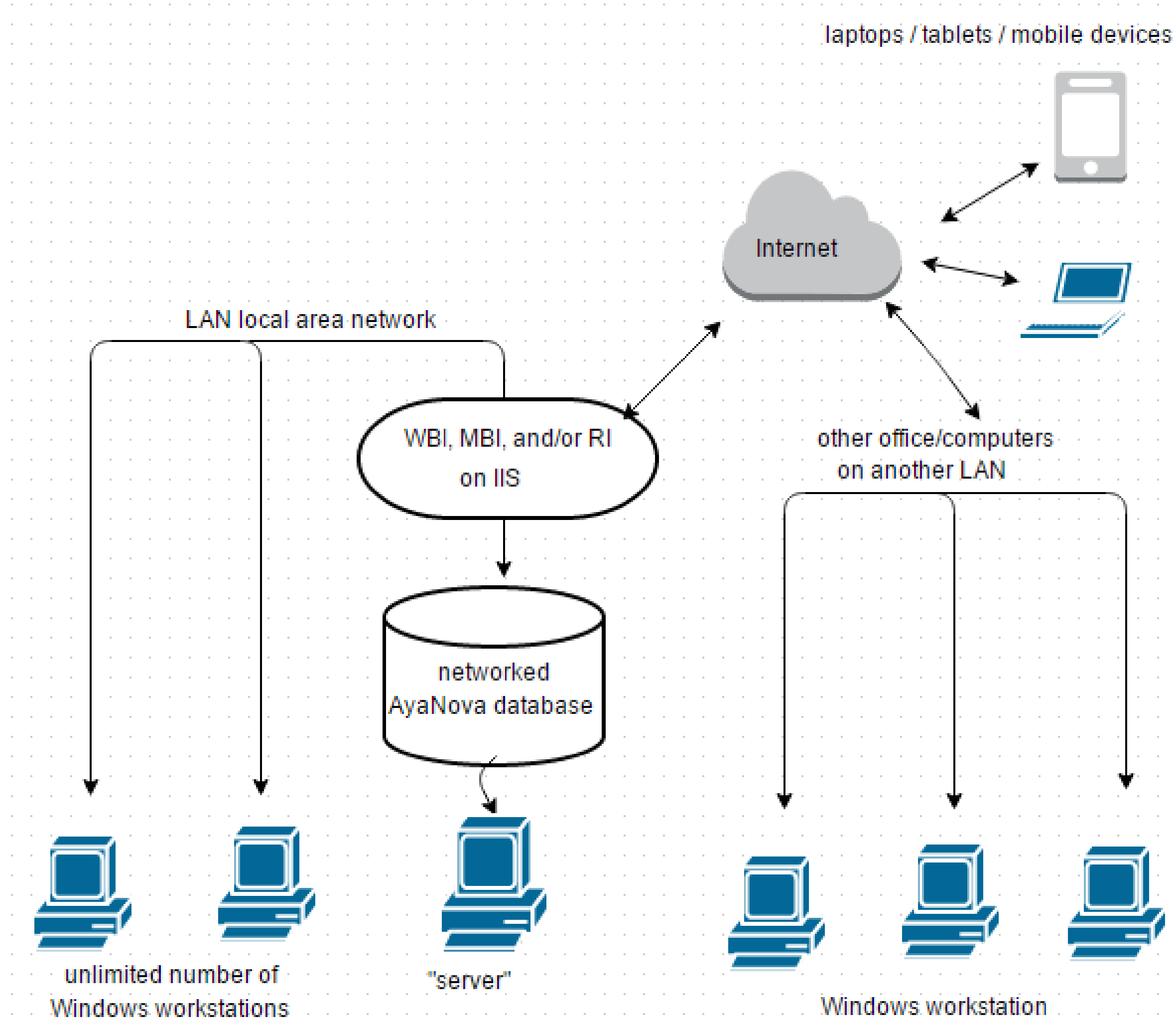
AyaNova related:

- MBI is not a replacement for the AyaNova program, MBI is an extension of the AyaNova program.
- MBI needs to access a database server due to the nature of IIS - you can not use MBI with a stand-alone default installation of AyaNova. Do refer to the network configuration section to configure AyaNova for one of the network configurations before setting up MBI.
- MBI should be installed on a computer within the same LAN as the computer where the AyaNova database and AyaNova database server reside
- The latest version of AyaNova **must** be installed and operational on your IIS server before installing the latest version of MBI, and your AyaNova **must** be configured for network use before installing MBI on this computer

Mobile device requirements:

- Wireless data services from a mobile service provider
- A device with a web browser that supports XHTML Basic or XHTML MP or WML 2.x or greater. (the legacy WAP / WML 1.x are *NOT* supported)
- **NOTE**: Signature capture requires a browser that is HTML 5 compliant such as IE 9.0+, FIREFOX 3.0+, SAFARI 3.0+, CHROME 3.0+, OPERA 10.0+, IPAD 1.0+, IPHONE 1.0+, ANDROID 1.0+ .
- Some devices come with a less than ideal web browser. Opera makes a popular free web browser for wireless devices called Opera MINI that can be installed on many devices, more information can be found here: http://www.operamini.com/ Check whether it is HTML 5 compliant yet if using signature capture with MBI

8.10.2 MBI Requirements



Above image is a representation of the web applications WBI, MBI, and/or RI installation configuration with IIS

The AyaNova MBI (Minimal Browser Interface) is a web application installed on your Microsoft Internet Information Server (IIS) to provide minimal text web browser access for your scheduleable resources to your networked AyaNova data.

Requirements before proceeding with MBI setup:

- AyaNova requirements:
    - Latest version of AyaNova
    - AyaNova database must be networked
        - SQL Express or SQL Server is recommended if will be using any of the remote access options.

- AyaNova database licensed for MBI

- Computer requirements:
  - Windows 7 with IIS7 is recommended minimum although will run on as low as XP Pro with IIS5
  - approximately 40MB of hard drive space
  - Computer can be the same server where your database is networked on, or it can be another computer within the same LAN
  - As with the AyaNova database server, the higher the hardware specifications, the better the performance. If you are encountering slow response, you will want to upgrade your hardware and/or operating system. Minimum hardware requirements would be that for the IIS version compatible with your Windows operating system.

- Network requirements:
  - Static external Internet IP address for your Internet router/firewall is recommended
    - Your router/firewall has a static external IP address
    - Your router/firewall configured for port forwarding of your IIS computer.

NOTE: you can certainly use a dynamic IP address for your public router/firewall, but of course you are aware that as a dynamic IP address changes constantly, you and your staff would need to know what the changed IP address is every time it changes to be able to access via any AyaNova remote access option.

OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

- Security requirements:
  - IIS / firewall / router security:
    - If you are not comfortable with configuring your IIS / firewall / router, it is recommended that you call in a local IT networking professional to do so.
    - Any additional IIS security settings other than what is set when your IIS is default installed is beyond the scope of the support we provide.
    - If you wish to implement additional security settings, we highly recommend you first follow the default settings for setting MBI confirming you can successfully access, and only then make any changes, being sure to check after each change to see if affects MBI adversely.
  - If your data is highly sensitive:

- Any information sent over the internet is susceptible to Man-In-The-Middle (MitM) Attacks and it is recommended if your data is highly sensitive, to implement Transport Layer Security, typically involving HTTPS, TLS and SSL.
- SSL / TLS is enabled at the Microsoft IIS web server, not via AyaNova WBI or RI or MBI or Dataportal which do not have any special requirements or settings for encryption as that happens a layer below AyaNova at the web server.
- How to procure and install an SSL certificate and enable SSL on an IIS web server is beyond the scope of the support we provide. A suggestion would be to search via Google https://www.google.ca/search?q=microsoft+How+to+implement+SSL+in+IIS
- Be aware that SSL certificates need to be purchased from a certificate issuing authority and can be pricey **however** there is a new industry sponsored certificate authority providing no charge certificates which has been started up recently in an attempt to get everyone to start using encryption that might be of interest: https://letsencrypt.org/

- Web browser requirements:
  - HTML 5 compliant web browser such as IE 9.0+, FIREFOX 3.0+, SAFARI 3.0+, CHROME 3.0+, OPERA 10.0+, IPAD 1.0+, IPHONE 1.0+, ANDROID 1.0+

8.10.3 Step #1: MBI Installation

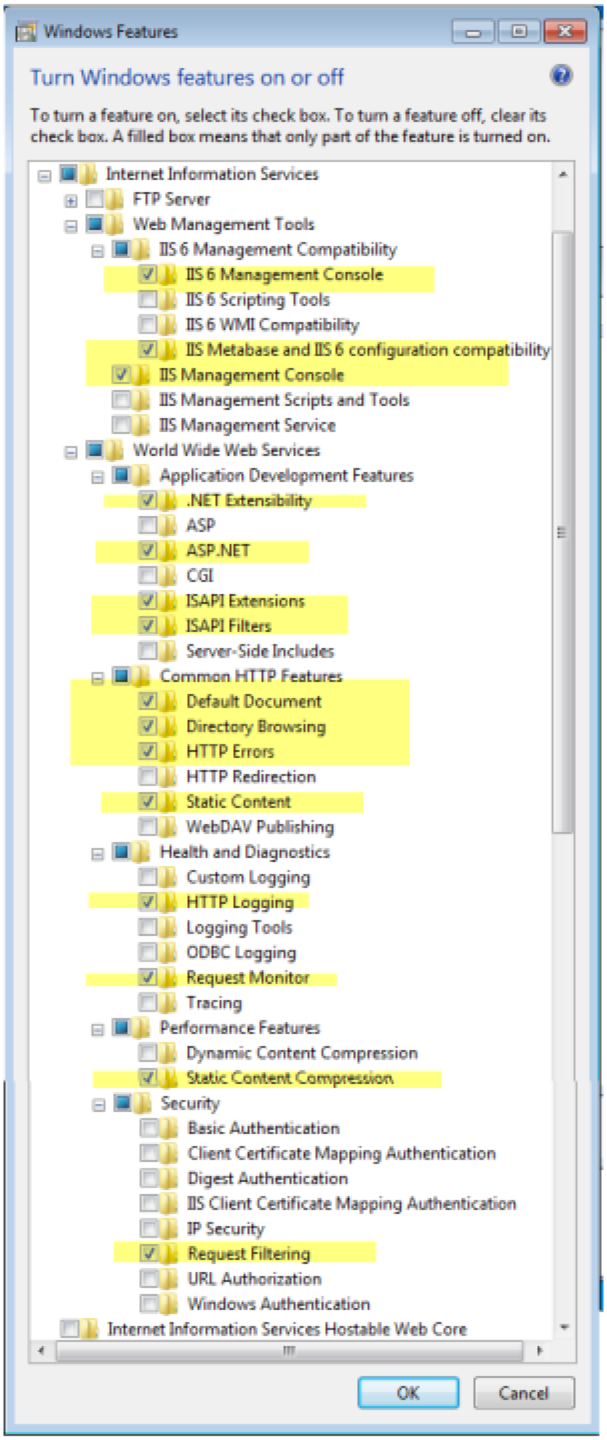
It is always recommend to read through all instructions first before proceeding.

A. IIS (Internet Information Services) is installed on the computer you want to run MBI on
B. AyaNova is networked and is the latest version.
C. AyaNova is installed on this computer and successfully runs
D. Run the AyaNova MBI setup file to install MBI files

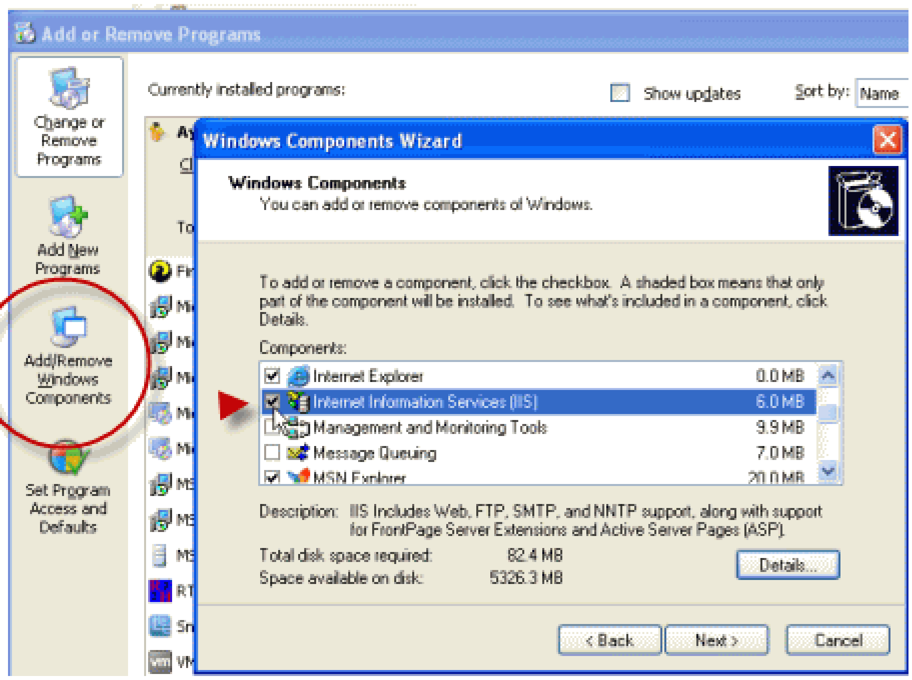
A. Is IIS (Internet Information Services) installed on the computer you want to run MBI on?

Install IIS by going to **Add/Remove Windows Components** and follow the on-screen instructions to install or add components to IIS if not already installed.

Below is example screenshot of all of the specific Internet Information Service settings that need to be checkmarked on a Windows 7 64bit operating system in order for MBI to function fully.



Below is example screenshot of adding IIS onto an older OS such as XP 64 via Add/Remove Windows Components

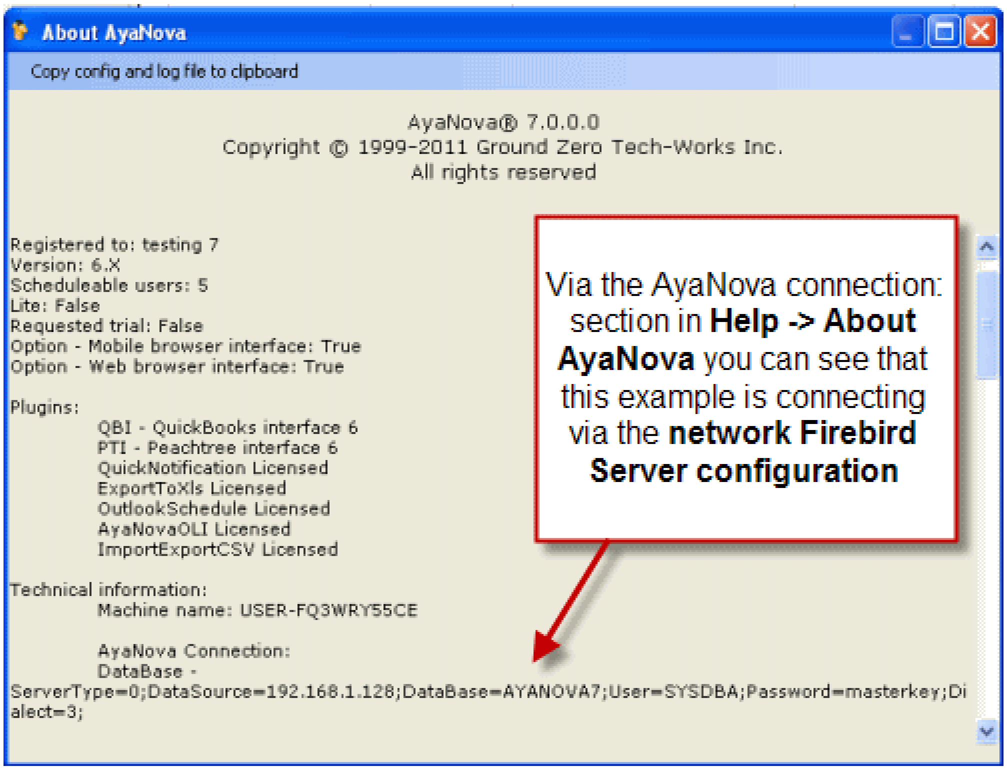


- Once installed, run Windows Updates again and apply **all** recommended updates
- Reboot again and check Windows Updates again, before proceeding with the installation.

B. Confirm that your AyaNova is networked and is the latest version.

- AyaNova **must** be networked using either Firebird Server, SQL Express or SQL Server. MBI will not run if using the default stand-alone installation of AyaNova.

- Refer to this AyaNova Help documentation section on networking AyaNova if you have not yet done so.



C. AyaNova is installed on to this computer and successfully runs

- Run AyaNova. Log in. Make sure you can log in successfully.

D. Run the MBI setup file and install

- Download the AyaNova MBI setup installation file from http://www.ayanova.com/download.htm and install MBI
- The installation will install MBI by default to C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaMBI and set up a AyaNovaMBI site under the Default Web Site as shown in your IIS Manager

E. Once installation is complete, continue with configuration

8.10.4 Extra: If do not want to use Default Web Site

NOTE: If on your server you can not or do not want to use a web site off of Default Web Site as per the Installation steps, you can manually create a new virtual web site pointing to the AyaNova folder as per the following steps:

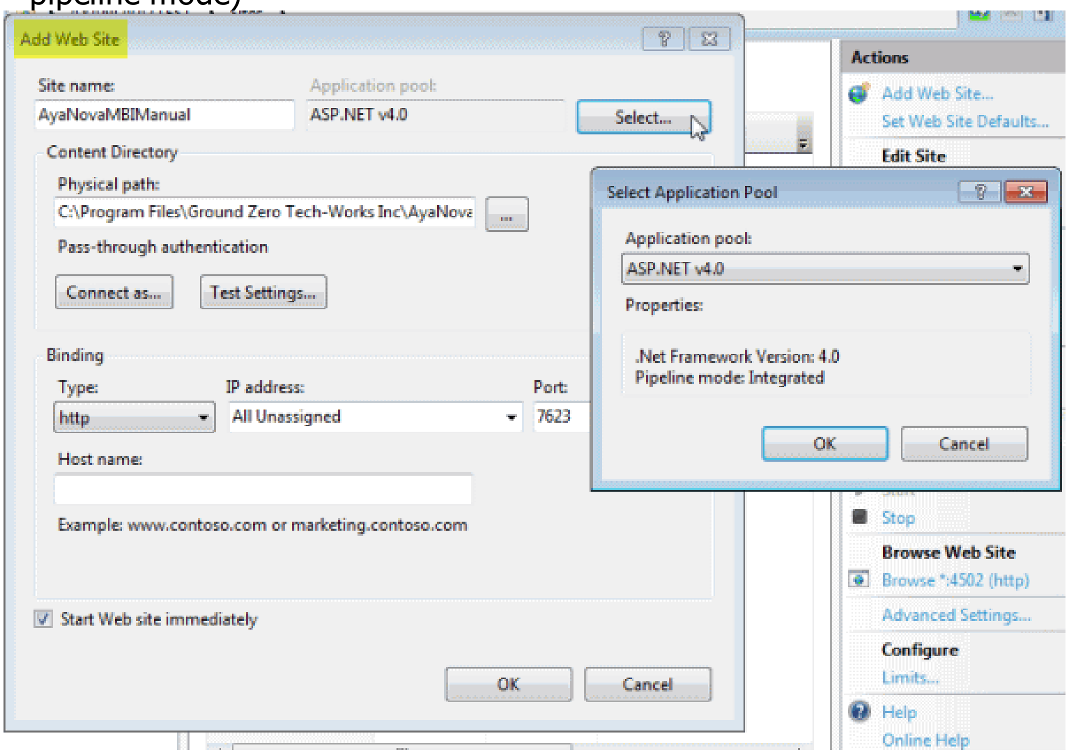
1. Perform all steps as per Step #1: MBI Installation

2. In IIS Manager, delete the installed web site AyaNovaMBI under Default Web Site (this should not remove the installed files)

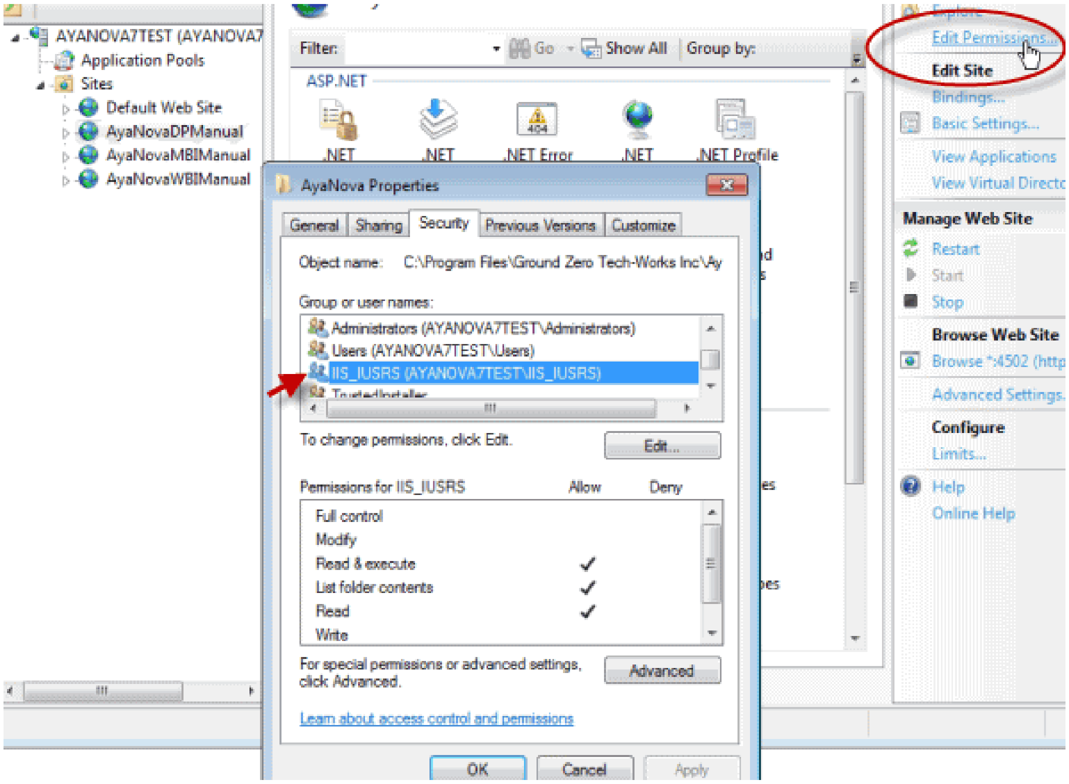
3. In IIS Manager, create a new web site pointing to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaMBI folder (or C:\Program Files\... if 32 bit computer) with its own port #

   <u>If using older OS such as Windows 2003:</u>
   - Allow anonymous access to the web site
   - The web site access permissions must be at minimum Read, Run scripts and Execute
   - Make sure .NET 4 is selected in the ASP.NET tab for this new site
   - You may or may not have to set the IP Address property of your new website to the computer's actual internal ip address instead of (All Unassigned)

   <u>If using Windows 7 and newer:</u>
   - Select **ASP.NET v4.0** application pool (uses Integrated managed pipeline mode)



   - Right-click on the newly created site, select Security tab, see that IIS_USERS is listed. Add if not.



4. Stop and Start this new web site that you just created

5. As the site is not under Default Web Site, note of course that the port # you set for your router in the Configuration steps would be for this new AyaNovaMBI site itself, not for Default Web Site.

6. As the site is not part of Default Web Site, the URL for testing would now be ip address and port number such as http://xxx.xxx.xxx.xxx:XXXX/ where XXXX is the port number you gave when you manually created the site and xxx.xxx.xxx.xxx would be the ip address

8.10.5 Step #2: MBI Configuration

Configuration of MBI differs depending on the operating system in use.

Below are first the steps **if using older OS such as Windows XP Pro or Windows 2003**; and than second after that are the steps **if using Windows 7 and newer**.

Steps to perform if using older OS such as Windows XP Pro or Windows 2003

A. Open the IIS Manager and confirm that AyaNovaMBI is present as an application site under Default Web Site

B. Confirm what the external static IP address is for your router/firewall (as your remote users will use that ip address, not a private internal ip)

C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)

Configure your router to forward outside Internet requests to the IIS server

Every model router is different so we can not provide specific directions here.

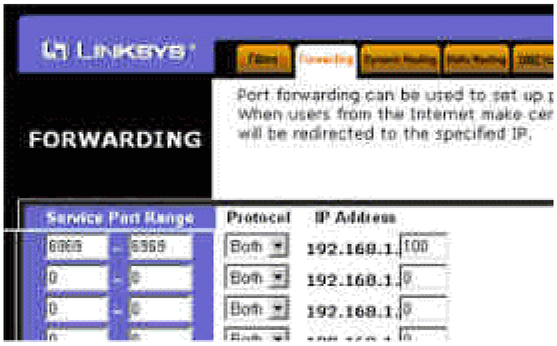
You will need to check your router documentation manual on how to configure forwarding

Basically, with most models you would bring up the software configuration for the router by connecting to the router via your web browser, go into Advanced settings, go into Forwarding settings, enter the internal IP address of the MBI IIS server, enter the Port number outside Internet users would enter to be redirected to the MBI IIS server (same port number the Default Web Site is set to use in Computer Management)

For example:

1. Your router's static Internet IP address is 333.222.101.12
2. The Default Web Site TCP Port is set to 6969
3. The MBI server's internal IP address is 192.168.1.100
4. You install and configure MBI to this computer
5. You configure your router to forward port 6969 to 192.168.1.100
6. Remote Internet users would enter the URL of **http://333.222.101.12:8989/AyaNovaMBI/** to bring up the login page for accessing via MBI. If the port number is 80 (the default web server port) then it can be left off of the URL in the browser.

- in our example screenshot below for our example LinkSys router - the forwarding port we have set is 6969 for the database server's internal IP address of 192.168.1.100



C.2 If you only have dynamic IP

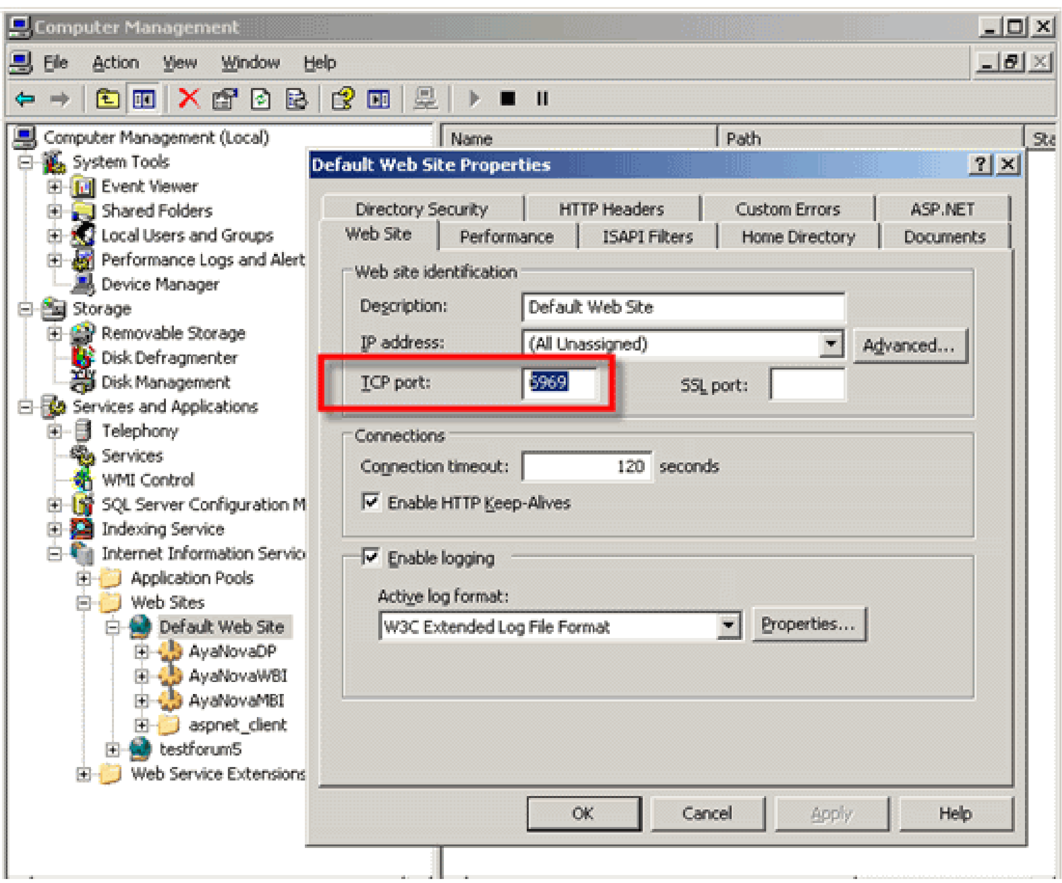
You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

D. Confirm that the Default Web Site in IIS is configured for this same port #

- In our **example**, we have the TCP Port as 6969 for the Default Web Site because as the above example, we want to have remote users forwarded to port 6969 onto the server.
- You do not have to use 6969 as the TCP Port and you can leave it at it's default of 80 - this is just an example.

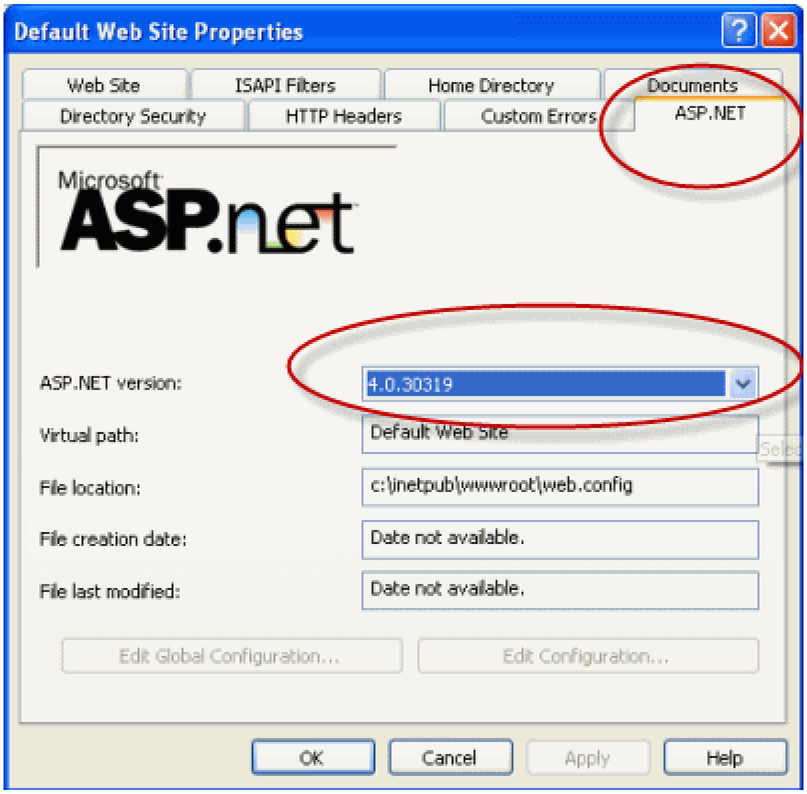


E. Replace the sample config.txt installed by the MBI setup with the same config.txt that your AyaNova program uses to connect to the networked database.

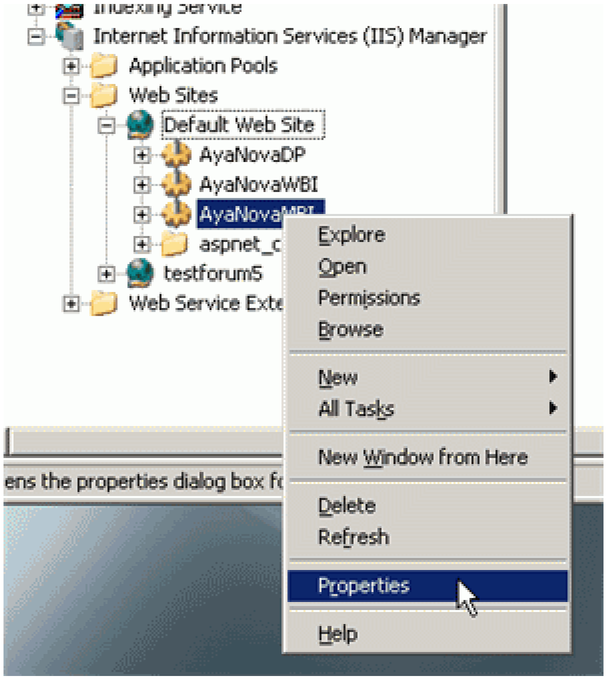
- a. Again confirm that the latest version of AyaNova is already installed and working connected to the networked AyaNova database (you can login and see your data) on this computer prior to installing MBI. Check your version by select menu Help -> About AyaNova Once confirmed AyaNova and MBI are the latest, then continue.
- b. Use Windows Explorer to open C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova folder, and copy the config.txt file
- c. Move to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaMBI**bin** directory and paste the config.txt there
- d. You will be asked to confirm overwriting the existing config.txt, click Yes.
- e. If you do not get asked, this may mean you are pasting to the wrong folder - check your steps and redo.

F. Confirm that both the **Default Web Site** and the **AyaNovaMBI site** are using Microsoft.NET Framework 4

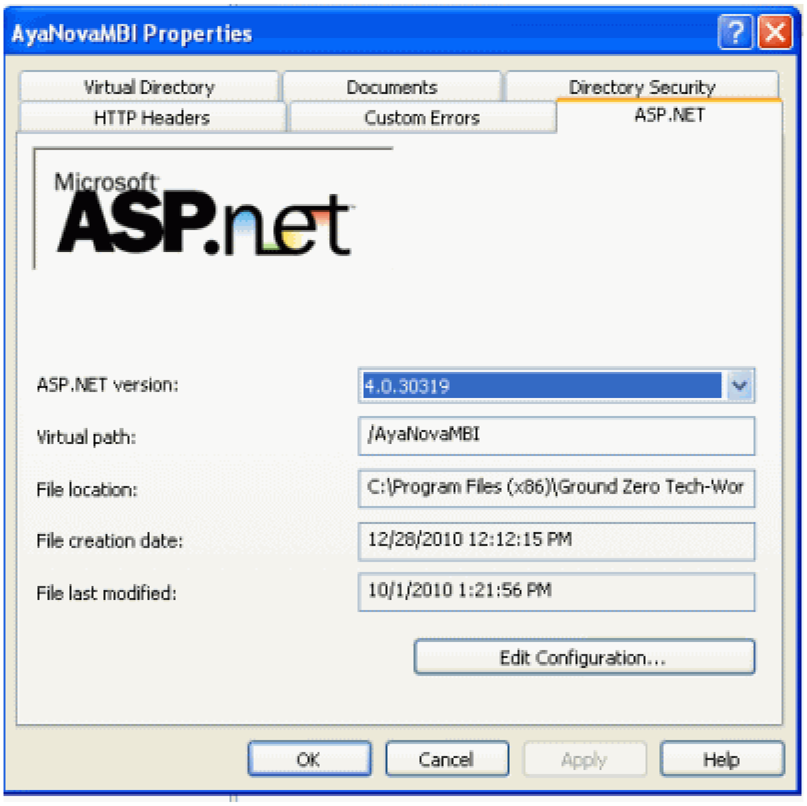
Click on the ASP.NET tab of this **Default Web Site** and make sure the .NET Framework selected is 4



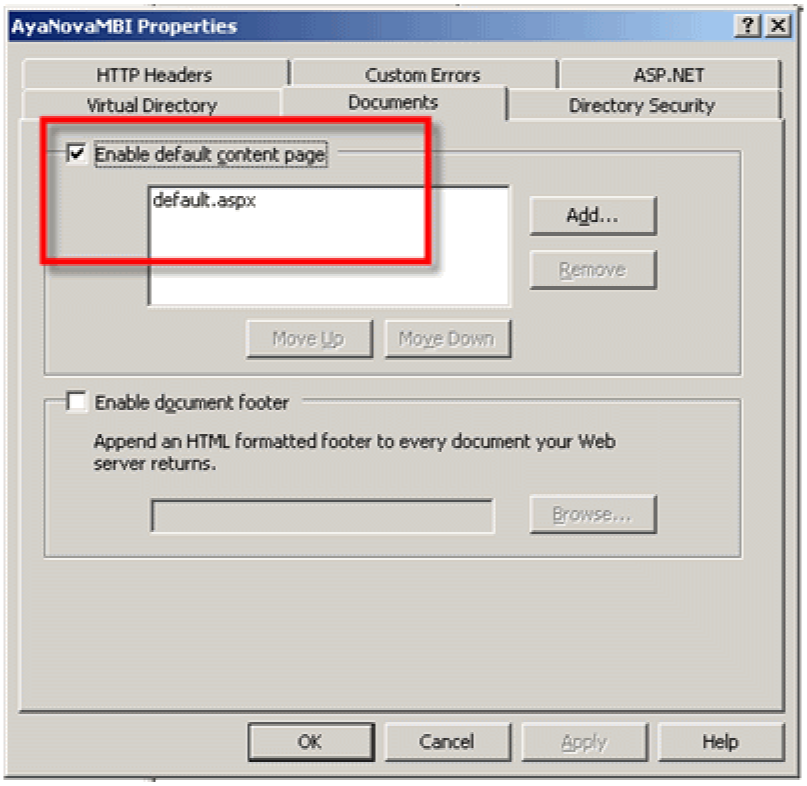
Right-click on the AyaNovaMBI site, and select Properties



View the ASP.NET tab and make sure the .NET Framework selected is 4

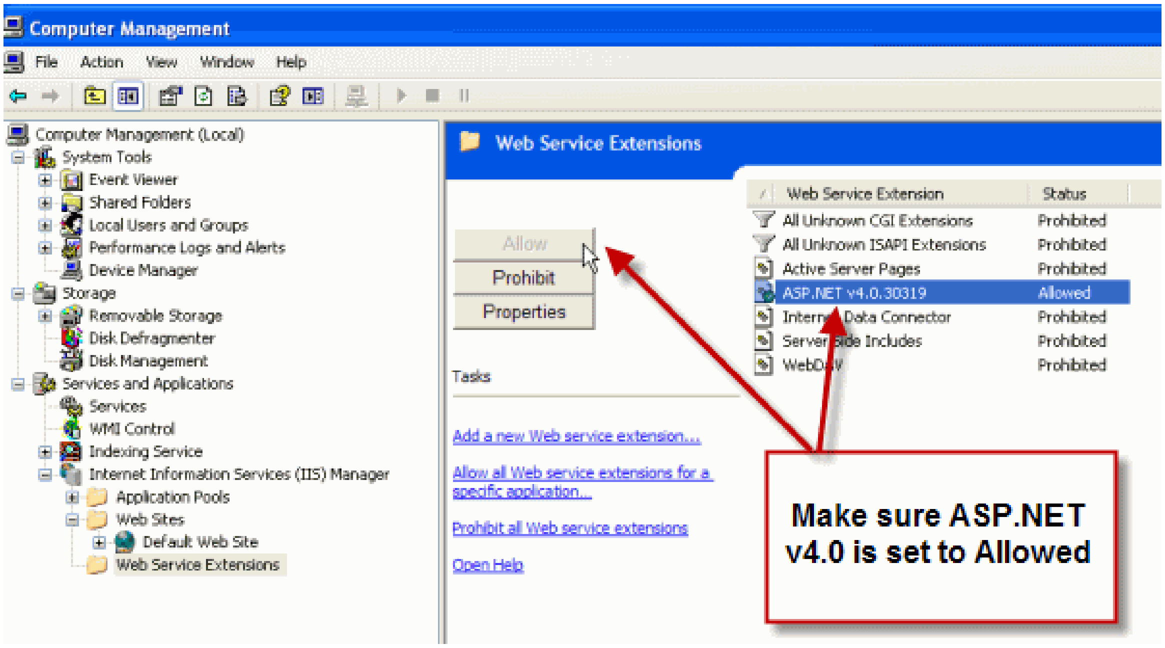


G. View the Documents tab and make sure default.aspx is set



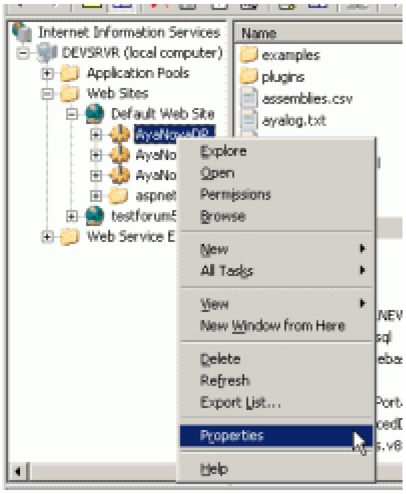
H. If using an older OS such as Windows 2003 or Windows XP 64 bit , select the Web Service Extensions and make sure is set to Allowed *(if not set to Allowed, will get 404 error Page Not Found when performing step N*)

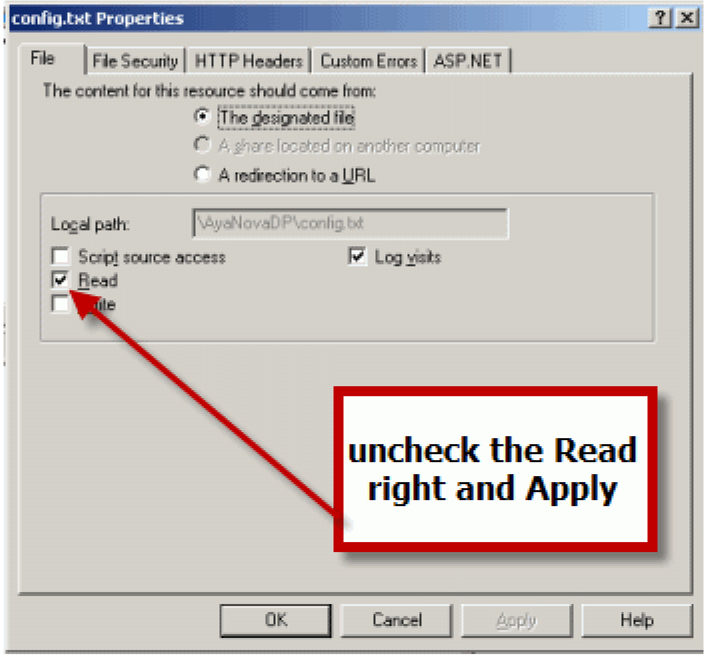
NOTE: If you do not see this extension listed, it may be because your ASP.NET needs to be re-registered to work with IIS again by running *"%windir%\Microsoft.NET\Framework\version\aspnet_regiis.exe" -i* where *%winver%* is the Windows directory for your operating system, and *version* represents the version number of the .NET Framework that you installed on your server. You must replace this placeholder with the actual version number when you type the command.



I. The following are additional rights settings you may want to set so that external users can not view the contents of the config.txt file

1. Open the IIS Manager or Computer Management
2. Right-click on config.txt that is within the folder of the AyaNovaMBI site
3. Select Properties
4. Un-check the Read right, and save.





I. Stop and Start the default web site

J. Continue to the User settings for MBI

Steps to perform if Windows 7 and newer

A. After installation has completed, open the IIS Manager and confirm that AyaNovaMBI is present

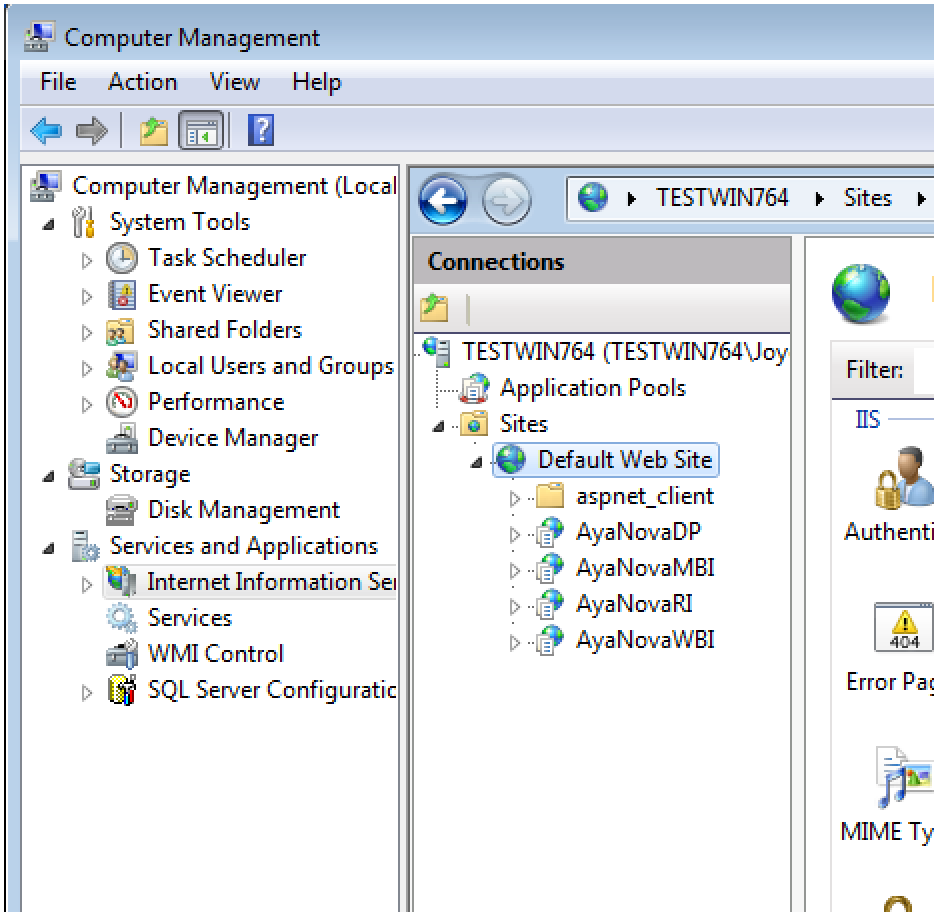


image above shows all optional remote access applications installed. your Default Web Site layout may be different.

B. Confirm what the <u>external static</u> IP address is for your router/firewall (as your remote users will use that ip address, not a private internal ip)

C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)

<u>Configure your router</u> to forward outside Internet requests to the IIS server

Every model router is different so we can not provide specific directions here.

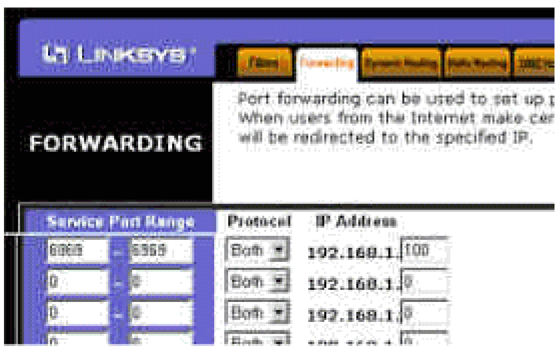
You will need to check your router documentation manual on how to configure forwarding

Basically, with most models you would bring up the software configuration for the router by connecting to the router via your web browser, go into Advanced settings, go into Forwarding settings, enter the internal IP address of the MBI IIS server, enter the Port number outside Internet users would enter to be redirected to the MBI IIS server (same port number the Default Web Site is set to use in Computer Management)

For example:

1. Your router's static Internet IP address is 333.222.101.12
2. The Default Web Site TCP Port is set to 6969
3. The MBI server's internal IP address is 192.168.1.100
4. You install and configure MBI to this computer
5. You configure your router to forward port 6969 to 192.168.1.100
6. Remote Internet users would enter the URL of **http://333.222.101.12:8989/AyaNovaMBI/** to bring up the login page for accessing via MBI. If the port number is 80 (the default web server port) then it can be left off of the URL in the browser.

- in our example screenshot below for our example LinkSys router - the forwarding port we have set is 6969 for the database server's internal IP address of 192.168.1.100



C.2 If you only have dynamic IP

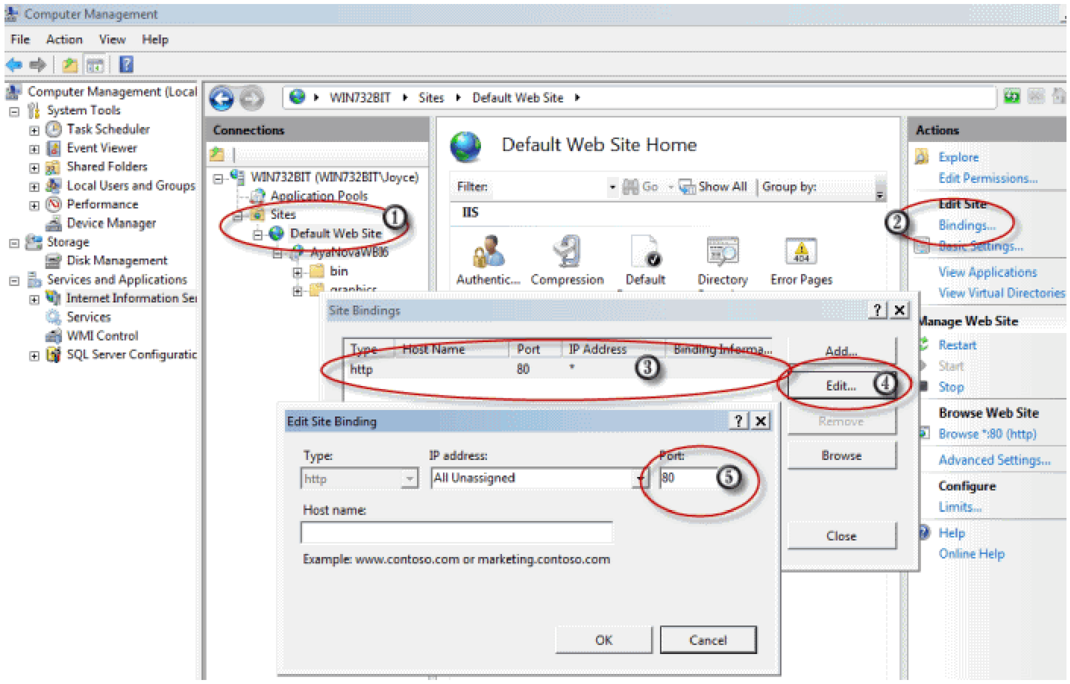
You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow https://forum.ayanova.com/t/yes-you-can-use-dns-and-your-dynamic-ip-address-to-set-up-remote-access/2311

D. Confirm that IIS is configured for this same port #

- In our **example screenshot below**, the Port is 80 for the Default Web Site.
- So would need to edit the port for the Default Web Site to 6969 to match that set for the router if using that port number of 6969.



E. Replace the sample config.txt installed by the MBI setup with the same config.txt that your AyaNova program uses to connect to the networked database.

- a. Again confirm that the latest version of AyaNova is already installed and working connected to the networked AyaNova database (you can login and see your data) on this computer prior to installing MBI. Check your version by select menu Help -> About AyaNova Once confirmed AyaNova and MBI are the latest, then continue.
- b. Use Windows Explorer to open C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova folder, and copy the config.txt file
- c. Move to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNovaMBI**bin** directory and paste the config.txt there
- d. You will be asked to confirm overwriting the existing config.txt, click Yes.
- e. If you do not get asked, this may mean you are pasting to the wrong folder - check your steps and redo.

F. Confirm that your Default Web Site and the AyaNova remote access application(s) just installed are associated with an application pool that uses the managed piped mode Integrated (not Classic) and uses .NET v4.0 (later versions may say version 4.2, 4.3, 4.5 etc)

• This .NET v4.x application pools are **created automatically** for you when you installed the IIS components in Step #1 - MBI Installation with .NET 4 installed

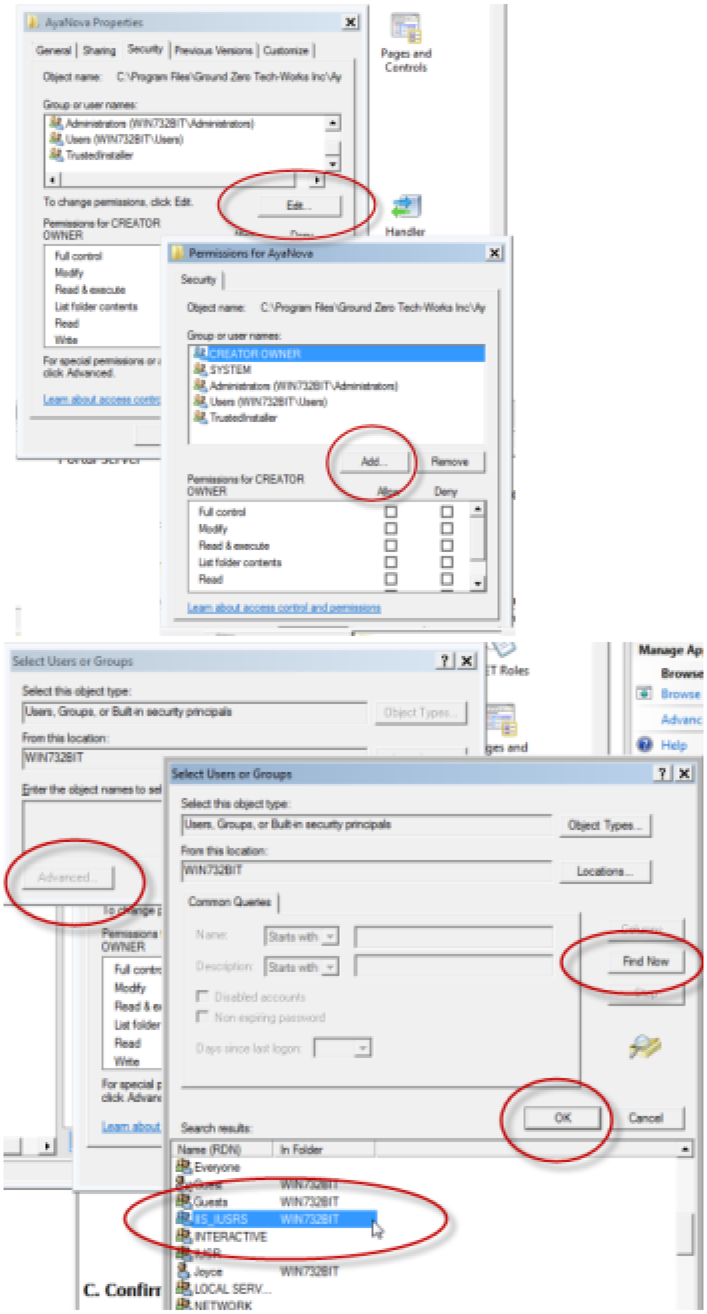
• Your version of Windows may have named the application pool ASP.NET v4.0 or it may have been named some other name such as DefaultAppPool or some other name.

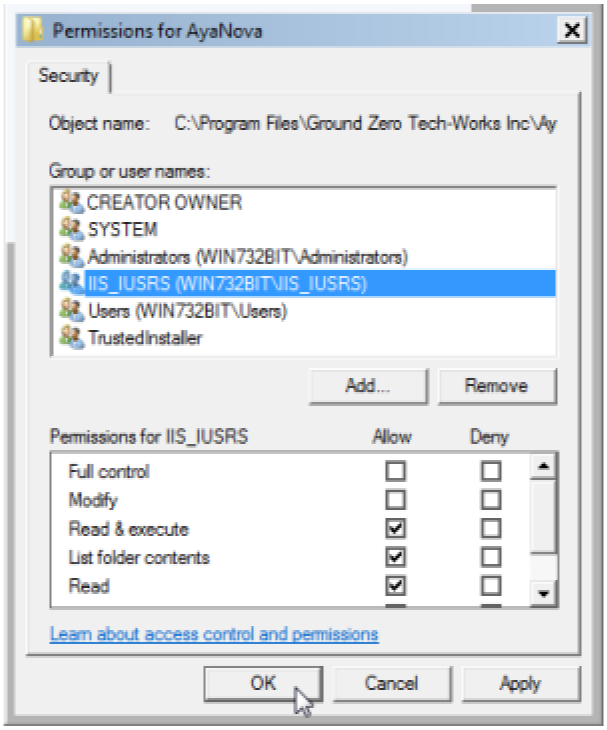
- The name doesn't matter - what matters is that the application pool is associated with your Default Web Site and the AyaNova remote access components has:
  - managed pipeline mode of **Integrated**
  - .NET 4 Framework

- If your Application Pools via your IIS **does not** show an application pool with managed pipeline mode of Integrated and framework version of 4.x (x being whatever the latest version 4 that is available) then you need to reinstall (or check to make sure even is installed) the required IIS components as outlined in Step#1. A and redo your steps.

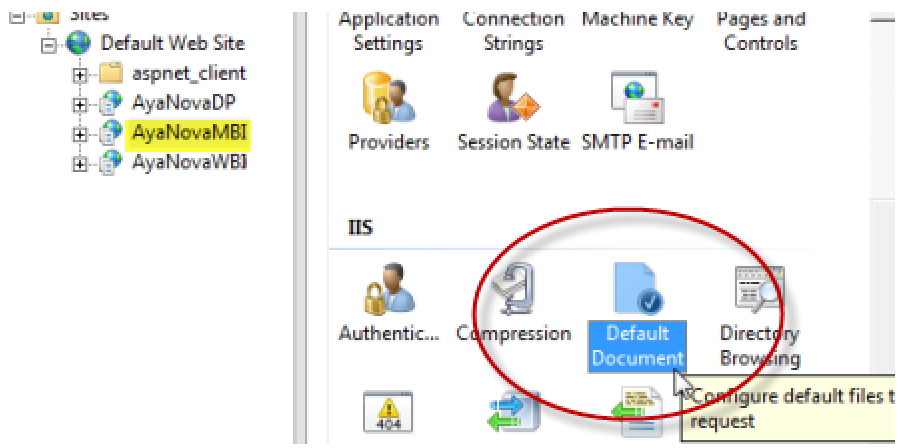
G. Check that IIS_Users has permissions

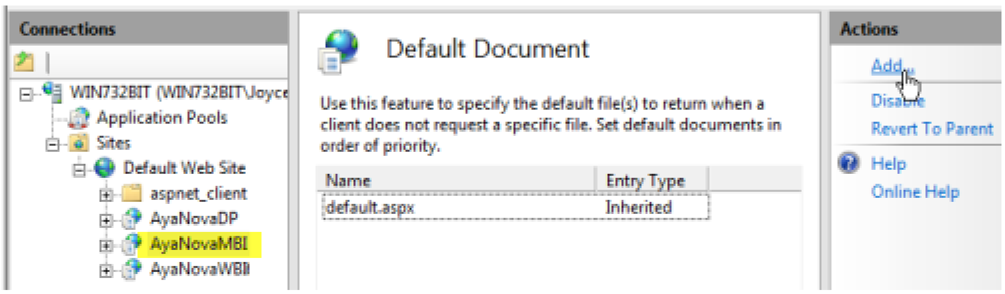
Right-click on **Default Web Site** -> Select **Edit Permissions**... -> Select the **Security** tab
If IIS_Users is not listed, do add.
Example screenshots taken such as click on Edit -> than Add... -> Advanced -> Find Now -> scroll down and click on IIS_USERS and OK till now showing.


AyaNova Properties
Permissions for AyaNova
Select Users or Groups
Add...
Remove
Advanced...
Find Now
OK
Cancel
IIS_IUSRS



H. View the Default Documents setting and make sure default.aspx is set



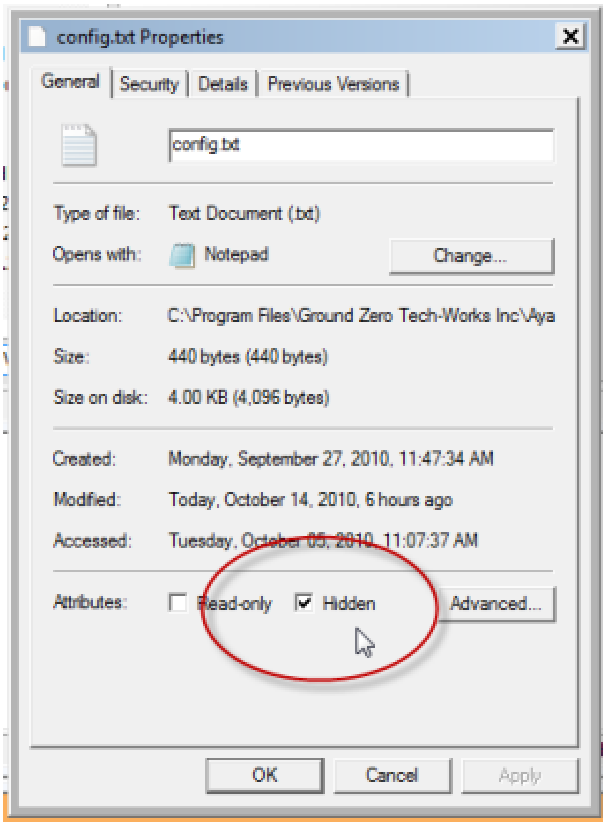


I. The following are additional rights settings you may want to set so that external users can not view the contents of the config.txt file

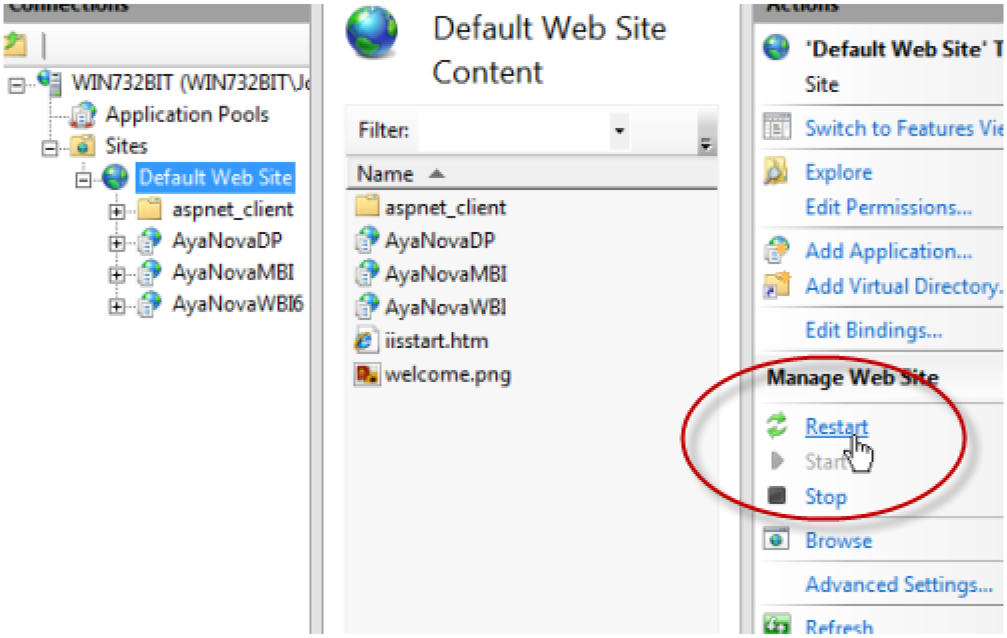
1. Switch to Content View for AyaNovaMBI

3. Right-click on the config.txt file and edit permissions

4. Check-mark Hidden



I. Restart the default web site



J. Continue to User settings

8.10.6 Step #3: User settings to be able to access MBI

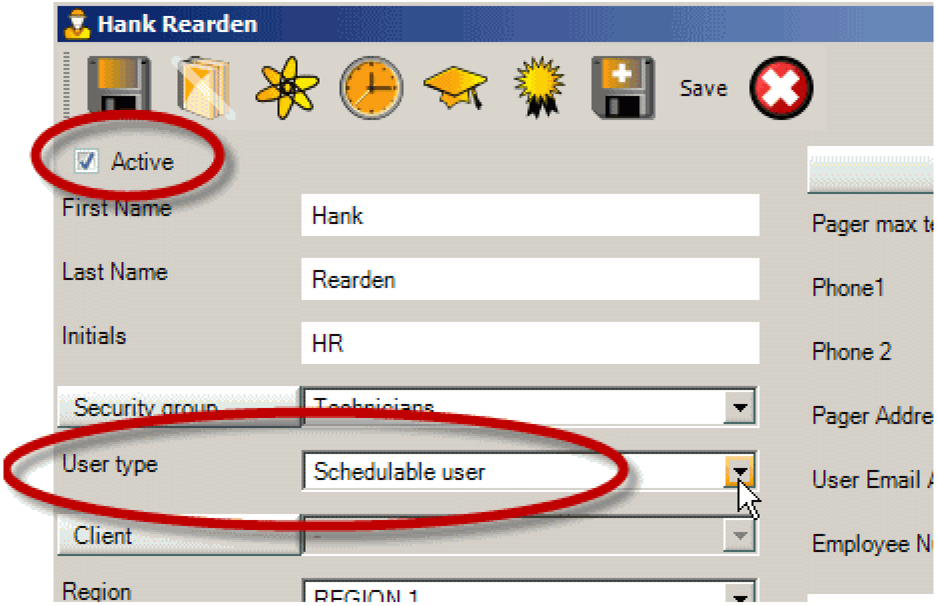
Two user settings must be set:

1. User must be of type Schedulable User

2. Security Group the schedulable user is a member of must have the minimum rights

1. User must be of type Schedulable User:

- In the user's entry screen, the User Type Schedulable user must be selected as only schedulable users can log in via MBI
- The user must also be active



2. Security Group the schedulable user is a member of must have the minimum rights:

For a schedulable user to be able to view and edit features via MBI, the following security group settings must be set to at least the minimum listed below. Refer to the Security Groups section for more details.

Object.Client	Set to minimum Read Only	So user can view details about Client
Object.Memo	Set to minimum Read/Write	So user can view, create new and reply to memos
Object.ScheduleForm	Set to minimum Read/Write	So user can view Schedule and make edits
Object.ScheduleMarker	Set to minimum Read Only	So user can view Schedule Markers
Object.Workorder	Set to minimum Read/Write	So user can view workorder information and change statuses and enter in labor
Object.WorkorderItem	Set to minimum Read/Write	So user can view workorder information and change statuses and enter in labor
Object.WorkorderItemLabor	Set to minimum Read/Write	So user can view workorder information and change statuses and enter in labor

For example, if the security group the schedulable user is a member of only has Read Only rights to Object.Workorder, that user will not see the Workorder Status selection field because he can not edit it.

After confirming that the users to test logging in with have these two set, continue to Step #4 - MBI Testing

8.10.7 Step #4: MBI Testing

1. Test the MBI connection on the server first

Open up a web browser on the MBI server itself and enter the URL to the AyaNovaMBI login page

Enter in the path **http://localhost/AyaNovaMBI/** if you have not specified a port or **http://localhost:XXXX/AyaNovaMBI/** where XXXX is the TCP Port number of your Default Web Site on this WBI server if you have specified a port other than the default of 80

Confirm you can bring up the MBI login screen

Confirm you can log in using a valid AyaNova schedulable user username and password

Also test entering in this local computer's IP address instead of localhost

For example, if the local area IP address is 192.168.1.100 and the TCP Port number of your Default Web Site of IIS is 9632, you would enter in the URL address line in the web browser on the WBI server itself **http://192.168.1.100:9632/AyaNovaMBI/**

If the MBI login screen does not display, double-check all previous steps right from the beginning.

2. Test on a local network computer:

Open up a web browser on a computer on the same internal network as the MBI server

Enter in the path **http://xxx.xxx.xxx.xxx:XXXX/AyaNovaMBI/** where xxx.xxx.xxx.xxx is the local area connection IP address of the MBI server and XXXX is the TCP Port number of the Default Web Site on the WBI server

For example, if I installed MBI to a computer on my network that has an internal IP address of 192.168.1.100, and the TCP Port of the Default Web Site on this computer is 9632, I would enter in **http://192.168.1.100:9632/AyaNovaMBI/** as the URL address.

If the MBI login screen does not display, but it did in the first test on the server itself above, you may be entering an incorrect local IP address for the MBI server; or the MBI server's operating system may have a firewall enabled that is preventing access.

3. Test via a remote mobile Internet connection:

On a remote device that is connected to the Internet, open up a compatible web browser

Enter in the path **http://xxx.xxx.xxx.xxx:XXXX/AyaNovaMBI/** where xxx.xxx.xxx.xxx is the IP address of your **router** and XXXX is the **forward** port you have configured on your router (which is also the same as the TCP Port number of the Default Web Site on the WBI server)

For example, if the router's static IP address is 222.333.777.12 and the forwarded port configured for the IP address 192.168.1.100 that I set up in the router's configuration is (and that is also the TCP Port for the Default Web Site) is 9632, I would enter **http://222.333.777.12:9632/AyaNovaMBI/** into the web browser URL address.

If the MBI login screen does not display, but it did in the first two tests above, you may not have configured your router correctly. Review and edit your configuration - don't forget to reset after.

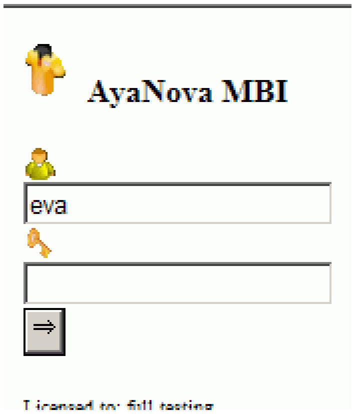
8.10.8 MBI Use

As every mobile device is different in how to use, we can not provide step by step use instructions for use with your exact mobile device. Below is an overview of the available features.

Only Schedulable Users can log in via MBI
Schedule
View client contact information
Change status of workorder
View and add billable labor information to the scheduled workorder item
AyaNova internal memos
Recent list
Client signature

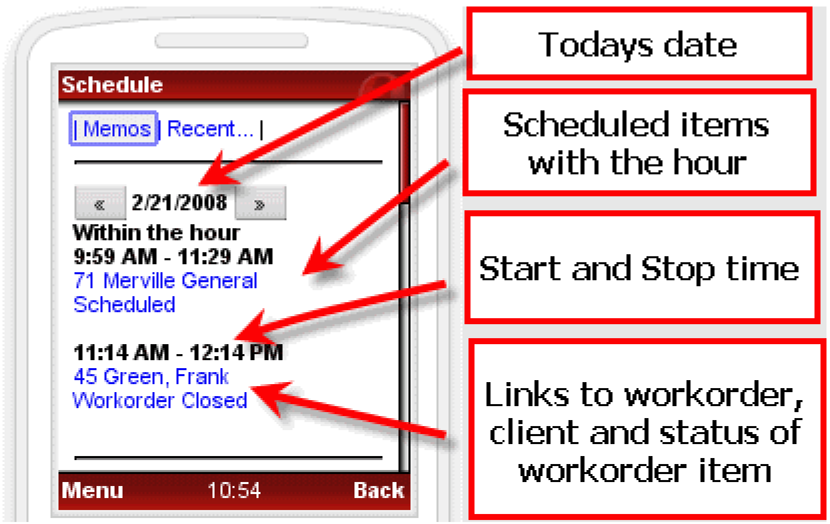
Only Schedulable Users can log in via MBI

MBI will only accept login by an AyaNova user **if** type Schedulable User



Schedule screen

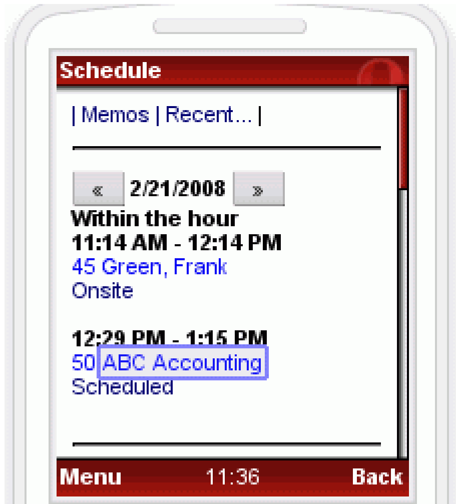
First screen after log in defaults to showing scheduled items for the schedulable user, with the items within the present hour listed first

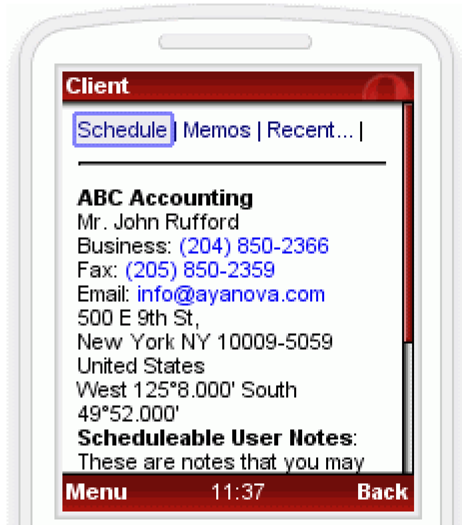


- Easily and quickly check what and where and when you are scheduled
    - Easily see the scheduled start and start time

View client contact information

- Easily select the client if need to view address or contact information





- If mobile device has the ability, automatically call the phone number selected or email the email address selected.

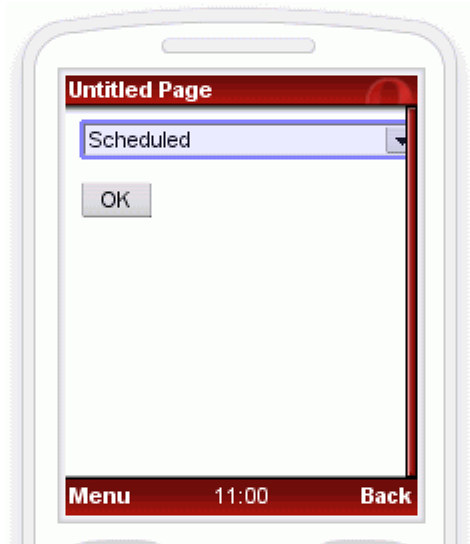
Change status of workorder

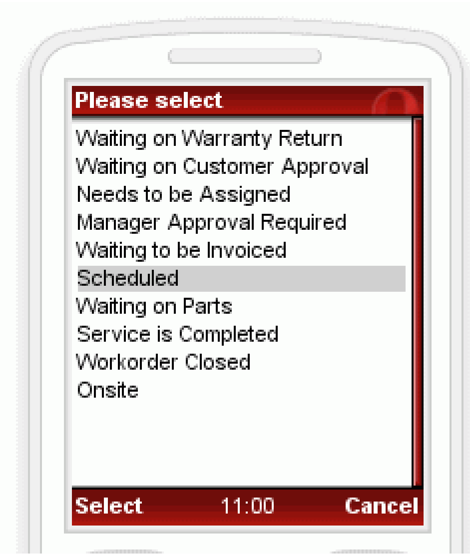
The schedulable user can easily change the status of a workorder item so that those back at the office know what is occurring

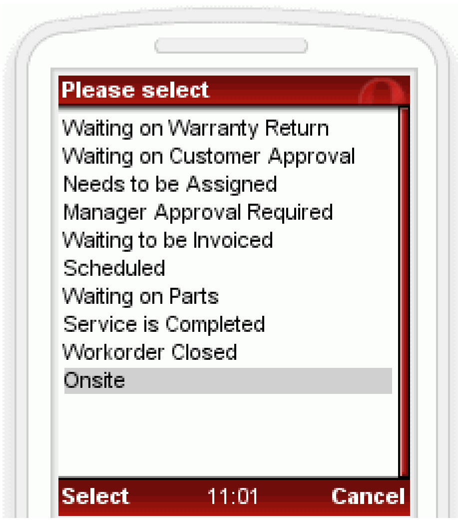
- For example, when work is completed at one site, change the status to Completed, and change the status on the next workorder item to On Route To, or if just on site, change status to On Site (*note that these are just example Workorder Statuses, as you can create your own*)

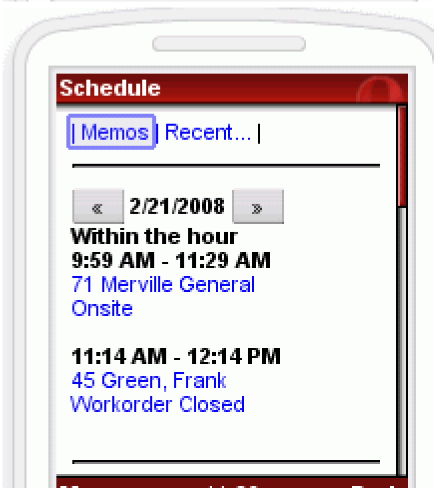
- **NOTE**: if the status does not show for a workorder it is because a) the user logged in does not have Read/Write rights to workorders or b) the workorder has been checkmarked Service Completed.


Schedule
| Memos | Recent... |
« 2/21/2008 »
Within the hour
9:59 AM - 11:29 AM
71 Merville General
Scheduled
11:14 AM - 12:14 PM
45 Green, Frank
Workorder Closed
Menu
10:59
Back


Untitled Page
Scheduled
OK
Menu
11:00
Back

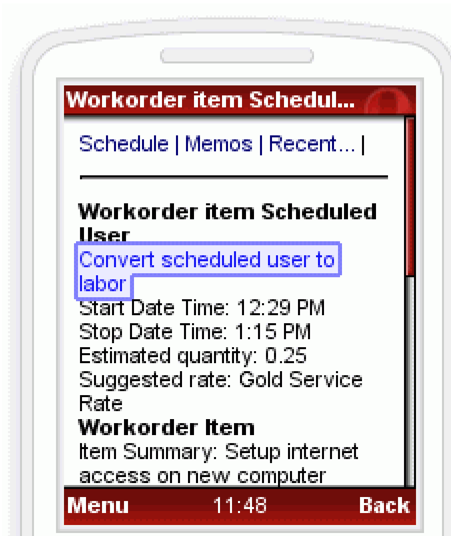

Please select
Waiting on Warranty Return
Waiting on Customer Approval
Needs to be Assigned
Manager Approval Required
Waiting to be Invoiced
Scheduled
Waiting on Parts
Service is Completed
Workorder Closed
Onsite
Select
11:00
Cancel



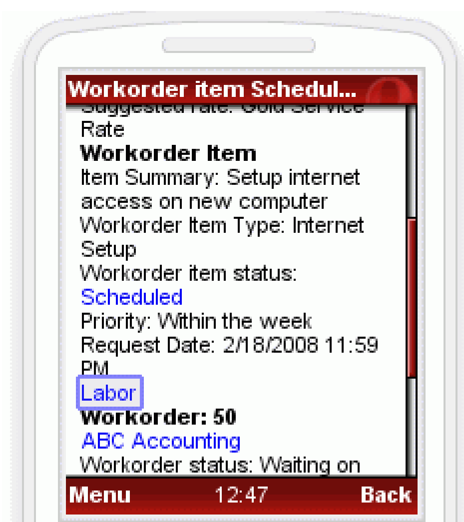


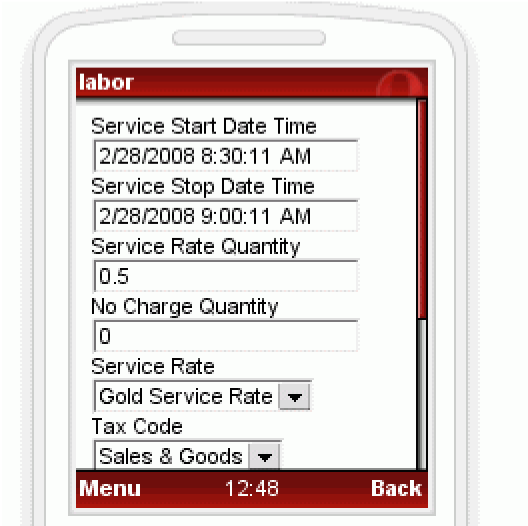
View and add billable labor information to the scheduled workorder item

- Can select to convert the Scheduled Start and Stop automatically to Labor saving time on re-entry

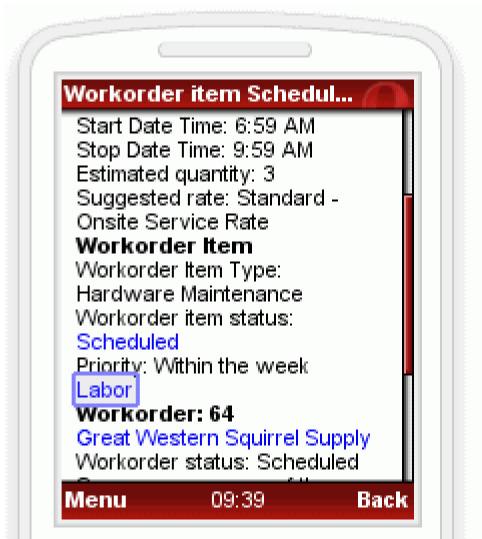


- Can view and edit existing Labor items if had previously entered

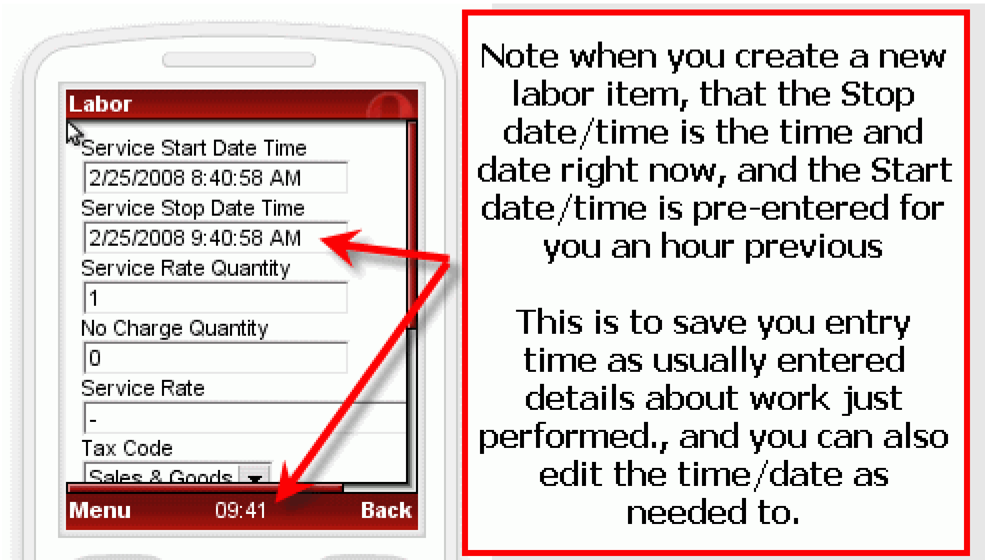




- Can add new Labor item



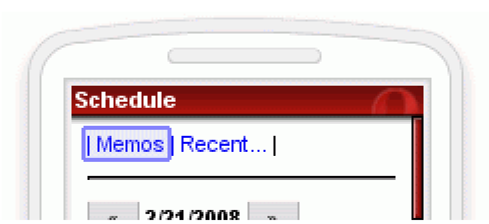
- New created Labor item by default enters Stop date/time of the date/time of entry, and Start date/time an hour earlier, saving entry time for the user, as well as providing a basis for where the user can easily edit.

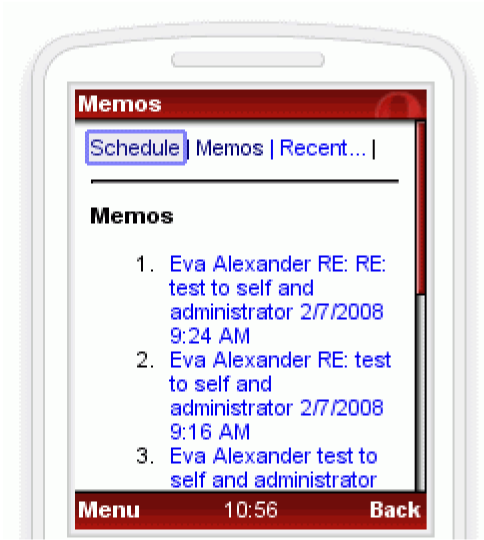


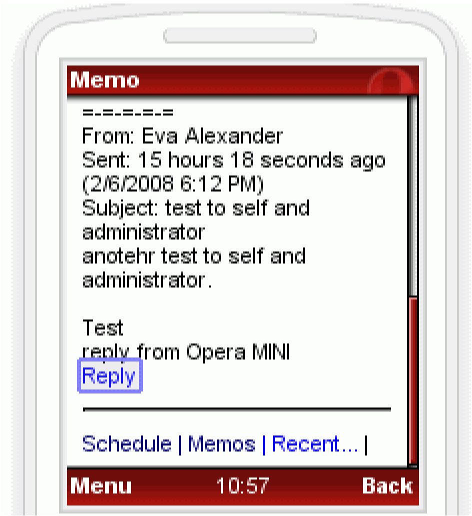
- User can view the serial number of the unit service is to be performed on. Selection of a unit via MBI is not a feature
- Entry of parts used in service is not a feature of MBI

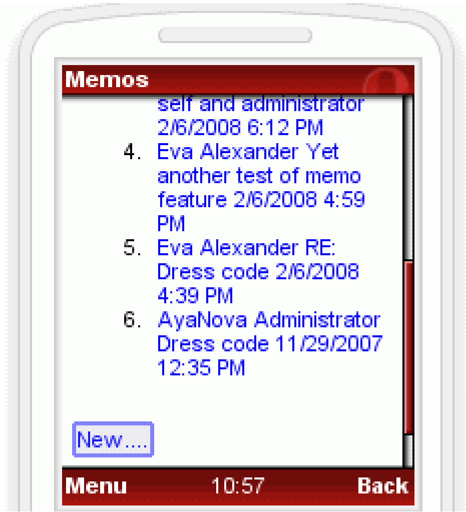
AyaNova internal memos

- You can view, reply, create new, and send internal AyaNova memos.
- This is very useful to receive information from the office while on the road, as well as to send information to other AyaNova users while out on the road.

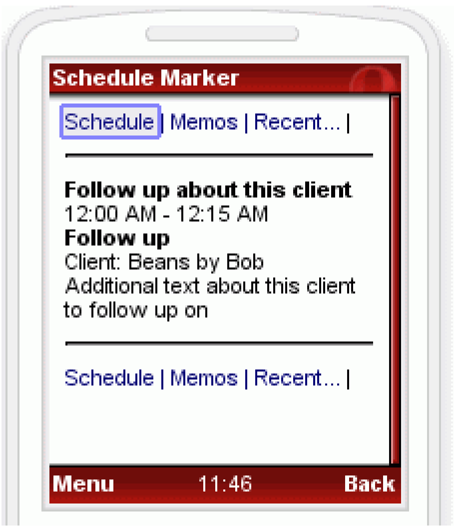








- View text of existing Schedule Markers



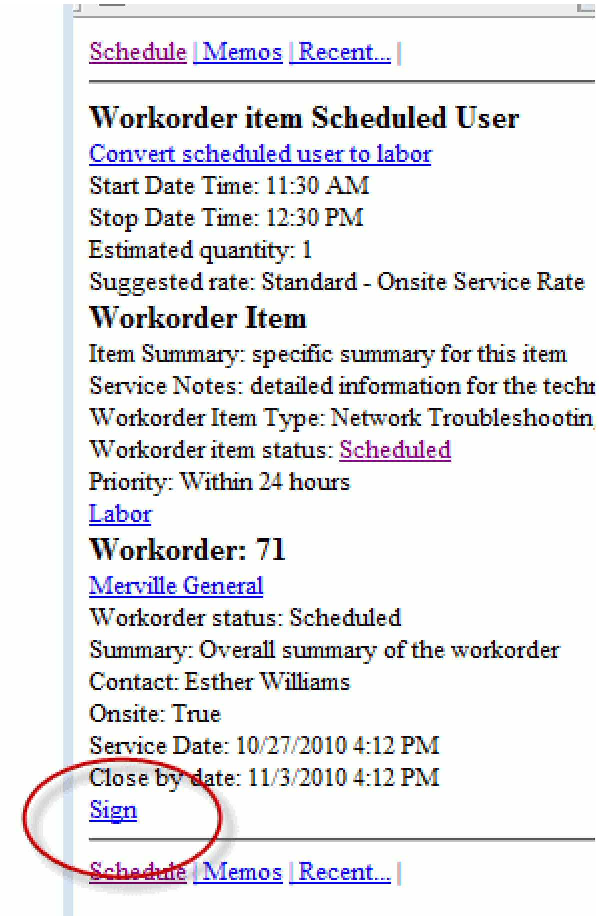
Recent list

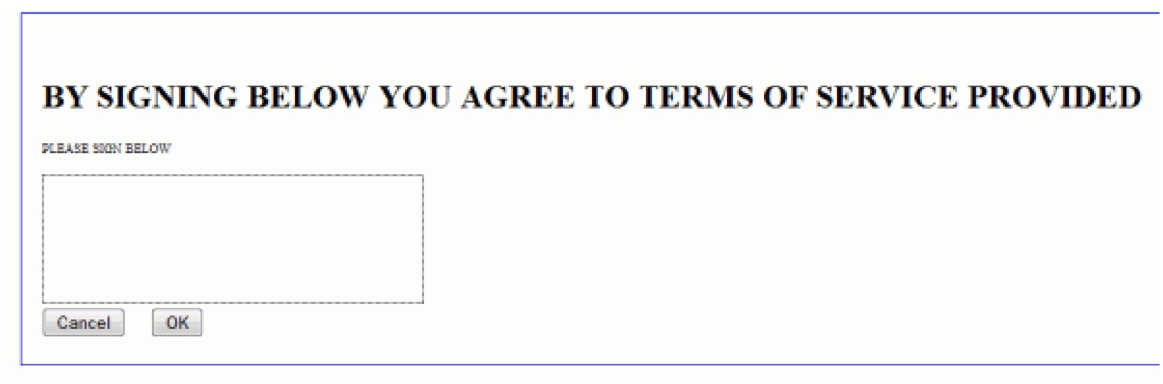
- Users can view most recently viewed objects, saving time by being able to go directly to the object they were recently working on.

Client Signature

NOTE: Signature capture requires a browser that is HTML 5 compliant such as IE 9.0+, FIREFOX 3.0+, SAFARI 3.0+, CHROME 3.0+, OPERA 10.0+, IPAD 1.0+, IPHONE 1.0+, ANDROID 1.0+ .

- The Signature hyperlink is on the bottom of page displayed when user selects a workorder from the main Schedule
- Select to display the signature box where your client can sign - select the OK when completed
- Note that in keeping with the minimalist philosophy of MBI for speed, the signature is captured however it is not displayed as a graphic image anywhere in MBI





What displays in the signature header or footer or title can be set in the Signature section of Global Settings

Want your client to receive a report of the work performed along with their signature?

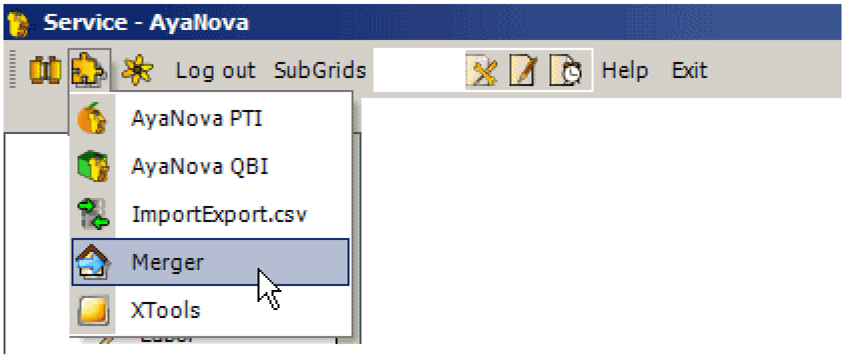
- Edit the Client Notifications for the region of the client, creating an active Workorder Status Changed notification set to a specific status with your report template selected that shows the signature image
- When out in the field, your schedulable user can have the client sign via MBI.
- And than your schedulable user sets the workorder to that specific workorder status, and the client will receive via email the report showing their signature!

Optional Add-ons

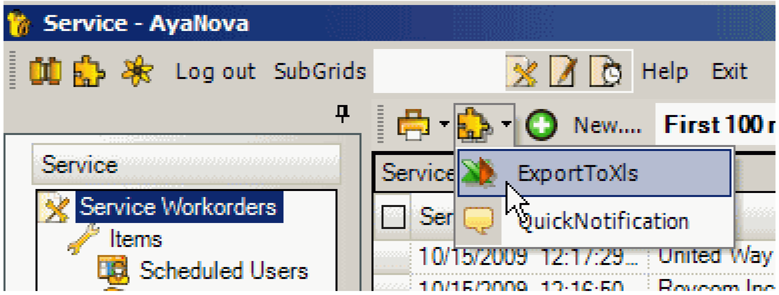
9 Optional Add-ons

9.1 PlugIns

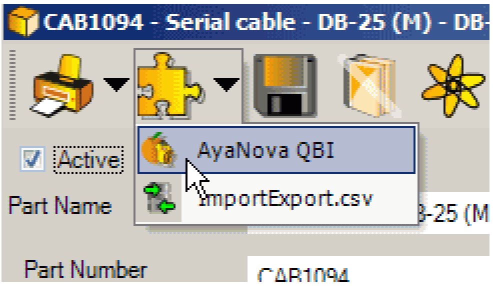
AyaNova includes many optional add-on's - whether they display from the Plug-in menu option on the main menu bar, main grid menu bars and/or entry screen menu bars is dependent on whether you have installed and have licensed.



Example screenshot of plug-ins menu from the main menu bar



Example screenshot of plug-ins menu from the Service Workorders grid menu bar



Example screenshot of plug-ins menu from the Part entry screen menu bar

ClientMover

This utility provides the ability for an administrator to easily and quickly remove one or multiple Clients and all their linked records such as Workorders, Quotes, PMs, Units etc.
See: ClientMover

OutlookSchedule

The OutlookSchedule plug-in exports the scheduled items for the logged in user into an Outlook calendar.
See: OutlookSchedule

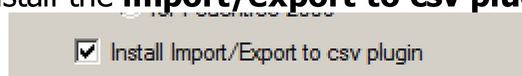
Quick Notification

The Quick Notification plug-in allows any AyaNova user to send a quick message to a subscribed AyaNova user. How the message is sent (via AyaNova memo, via AyaNova popup, via SMS, via email) is dependant on what delivery method the recipient user has set up for this subscription. A Quick Notification license is required to use this plug-in
See: Quick Notification

Export to XLS

This plug-in provides the ability to export main grid's column data to an xls file for further data analysis. An Export to XLS license is required to use this plug-in
See: Export to XLS

ImportExport.csv

Select to install the **import/export to csv plugin** during the initial AyaNova installation 

to provide the no charge ImportExport.csv utility for importing and exporting clients, rates, parts, units, unit service types, workorder statuses, priorities, workorder item types.

Merger

This utility allows you to "merge" clients - transfer workorders, quotes, etc from one client to another
See: Client Merger

XTools

This utility allows you to enter links to other programs, websites, etc to have quick access while within the AyaNova program. It can be configured two ways - either via the <Configure> option or directly via the XML file.
See: XTools

AyaNova PTI

PTI is an optional add-on that interfaces AyaNova and Peachtree accounting software. Please refer to the PTI web page for features, and to the PTI Online Help file for requirements, installation, configuration and use. A PTI license is required to use this plugin.

AyaNova QBI

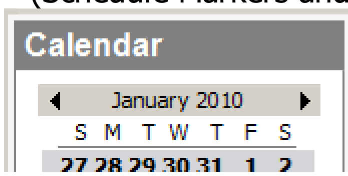
QBI is an optional add-on that interfaces AyaNova and QuickBooks accounting software. Please refer to QBI web page for features, and to the QBI Online Help file for requirements, installation, configuration and use. A QBI license is required to use this plugin.

9.2 AyaNova OLI - Outlook Interface

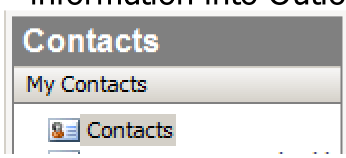
9.2.1 OLI Installation

The AyaNova OLI Outlook Interface plug-in provides the following AyaNova features from within your Outlook program :

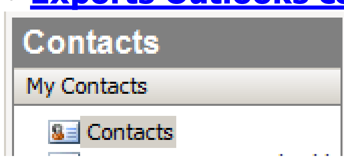
- **Exports the logged in user's AyaNova scheduled items** (Schedule Markers and workorder items) into Outlook



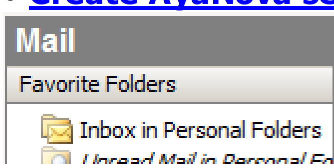
- **Imports AyaNova clients/vendors/head offices** contact information into Outlook



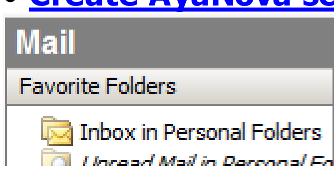
- **Exports Outlooks contact information into AyaNova**



- **Create AyaNova service workorders from Outlook email**



- **Create AyaNova schedule markers from Outlook email**



AyaNova OLI Outlook Interface installation:

1. Requirements prior to installation of OLI to your computer:
    1. Your AyaNova program is already installed onto your computer

2. Your AyaNova program is the latest version
    i. Help -> Check for Updates
3. Your AyaNova database is licensed for OLI
    i. go to Help -> About AyaNova to confirm you have either a temporary license for OLI or have purchased OLI subscription
4. Compatible version of Outlook
    i. 32bit version of Outlook (OLI is **not** compatible with 64bit Outlook)
    ii. Outlook installed to the same computer as your AyaNova program and OLI installation (OLI is not compatible with cloud based Outlook)
        a. OLI is **not** compatible with Outlook versions older than 2002
        b. Newer versions of Outlook may or may not be compatible (i.e. 2002, 2003, 2007, 2010 are confirmed compatible) - be sure to test with your version of Outlook before purchase
        c. **Contact us with all text from your Help-About AyaNova to trial before purchase!**
5. If your computer itself is 64bit, then your AyaNova must be networked using SQL Express or SQL Server to be able to run OLI
    i. OLI will **not** run on a 64bit computer if your AyaNova is configured for standalone use or is networked using Firebird Server.
6. If your computer itself is 32bit and your AyaNova is installed for stand-alone use:
    i. you must close Outlook to run your AyaNova or close your AyaNova to run your Outlook
    ii. both can not run at the same time.
7. Your Outlook program is **fully shut down before** running the installation
8. Your AyaNova program is **fully shut down before** running the installation
9. Proceed to the next step

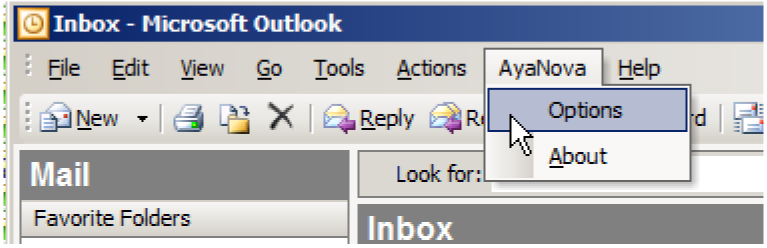
2. Download the AyaNova OLI (Outlook interface) setup file from the Downloads web page to a temporary folder on your computer

3. Run the AyaNova OLI setup file and follow the prompts to install

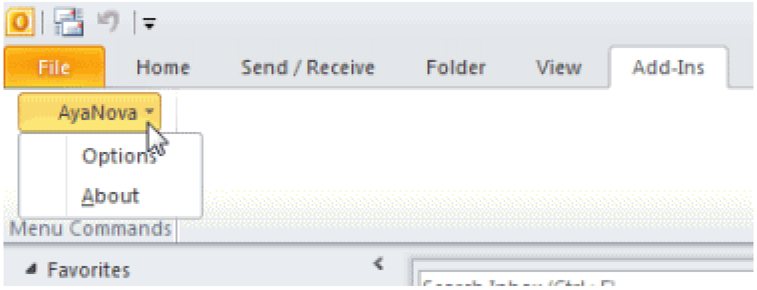
- The OLI plug-in files will be installed to this computer in the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\ folder
- You will also notice a DOS screen display for a short while during installation, this is when the registry settings required by Outlook are applied.

4. Run your Outlook program once the installation has completed.

5. You will now see that you have an AyaNova menu option when viewing Calendars, an AyaNova menu option when viewing Contacts, an AyaNova menu option from the main Mail section, and an AyaNova menu option when viewing a specific email



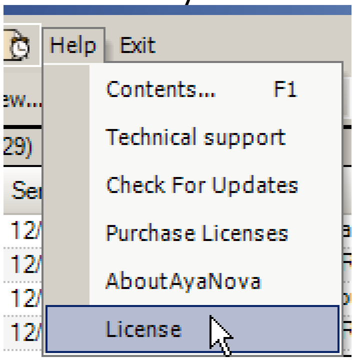
Of course if Outlook 2010 or higher with its new menu, the OLI optional add-on will be located under Add-Ins

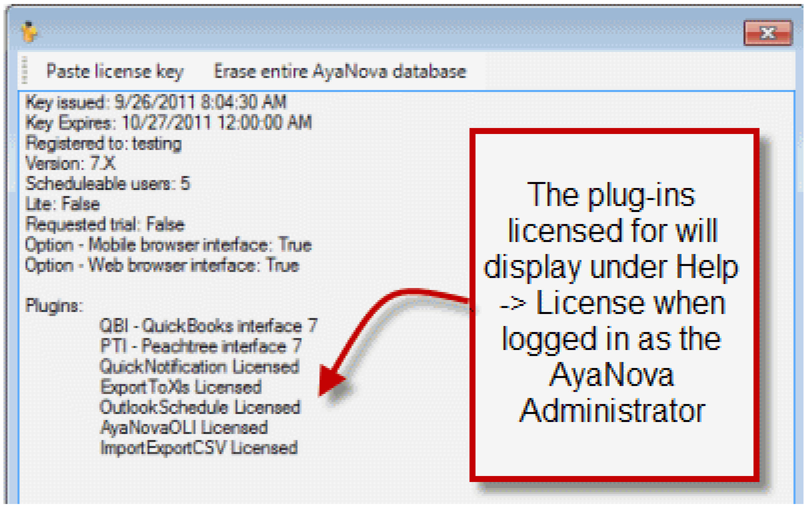


- In some circumstances if after successful installation, you load Outlook and the OLI plugin is listed as disabled in your Outlook, shut down your Outlook and run it again in compatibility mode.

6. An AyaNova OLI plug-in license is required to be installed <u>to each computer, before you can run the plug-in on that computer</u>.

- You can check to see if licensed by logging in as the AyaNova Administrator, select Help -> License or log in as any user and select Help -> About AyaNova





- If you would like to test this OLI plug-in but not yet licensed, include in your email request to *support@ayanova.com* the text from your Help -> License and your ayalog.txt file from your AyaNova program folder
- Only one OLI license is needed for your database

Common things to be aware of:

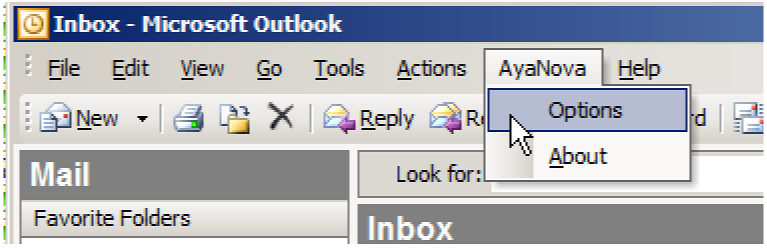
- If your AyaNova is installed on a single computer with the default stand-alone configuration, you can not run both your AyaNova program and your Outlook at the same time.
- Be aware that when you exit out of Outlook, that it does take a few more minutes before Outlook has "really" exited. So before running stand-alone AyaNova, give it a couple minutes after exiting out of Outlook.
- If your AyaNova is networked, you **can** run both AyaNova and Outlook at the same time. And if concerned that you just have a single computer - no problem, as you do not need a computer that is a "server" to configure AyaNova for network use. You can configure AyaNova for network use on a single computer too. Just follow the steps for either configuring for network use using either the free network Firebird Server or if a 64 bit computer, use the free SQL Express

9.2.2 Connecting to AyaNova via OLI

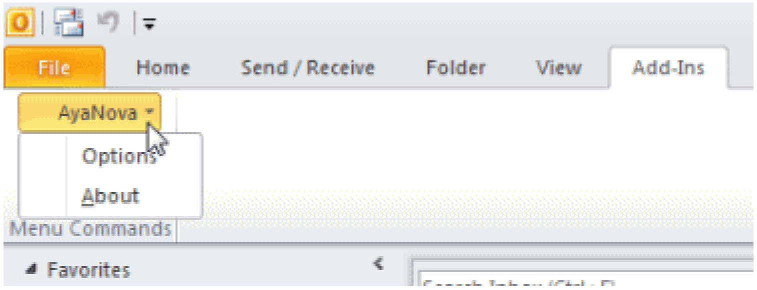
Once the OLI plug-in has been installed, do the following:

1. Start your Outlook program
2. You will note in Outlook that there is now an AyaNova menu option in the following four areas of Outlook

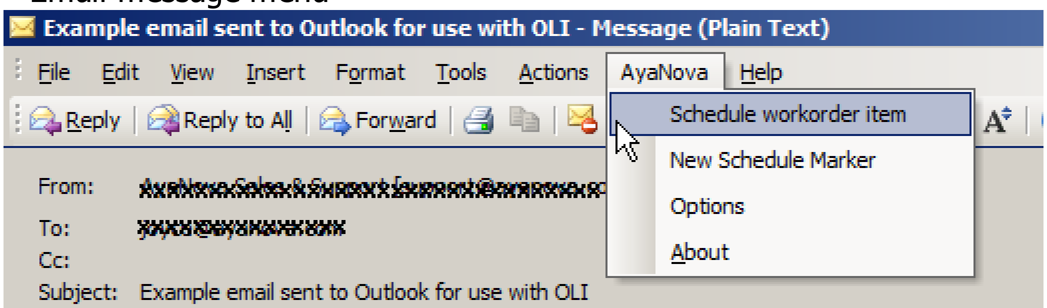
- Main Mail menu



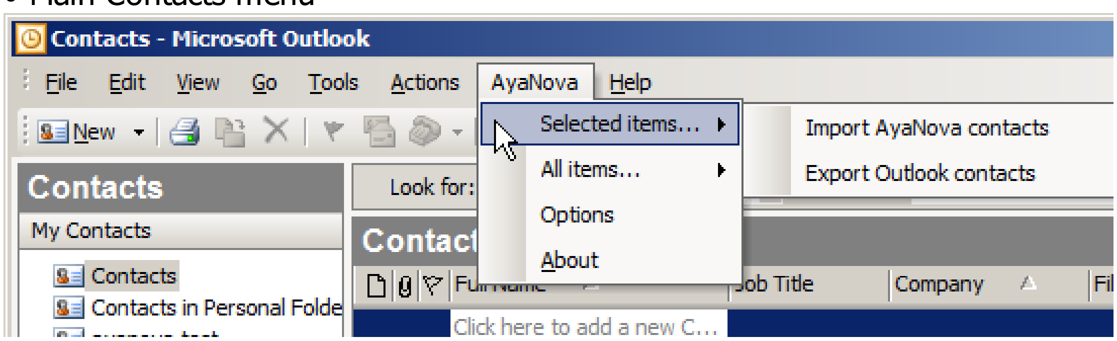
Of course if Outlook 2010 or higher with its new menu, the OLI optional add-on will be located under Add-Ins



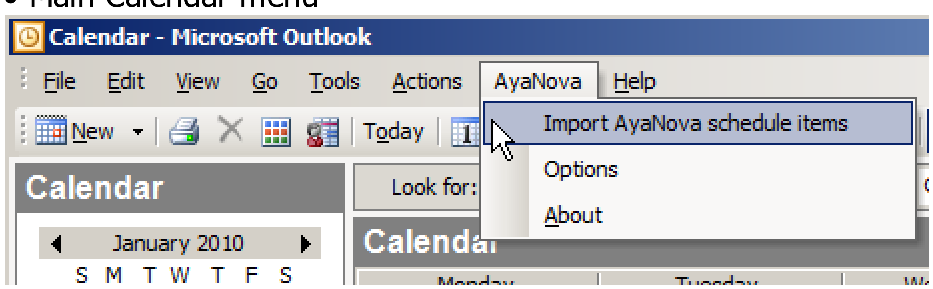
- Email message menu



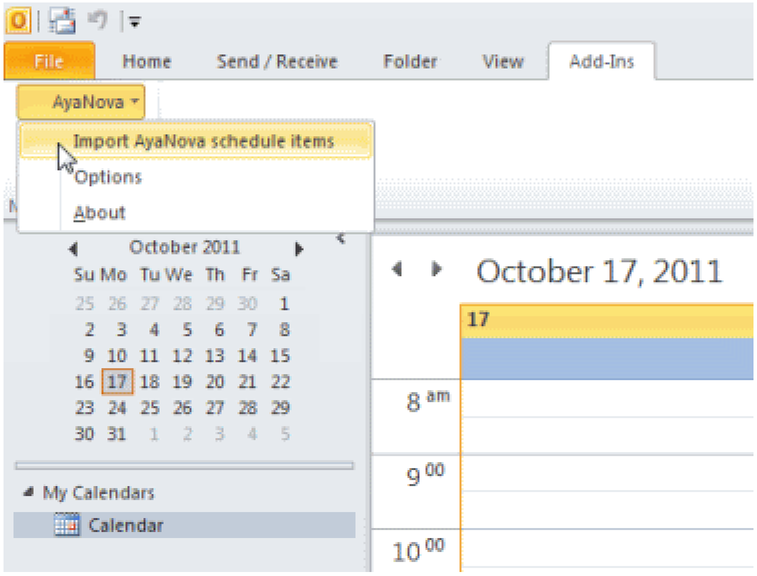
- Main Contacts menu



- Main Calendar menu



Of course if Outlook 2010 or higher, the menu options will be located under Add-Ins



3. You do not actually connect to your AyaNova database until the first time in that Outlook session that you select an AyaNova menu option which will bring up the AyaNova OLI login window

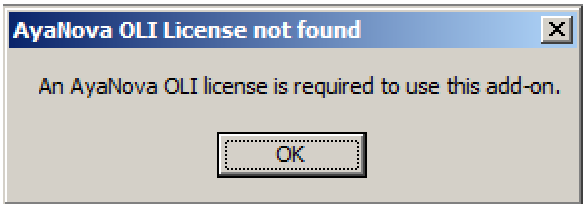
For example:

a. View your Contacts section of Outlook and select the menu option Import your AyaNova scheduled items.

b. The AyaNova OLI login window displays so that you log into your AyaNova database as a specific user when you first select to perform an AyaNova feature in that session of Outlook.

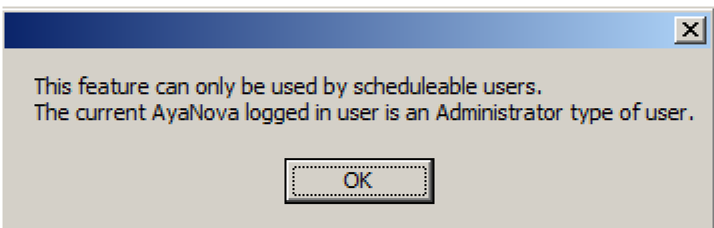
c. Outlook will automatically know which AyaNova database to connect to because the AyaNova OLI files were installed to the same program folder as your AyaNova program files - and both the AyaNova program files and the OLI plug-in files use the same config.txt file.

d. An OLI license is required.



If you want to try out any of AyaNova's plug-in's, just attach a copy of your ayalog.txt file from your AyaNova program folder to your email request to *support@ayanova.com* for a temporary key.

NOTE: Must be logged in as a schedulable user if want to import AyaNova scheduled items into the Outlook Calendar. If not logged into OLI as a schedulable user, just exit out of Outlook, wait a minute for Outlook to completely close out, and then run Outlook again so that you can now log in as a schedulable user when selecting to import AyaNova scheduled items



Use of OLI with stand-alone configuration

- If your AyaNova is installed on a single computer with the default stand-alone configuration, you **can not** run both your AyaNova program and your Outlook at the same time.
- Be aware that when you exit out of Outlook, that it does take a few more minutes before Outlook has "really" exited. So before running stand-alone AyaNova, give it a couple minutes after exiting out of Outlook.
- If your AyaNova is networked, you **can** run both AyaNova and Outlook at the same time. And if concerned that you just have a single computer - no problem, as you do not need a computer that is a "server" to configure AyaNova for network use. You can configure AyaNova for network use on a single computer too. Just follow the steps for either configuring for network use using either the free network Firebird Server or if a 64 bit computer, use the free SQL Express

9.2.3 OLI - AyaNova Schedule Export to Outlook

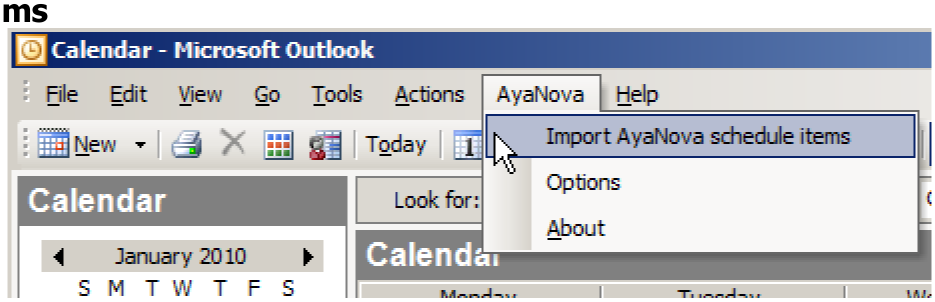
Things to remember about Import AyaNova scheduled items

1. Must log in as an AyaNova schedulable user
2. Only scheduled items newer than the date it is right now will be imported
3. Closed workorder items not imported
4. What is imported from the workorder is based on the Workorder Item Summary Template set up in your Global Settings

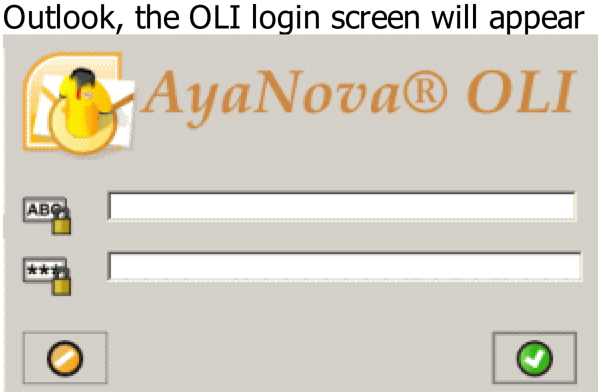
Importing AyaNova Schedule Items into Outlook

1. In Outlook, view the Calendar section

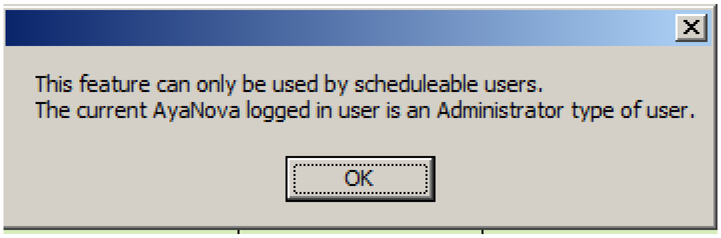
2. In the Calendar main menu, select **AyaNova** -> **Import AyaNova schedule items**



a. If this is the first time selecting any AyaNova option in this session of Outlook, the OLI login screen will appear

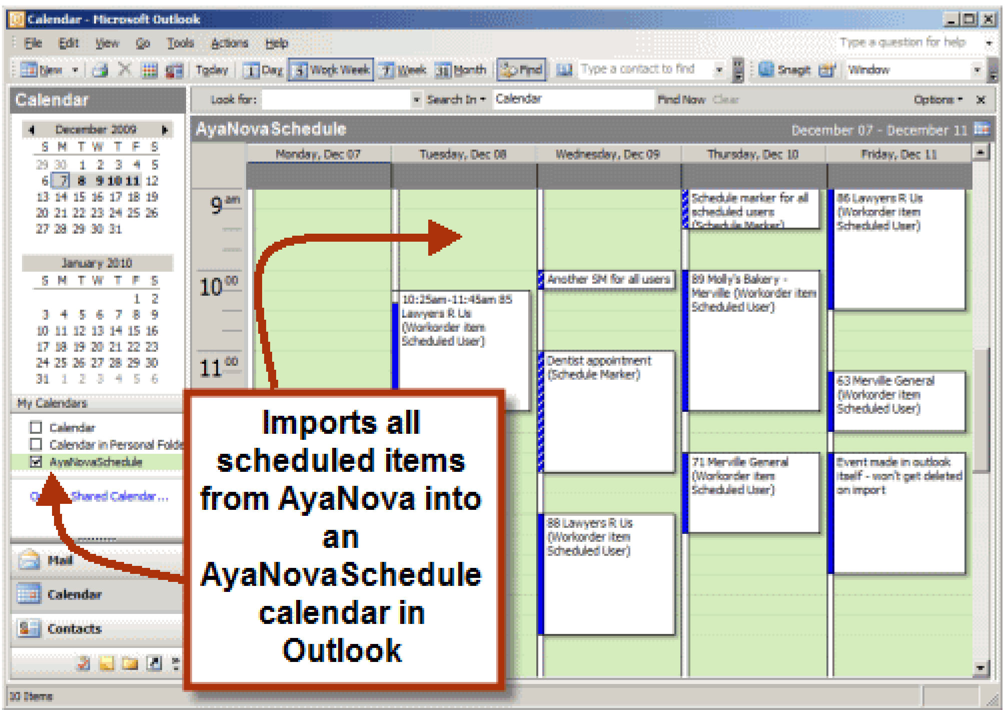


b. **NOTE:** Log in as the AyaNova schedulable user that you want AyaNova scheduled items imported for.



c. If already logged in to OLI but not as a schedulable user, just exit out of Outlook, wait a minute for Outlook to completely close out, and then run Outlook again so that you can now log in as a schedulable user when selecting to import AyaNova scheduled items

3. An Outlook calendar called AyaNovaSchedule will be created and all future scheduled AyaNova items for the logged in schedulable user will be imported into this Outlook calendar.



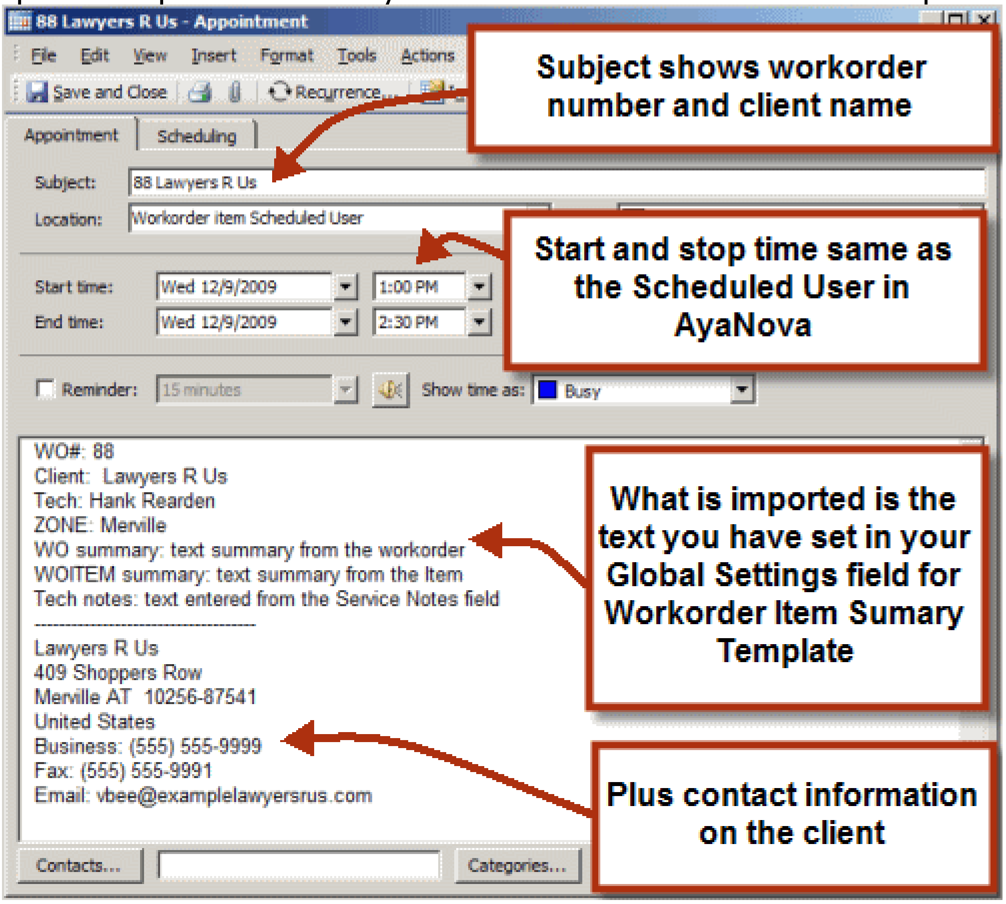
- **NOTE:** Imports **only scheduled items** (Schedule Markers and workorder items) **for the currently logged in user**

- **NOTE:** Imports **only items newer** than the date/time it is right now that you performed the import. occurring from time of import forwards. Previously scheduled items will not be imported.

  For example, if after importing nothing shows in your AyaNovaSchedule calendar in Outlook, it is because you do not have any scheduled items in AyaNova that are newer than the date and time it is right now.

- **NOTE: Does not import Closed** workorder items

5. Open an imported event in your Outlook to see what has been imported



- The details imported in the Outlook event are based on the Workorder Item Summary Template set up in your Global Settings

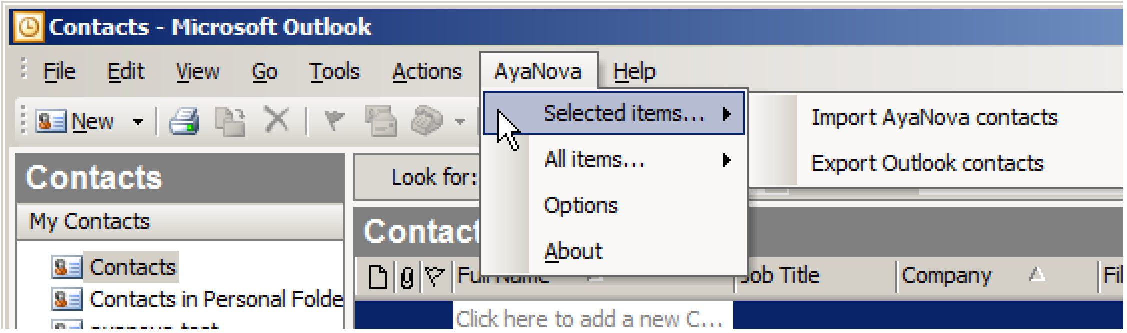
- Plus also imports the client's contact information - address, business, fax and mobile phone numbers and the email address.

6. You can run the menu option **Import AyaNova scheduled items** as often as you like.

- When the menu option is run, the existing imported scheduled events are compared between AyaNova and the Outlook AyaNovaSchedule calendar. And if have changed, deletes the Outlook AyaNovaSchedule calendar events and imports again from AyaNova so you always have the latest information in your Outlook AyaNovaSchedule calendar

- If you have created new events in the Outlook AyaNovaSchedule calendar directly, these are not removed when you import again from AyaNova - only those originally imported.

9.2.4 OLI - AyaNova / Outlook Contacts Import/Export



From the Outlook Contacts section, with OLI you can:

- Import all AyaNova clients, vendors and head offices as Outlook contacts
- Export all Outlook contacts into AyaNova as clients or vendors or head offices
- Import selected AyaNova clients, vendors and head offices as Outlook contacts
- And you can export selected Outlook contacts into AyaNova as clients or vendors or head offices.

- With OLI, you also update existing when you import or export.

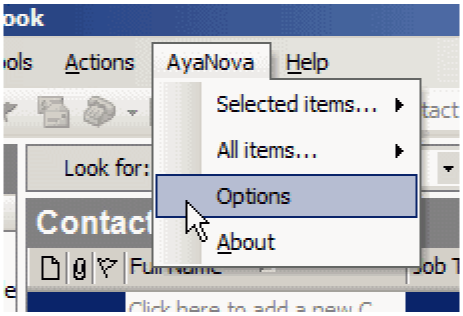
Review details about mapping phone and address fields before proceeding.

9.2.4.1 Map Phone and Address Fields Option

Before importing or exporting contacts, you will first want to map phone and address fields between AyaNova and Outlook.

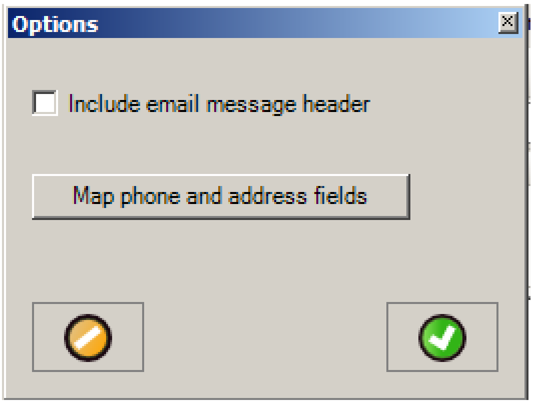
This "tells" the OLI plug-in what fields in the Outlook contact entry screen match up with what fields in the AyaNova entry screen.

1. From any AyaNova menu, select **Options**

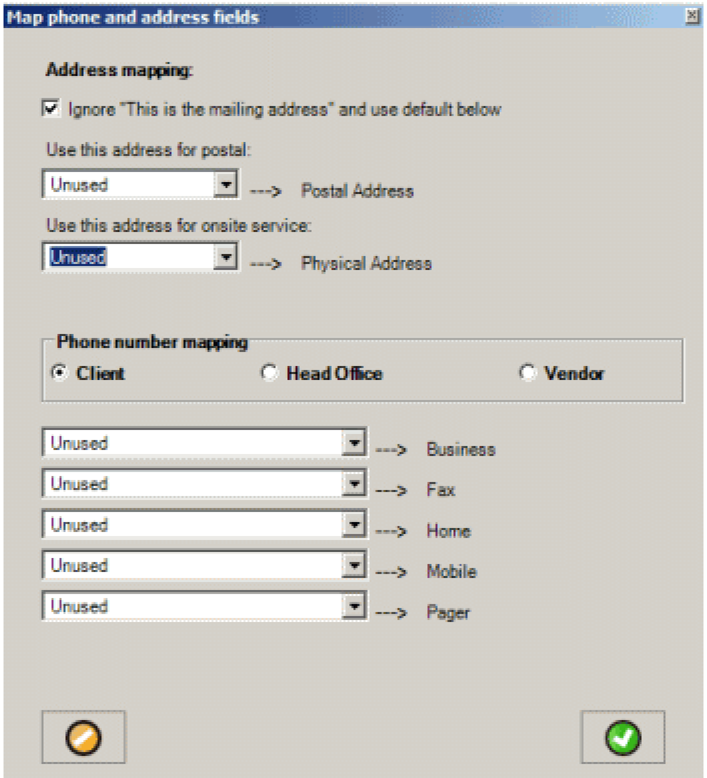


2. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear. Log in as an AyaNova user.

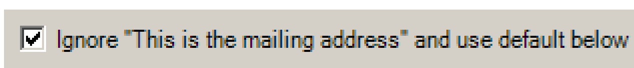
3. Select the **Map phone and address fields**



4. The Map phone and address fields entry screen appears



Address mapping fields



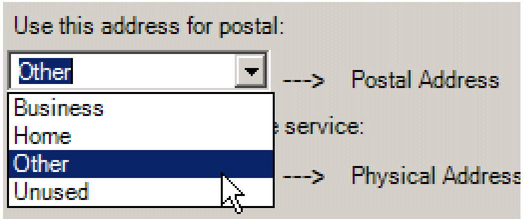
Ignore "This is the mailing address" and use default below

This is only used when exporting contacts *to* AyaNova.

In an Outlook contact, there is a checkbox for a field called "This is a mailing address" that if you checkmark makes that address (either Business, Home or Other) as the "mailing address" according to Outlook.

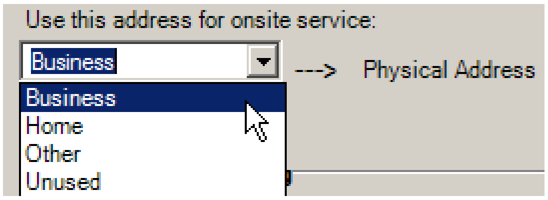
If not check-marked (false), when exports a contact to AyaNova and needs to set the Postal address in AyaNova it will use the Outlook address that has a checkmark in the "This is the mailing address" field. Note that it's possible to have none of the three addresses with a selection for "This is the mailing address" in which case OLI falls back to the user selected mailing address.

If check-marked (true) then it simply uses the address the user selected as the postal address and it makes no difference which Outlook address has that checked.



Use this address for postal:

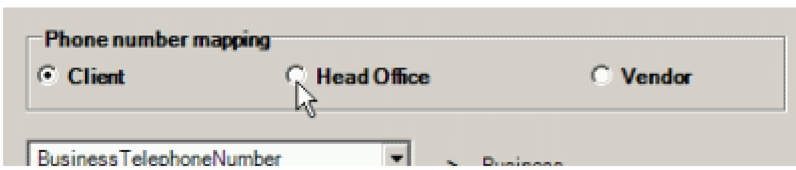
Select which Outlook address maps to the AyaNova Postal Address



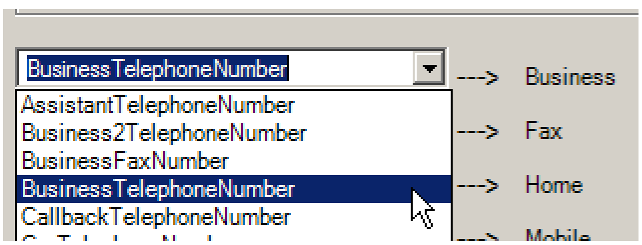
Use this address for onsite service:

Select which Outlook address maps to the AyaNova Physical Address

Phone number mapping fields

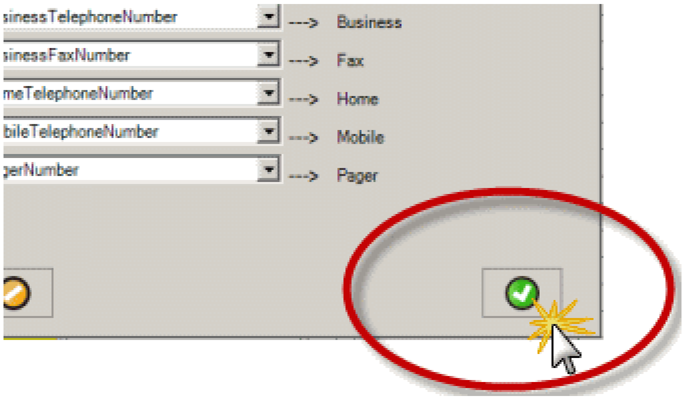


Select which AyaNova object setting the phone number mapping for



Select the Outlook number you want to map to each of the AyaNova phone fields.

5. Click on the OK button to save your mappings.



6. Additional information on where the mappings are saved:

All information once entered for the Map Phone And Address Fields option above is saved in a file called user.config by Outlook. Location of the user.config file varies on computers depending on the profile directory for that operating system.

On an example older OS such as an XP station, the profile directory is C:\Documents and Settings*username*\Local Settings\Application Data\ so the user.config file is created in the C:\Documents and Settings*username*\Local Settings\Application Data\Microsoft_Corporation\DefaultDomain_Path_ykkp3qrq5gwiowao2hxg0jyh0jikbl1q\11.0.8312 folder

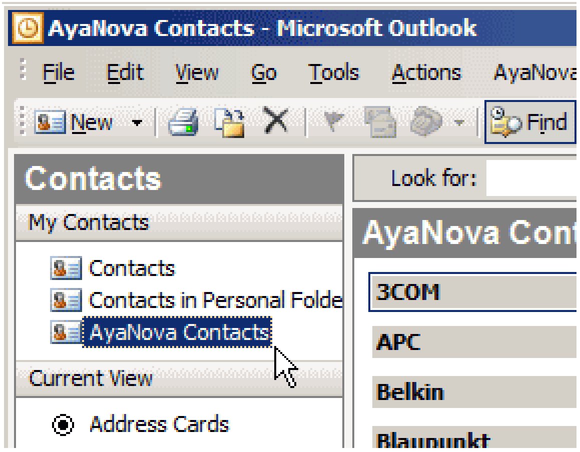
If ever you want to reset all mappings back to nothing without having to select as such, you can do a search on your computer for the user.config file, open it using NotePad to confirm it is the correct file and than delete the file user.config. The next time you edit the mappings, the file will be newly created.

9.2.4.2 All Items - Import AyaNova Contacts

Do note that All Items - Import AyaNova Contacts will also **update existing** Outlook contacts with the same name with the latest AyaNova information, as well as import not yet imported AyaNova contacts into your Outlook.

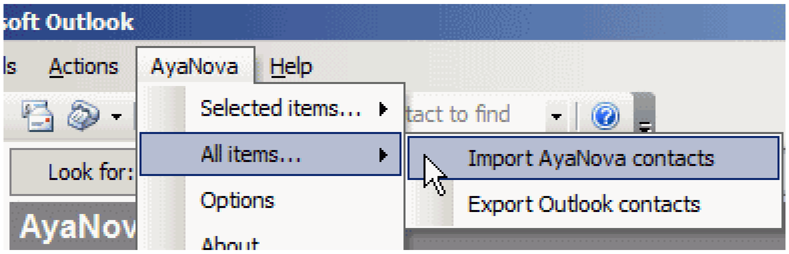
To import all AyaNova contacts (either all Clients, or all Head Offices, or all Vendors of a certain vendor type) into the Outlook Contacts folder viewing:

1. It is suggested to **create an specific AyaNova Contacts folder** so that all AyaNova contacts are imported into this separate from your regular Outlook Contacts. This way you can easily delete the entire folder if need be as well as keep separate.



2. Before selecting the menu option to import the AyaNova contacts, make sure that you have selected and are viewing the Contacts folder you want these AyaNova contacts imported into.

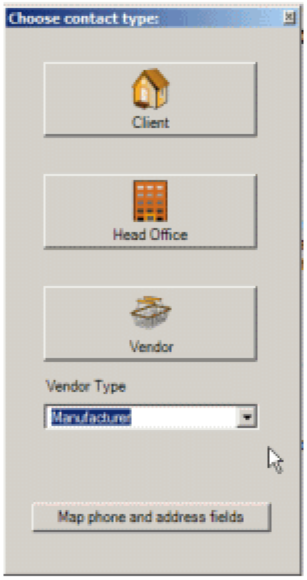
3. Select the menu option **AyaNova -> All Items... -> Import AyaNova Contacts** from the Outlook Contacts menu



4. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear.

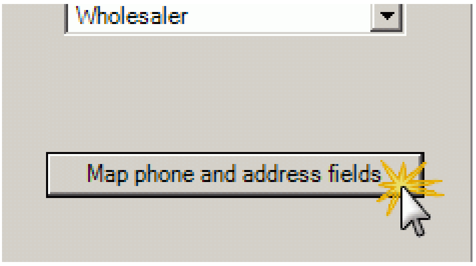
Log in as an AyaNova user that is a member of a security group that has rights to Clients, Head Offices and Vendors.

5. The **Choose contact type:** window appears



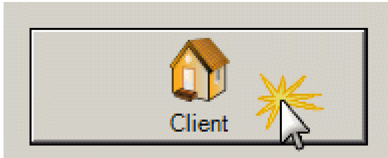
6. If you have not yet mapped phone and address fields between AyaNova and Outlook, do so before proceeding.

- If you do not, than your AyaNova contacts imported will not have their phone and addresses imported.
- Refer to the section [Map Phone and Address Fields Option]
- Do note of course that you can access by the Map Phone and Address Fields button from this window

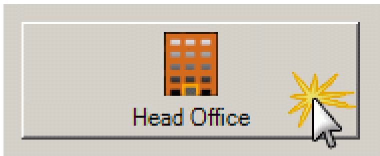


7. Import AyaNova contacts

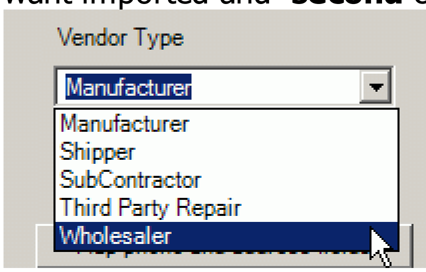
a. If you want to import all AyaNova clients contact information, than click on the Client button

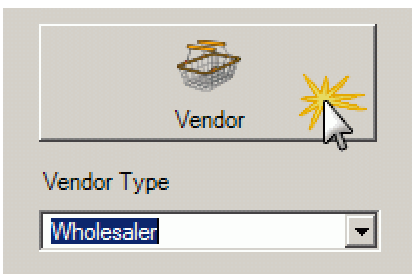


b. If you want to import all AyaNova Head Office contact information, than click on the Head Office button

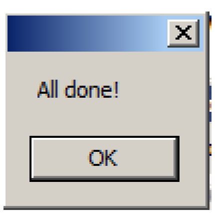


c. If you want to import Vendors, **first** select the type of vendor contacts you want imported and **second** click on the Vendor button





8. If you have a lot of contacts in AyaNova, you will see the wait cursor rolling to let you know something is happening. When the import is finished, it will pop up the All Done! message.



9. All Items - Import AyaNova Contacts will also **update existing** Outlook contacts with the same name with the latest AyaNova information

For example:

- You already have an AyaNova client with the Client name: Beans By Bob, and you already have an Outlook contact with Company name: Beans By Bob that are the same in all details.
- You edit the phone number of the AyaNova client Beans By Bob and save.
- When you select this option to import AyaNova Contacts and select Clients, the Outlook contact Beans By Bob will be updated with the new phone number from the AyaNova client Beans By Bob

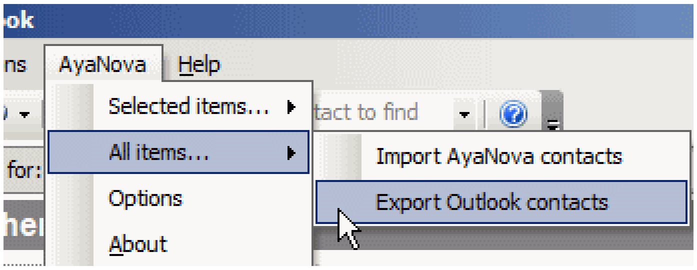
9.2.4.3 All Items - Export Outlook Contacts

All Items - Export Outlook Contacts will also **update existing** AyaNova objects of the type selected (client, head office or vendor of that type) that have the same name as the Outlook contact being exported, as well as export not yet exported Outlook contacts into your AyaNova.

To export all Outlook contacts from the Outlook Contacts folder you are viewing into AyaNova as either AyaNova Clients, or AyaNova Head Offices or as AyaNova Vendors of a certain type:

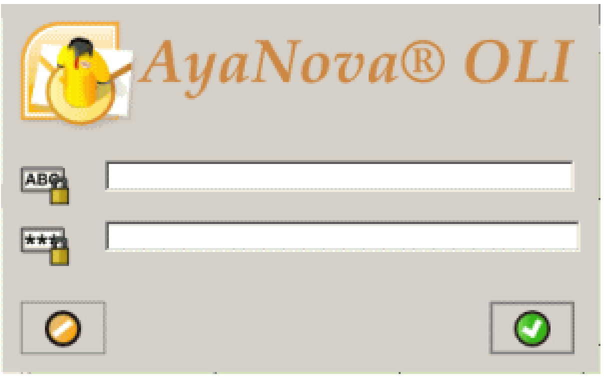
1. View the Outlook Contacts folder you wish to export from

2. Select the menu option **AyaNova -> All Items... -> Export Outlook Contacts**.

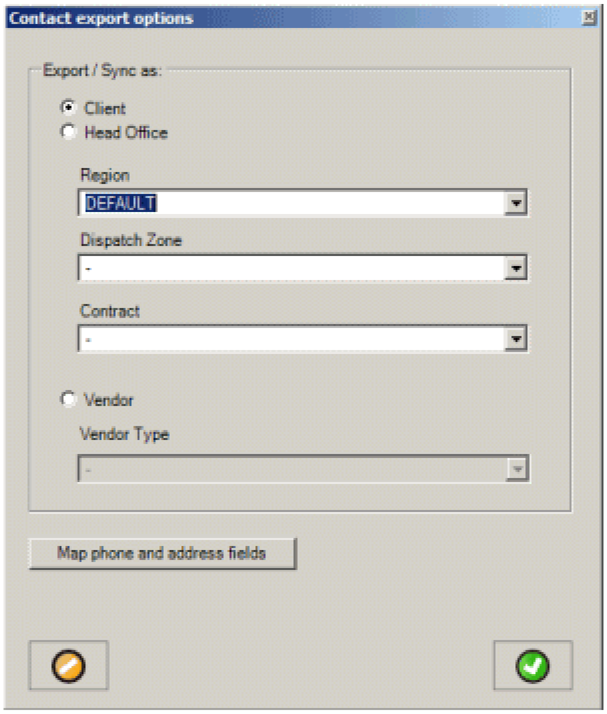


3. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear.

Log in as an AyaNova user that is a member of a security group that has rights to create Clients, Head Offices and Vendors.

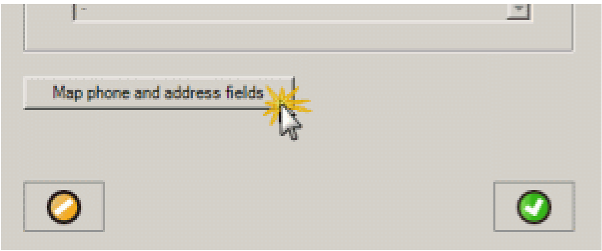


4. The Contact export options window will appear.



5. If you have not yet mapped phone and address fields between AyaNova and Outlook, do so before proceeding

- If you do not, than your Outlook contacts will not have their phone and addresses exported into AyaNova.
  - Refer to the section Map Phone and Address Fields Option
  - Do note of course that you can access by the Map Phone and Address Fields button from this window



6. Export Outlook contacts:

a. Export all of the Outlook contacts in this Contacts folder you are viewing into AyaNova as Clients

- Select the radio button for Client
- Identify what Region, Dispatch Zone, and Contract if any you want all of these contacts imported to be set to.
- Select the OK button  to export

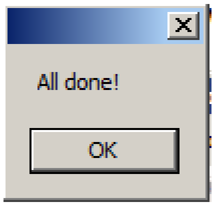
b. Export all of the Outlook contacts in this Contacts folder you are viewing into AyaNova as Head Offices

- Select the radio button for Head Office
- Identify what Region, Dispatch Zone, and Contract if any you want all of these contacts imported to be set to.
- Select the OK button  to export

c. Export all of the Outlook contacts in this Contacts folder you are viewing into AyaNova as Vendors

- Select the radio button for Vendor
- Identify what Vendor Type if any you want all of these contacts imported to be set to.
- Select the OK button  to export

7. If you have a lot of contacts in Outlook, you will see the wait cursor rolling to let you know something is happening. When the export is finished, it will pop up the All Done! message.



8. Do note that All Items - Export Outlook Contacts will also **update existing** AyaNova objects of the type selected (client, head office or vendor of that type) that have the same name as the Outlook contact being exported, as well as export not yet exported Outlook contacts into your AyaNova.

For example:

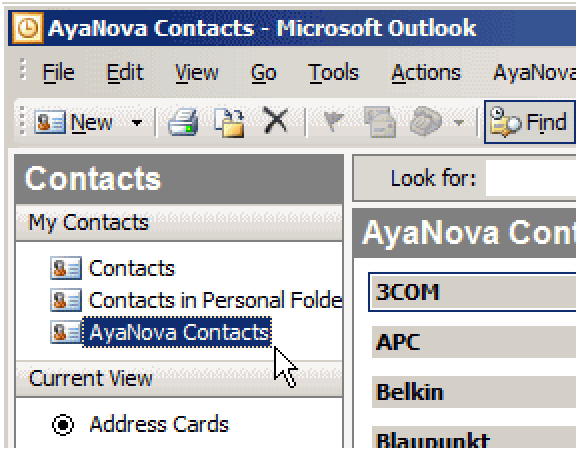
- You already have an Outlook contact with the Company name: Beans By Bob and you already have an AyaNova client with Client name: Beans By Bob that are the same in all details.
- You edit the phone number of the Outlook contact Beans By Bob and save.
- When you select this option to export Outlook contacts and select Clients, the AyaNova client Beans By Bob will be updated with the new phone number from the Outlook contact Beans By Bob

9.2.4.4 Selected Items - Import AyaNova Contacts

Do note that Selected Items - Import AyaNova Contacts will also **update existing** Outlook contacts with the same name with the latest AyaNova information

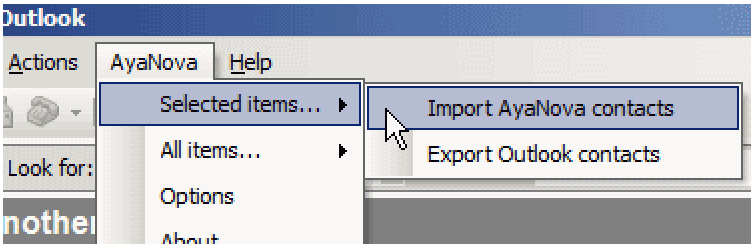
To import selected AyaNova contacts (either selected Clients, or selected Head Offices, or selected Vendors of a certain vendor type) into the Outlook Contacts folder viewing:

1. It is suggested to **create an specific AyaNova Contacts folder** so that all AyaNova contacts are imported into this separate from your regular Outlook Contacts. This way you can easily delete the entire folder if need be as well as keep separate.



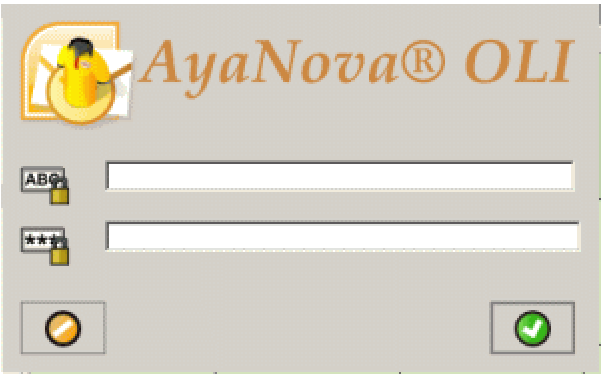
2. Before selecting the menu option to import the AyaNova contacts, make sure that you have selected and are viewing the Contacts folder you want these AyaNova contacts imported into.

3. Select the menu option **AyaNova -> Selected Items... -> Import AyaNova Contacts** from the Outlook Contacts menu

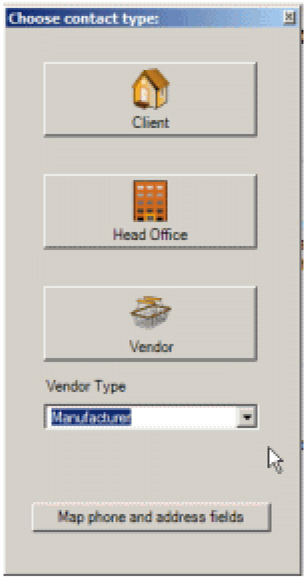


4. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear.

Log in as an AyaNova user that is a member of a security group that has rights to Clients, Head Offices and Vendors.

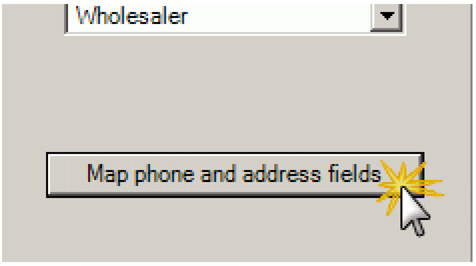


5. The **Choose contact type:** window appears



6. If you have not yet mapped phone and address fields between AyaNova and Outlook, do so before proceeding.

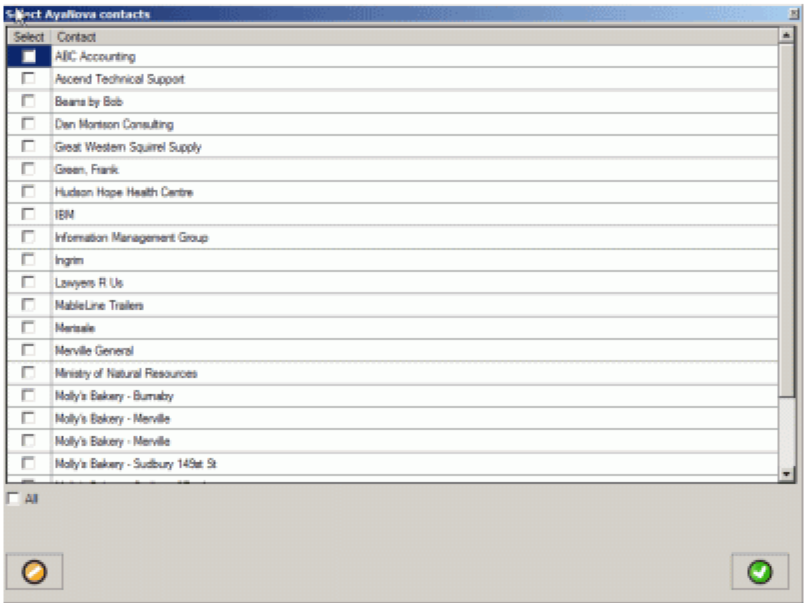
- If you do not, than your AyaNova contacts imported will not have their phone and addresses imported.
- Refer to the section Map Phone and Address Fields Option
- Do note of course that you can access by the Map Phone and Address Fields button from this window



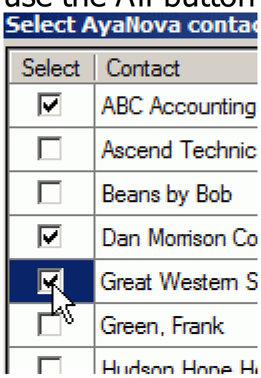
7. Import selected AyaNova contacts

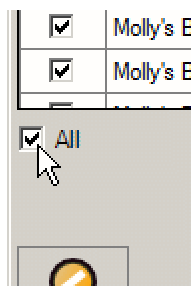
a. For example, if you want to import selected AyaNova clients contact information, than click on the Client button

b. A list of all of your AyaNova clients will display



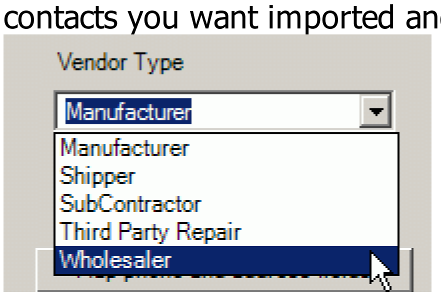
c. Use your mouse to checkmark all clients you want to import. You can also use the All button to checkmark all.

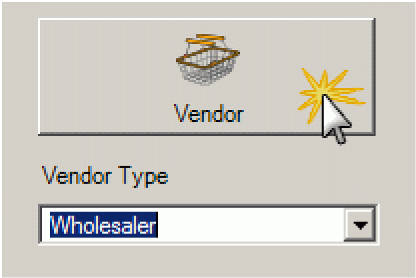




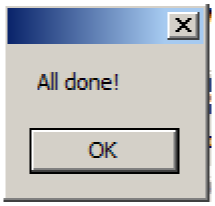
d. Select the OK button  to import these selected clients into your Outlook contacts folder that you are viewing

e. If you want to import selected Vendors, **first** select the type of vendor contacts you want imported and **second** click on the Vendor button





f. The All Done! window will pop up to let you know the import is finished.



8. Selected Items - Import AyaNova Contacts will also **update existing** Outlook contacts with the same name with the latest AyaNova information

For example:
- You already have an AyaNova client with the Client name: Beans By Bob, and you already have an Outlook contact with Company name: Beans By Bob that are the same in all details.
- You edit the phone number of the AyaNova client Beans By Bob and save.
- When you select this option to import AyaNova Contacts, select Clients, and select Beans By Bob to import, the Outlook contact Beans By Bob will be updated with the new phone number from the AyaNova client Beans By Bob

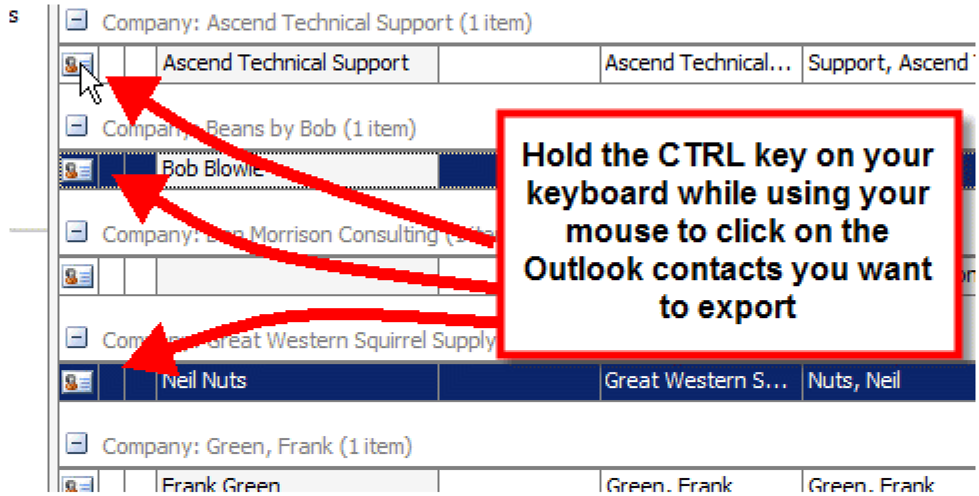
9.2.4.5 Selected Items - Export Outlook Contacts

Do note that All Items - Export Outlook Contacts will also **update existing** AyaNova objects of the type selected (client, head office or vendor of that type) that have the same name as the Outlook contact being exported, as well as export not yet exported Outlook contacts into your AyaNova.

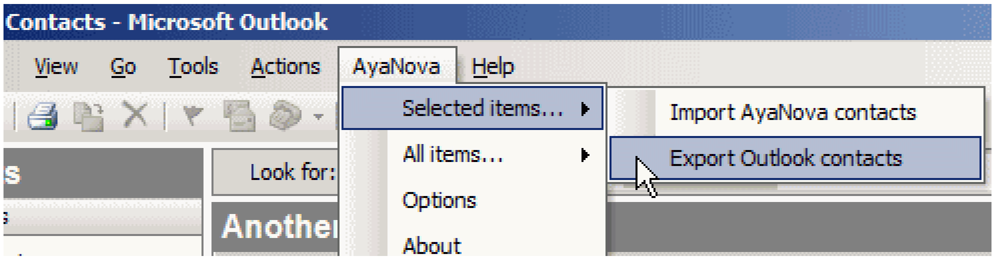
To export selected Outlook contacts from the Outlook Contacts folder you are viewing into AyaNova as either AyaNova Clients, or AyaNova Head Offices or as AyaNova Vendors of a certain type:

1. View the Outlook Contacts folder you wish to export from

2. Use your mouse and CTRL key on your keyboard to select the specific contacts you want to export into AyaNova



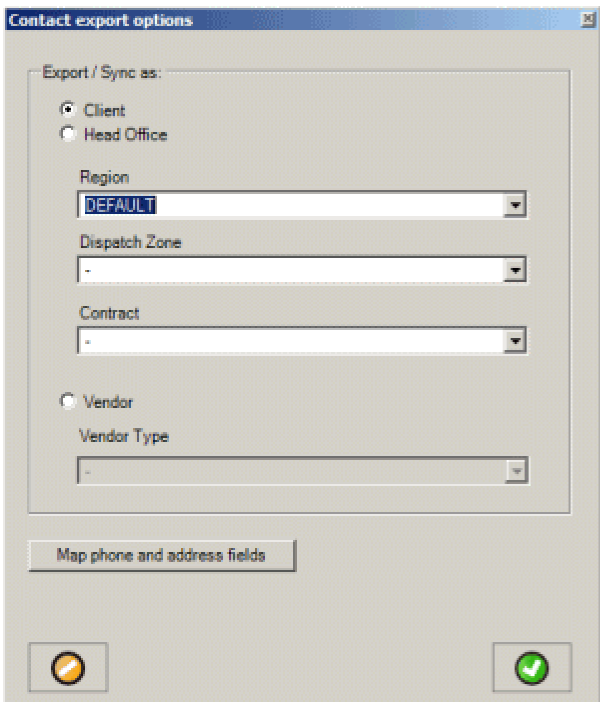
3. Once your Outlook contacts are selected that you want to export, now select the menu option **AyaNova -> Selected Items... -> Export Outlook Contacts**.



4. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear.

Log in as an AyaNova user that is a member of a security group that has rights to create Clients, Head Offices and Vendors.

5. The Contact export options window will appear.



6. If you have not yet mapped phone and address fields between AyaNova and Outlook, do so before proceeding

- If you do not, than your Outlook contacts will not have their phone and addresses exported into AyaNova.
  - Refer to the section Map Phone and Address Fields Option
  - Do note of course that you can access by the Map Phone and Address Fields button from this window

7. Export Outlook contacts:

a. Export the selected Outlook contacts in this Contacts folder you are viewing into AyaNova as Clients

- Select the radio button for Client
- Identify what Region, Dispatch Zone, and Contract if any you want all of these contacts imported to be set to.
- Select the OK button  to export

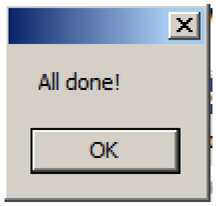
b. Export the selected Outlook contacts in this Contacts folder you are viewing into AyaNova as Head Offices

- Select the radio button for Head Office
- Identify what Region, Dispatch Zone, and Contract if any you want all of these contacts imported to be set to.
- Select the OK button  to export

c. Export the selected Outlook contacts in this Contacts folder you are viewing into AyaNova as Vendors

- Select the radio button for Vendor
- Identify what Vendor Type if any you want all of these contacts imported to be set to.
- Select the OK button  to export

8. If you have a lot of contacts in Outlook, you will see the wait cursor rolling to let you know something is happening. When the export is finished, it will pop up the All Done! message.



9. Do note that Selected Items - Export Outlook Contacts will also **update existing** AyaNova objects of the type selected (client, head office or vendor of that type) that have the same name as the Outlook contact being exported, as well as export not yet exported Outlook contacts into your AyaNova.

For example:

- You already have an Outlook contact with the Company name: Beans By Bob and you already have an AyaNova client with Client name: Beans By Bob that are the same in all details.
- You edit the phone number of the Outlook contact Beans By Bob and save.
- When you select this option to export Outlook contacts after having selecting the Beans By Bob and select Clients, the AyaNova client Beans By Bob will be updated with the new phone number from the Outlook contact Beans By Bob

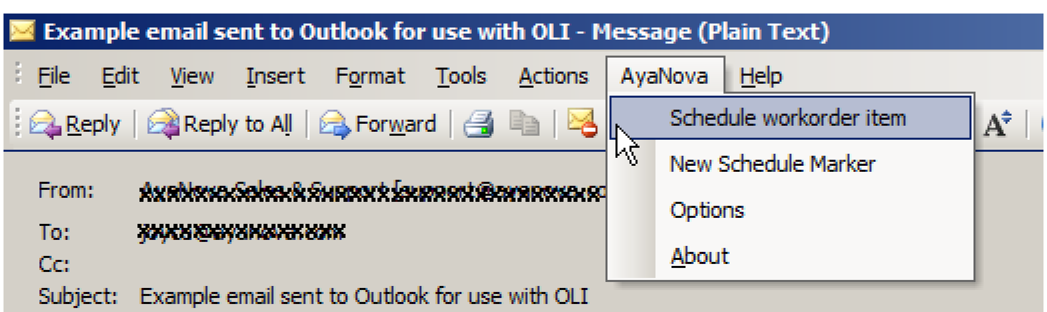
9.2.5 OLI - Create AyaNova service workorder from Outlook Email

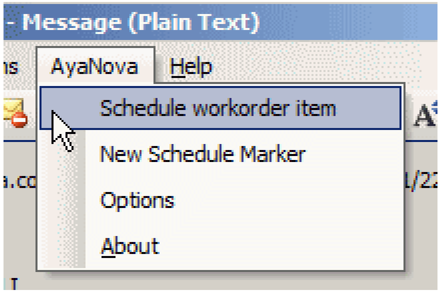
Generate a workorder from an Outlook email

In addition to copying the email text into the generated workorder, you can also enter details in the fields of the workorder, select a specific unit owned by the client, and schedule users for this workorder all using just OLI.

1. Open the Outlook email message

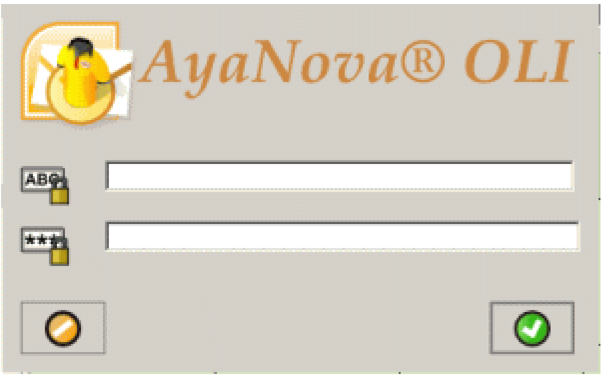
2. Select the email message menu **AyaNova -> Schedule workorder item**





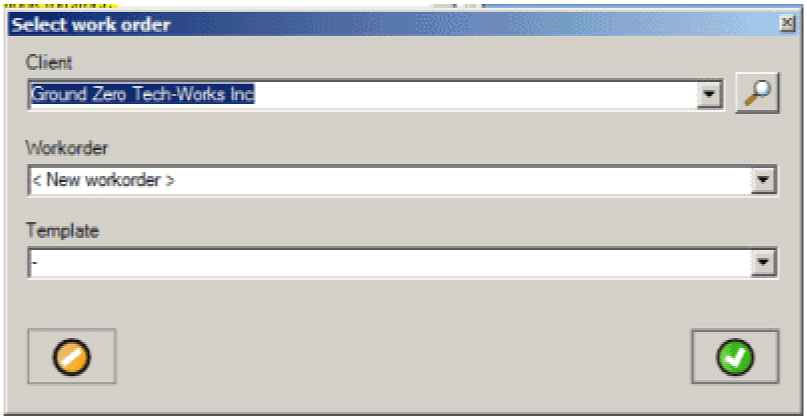
3. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear.

Log in as an AyaNova user that is a member of a security group that has rights to create a Schedule Marker.



4. The Select Work Order window appears.

- Select the specific client the workorder is to be created for
- If a new workorder or added as a workorder item to an existing
- And whether to use an AyaNova Service Workorder template to enter pre-filled data for you.
- And then click the OK button  to generate the Service Workorder

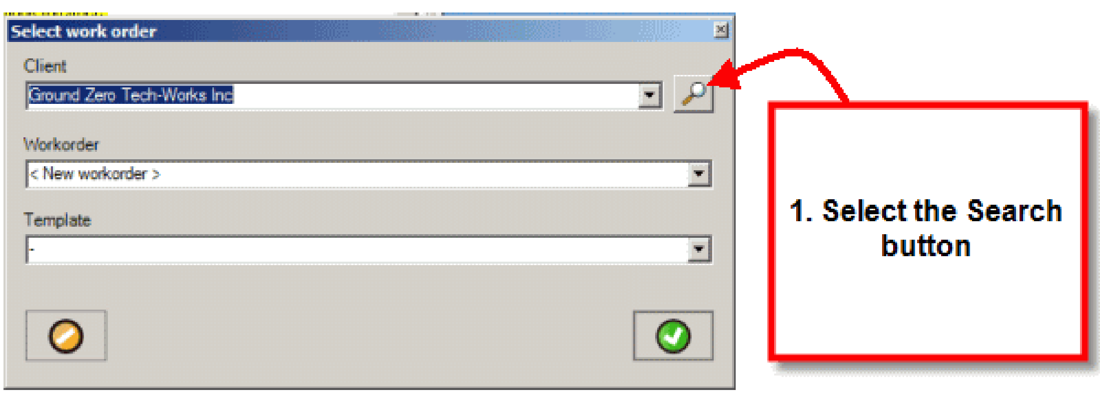


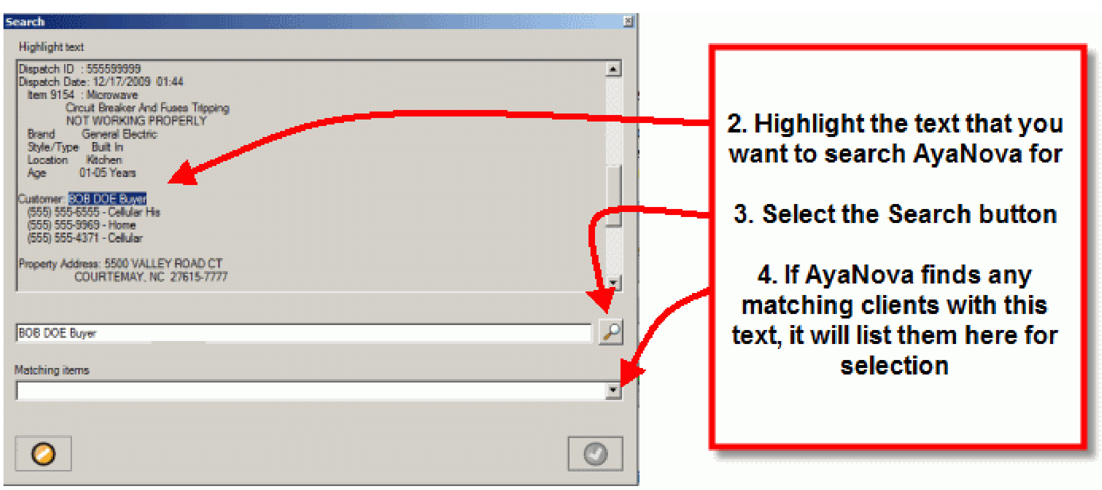
Client:

OLI will search your existing AyaNova clients to see if the email address From: matches. If it does find a match, it will automatically have that client pre-selected for you.

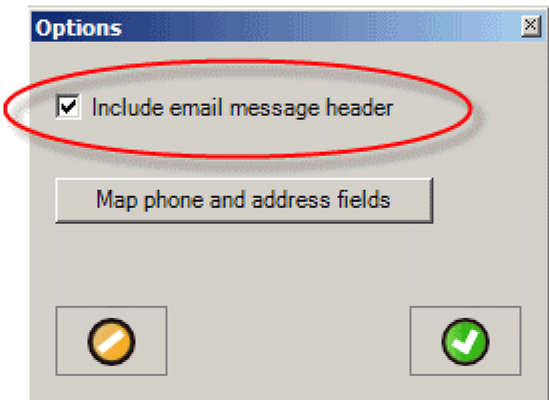
You can of course select any other client.

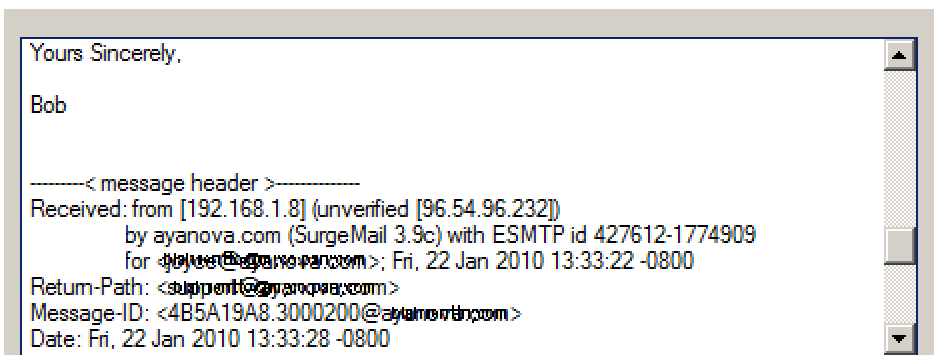
Or check out the Search feature to find the client which will help save you time.





This is another reason why you may want to include the email message header, as it may contain information to help you search to find the correct client to assign this to.

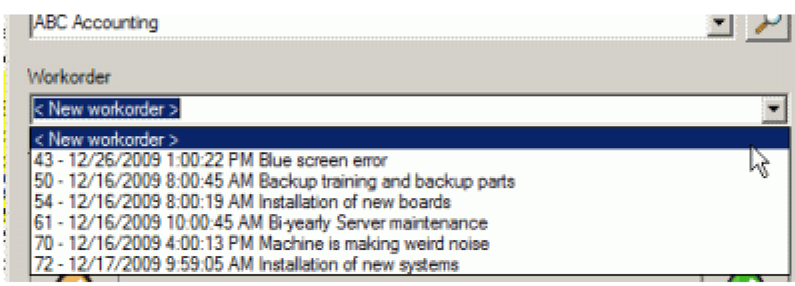




example of message header in Notes area.

Workorder:

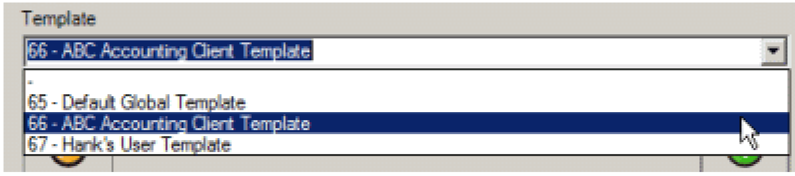
Once you have selected the client, you can create either a new workorder or add to an existing open workorder.



NOTE: If you select an existing workorder for this client, the existing Order header and Service Workorder header fields will automatically display with what is already in this workorder.

Template:

If you use [service workorder templates]() to pre-enter information, select.

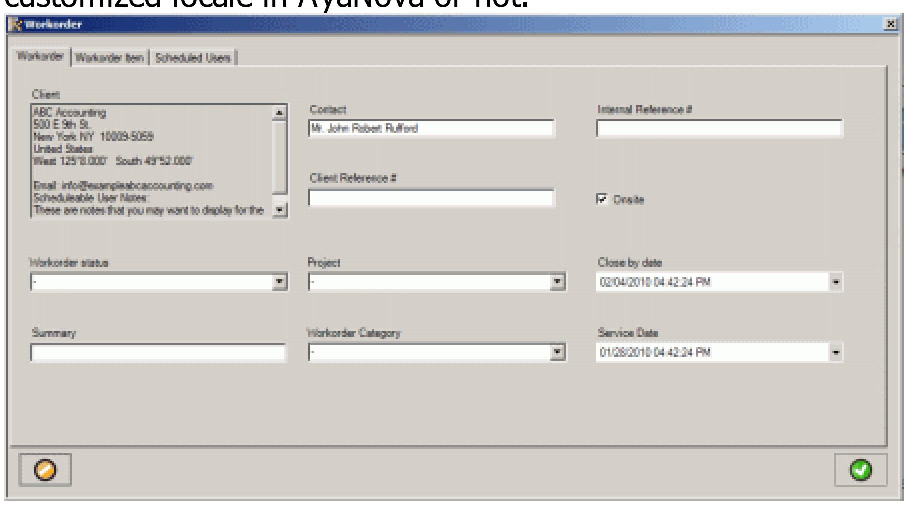


5. The OLI Workorder entry screen appears so that you can enter in any additional information as needed. Whatever you enter here will be in the workorder that is generated once you complete the steps.

Each field in the OLI Workorder entry screen corresponds to the same field in your AyaNova service workorder entry screen.

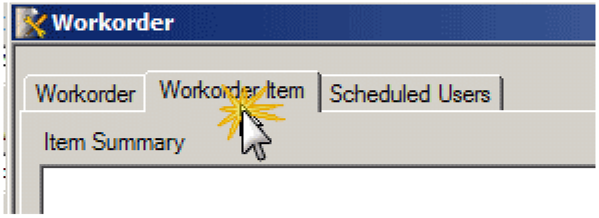
Workorder tab

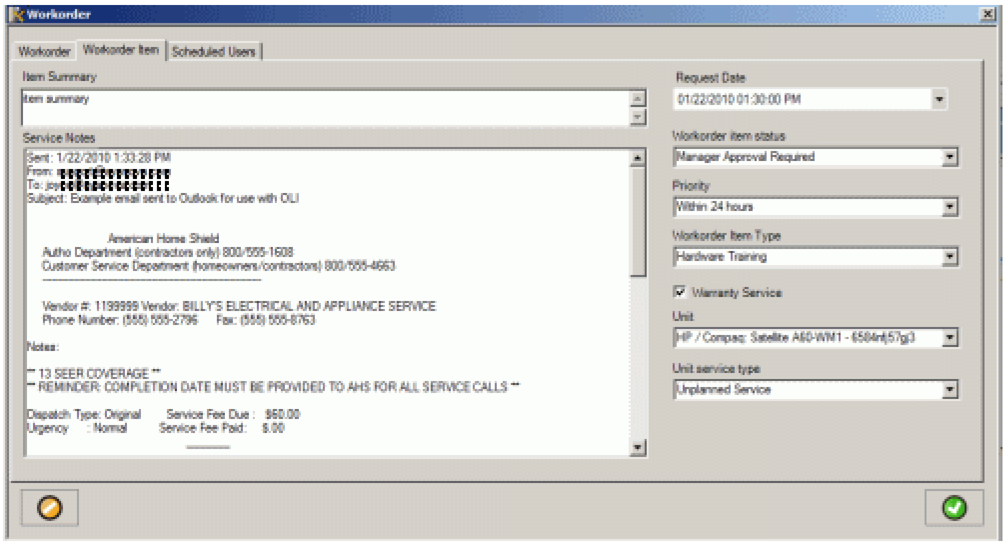
In here you can edit the fields from [the Order header]() and [the Service Workorder header](). How your OLI labels depends on if you are using a customized locale in AyaNova or not.



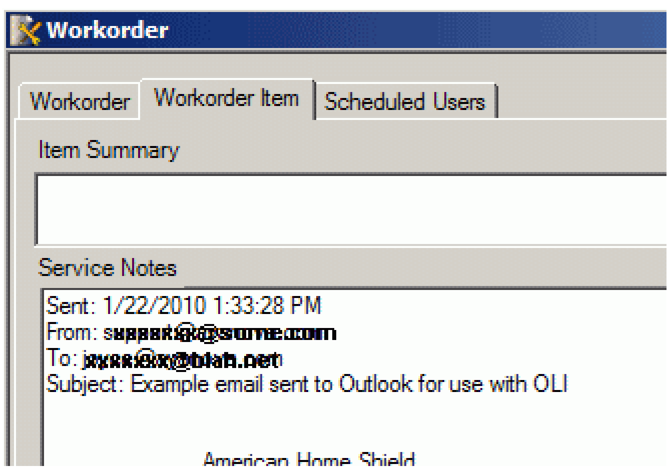
Workorder Item tab

Click the tab for Workorder Item to enter details specific for the workorder item **including selecting service for a specific unit** owned by this client already entered into AyaNova.



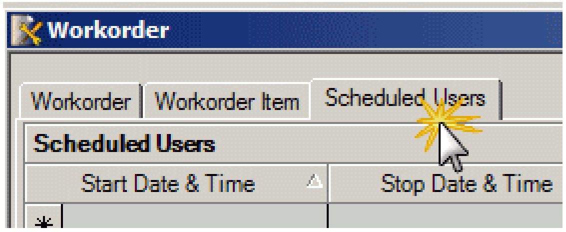


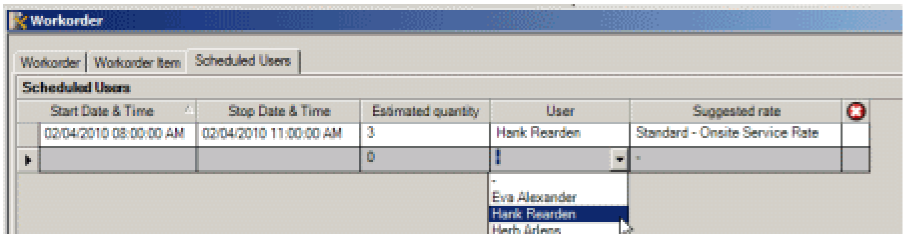
All of the text from the email is entered automatically for you into the Service Notes field. Edit as needed.



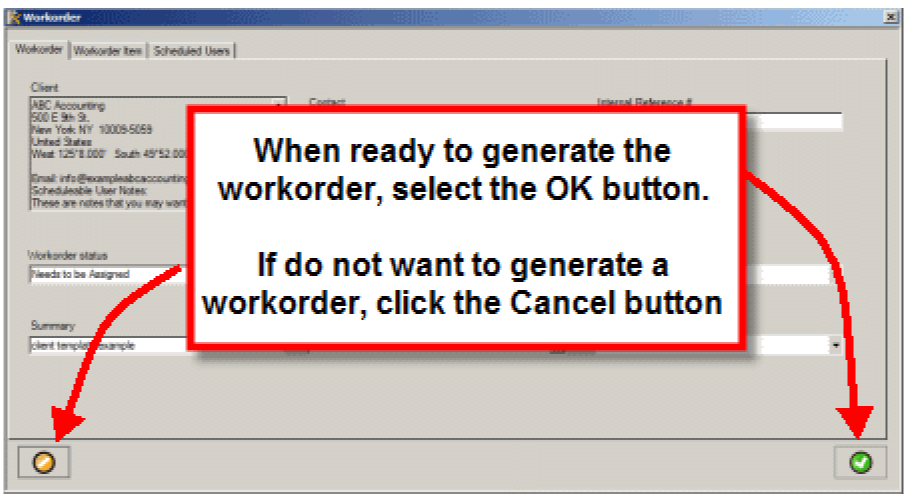
Scheduled Users tab

Click the tab for Scheduled Users to schedule **one or more users** to provide service directly at this stage of creating the workorder through OLI.





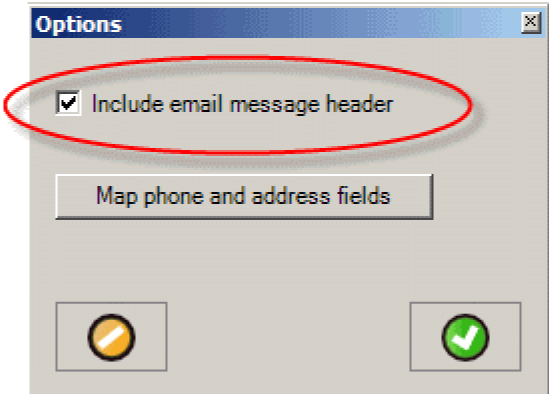
6. Generate the workorder from this email by selecting the OK button 

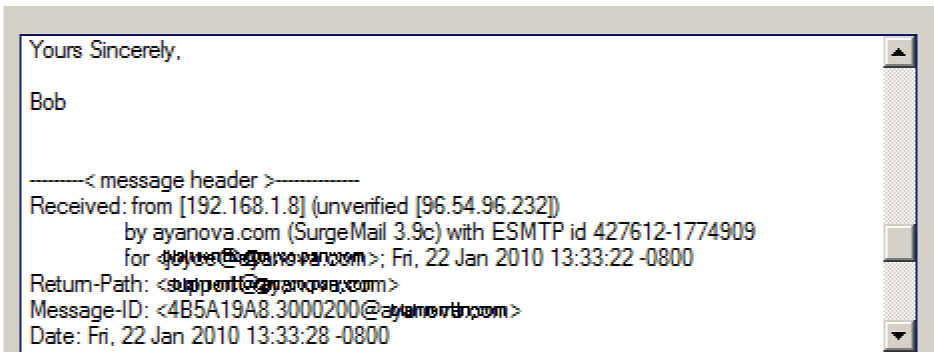


7. The workorder will be generated in your AyaNova with all of the data you entered.

Log into your AyaNova and see it.

NOTE: If you want the email message header to also be inserted in the Service Notes field (it will be inserted after the email message), make sure that your Options for this is check-marked.





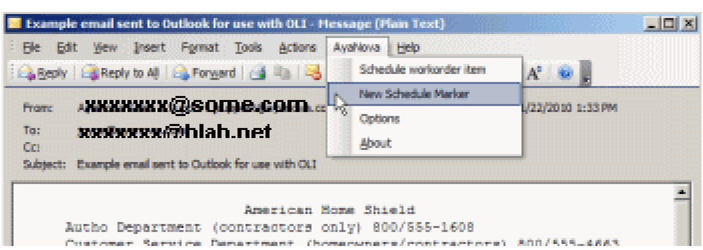
example of message header in Notes area.

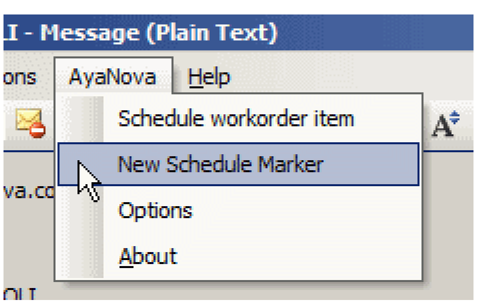
9.2.6 OLI - Create AyaNova Schedule Marker from Outlook Email

Generate a schedule marker from an Outlook email

1. Open the Outlook email message

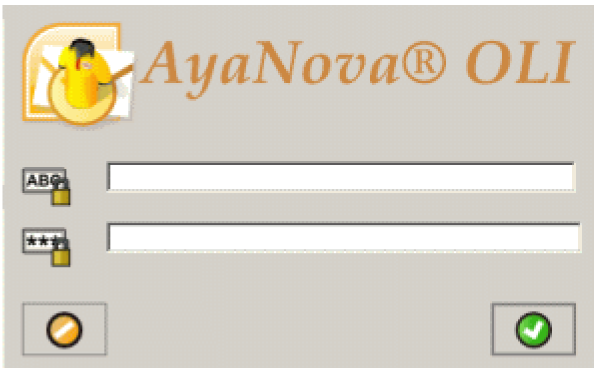
2. Select the email message menu **AyaNova** -> **New Schedule Marker**



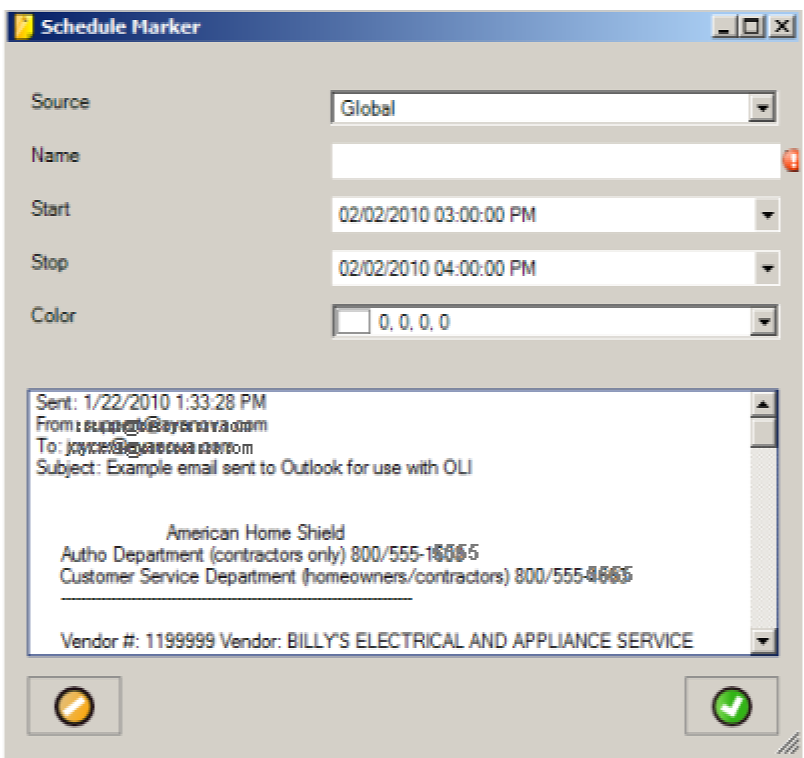


3. If you have not yet been asked to log in via OLI (as have not selected any other menu option since running this session of Outlook), than the OLI login window will appear.

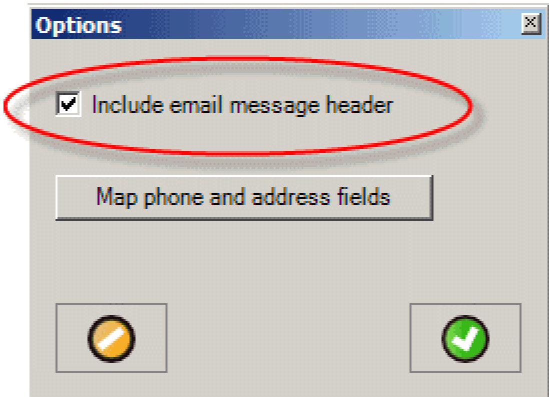
Log in as an AyaNova user that is a member of a security group that has rights to create a Schedule Marker.

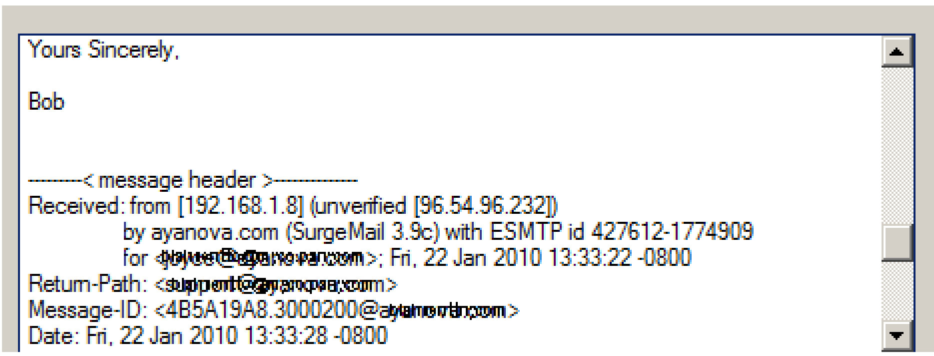


4. An AyaNova Schedule Marker window will appear with the text from the Outlook email message in its Notes: field .



NOTE: if you want the message header information to be appended into the Notes, make sure you have check-marked the Include email message header in the Options.



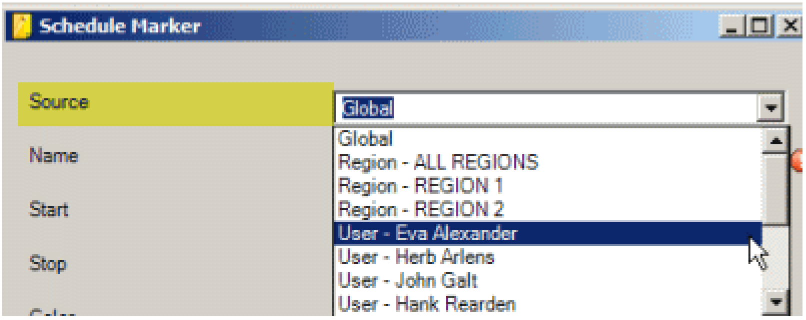


example of message header in Notes area.

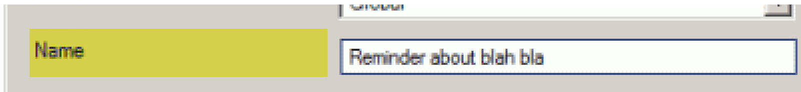
5. Edit the Schedule Marker as needed:

You will want to review the [Schedule Marker section]() of this Help documentation for an overview of how Schedule Markers are used in the AyaNova Schedule screen.

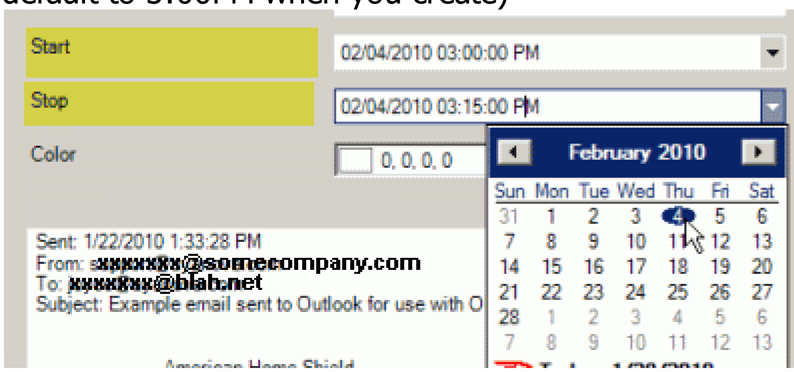
a. **Source:** Select whether this is to be a Schedule Marker for all schedulable users (Global); for all schedulable users of a specific region; for a specific schedulable user; for schedulable users of a specific Dispatch Zone; for schedulable users of a specific Schedulable User Group.



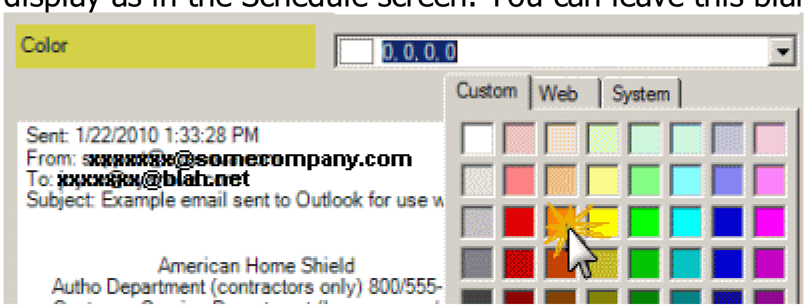
b. Name: Enter in sort text that will be descriptive of what this schedule marker is for.



c. Start: and Stop: Edit the Start and Stop date and time as needed. By default the Start will be the closest next hour (i.e. if it is 2:37PM right now, will default to 3:00PM when you create)



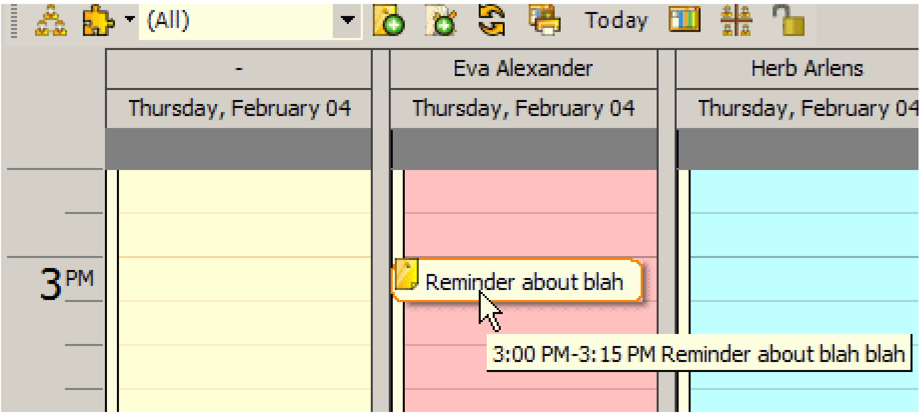
d. Color: This is where you select what color you want the schedule marker to display as in the Schedule screen. You can leave this blank for none.



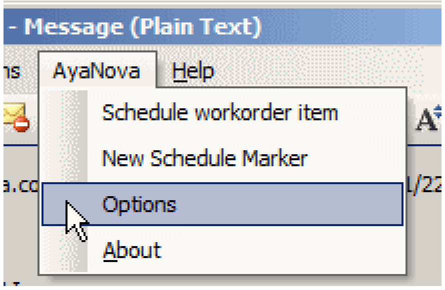
e. Notes:

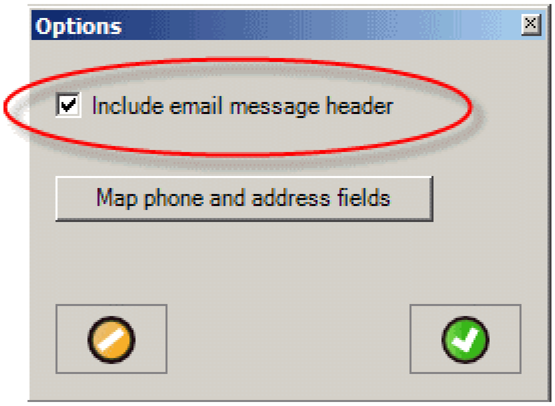
6. Select the OK button  to create the Schedule Marker in AyaNova

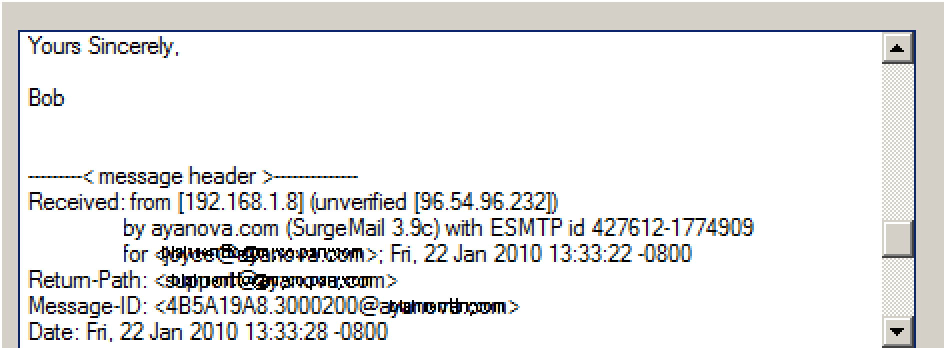
7. Your Schedule Marker will now be available in AyaNova



NOTE: If you want the email message header to be inserted in the Schedule Marker body, make sure that your **Options** for this is checkmarked.



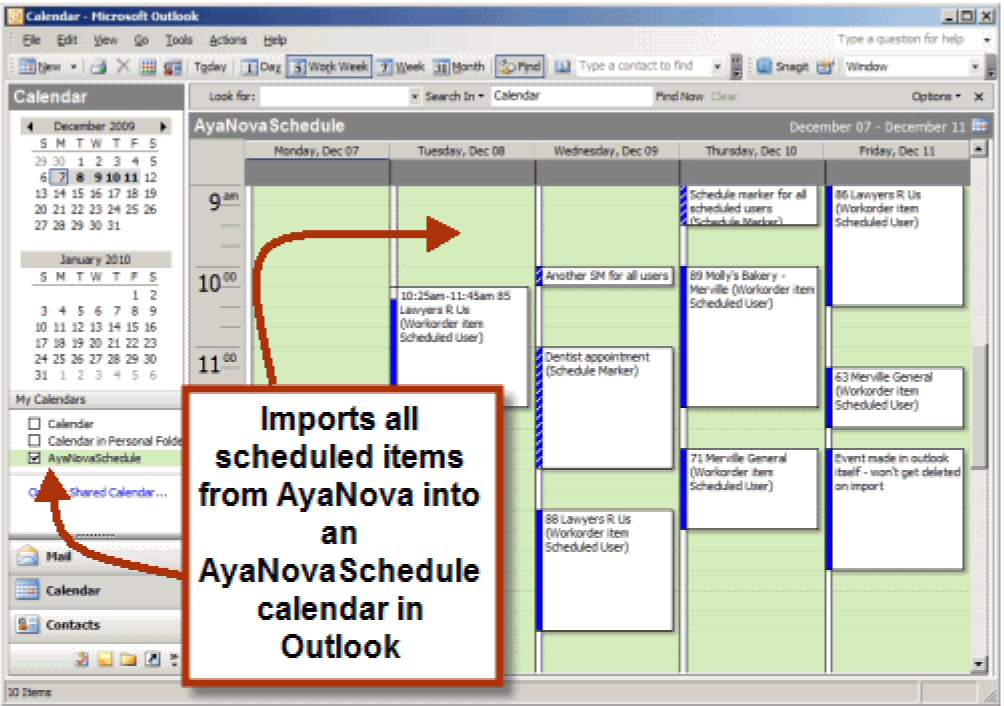




example of message header in Notes area.

9.3 Export to Outlook Schedule Plug-in

9.3.1 Outlook Schedule export



The **OutlookSchedule plug-in:**

- Exports the scheduled items (Schedule Markers and workorder items) for the logged in user into an Outlook calendar called AyaNovaSchedule

Requirements:

1. Your AyaNova program is already installed onto your computer
2. Your AyaNova program is the latest version
   i. Help -> Check for Updates
3. Your AyaNova database is licensed for OutlookSchedule
   i. go to Help -> About AyaNova
   ii. confirm you have either a temporary license for OutlookSchedule or have purchased OutlookSchedule subscription
4. Compatible version of Outlook
   i. 32bit Outlook version (OutlookSchedule is **not** compatible with 64bit Outlook)
   ii. Outlook installed to the same computer as your AyaNova program and OutlookSchedule installation (OutlookSchedule is not compatible with cloud based Outlook)

a. OutlookScheduleExport is **not** compatible with Outlook versions older than 2002 (i.e. 2002, 2003, 2007, 2010 are confirmed compatible)
b. Newer versions of Outlook may or may not be compatible - be sure to test with your version of Outlook before purchase
c. **Contact us with all text from your Help-About AyaNova to trial before purchase!**

5. Your Outlook program is **fully shut down** **<u>before</u>** running the installation
6. Proceed to OutlookSchedule export installation

9.3.2 Outlook Schedule export installation

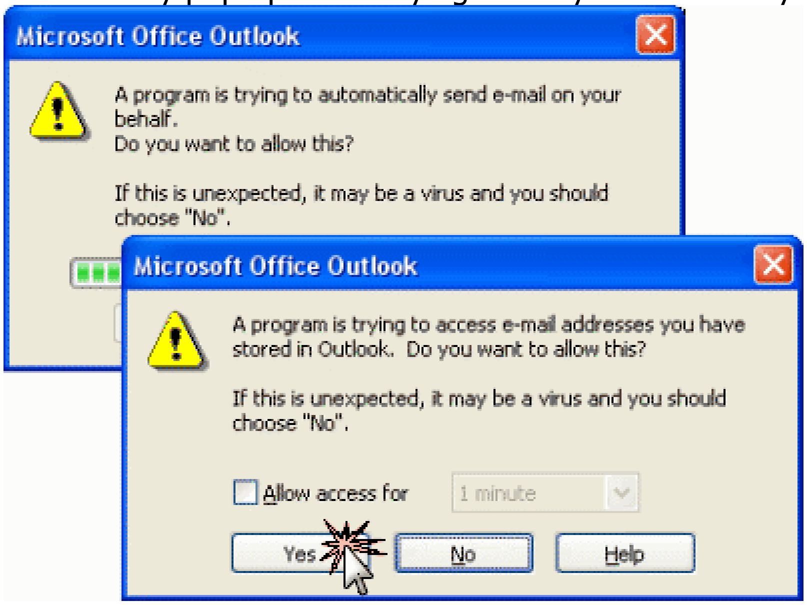
OutlookSchedule plug-in installation:

1. Confirm your OutlookSchedule requirements.

2. Install by running the Outlook Schedule Export setup file downloaded from the Downloads web page

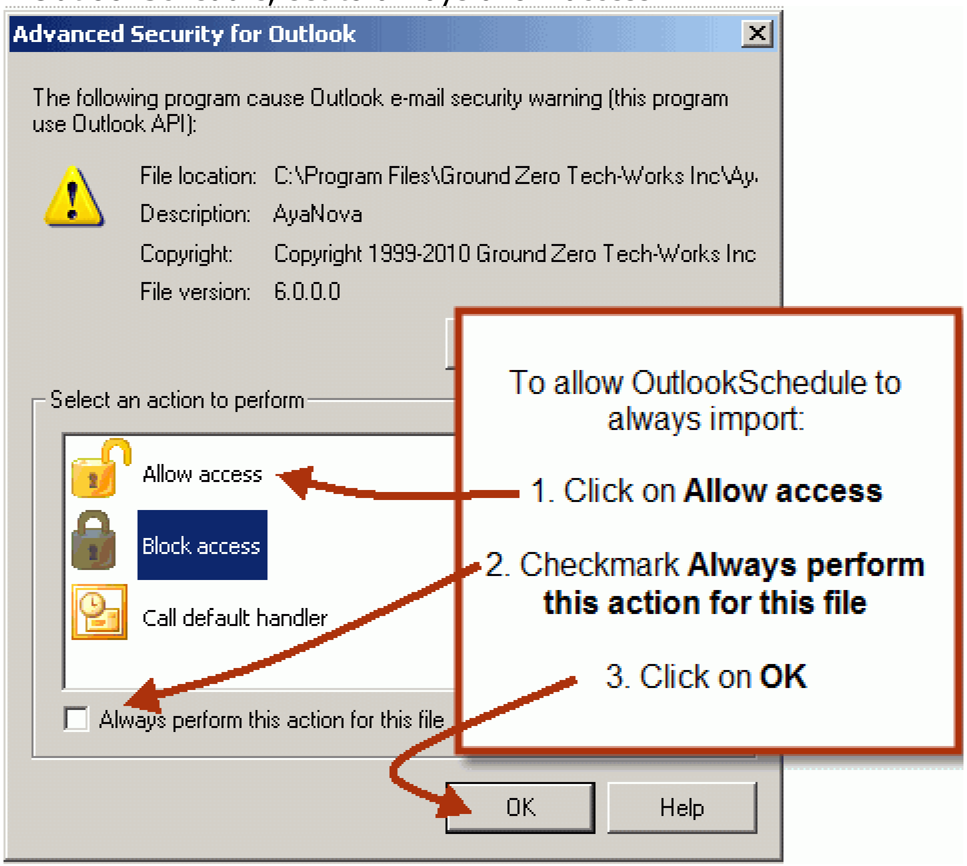
- The OutlookSchedule plug-in files will be installed to this computer in the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\plugins\OutlookSchedule folder

3. Outlook may pop up an annoying security notice when you import



- To allow OutlookSchedule to import, just checkmark the Allow Access and click on OK

- MAPILab creates the free utility **Advanced Security for Outlook** at http://www.mapilab.com/outlook/security/ that once installed will mean you won't have to do this every time.
  - Download the outlook_security.zip file from MAPILab or from the AyaNova Downloads web page
  - Extract the setup file and release notes from the zip file
  - Install the setup file and the second time you run the AyaNova OutlookSchedule, set to always allow access



9.3.3 How to export scheduled items to Outlook

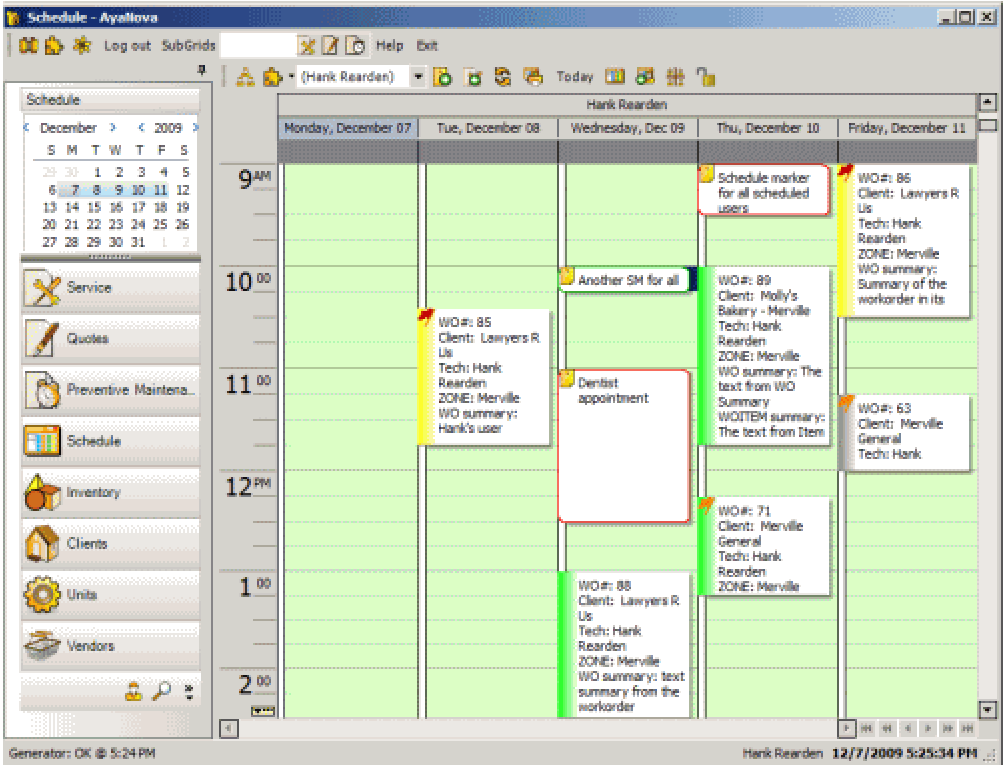
NOTE: **Only items newer** that the date/time it is right now will be exported.

For example, if you export and nothing shows in your AyaNova Calendar in Outlook, it is because you do not have any scheduled items newer than the date and time it is right now.

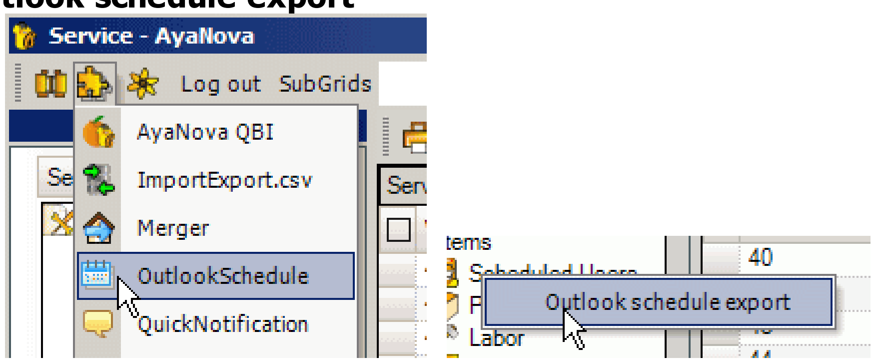
How to export your scheduled items into Outlook:

1. Install as per the installation instructions

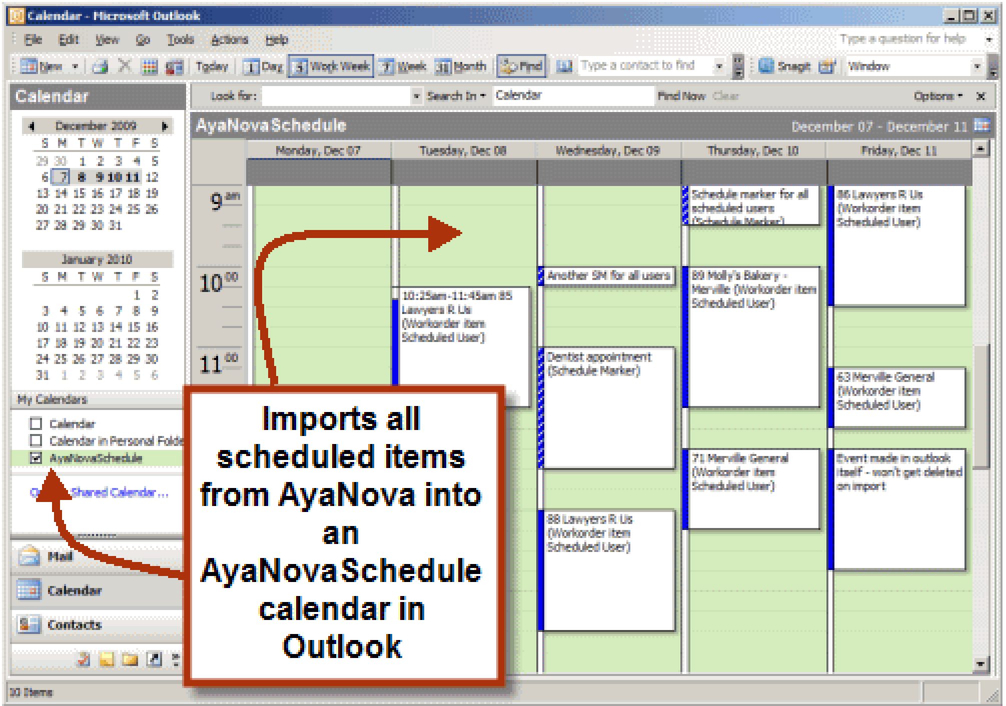
2. Log in as a schedulable user. In the example below, the scheduled user Hank has a number of scheduled workorder items and Schedule Markers



3. Drop down the main menu Plug-ins and select **OutlookSchedule** and then **Outlook schedule export**

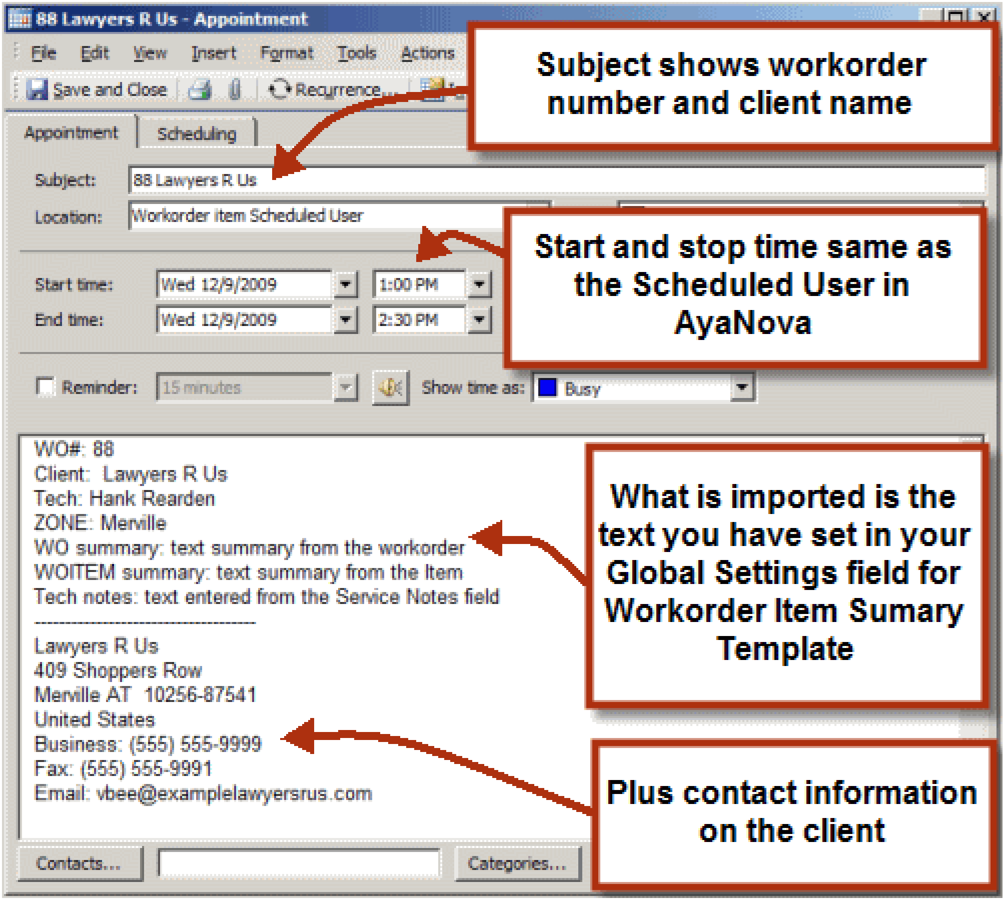


4. The plug-in will create an Outlook calendar called AyaNovaSchedule and import all scheduled AyaNova items for the logged in schedulable user into this Outlook calendar.



- Exports only scheduled items (Schedule Markers and workorder items) for the currently logged in user
- Exports only items occurring from time of export forwards (does not export previously scheduled items)
- Does not export Closed workorder items

5. Open an imported event in your Outlook to see what has been imported



- The details imported in the Outlook event are based on the Workorder Item Summary Template set up in your Global Settings
- Plus also imports the client's contact information - address, business, fax and mobile phone numbers and the email address.

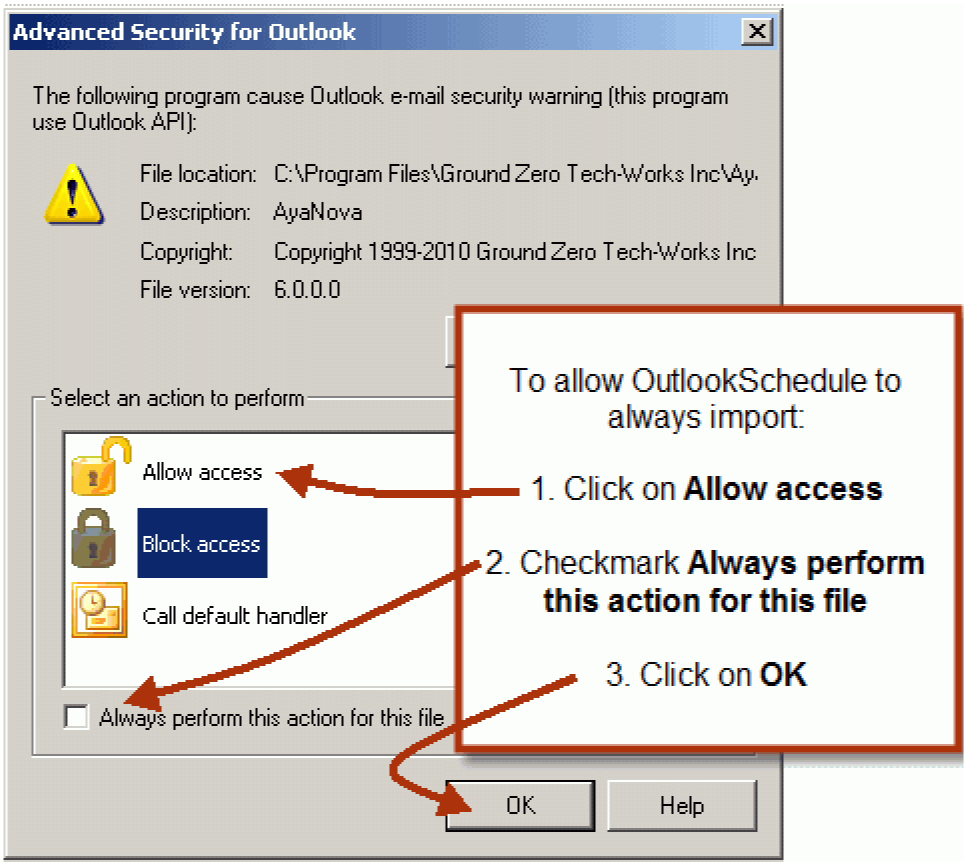
6. You can run the OutlookSchedule plug-in as often as you like.

   - When the OutlookSchedule plug-in is run, it compares the existing imported scheduled events between AyaNova and the Outlook AyaNovaSchedule calendar. And if have changed, deletes the Outlook AyaNovaSchedule calendar events and imports again from AyaNova so you always have the latest information in your Outlook AyaNovaSchedule calendar
   - If you have created new events in the Outlook AyaNovaSchedule calendar directly, these are not removed when you import again from AyaNova - only those originally imported.

7. Outlook may pop up an annoying security notice when you import

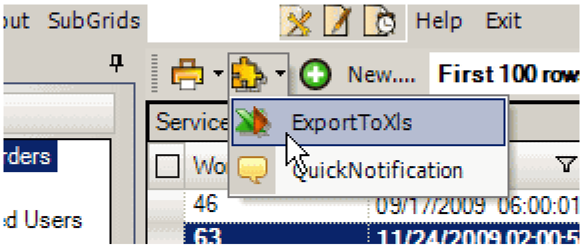
- To allow OutlookSchedule to import, just checkmark the Allow Access and click on OK

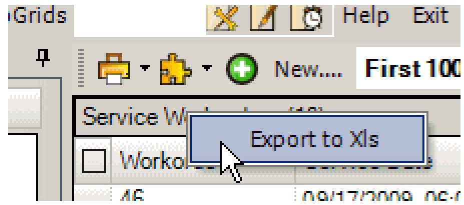
- MAPILab creates the free utility **Advanced Security for Outlook** at http://www.mapilab.com/outlook/security/ that once installed will mean you won't have to do this every time.
  - Download the outlook_security.zip file from MAPILab or from the AyaNova Downloads web page
  - Extract the setup file and release notes from the zip file
  - Install the setup file and run the AyaNova OutlookSchedule and set to always allow access


Advanced Security for Outlook
The following program cause Outlook e-mail security warning (this program use Outlook API):
File location: C:\Program Files\Ground Zero Tech-Works Inc\Ay
Description: AyaNova
Copyright: Copyright 1999-2010 Ground Zero Tech-Works Inc
File version: 6.0.0.0
Select an action to perform
Allow access
Block access
Call default handler
Always perform this action for this file
OK
Help
To allow OutlookSchedule to always import:
1. Click on Allow access
2. Checkmark Always perform this action for this file
3. Click on OK

9.4 Export to XLS Plug-in

9.4.1 Export to XLS





The **Export to XLS plug-in:**

- Export all records from a grid; or filter to show specific records to export; or select specific records to export
- Exports all columns available from that grid
- Exports in Excel BIFF8 format compatible with Excel 97 or newer, OpenOffice Calc or any other program that can read Excel 97 files.
- The export column order **does not** follow the grid column order the AyaNova user is viewing so as to ensure every export is consistent in case the user has formulas etc that rely on column order
- The sort order **does** follow that in your AyaNova grid

Requirements:

- You don't need Excel or Open Office etc installed on your computer to be able to run this utility
- Your 45 day trial includes the Export to XLS optional add-on license so you can fully try it out.
- Purchase the Export to XLS optional add-on license from the Purchase web page
- Or if your company is already licensed for AyaNova and would like to trial, contact us with the information from your Help -> About AyaNova and request a temporary key to trial.
- Requires that the Export to XLS program files be installed to the computer itself, where the Export to XLS utility will be run on.

9.4.2 Export To XLS installation

Export to XLS plug-in installation:

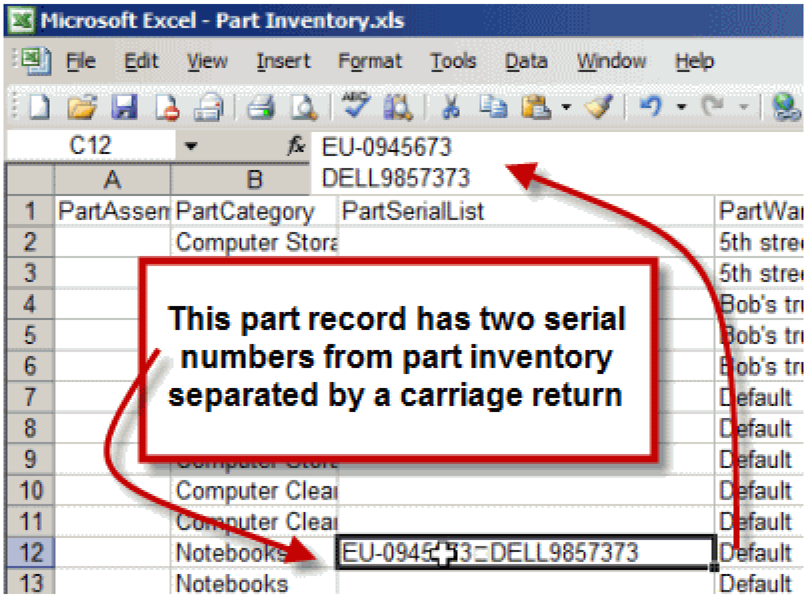
1. Confirm your Export To XLS requirements

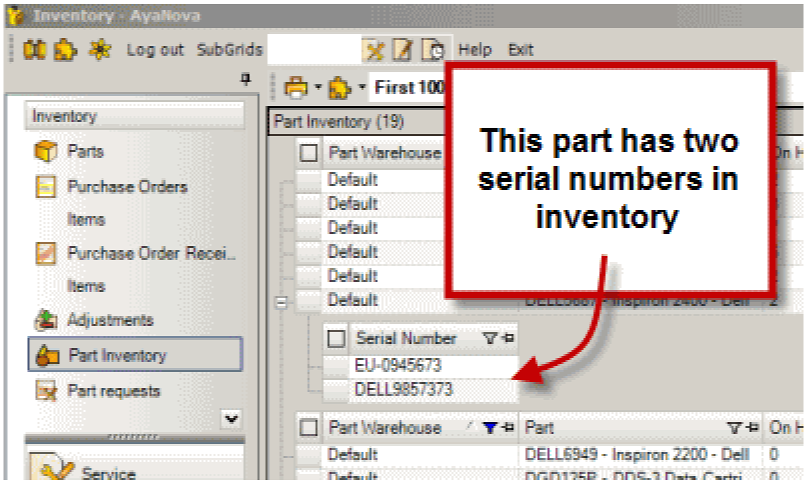
2. Download the Export to XLS setup file from the Download web page and install to the computer where you want to use the ExportToXLS plugin

   The Export to XLS plug-in files will be installed to this computer in the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\plugins\ExportToXls folder

3. The Export to XLS plug-in is available from the following grid menu's once installed to the computer it will be run on:

   All Service navigation pane grids
   All Quote navigation pane grids
   All Preventive Maintenance navigation pane grids
   All Client navigation pane grids
   Vendor grid
   Memos grid
   All Inventory navigation pane grids
   Note that serial numbers for a specific part are all imported in one field with a carriage return between



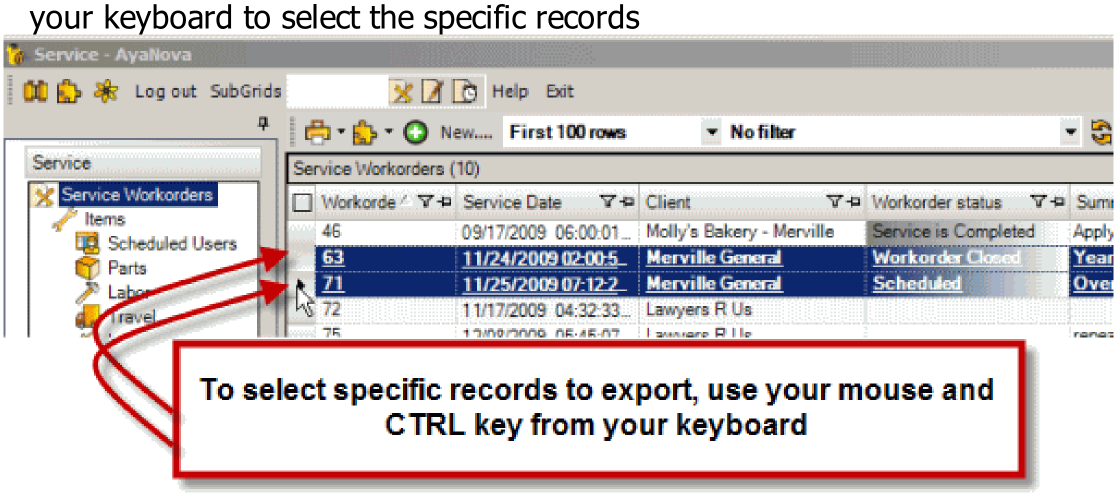


9.4.3 How to Export to XLS

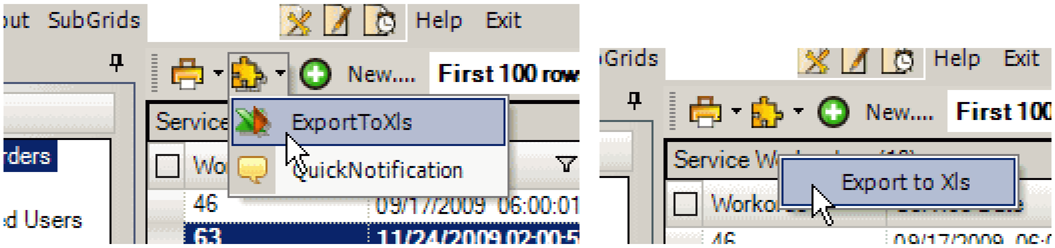
The Export to XLS plug in allows you to easily export record data to an XLS file for additional business analysis, import into other software, etc

How to export to an XLS file:

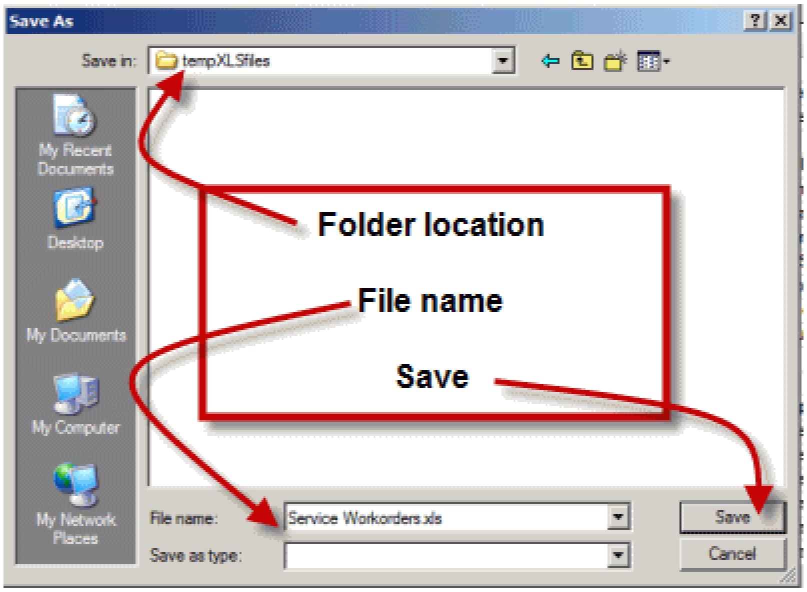
1. Install as per the installation instructions
2. View the grid you want to export from
   - If you want all records from this grid that are displaying, no need to select anything
   - If you want specific records, you can use your mouse and the CRTL key on your keyboard to select the specific records



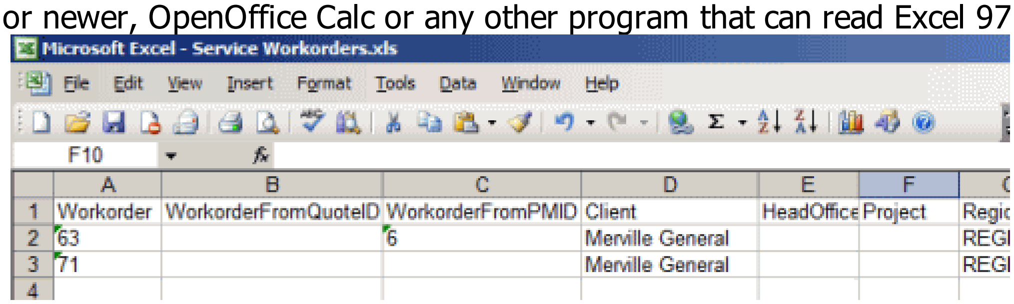
   - Or you can filter to display specific records. Refer to the Filtering a grid section of this Help file for details on filtering
3. Select the **ExportToXLS** plug-in menu and select **Export to XLs**



4. Accept the file name or edit as desired with the xls extension to a folder, and Save



5. The file will be saved to the folder you specified. You can open with Excel 97 or newer, OpenOffice Calc or any other program that can read Excel 97 files

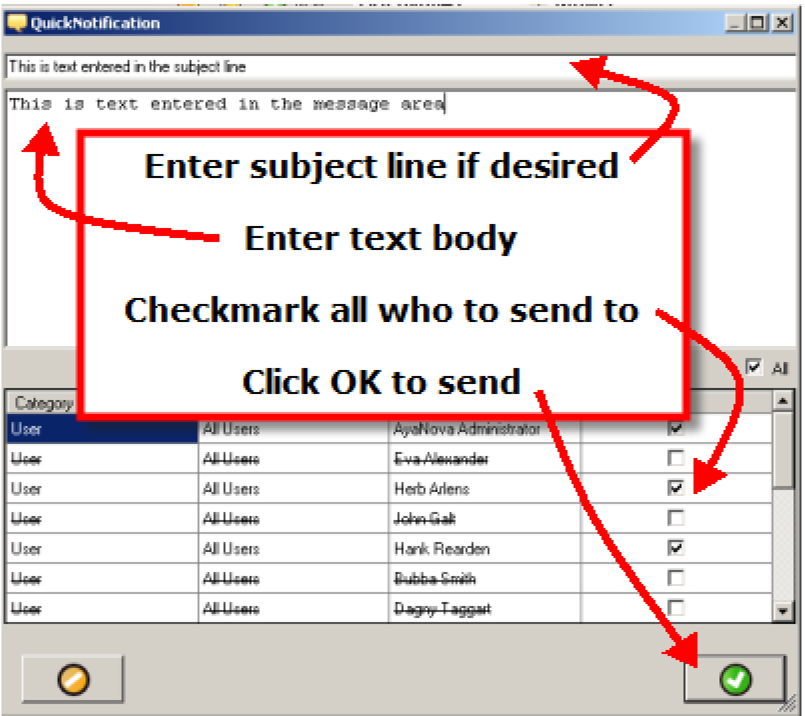


- The sort order of the records does follow that from your AyaNova grid. In the example screenshot above, workorder 63 was listed before workorder 71, so is in that order in the exported file
- The column order **does not** follow the grid column order the AyaNova user is viewing so as to ensure every export is consistent in case the user has formulas etc that rely on column order.

- It is encouraged that you export to an XLS file and view so that you can see the columns that are exported and their column order.

9.5 Quick Notification

9.5.1 Requirements for Quick Notification



The **Quick Notification** plug-in allows any AyaNova user to send a quick message to a subscribed AyaNova user.

- A list of which AyaNova users to send to depends on from which menu bar you select the Quick Notification plug-in.
- The quick message could arrive via AyaNova memo, AyaNova popup, external email or external SMS as works in conjunction with the AyaNova Notification Subscriptions feature.

Requirements for Quick Notification:

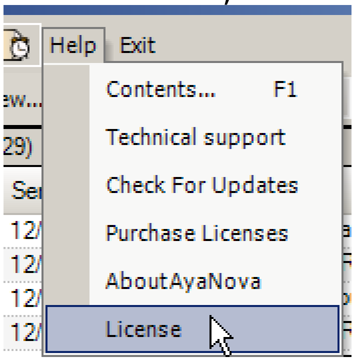
1. **AyaNova must be licensed for the Quick Notification optional add-on**
2. **The Quick Notification plug-in is installed on this computer**
3. **Notifications must be set in Global Settings**
4. **The Generator must be running**
5. **The user you are sending the Quick Notification to must be subscribed to Quick Notification subscription**

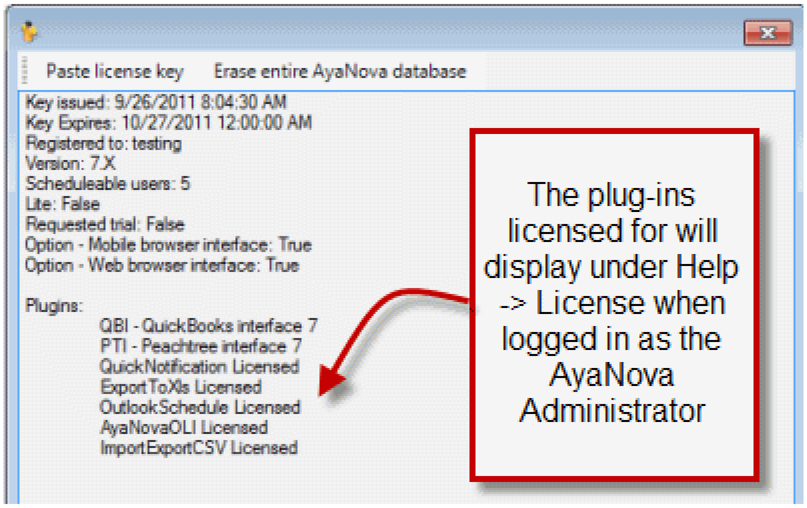
1. AyaNova must be licensed for the Quick Notification optional add-on

- Your 45 day trial includes the Quick Notification license so you can fully try it out.
- Purchase the Quick Notification optional add-on plug in subscription license from the Purchase web page
- Or if your company is already licensed for AyaNova and would like to trial, contact us with the information from your Help -> About AyaNova and request a temporary key to trial.

2. The Quick Notification plug-in is installed on this computer

- Download the Quick Notification setup file from the Download web page
  - Install by running the setup file - the Quick Notification plug-in files will be installed to this computer in the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\plugins\QuickNotification folder
  - A Quick Notification database license is required
  - You can check to see if licensed by logging in as the AyaNova Administrator, select Help -> License

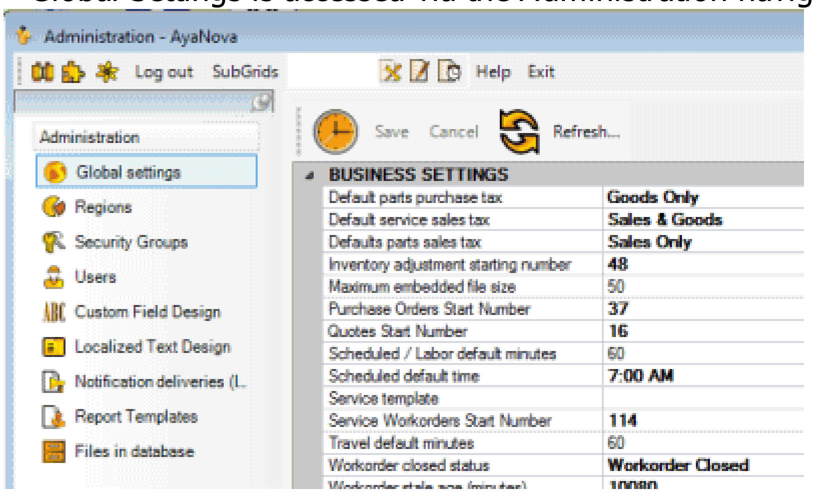




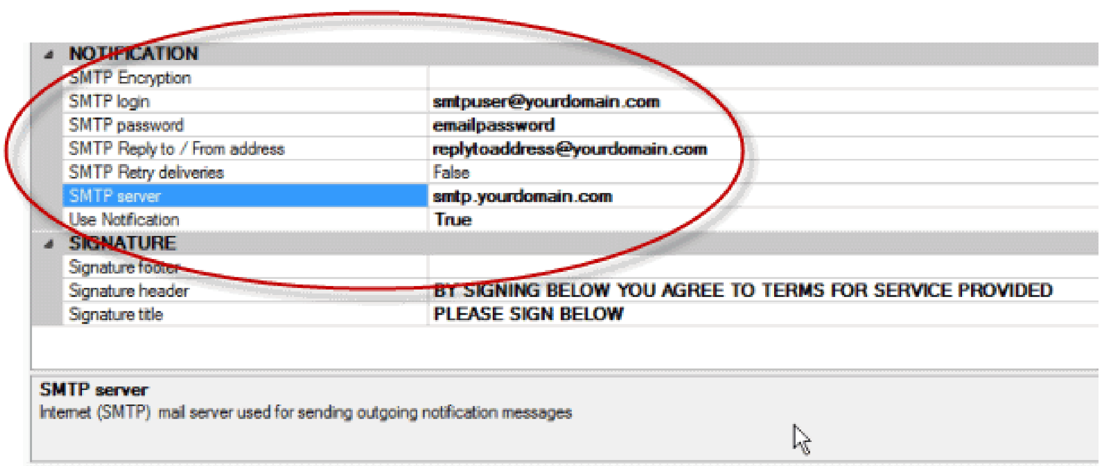
- If you would like to test this plug-in, include in your email request to *support@ayanova.com* the text from your Help -> License
- Only one license is needed for your database

3. Notifications must be set in Global Settings

- Global Settings is accessed via the Administration navigation pane



- **Use Notification** must be set to **True**



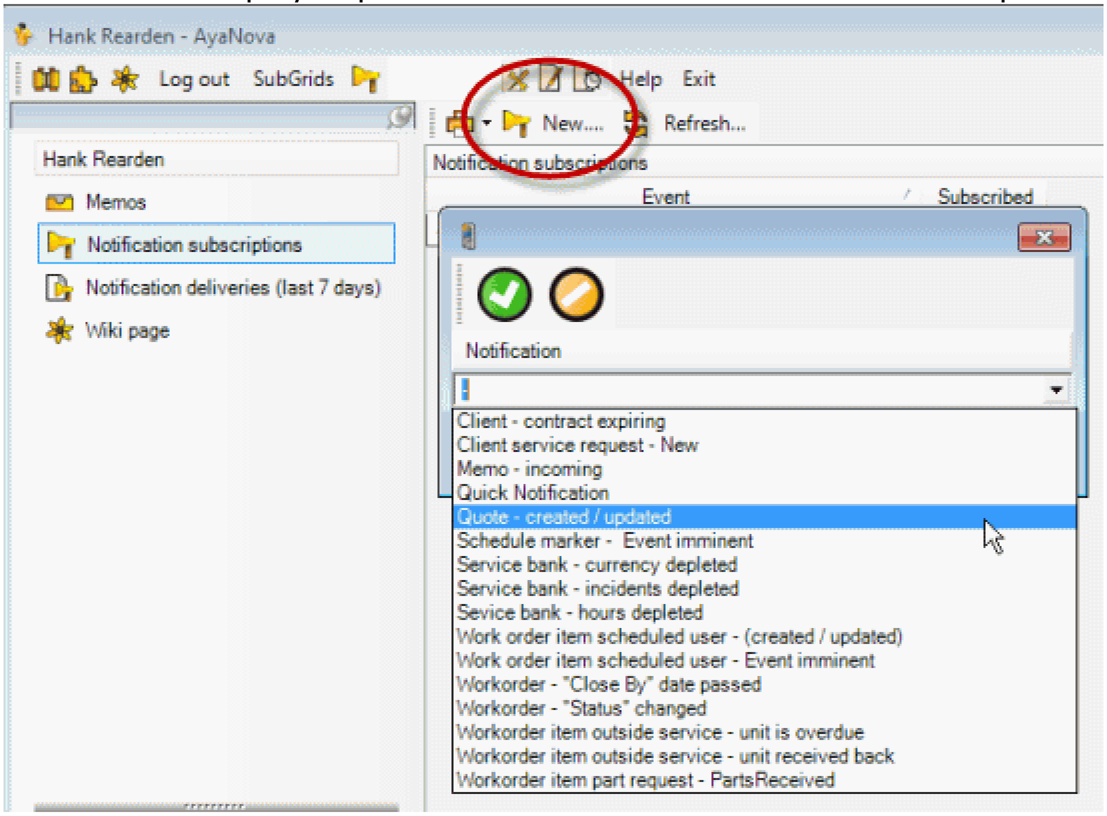
- If any users subscribed to notifications have a delivery method of external Email or SMS, than the SMTP settings must be set.
- Refer to the Global Settings section of this Help file for details

4. The Generator must be running

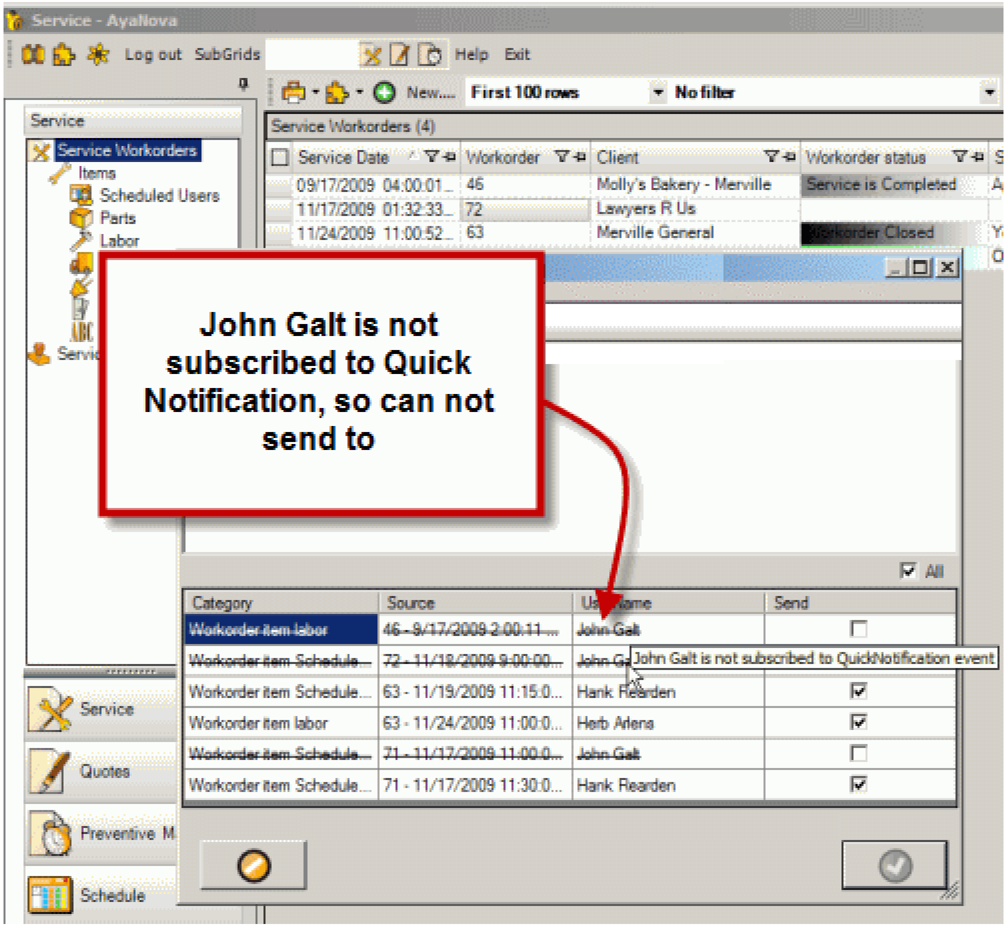
- The Generator checks every five minutes to see if there is any notifications to be sent
- If stand-alone configuration of AyaNova, do note that the Generator does not run when logged in as the AyaNova Administrator
- Refer to the Generator section of this Help file for details

5. The user you are sending the Quick Notification to must be subscribed to Quick Notification subscription

- Refer to the step by step How to subscribe to a Notification for example



If the user is not subscribed, then their name will show in the selection list for sending a Quick Notification will a line through it (as not available to send a Quick Notification to).



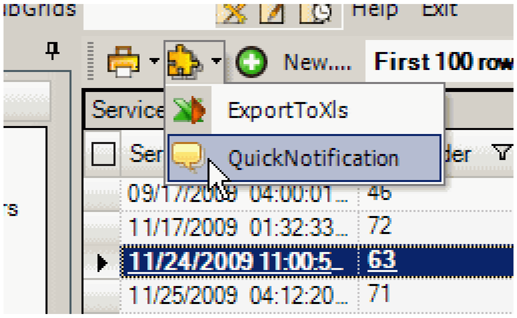
9.5.2 Sending a Quick Notification

The Quick Notification plug-in allows any AyaNova user to send a quick message to a subscribed AyaNova user.

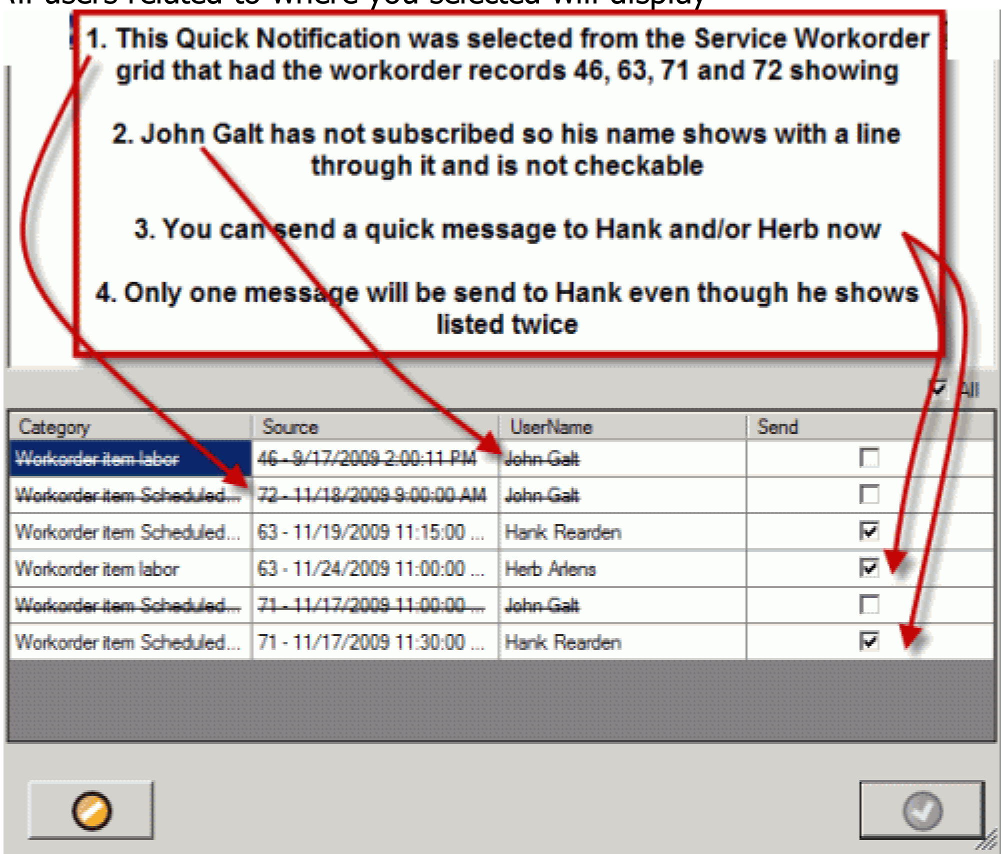
- The quick message could arrive via AyaNova memo, AyaNova popup, external email or external SMS.
- A list of which AyaNova users to send to depends on from which menu bar you select the Quick Notification plug-in and what record selected.
- Do ensure that the Requirements for Quick Notification have been met before sending a Quick Notification

To send a Quick Notification:

1. Select the **Quick Notification** plug-in from the appropriate menu bar and select **Send Quick Notification**



2. All users related to where you selected will display

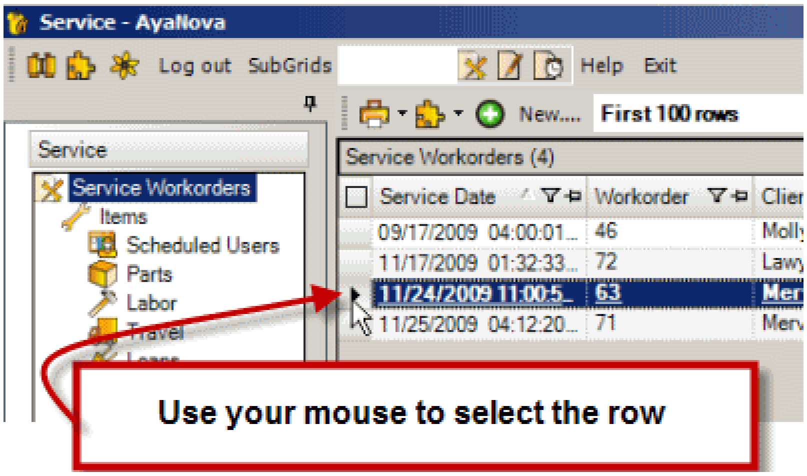


For example:

If you were in the Schedule screen, you would use your mouse to click on scheduled workorder items. The users scheduled in these workorders will then be listed to send send the notification to

Another example:

Select a specific workorder from the Service Workorders grid, and only the schedulable users selected in that workorder will display listed to send a Quick Notification to. This feature is very useful if you want to quickly send a message only to users that are concerned with a certain workorder.



Main menu bar - all AyaNova users will be listed to send a Quick Notification to

Service navigation pane grids menu bar - schedulable users selected in the service workorder records showing will be listed to send a Quick Notification to.

Memos grid menu bar - select specific memo records and those users the memo sent from will be listed to send a Quick Notification to

Schedule screen menu bar - the schedulable users of the workorder items selected will show to send a Quick Notification to

Service Workorder entry screen menu bar - the schedulable users selected in this service workorder will show to send a Quick Notification to

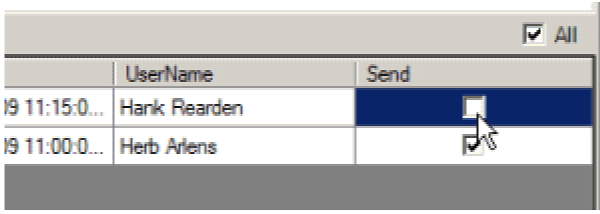
User entry screen menu bar - this user will show for selection to send a Quick Notification to

Memo entry screen menu bar - the user the memo was originally sent from will show for selection to send a Quick Notification to

3. Enter in subject line if desired and the text message

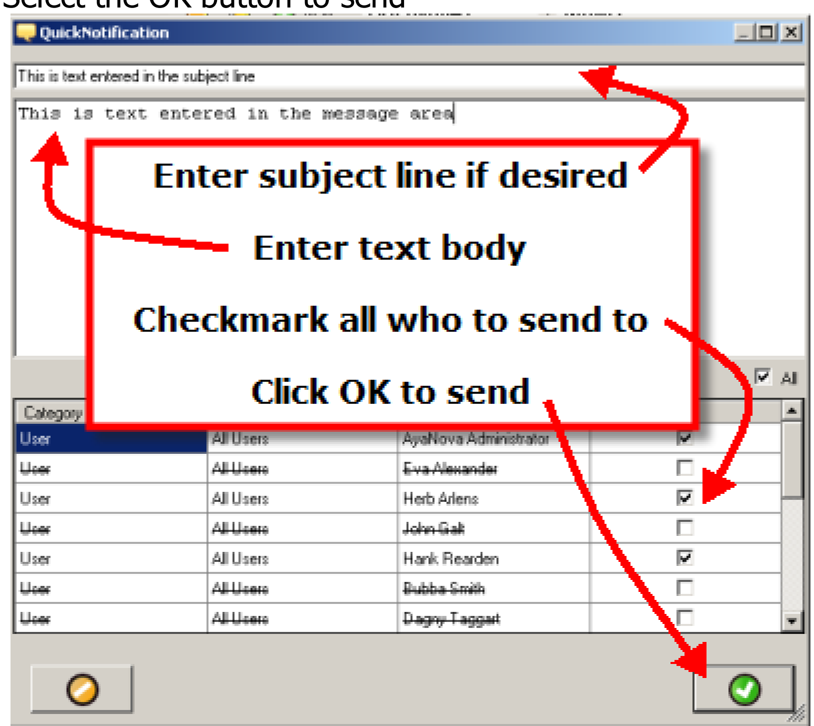
- If no subject text entered, email and memo notifications will just say QuickNotification in the subject line

4. Check and/or un-check the users you want to send the Quick Notification to



- By default all users able to send a Quick Notification to will be pre-check-marked for you.
- If the user has **not yet subscribed** to Quick Notification, then their name will **not** be check-marked and will have a line through it to let you see at a glance they have not yet subscribed.
- Even though a user may be listed more than once, only one quick message will be sent to that user.

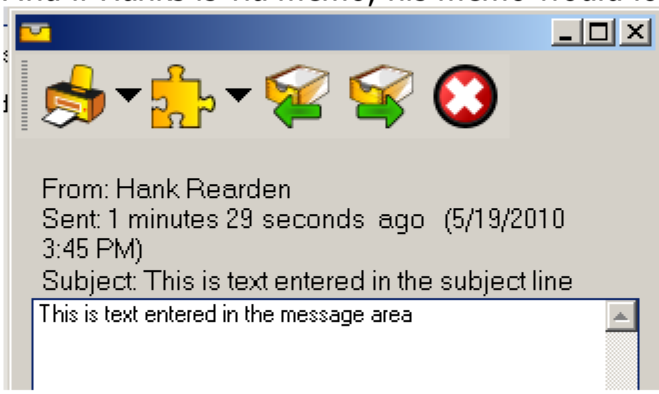
5. Select the OK button to send



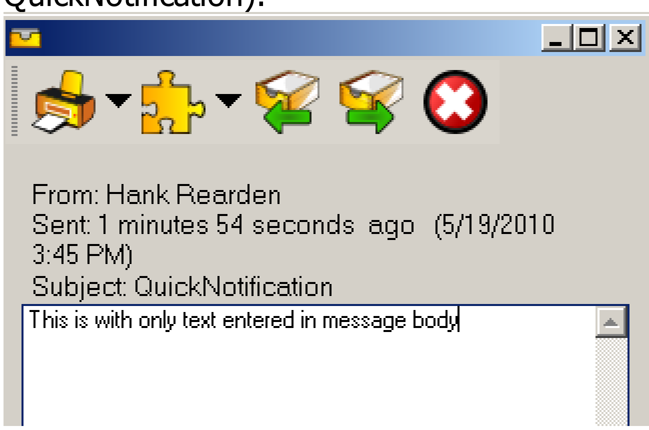
6. When the Generator next checks on its 5 minute interval, it will send out this Quick Notification to the users you check marked to send to via the delivery method that user set in their notification subscription

For example, if Herb's subscription to the Quick Notification subscription is via a delivery method of AyaNova popup, he would get a popup such as the screenshot below:

And if Hanks is via memo, his memo would look like:



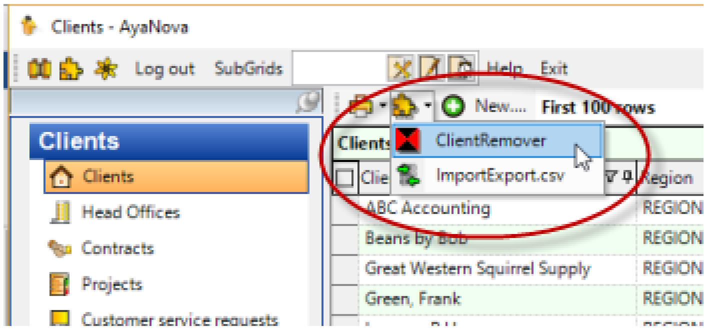
Whereas if the Quick Notification sent out has no subject line, then Hank's memo would look like below (note the subject line will default to saying QuickNotification):

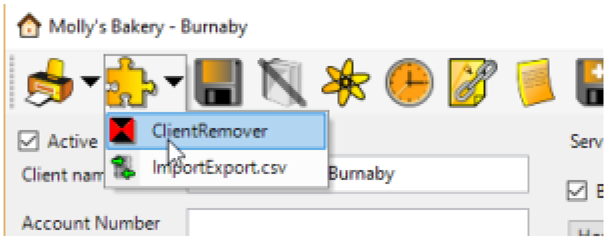


9.6 ClientRemover

The **ClientRemover** plugin is available at no extra charge.

The ClientRemover plugin may be accessed via the Clients grid menu Plug-In menu, also can be accessed from the Plug-In menu option within the client record itself.





This utility allows you to remove clients easily and quickly, including their linked workorders, quotes, etc.

- The ClientRemover feature is automatically installed by the AyaNova setup

- The ClientRemover feature can **only** successfully run for the **AyaNova Administrator** account.

  For example: if you log in as a user that is of **User Type** Schedulable user or log in as **any other** Administrator user, you will see the ClientRemover feature in the Plug-In drop down list, but you **will not** be able to actually delete any via this method.
  You **must** log in as your AyaNova Administrator account to use this plug-in.

- If the client has workorders that have parts on order and not yet received, the utility will display a message identifying the workorder in question. To resolve this, do either of the following:
  o set the PO status to Closed - non-received; Save & exit the PO.
  o receive the parts ordered.

- This utility makes significant changes to your database, ensure you have a restorable and current backup before proceeding.

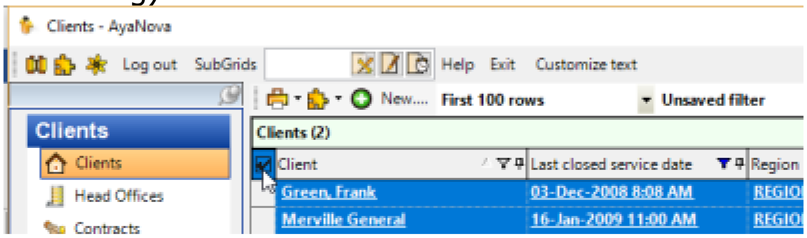
How to use the ClientRemover utility:

1. Make sure all users are out of AyaNova (otherwise if other users are editing the data you will be deleting, problems may occur)

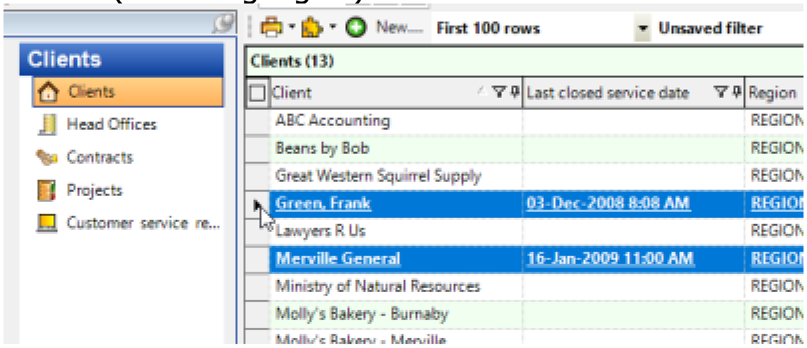
2. Log in as the AyaNova Administrator

3. From the Clients grid, select the specific client(s) that you want deleted. You can manually checkmark specific client rows, or filter to only show clients based on a specific filter and than use the select all rows checkbox.

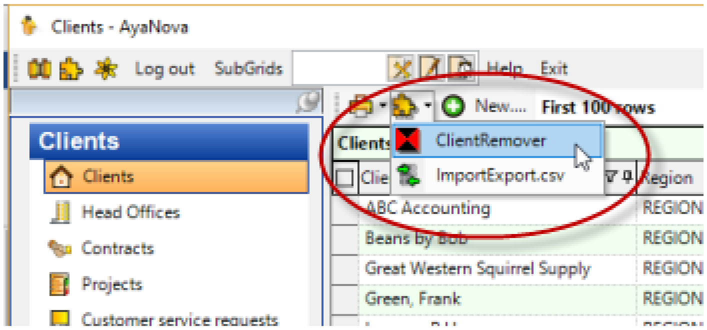
First example screenshot below, we have filtered based on the Last Closed Service Date and used the select all rows checkbox to checkmark (which highlights all rows showing):



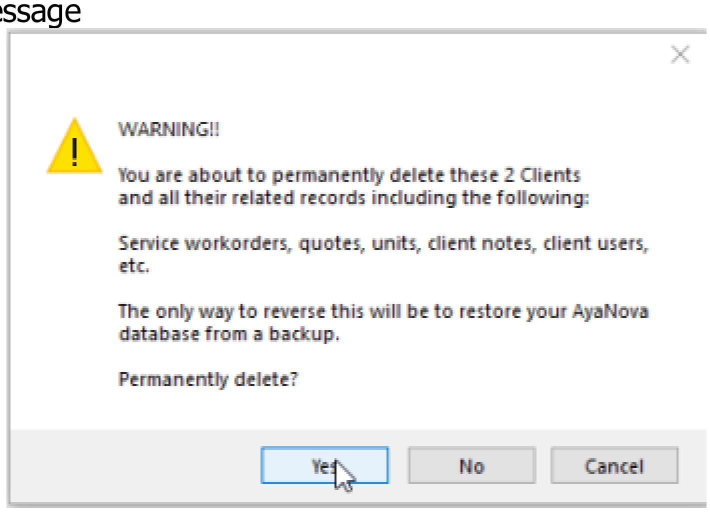
Second example screenshot below, we have manually checkmarked the specific clients we want deleted by holding the SHIFT key while using mouse to checkmark (which highlights) those clients we want deleted:



4. With the client(s) selected that you want fully deleted, select the ClientRemover option from the Client's grid menu Plug-In



5. As you would with any message that appears, read and confirm the warning message



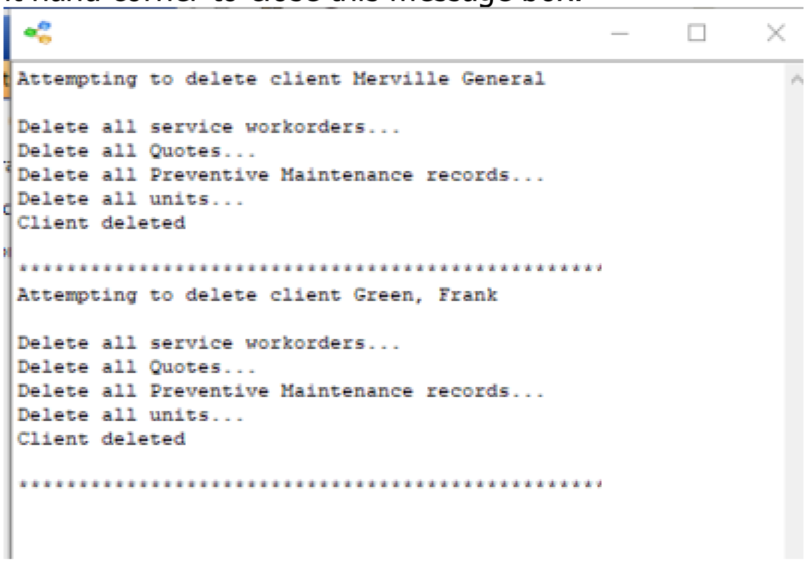
6. If an issue prevents AyaNova from deleting the records of the client and the client, a text box will display that shows the workorder number so you can resolve the issue. 99% of the reason why ClientRemover will show this will be **because <u>there is a part on order not yet received</u>. Fix this issue by either receiving the part, or closing the PO without receiving. Then redo your ClientRemover steps again.**

```
Attempting to delete client test client2

Delete all service workorders...
Unable to delete workorder 78 due to: violation of FOREIGN KEY constraint
"FK_APURCHASEORDERITEM_AWORKORDE" on table "APURCHASEORDERITEM"
Foreign key references are present for the record
Delete all Quotes...
Delete all Preventive Maintenance records...
Delete all units...
Error attempting to delete client:
violation of FOREIGN KEY constraint "FK_AWORKORDER_ACLIENT" on table "AWORKORDER"
Foreign key references are present for the record

Client test client2 was *NOT* deleted
```

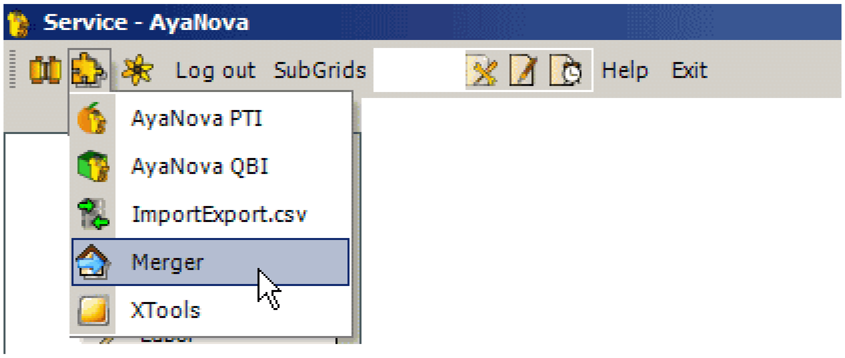
7. If no issues, message will show deleted successfully. Click on the X in upper right hand corner to close this message box.



8. It would be suggested to refresh your client grid, and confirm now no longer present.

9.7 Client Merger

The **Merger** menu option is available via the main menu Plug-In option at no extra charge



This utility allows you to "merge" clients - transfer workorders, quotes, etc from one client to another.

- The client Merger feature is automatically installed by AyaNova
- The client Merge feature is **only** available for a user logged in that is of **User Type** Administration user and that user's **Security Group** has full Read/Write/Delete to the Object.Client, Object.ClientNote, Object.ClientServiceRequest, Object.PurchaseOrder, Object.Unit, Object.User, and Object.WorkOrder objects

  For example: if you log in as a user that is of **User Type** Schedulable user, you will **not** see the Merger feature in the Plug-In drop down list. Whereas if you log in as the AyaNova Administrator, you **will** see the Merger feature in the Plug-In drop down list.

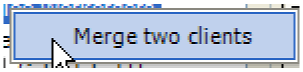
- The Merger changes the FROM client's internal ID to that of the TO client for its units, service workorders, quotes, client notes, client service requests, and purchase orders.
- The Merger does NOT delete the FROM client. It will still be listed. If you no longer want this client available for selection, then either set it to inactive or delete it.
- This utility makes significant changes to your database, ensure you have a restorable and current backup before proceeding.

How to use the Client Merger utility:

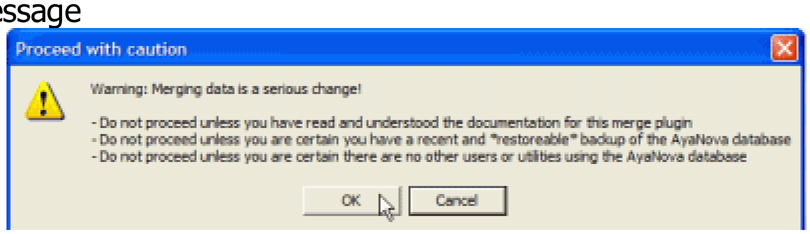
1. Make sure all users are out of AyaNova (otherwise if other users are editing the data you will be merging, problems will occur)

2. Log in as the AyaNova Administrator or an AyaNova user that is of of **User Type** Administration user and that user's **Security Group** has full Read/Write/Delete to the objects stated above

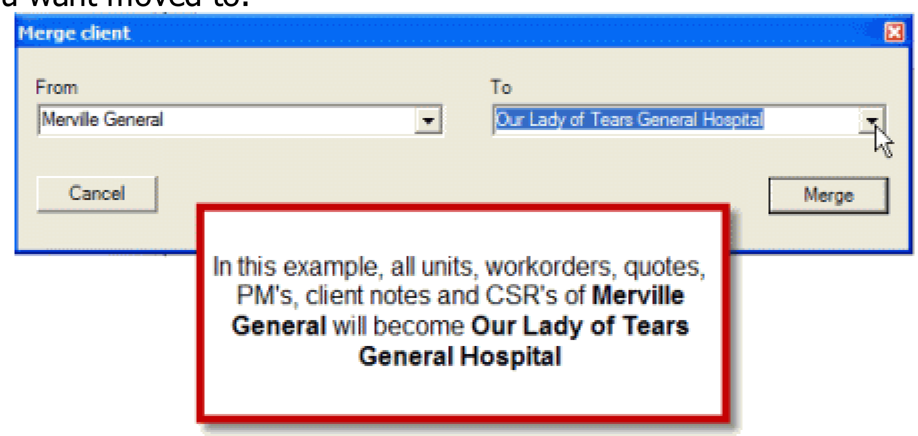
3. Select the Merger option from the main menu Plug-In and then select Merge two clients



4. As you would with any message that appears, read and confirm the warning message

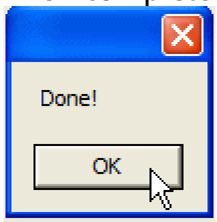


5. Select in the **From**: field the client you want to move from. And the **To**: client you want moved to.



6. Select the Merge button.

7. When completed, it will pop up with a Done message.



8. Now all units, service workorders, quotes, PM's, client notes and CSR's of the From: client will be transferred to the To: client.

9. Now either set the From: client to inactive or delete it via its client entry screen.

9.8 XTools

The XTools utility gives you the ability to enter links to other programs, websites, etc to have quick access while within the AyaNova program.

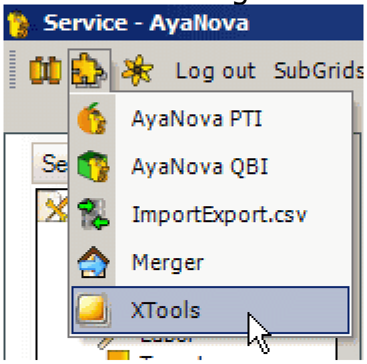
- For example, you might want to have a quick link to your Calculator or to the AyaNova Support Forum or to your RI login web page.
- XTools is provided no charge when you install AyaNova

XTools can be configured two ways - either via the <Configure> option or directly via the XML file.

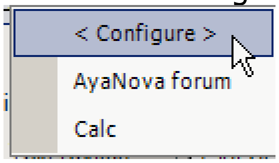
> **NOTE**: What XTools display is based on the XML file in that specific computer's AyaNova program folder. It does not follow the AyaNova user.

1. Configure using the <Configure> option

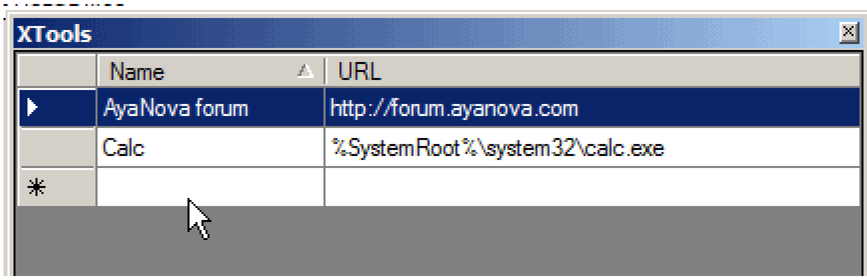
1. Select the PlugIn menu option on the main menu -> select XTools



2. Select <Configure>



3. Enter in a Name to display for the link you are entering, and enter in the URL either a path on your computer or a web URL



2. Configure by editing the XML file directly

1. Open Windows Explorer and move to the C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\plugins\XTools folder

2. Edit the xtools.xml file using NotePad

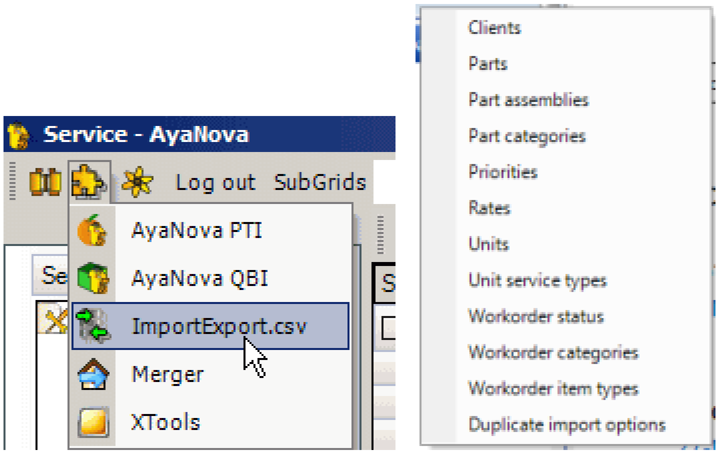
3. Refer to the existing entries as examples

Note: you can easily configure using the <Configure> menu option, and then copy the xtools.xml file to other computer's C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\plugins\XTools folder if you want all users to have the same XTools configuration.

9.9 ImportExport.csv

9.9.1 ImportExport.csv overview

The ImportExport.csv utility provides the ability to mass import and/or export the following types of AyaNova records:



- Client records
- Part records
- Part assemblies records
- Part categories
- Priorities records
- Rates records
- Units records
- Unit service types records
- Workorder statuses records
- Workorder item types records

Use our ImportExport.csv at no charge.
Whereas the Duplicate import option to the ImportExport.csv does require a license purchase.

Example use of ImportExport.csv:

You previously had your parts in an Excel spreadsheet.
Instead of having to re-type in all of the data into AyaNova, easily export part information from your old database into a CSV file and then import quickly and easily into AyaNova.

You want to export your client information to your accounting program.

Use the ImportExportCSV utility to create an export CSV file of all of your client records, which you can then use to import into your accounting program.

Important information about the importing of records using the ImportExport.csv utility:

- Backup your AyaNova database **before** importing, there is no undo feature and it's easy to accidentally have a field in the wrong position as the import utility has no way of confirming if a phone number (for example) is in the email address column.
- Use the export feature to export your current records that are in your AyaNova to a comma separate values file which you can then open up using NotePad and see the correct format even before creating your own for import.
- Comma Separated Values files (.csv files) can be created and opened directly using Microsoft Access, this is handy if you wish to "massage" the data before importing or examine or work with an exported Clients.csv file
- For better performance when importing a large number of records, import from the fastest connection to the database possible
  - i.e. don't import a large number of part records via a dataportal connection unless performance is not a concern.
- NOTE: In some cases, when you use MS Excel to edit or create a CSV file, the resultant file will not have quotes around the fields that require it.
  - You can easily check by opening the file using Notepad.
  - If you get errors trying to import a file you edited in Excel, it is suggested to import it into a table in Microsoft Access.
  - Right click on the table in MS Access, select Export…, select CSV from the drop down list and the CSV file will be created correctly with quotes and commas.
  - If you do not have MS Access and you do have an active current subscription, send the existing CSV file zipped using WinZip to AyaNova Support, along with the full text of the error you received and what you checked so far and we can see if we can import into MS Access for you and create the formatted CSV file.
- With the no charge importexport.csv utility, duplicate records will not be imported:
  - The required field (i.e. for part records this is the Number field, for client records this is the Name field, for unit records this is the Serial field etc) is examined before each record is imported

    - If the required field is found to be in AyaNova already then that record is not imported.
    - This means you can re-import the same data safely without getting duplicate records.

- Whereas with the licensed ImportExport.csv Duplicate option, you can update existing records.

- After importing, examine the imported records and ensure fields were imported to the correct area of the record.
    - If any issues, restore from your most recent backup, and then perform again as needed.

9.9.2 ImportExport.csv Duplicate option

What does the Duplicate import option do
How to install the Duplicate import option
How to use the Duplicate import options

What does the Duplicate import option do:

The **ImportExport.csv Duplicate** option provides the ability to **update fields** in specific types of existing AyaNova records by presetting which fields of a type of importable record can be updated or not.

The ImportExport.csv utility provides the ability to import certain types of new records into AyaNova, as well as export existing these types of records to a csv file.
The ImportExport.csv utility is provided at no additional charge.
Whereas the ImportExport.csv Duplicate aspect extends the ability of the ImportExport.csv so that it can update existing records of the following types:

- client records
- part records
- unit records
- rates records

The ImportExport.csv Duplicate feature is requires purchase of the ImportExport.csv Duplicate license.

How to install the Duplicate import option:

There is no separate installation for the Duplicate import option.

When you select to [install the ImportExport.csv](#) no charge option, the Duplicate feature is also installed at the same time.

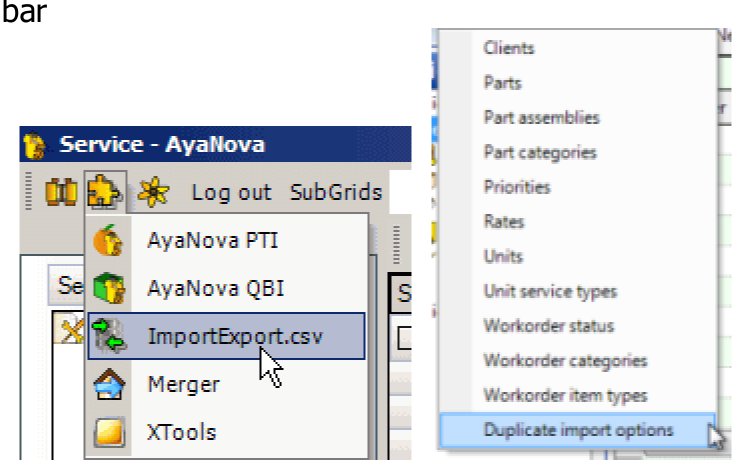
But note that the Duplicate option will **only** display for selection **if** you have purchased a current ImportExport.csv Duplicate plugin subscription license.

How to use the Duplicate import options:

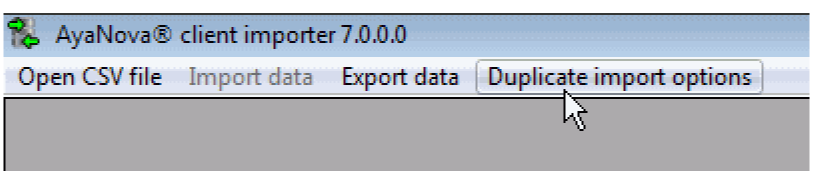
1. Select the Duplicate import option from either the main menu or from within the ImportExport.csv utility

The ImportExport.csv Duplicate menu option will only show if licensed.
If you do not see the menu option, check your Help -> About AyaNova for your licensing details.
Purchase if needed.

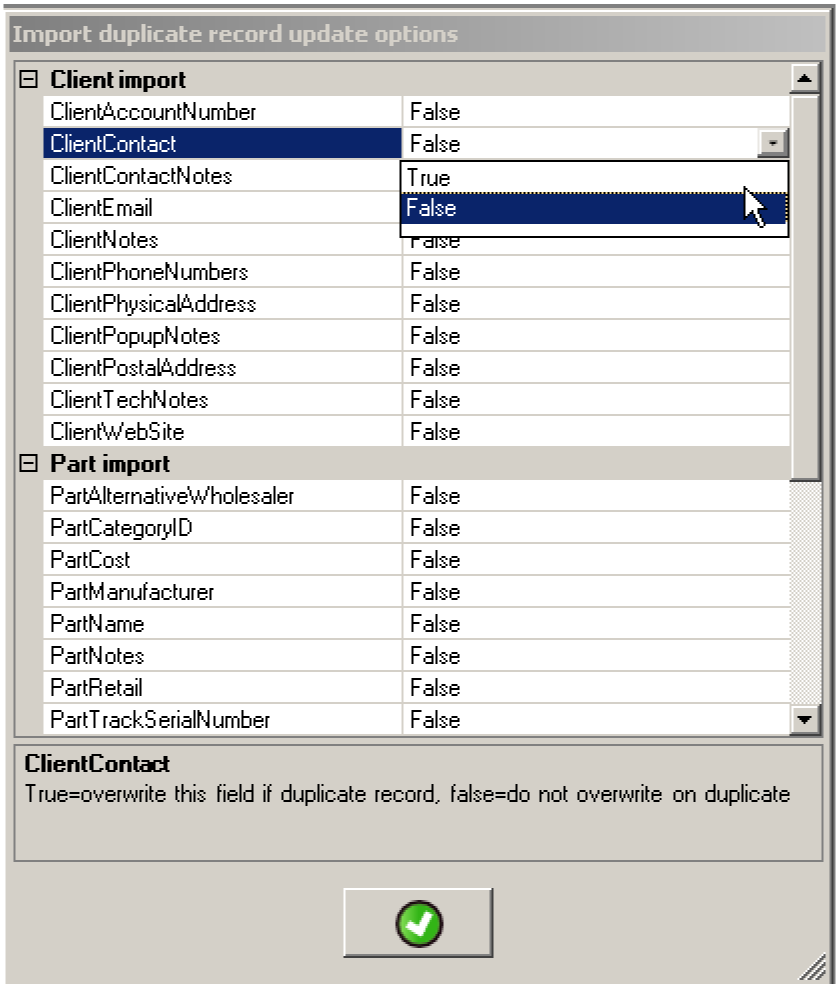
The Duplicate import options menu is accessible from the main AyaNova menu bar



The Duplicate import options menu is also accessible from within the ImportExport.csv utility



2. The Import Duplicate window will open



3. Set as needed.

   Set a field to True if you want that field (the field in an existing record) updated with the information that is in the import file that corresponds to that specific record.

   Keep the field at False if you do not want the field updated.

4. Click on the green OK button  to save any changes to settings

5. It is recommended to backup your AyaNova database before any import.

   This way, if anything was incorrect, you can quickly and easily restore from backup to the point it was at before your import, and then redo your steps until is as desired.

Refer to Backup and restore for your configuration.

6. Perform your ImportExport.csc import.

A message will display identifying the following:

- how many new records were imported (in screenshot above, this is 4 clients)
- how many existing records were updated (in screenshot above, this is 2 client records)
- how many records were not imported because they were exact duplicates having no changes from existing AyaNova records; or because they did not follow the format rules. (in screenshot above, 12 clients were not imported because they were exact duplicates - no changes from existing).

An example:

- You have existing client records in your AyaNova database.
- You have a csv file that might include:
  - o new records to be imported
  - o existing records with different information
  - o existing records with the same information
- You want existing client's phone number fields to be updated, but you do not want existing client record's Popup notes changed.
  1. In your Duplicate options, for **client** records, select True for ClientPhoneNumbers
  2. Save by selecting 
  3. Perform your import.

Another example:

- You have existing part records in your AyaNova database.
- All part's pricing is to increase, but you do not want any other changes to the existing parts

- To save time, rather than going into each part, editing the retail price, clicking save, and then to the next part - why not edit a single csv file and then import?!
    1. Perform an export to csv of your existing parts
    2. Now edit that csv file directly, editing the retail price for each part record as needed.
    4. In your Duplicate options, for **part** records, select True for PartRetail
    5. Save by selecting 
    6. Perform your import.

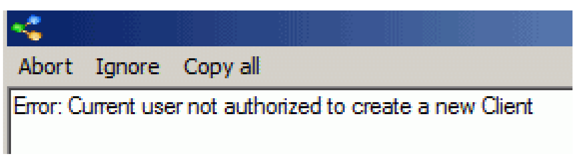
9.9.3 ImportExport.csv installation

Requirements before installation and use:

- Log in as a user with minimum Read/Write to the type of record you wish to import/export.

  An example:

  Your security group for your user has Object.Client set to ReadOnly. Therefore you will receive the following error if you attempt to import clients because your security group rights to Object.Client needs to be at minimum Read/Write



Installation:

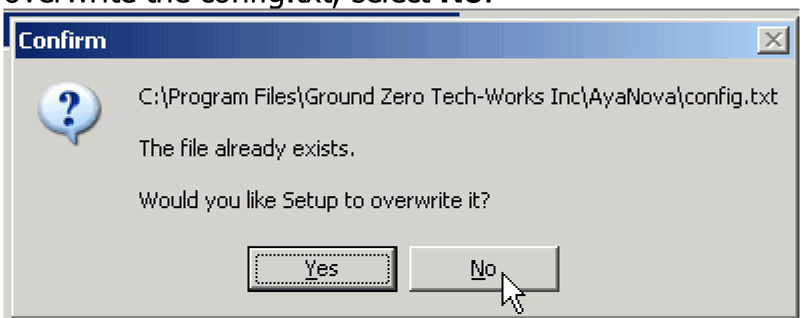
1. Perform the AyaNova installation on this computer where you want to run the ImportExport.csv from.

- If you had previously installed AyaNova, no worries, just run the AyaNovaSetup.exe file again overtop. Your previous selections will show already selected too.

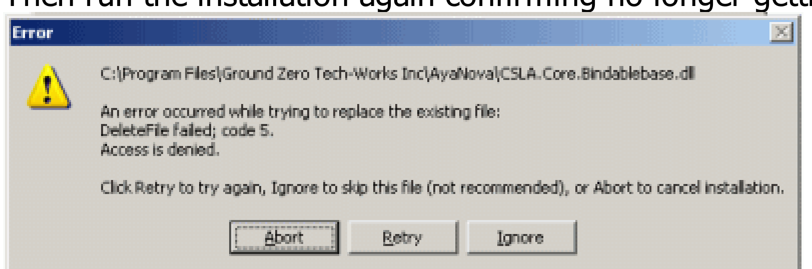
2. During the AyaNovaSetup.exe installation, select the **Install Import/Export to csv plugin**

3. Complete the installation

NOTE: If installing overtop of an existing AyaNova installation that has already been configured for network use, and you get a message asking if you wish to overwrite the config.txt, select **No**.



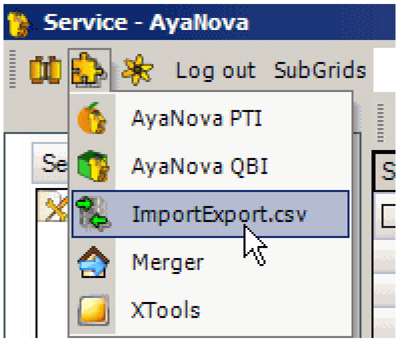
NOTE: if you get a message such as below about replacing a file, this is occurring because you have something running. Click **Abort**.
Then check to make sure you do NOT have any AyaNova program running on this computer (i.e. the desktop AyaNova, the network Generator, the dataportal, etc
Then run the installation again confirming no longer getting the message.

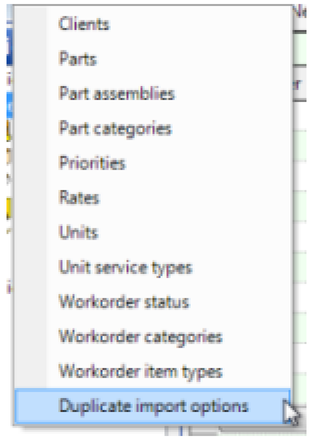


4. It is recommended to perform an export of the existing type of records first, so you can familiarize yourself with the format of the csv file needed for importing that type of record.

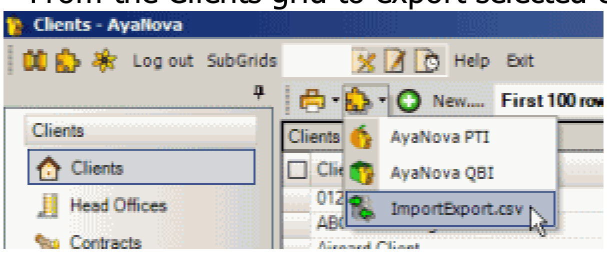
5. Run the ImportExport.csv utility from within the AyaNova program:

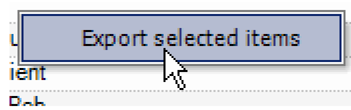
- From the main AyaNova menu bar to export or import or to set Duplicate import options if licensed



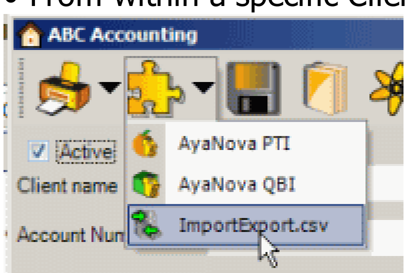


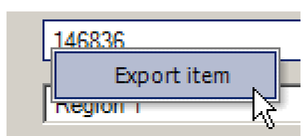
- From the Parts grid to export selected part records
- From the Units grid to export selected unit records
- From the Clients grid to export selected client records





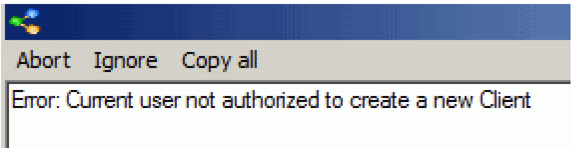
- From within a specific Part entry screen to export that specific part
- From within a specific Unit entry screen to export that specific unit
- From within a specific Client entry screen to export that specific client





NOTE: your AyaNova user log in must have minimum Read/Write to the object to be able to import.

For example, if your security group for your user has Object.Client set to ReadOnly then you will receive the following error if you attempt to import clients



9.9.4 ImportExport.csv format for each type of record

Not all fields of a record are imported/export. Refer to specifics below.

Fields of the record that can be exported out of AyaNova and that can be imported into AyaNova via the ImportExport.csv utility:

Client fields
Part fields
Part assemblies fields
Part categories fields
Priorities fields
Rates fields
Units fields
Unit service types fields
Workorder statuses fields
Workorder item types fields

Regardless of which type of record:

- We recommend performing **a test export** of your existing AyaNova records to a file, and than open that .csv file using NotePad, so that you can see the actual format.

- Back up your database before performing an import.
  - This way if any issues, you can restore back to the state it was before you imported.

- Your import file must be comma delimited with an extension of .CSV
  - CSV refers to Comma Separated Values

- Field order in your import file:
  - Your import file fields for Clients, Parts, Units or Rates can be in **any** order in your csv file as you identify when you run the import utility which entry screen field to import each of your import file columns into.
  - Whereas your import file fields for Part assemblies, Priorities, Unit service types, Workorder statuses and Workorder item types records **must be in the specific order** outlined for that type of record.

- If a field in your import file contains a comma, a return, or a quotation mark character than that field **must** be quoted (surrounded by quotation characters)
  - Example:
    - if the field for a client record's MailAddress is *1234 Mydrive St, Box 435* you must have quotes around it as in *"1234 Mydrive St, Box 435"* so that the comma is understood to be part of the field not a new field.

- Data that exceed the length of the field in the AyaNova record will be truncated (cut off)
  - Single line fields in AyaNova have a character max length of 255
  - If your import .csv file contains field data that is longer than 255 characters, it will be cut off
  - Example:
    - Your .csv file contains a record with a datafield of *"12345678912345678912345678912345678912345678912345678912345 67891234567891234567891234567891234567891234567891234567891 23456789123456789123456789123456789123456789123456789123456 78912345678912345678912345678912345678912345678912345678912 345678912345678912399999999*"
    - When imported into a field that is limited to 255 characters, the last characters will be cut off as the datafield will only display 255 characters *"12345678912345678912345678912345678912345678912345678912345 67891234567891234567891234567891234567891234567891234567891 23456789123456789123456789123456789123456789123456789123456 78912345678912345678912345678912345678912345678912345678912 345678912345678912 3*"

- Do not have the first row contain header information as all rows are imported.

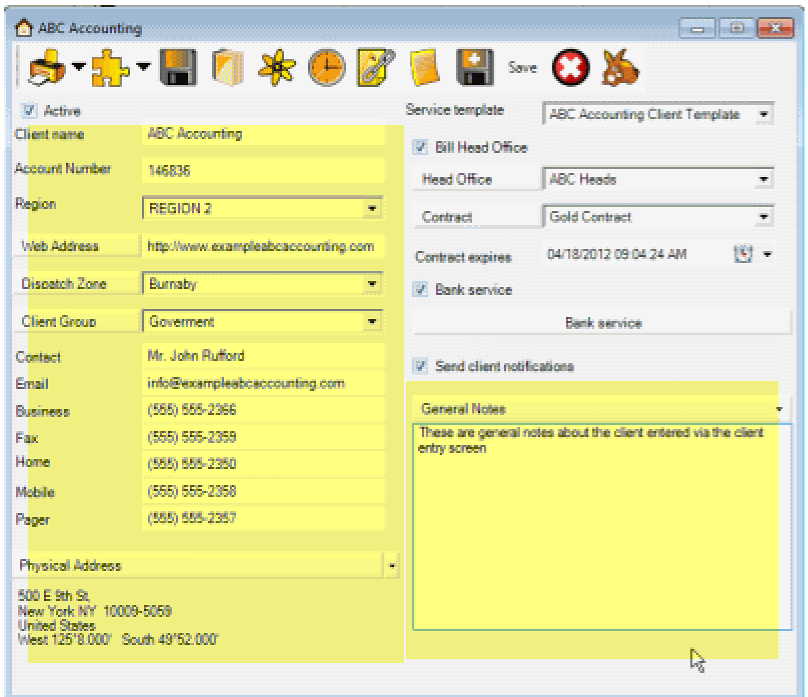
- Duplicate records will not be imported as the required field is examined before each record is imported. If the require fields value is found to be in AyaNova already then that record is not imported.
  - This means you can re-import the same data safely without getting duplicate records.
  - To update existing records requires purchase of the ImportExport.csv Duplicate option

Client fields

For a client record to be imported, you must specify at minimum the **Name** field

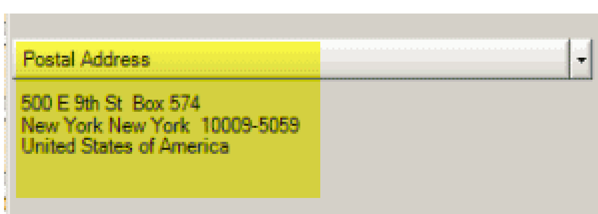
Your client import csv file can contain any of the following fields in any order:

***Name**, MailAddress, MailCity, MailStateProvince, MailCountry, MailPostal, DeliveryAddress, DeliveryCity, DeliveryStateProvince, DeliveryCountry, DeliveryPostal, Contact, ContactsNotes, Phone1 (Business), Phone2 (Fax), Phone3 (Home), Phone4 (Mobile), Phone5 (Pager), EmailAddress, AccountNumber, WebSite, GeneralNotes, TechNotes (Scheduleable User Notes), PopupNotes, Region, DispatchZone, ClientGroup*

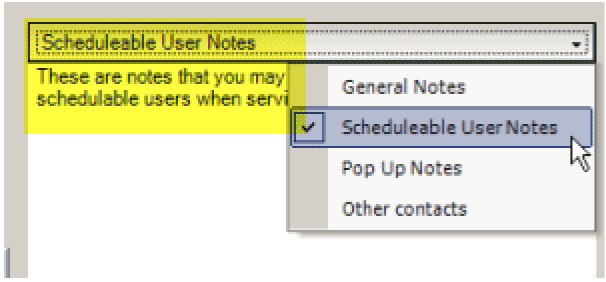


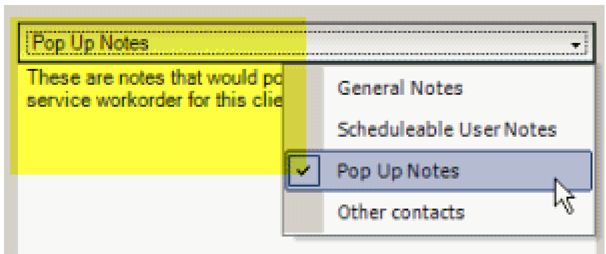
***Name**, AccountNumber, Region, WebSite, Contact, DispatchZone, ClientGroup, Contact, Email, Phone1, Phone2, Phone3, Phone4, Phone5,*

DeliveryAddress, DeliveryCity, DeliveryStateProvince, DeliveryCountry, DeliveryPostal (equates to the Physcial address fields)



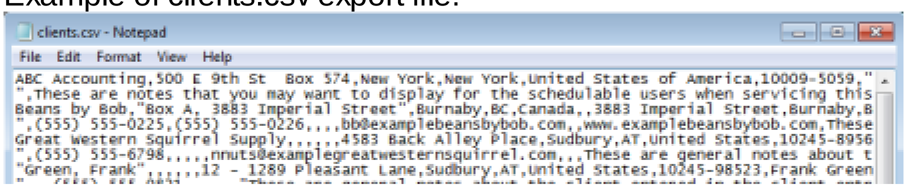
MailAddress, MailCity, MailStateProvince, MailCountry, MailPostal (equates to the Postal address fields)





GeneralNotes, TechNotes (equates to Scheduleable User Notes), PopupNotes, ContactsNotes

Example of clients.csv export file:

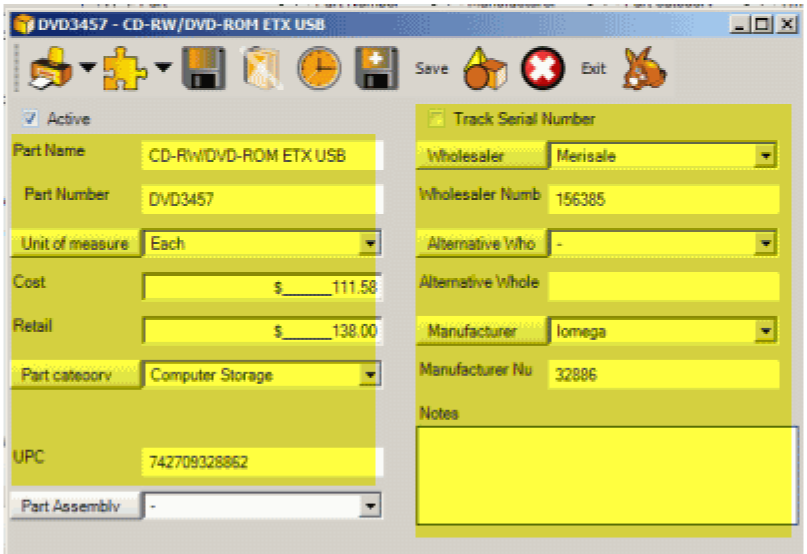


Part fields

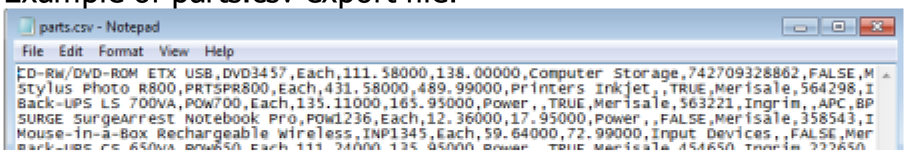
For a part record to be imported, you must specify <u>at minimum the **Number** field</u>

Your part import csv file can contain any of the following fields in any order:

*Name, **Number**, UnitOfMeasure, Cost, Retail, Category, UPC, TrackSerialNumber, WholeSaler, WholeSalerNumber, AlternativeWholeSaler, AlternativeWholeSalerNumber, Manufacturer, ManufacturerNumber, Notes*



Example of parts.csv export file:



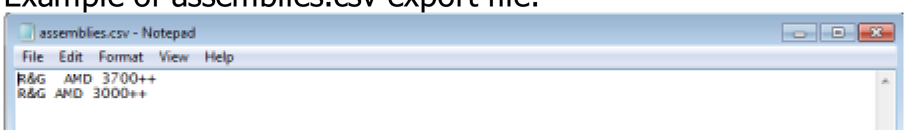
Part assemblies field

For a part assembly record to be imported, you must specify the **Part Assembly Name** field

A part assembly import csv file has only one field

Part Assembly Name

Example of assemblies.csv export file:



Part categories field

For a part category record to be imported, you must specify the **Part Category Name** field

A part category import csv file has only one field

Name

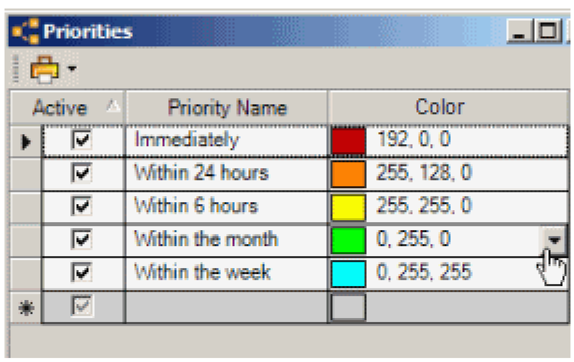
Example of partcategories.csv export file:

Priorities fields

For a Priority record to be imported, you must specify at minimum the **Priority Name** field

Your priorities import csv file can contain the following fields in the specific order shown:

PriorityName, HEX



Example of priority.csv export file:

The color is displayed as an RGB value, and stored in your AyaNova database as a integer.
As HEX numbers are commonly used, instead of requiring entry of a integer number, **provide your color as a HEX in your import file** and the ImportExport.csv utility will convert to storing as a integer and display as a RGB value.

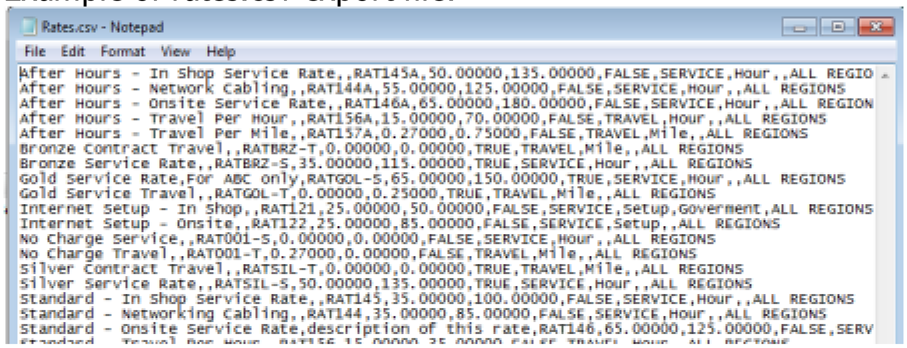
Rates fields

For a rate record to be imported, you must specify at minimum the Rate **Name** field

Your rate import csv file can contain the following fields in any order:

***Name**, Description, AccountNumber, Cost, Retail, ContractRate (True/False), RateType, RateUnitChargeDescription, ClientGroup, Region*

Example of rates.csv export file:



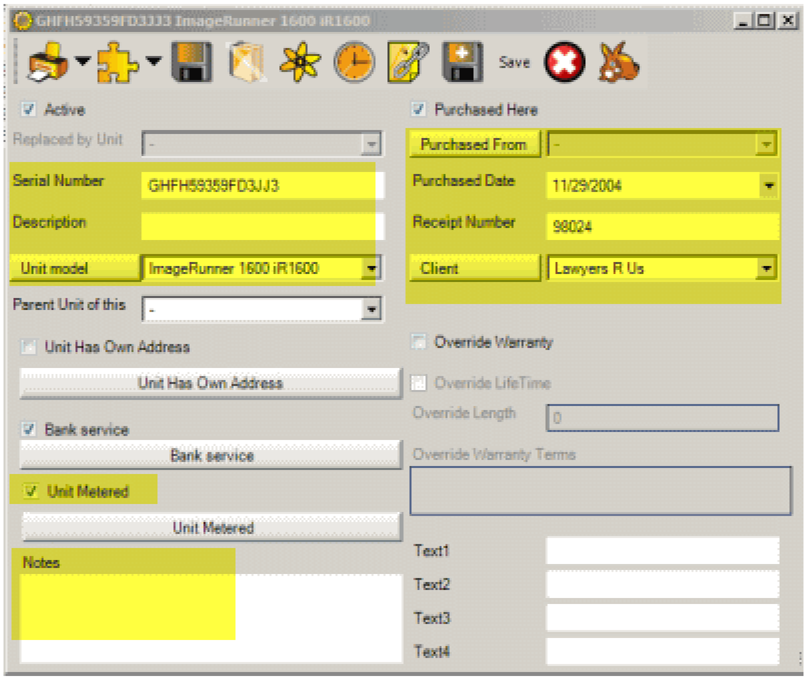

```
After Hours - In Shop Service Rate,,RAT145A,50.00000,135.00000,FALSE,SERVICE,Hour,,ALL REGIO
After Hours - Network Cabling,,RAT144A,55.00000,125.00000,FALSE,SERVICE,Hour,,ALL REGIONS
After Hours - Onsite Service Rate,,RAT146A,65.00000,180.00000,FALSE,SERVICE,Hour,,ALL REGION
After Hours - Travel Per Hour,,RAT156A,15.00000,70.00000,FALSE,TRAVEL,Hour,,ALL REGIONS
After Hours - Travel Per Mile,,RAT157A,0.27000,0.75000,FALSE,TRAVEL,Mile,,ALL REGIONS
Bronze Contract Travel,,RATBRZ-T,0.00000,0.00000,TRUE,TRAVEL,Mile,,ALL REGIONS
Bronze Service Rate,,RATBRZ-S,35.00000,115.00000,TRUE,SERVICE,Hour,,ALL REGIONS
Gold Service Rate,For ABC only,RATGOL-S,65.00000,150.00000,TRUE,SERVICE,Hour,,ALL REGIONS
Gold Service Travel,,RATGOL-T,0.00000,0.25000,TRUE,TRAVEL,Mile,,ALL REGIONS
Internet Setup - In Shop,,RAT121,25.00000,50.00000,FALSE,SERVICE,Setup,Goverment,ALL REGIONS
Internet Setup - Onsite,,RAT122,25.00000,85.00000,FALSE,SERVICE,Setup,,ALL REGIONS
No Charge Service,,RAT001-S,0.00000,0.00000,FALSE,SERVICE,Hour,,ALL REGIONS
No Charge Travel,,RAT001-T,0.27000,0.00000,FALSE,TRAVEL,Mile,,ALL REGIONS
Silver Contract Travel,,RATSIL-T,0.00000,0.00000,TRUE,TRAVEL,Mile,,ALL REGIONS
Silver Service Rate,,RATSIL-S,50.00000,135.00000,TRUE,SERVICE,Hour,,ALL REGIONS
Standard - In Shop Service Rate,,RAT145,35.00000,100.00000,FALSE,SERVICE,Hour,,ALL REGIONS
Standard - Networking Cabling,,RAT144,35.00000,85.00000,FALSE,SERVICE,Hour,,ALL REGIONS
Standard - Onsite Service Rate,description of this rate,RAT146,65.00000,125.00000,FALSE,SERV
```

Units fields

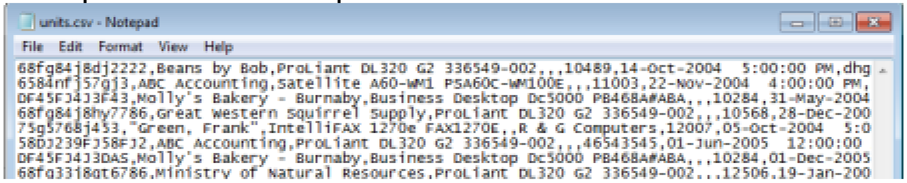
For a unit record to be imported, you must specify <u>at minimum the **Serial, Client and UnitModel** field</u>

Your unit import csv file can contain any of the following fields (these correspond to the fields in the unit entry screen) in any order:

***Serial, Client, UnitModel**, Notes, PurchasedFromVendor, SalesReceiptNumber, PurchasedDate, Description, Metered (True/False), WarrantyLength*



Example of units.csv export file:



- If a PurchasedFromVendor field is empty then the unit will be imported with the Bought here checkbox checked as it will be assumed that the unit was not bought from another vendor but from your company.

- PurchasedFromVendor, Client and UnitModel will be compared case insensitive against their counter parts name field in AyaNova to see if they already exist.
    - If they do, the imported unit will be set to use that existing record.
    - If they are not found in AyaNova then a new record will be created for them using the name in the import file.
    - So it is important to ensure that the import file contains names of these objects *exactly* as they are spelled in AyaNova if you intend to match an existing record.
    - The UnitModel field in the import file is compared against the Unit Model's name and number. If the field in the import file is not exactly laid out and typed as the Unit Model's name and number, a new unit model will be created with just the name entered.

- PurchasedFromVendors that need to be created on import will be set as WholeSaler vendor type in AyaNova.

- Warranty
  - Be sure the purchased date is set correctly in the import .csv file if you care about warranty tracking.
  - Since the Unit warranty information is not imported on a case by case basis be sure you have the UnitModel field correct in your CSV file before importing.
  - This ensures units will be imported under the correct unit model and you can then set the warranty for all imported units in one shot by setting the unit model warranty.

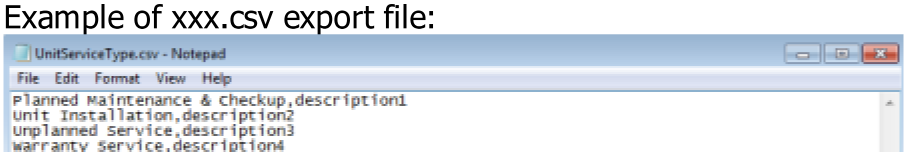
Unit service types fields

For a unit service type record to be imported, you must specify at minimum the **Name** field

Your unit service types import csv file can contain the following fields in the specific order shown:

Name, Description

Example of xxx.csv export file:



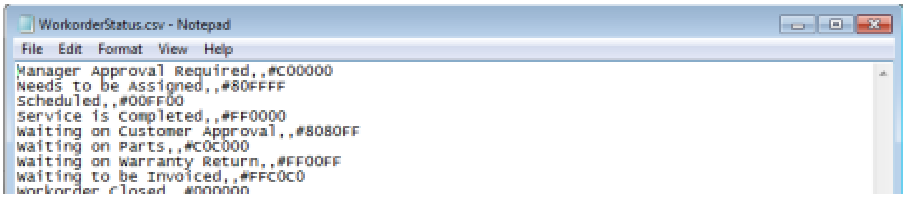
Workorder statuses fields

For a workorder status record to be imported, you must specify at minimum the **Name** field

Your workorder statuses import csv file can contain the following fields in the specific order shown:

Name, Description, HEX value

Example of workorderstatus.csv export file:



```
Manager Approval Required,,#C00000
Needs to be Assigned,,#80FFFF
Scheduled,,#00FF00
Service is Completed,,#FF0000
Waiting on Customer Approval,,#8080FF
Waiting on Parts,,#C0C000
Waiting on Warranty Return,,#FF00FF
Waiting to be Invoiced,,#FFC0C0
Workorder Closed,,#000000
```

The color is displayed as an RGB value, and stored in your AyaNova database as a integer.
As HEX numbers are commonly used, instead of requiring entry of a integer number, **provide your color as a HEX in your import file** and the ImportExport.csv utility will convert to storing as a integer and display as a RGB value.

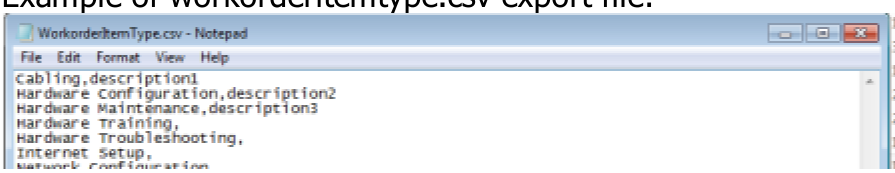
Workorder item types fields

For a workorder item type record to be imported, you must specify at minimum the **Name** field

Your workorder item types import csv file can contain the following fields in the specific order shown:

Name, Description

Example of workorderitemtype.csv export file:



```
Cabling,description1
Hardware Configuration,description2
Hardware Maintenance,description3
Hardware Training,
Hardware Troubleshooting,
Internet Setup,
Network Configuration
```

9.9.5 ImportExport.csv - exporting into csv format file

Export Part records, Client records, Unit records Part assemblies records, Part categories records, Priorities records, Rates records, Unit service types records, Workorder statuses records and Workorder item types records:

1. From the main AyaNova menu bar

Part records, Client records and Unit records can also be exported from:

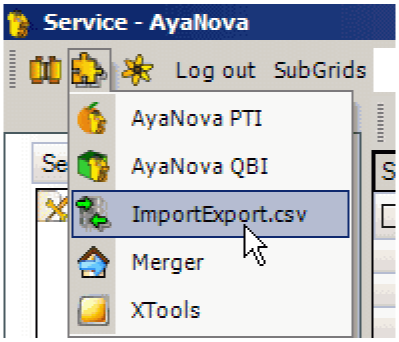
1. From the records grid to export selected records
2. From within a specific entry screen to export that specific record only
3. By right-clicking on a specific record in any main grid

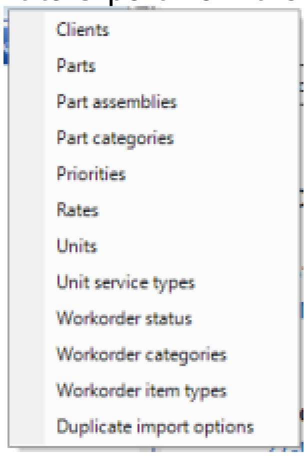
Client records and Unit records can also be exported from:

1. By right-clicking on a specific record in any main grid

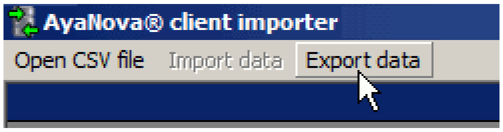
From the main AyaNova menu bar

a. Select the Plug-ins menu option -> ImportExport.csv -> select the specific type of record you want to export from the list of those available

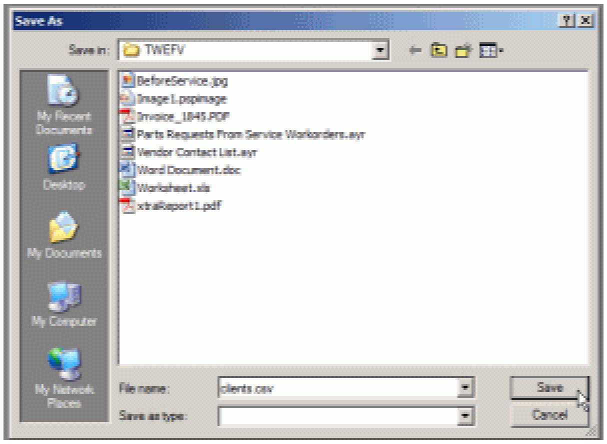




b. Select the menu option **Export data** from the import/export utility that opens. Our screenshot example below is the result of selecting Clients - you can tell which is open as shows at the top. In our screenshot example below, the AyaNova® client importer has been selected.



c. Browse to the location where you want to save the file and Save

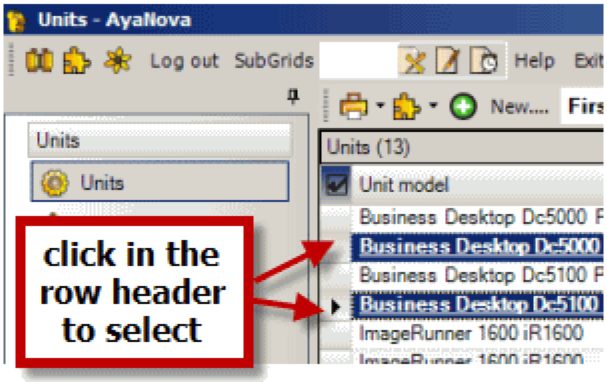


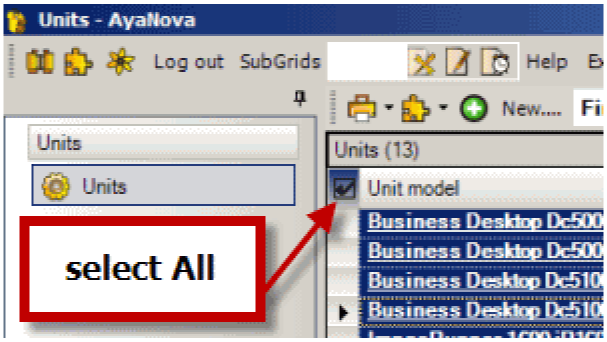
d. If you edit this file using Notepad, you will also see the format - that each field is quoted (surrounded by quotation marks) if there are spaces in the text, as well as divided by a comma.

From the records grid to export selected records

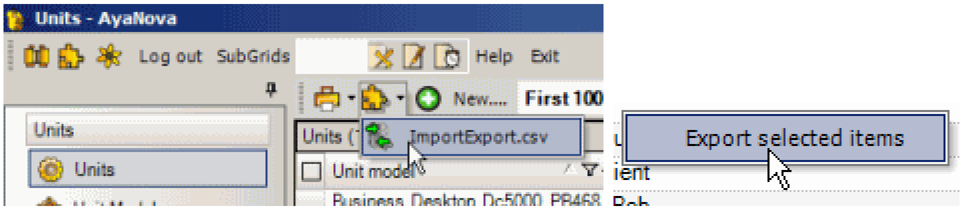
Example below is for exporting from the Units grid.
Similar steps applies to exporting from the Clients grid or the Parts grid.

a. In the Units grid, either select specific units you want to export to a CSV file by holding down the CTRL key and your mouse, or selecting all by selecting the column row header





b. From the Units grid menu, drop down the Plug-in's menu and select ImportExport.csv -> Export selected items



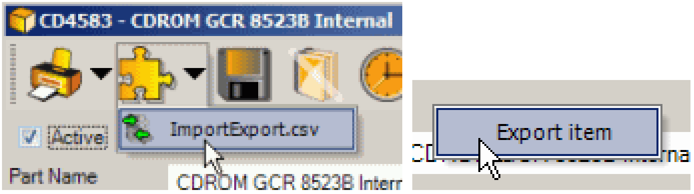
c. Browse to the location where you want to save the file and Save

d. Only those units selected will be exported to the CSV file

From within a specific entry screen to export that specific record only

Example below is for exporting from a Part entry screen.
Similar steps applies to exporting from a Client entry screen or a Unit entry screen.

a. From within a specific Part entry screen, drop down the Plug-in's menu option, select ImportExport.csv -> Export item



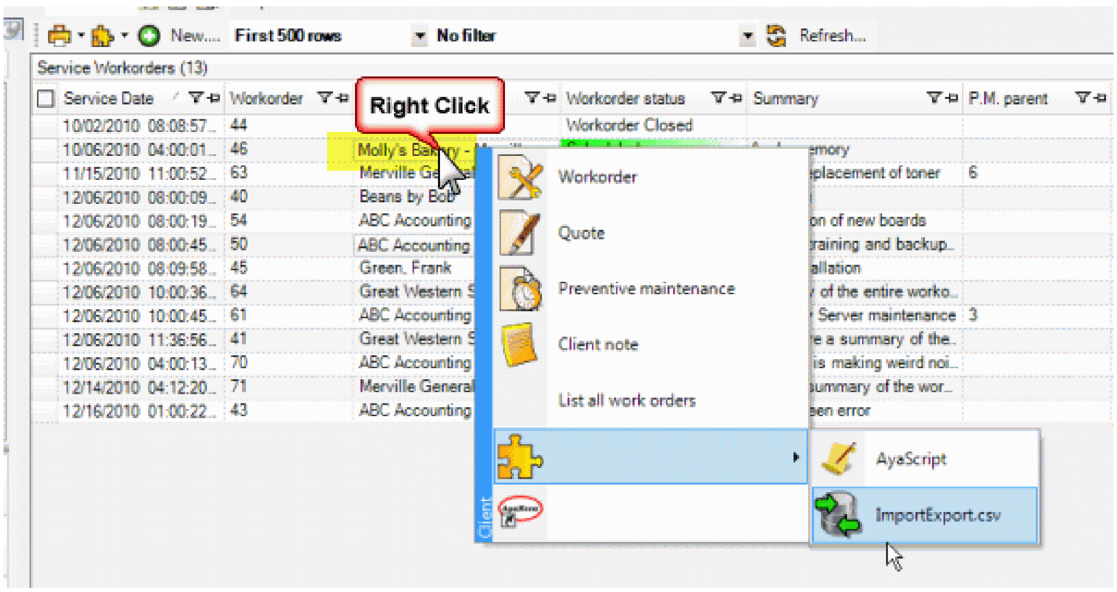
b. Browse to the location where you want to save the file and Save

c. Only this part will be exported to the CSV file

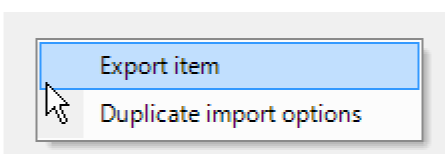
By right-clicking on a specific record in any main grid

Example below is for exporting by right-clicking on a client's name on the Service Workorders grid.
Similar steps applies to exporting by right-clicking on a Unit's serial number.

a. Right-click on the client's name in a grid, and from the Plugins menu select ImportExport.csv



b. And select Export Item and follow the prompts.



eeding.

9.9.6 ImportExport.csv - importing into AyaNova

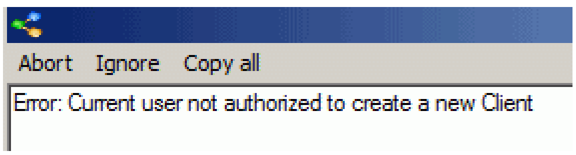
Before you import into AyaNova:

- It is recommended to ensure no one else is attempting to enter or edit data when you import.

- It is recommended to backup your AyaNova database before proceeding with an import. In the event of an issue with your import, then you can easily and quickly restore from backup to the point your database was at before the import.

- It is recommended to perform the import on the same computer where your AyaNova database resides and where your CSV file is located.

- It is required to log in as an AyaNova user with full rights to create the type of record you are importing. Otherwise you will get an error such as:



- The ImportExport.csv installation has been performed

- If licensed for the Duplicate option, set your Duplicate settings before the import.

- It is suggested to export existing records to a file so that you can see an example of the existing format.

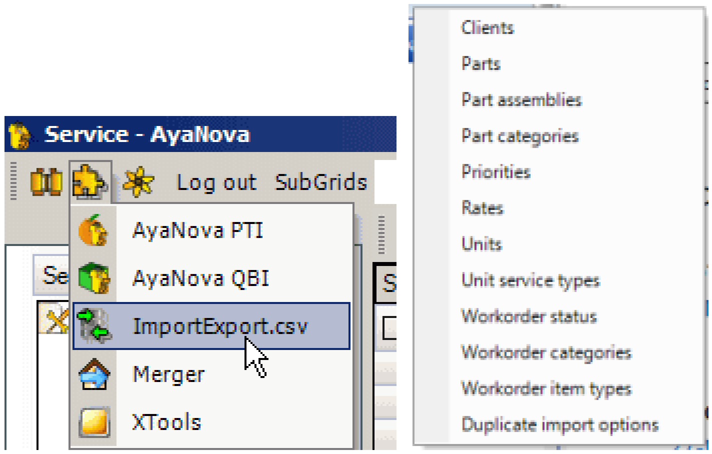
- Refer to the csv file format requirements. A suggestion is to export existing records out of AyaNova so that you may see examples of the format of what your file needs to be.

    - Reminder: only when importing clients/units/parts or rates can your csv row fields be in any order, as you can select which columns equate to which fields in the record for these. Part categories, workorder statuses, etc import have a preset field order that must be followed. Refer to the csv file format requirements

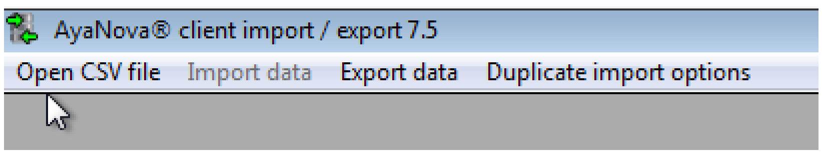
Example steps of Client records import:
Example steps of Unit records import:
Example steps of Part records import:

Example steps of Client records import:

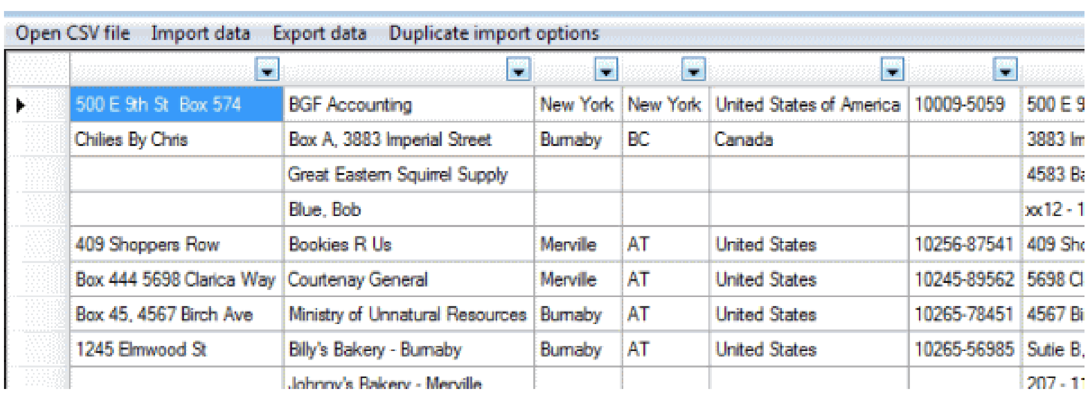
1. From the main menu select Plugins -> ImportExport.csv -> Clients to open the client import/export program



2. Select the menu option **Open CSV file**, and browse to the location of your csv import file and select it



3. The records in your import file will display

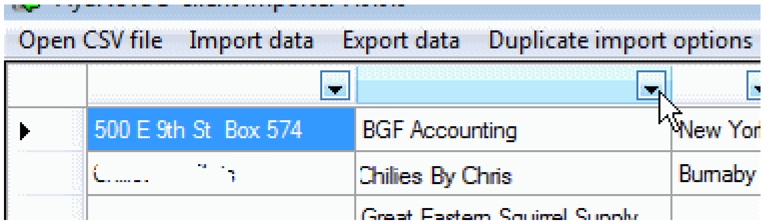


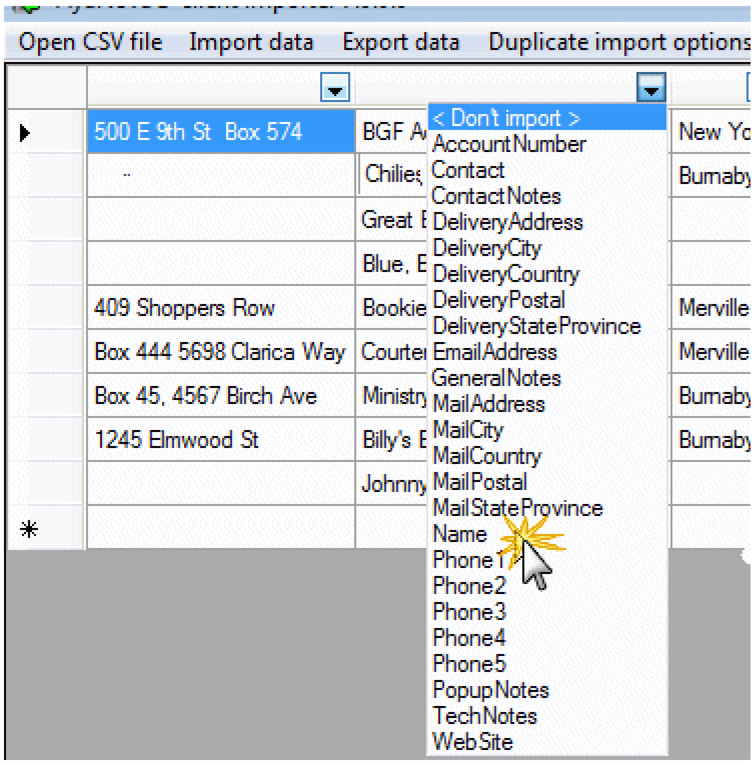
4. Now you need to tell the utility **which AyaNova field** to import each field from your import file.

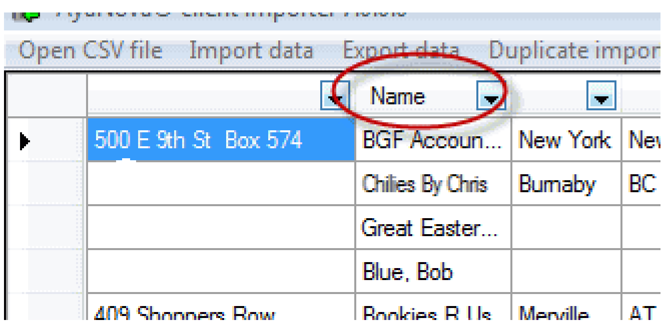
Drop down the column heading for each, and select the client field you want that to import into. In the example below, we are selecting the Name field for that column.

No problem if the order of your fields in your import file may be different - with clients, parts, units and rates you select which you want for your own columns.

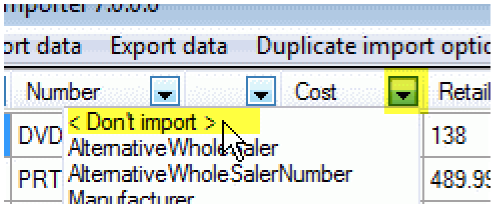
For a client record to be imported, you **must** specify at minimum the Name field. Refer to the format requirements





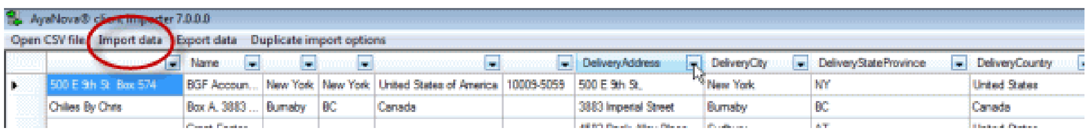


If you make an incorrect selection or selections from previous imports are showing, just drop down the list again and select <don't import> to free up that column and that selection again



5. If you have purchased an ImportExport.csv Duplicate subscription license, the Duplicate import options menu will display so that you can set what should overwrite or not. Refer to **[Importexport.csv duplicate option]** for more details

6. Once you have selected what fields you want to import, select the menu option **Import data**

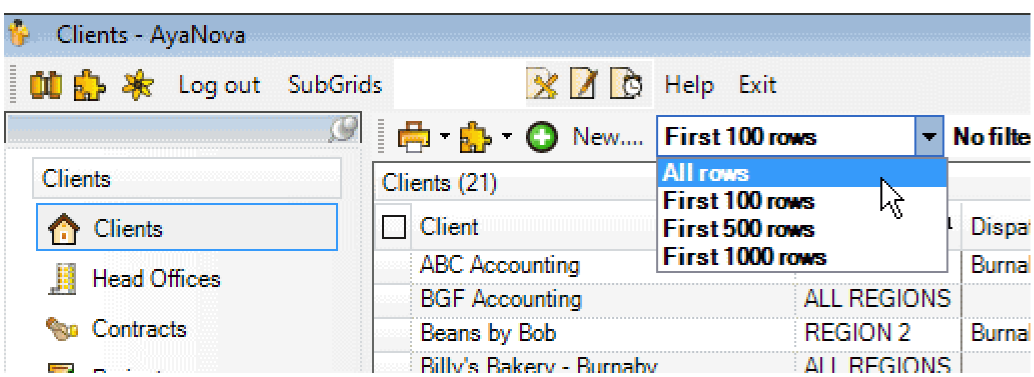


7. Your records from your import file will now be imported into AyaNova

• The time it will take will depend on the number of records to import

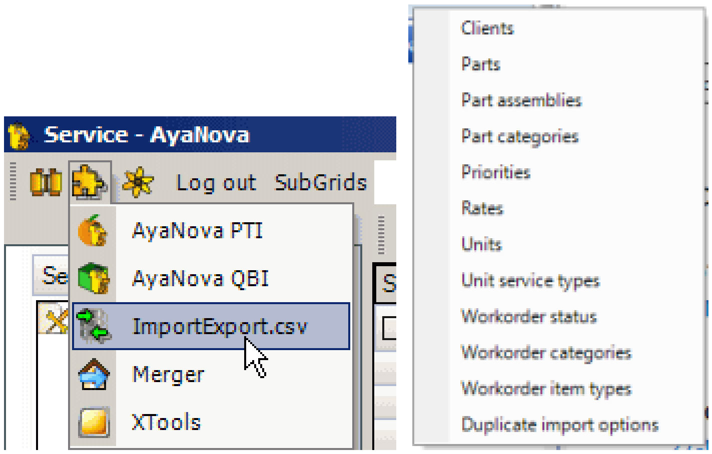
8. When the import is finished, a message will display identifying the number of client records imported, the number not imported if duplicates, and if duplicate settings use, how many were updated.

9. Exit out and view your clients in the Clients grid. Don't forget that you can change the list of rows to view at any time, as well as Refresh

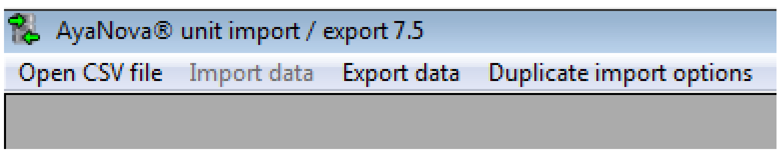


Example steps of Unit records import:

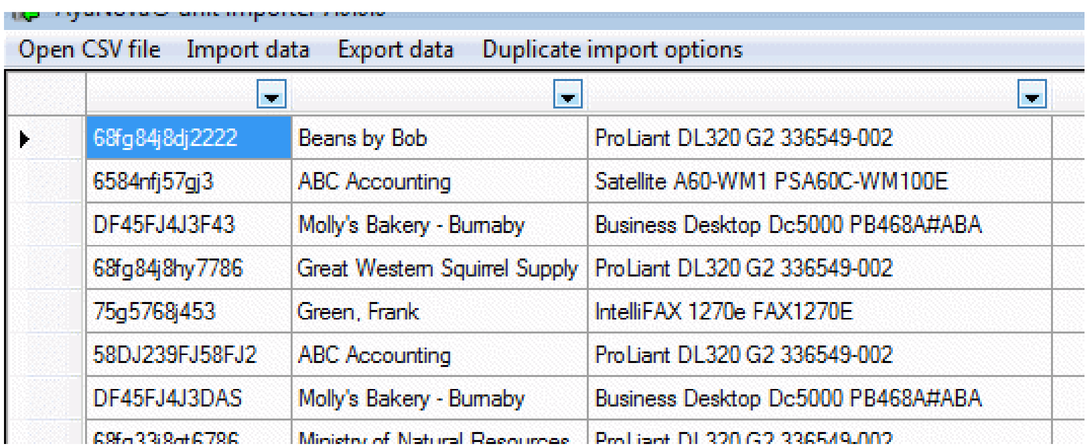
1. From the main menu select Plugins -> ImportExport.csv -> Units to open the unit import/export program



2. Select the menu option Open CSV file, and browse to the location of your csv import file and select it



3. The records in your import file will display

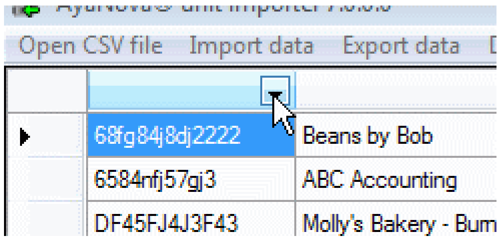


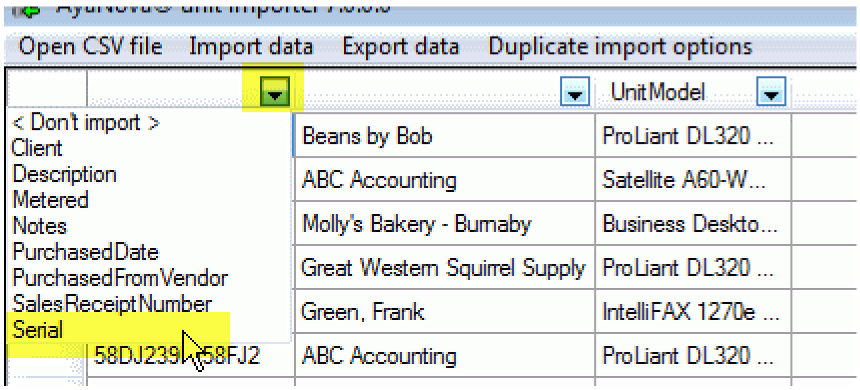
4. Now you need to tell the utility which AyaNova Unit record field to import each field of your record in your import file.

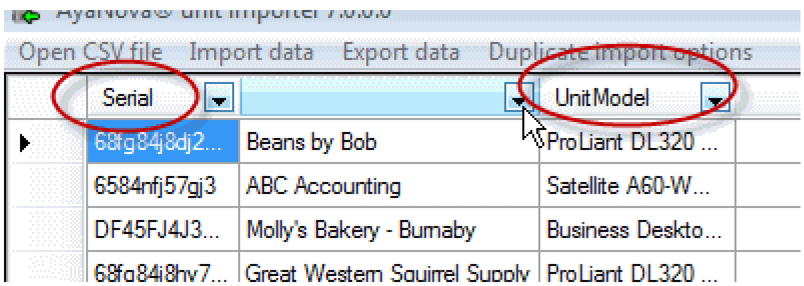
Drop down the column heading for each, and select the unit field you want that to import into. In the example below, we are selecting the SerialNumber field for that column.

No problem if the order of your fields in your import file may be different - as you select which you want for your own columns.

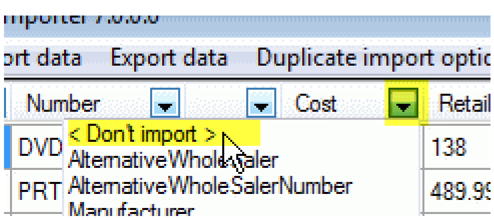
Do note that you **must** identify at minimum the Serial, the Client and the UnitModel columns as these are required for a unit record to be created.







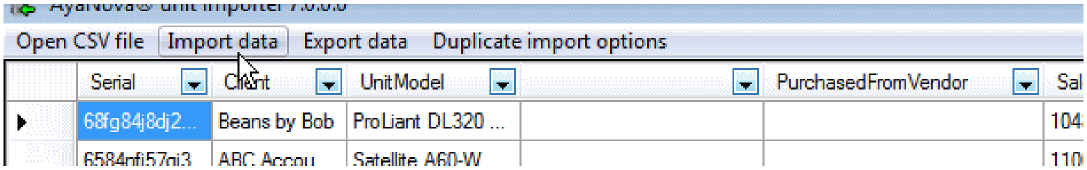
If you make an incorrect selection or selections from previous imports are showing, just drop down the list again and select <don't import> to free up that column and that selection again



5. If you have purchased an ImportExport.csv Duplicate subscription license, the Duplicate import options menu will display so that you can set

what should overwrite or not. Refer to **Importexport.csv duplicate option** for more details

6. Once you have selected what fields you want to import, select the menu option **Import data**

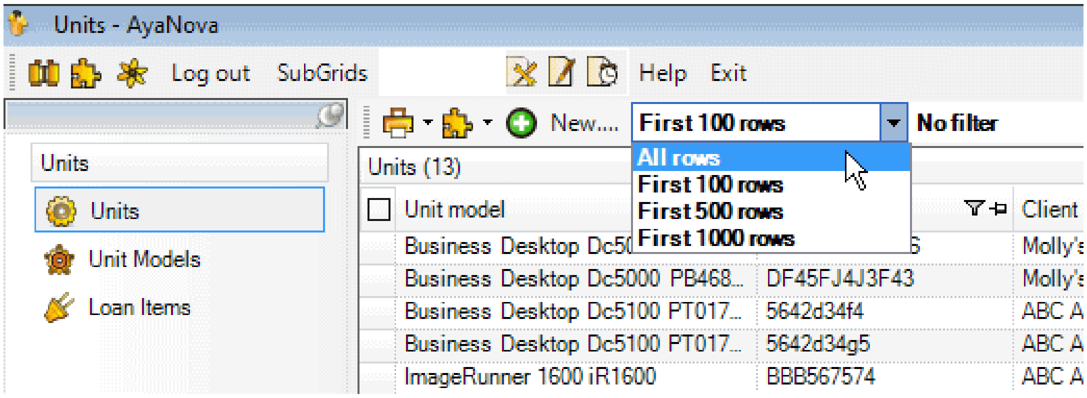


7. Your records from your import file will now be imported into AyaNova

- The time it will take will depend on the number of records to import

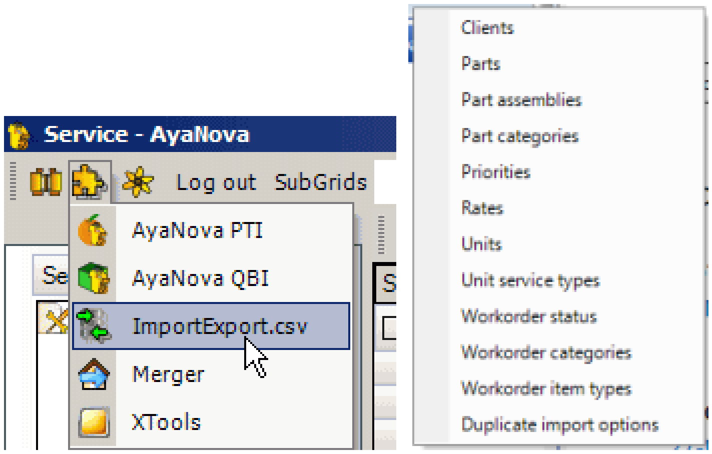
8. When the import is finished, a message will display identifying the number of unit records imported, the number not imported if duplicates, and if duplicate settings use, how many were updated.

9. Exit out and view your units in the Units grid. Don't forget that you can change the list of rows to view at any time, as well as Refresh

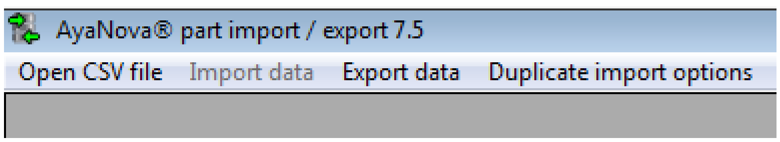


Example steps of Part records import:

1. From the main menu select Plugins -> ImportExport.csv -> Parts to open the part import/export program



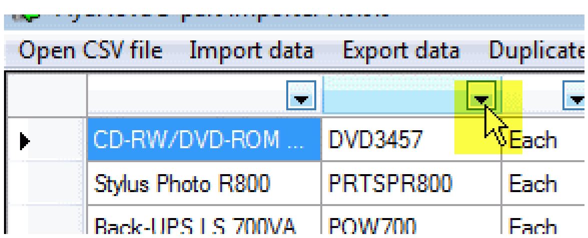
2. Select the menu option Open CSV file, and browse to the location of your csv import file and select it

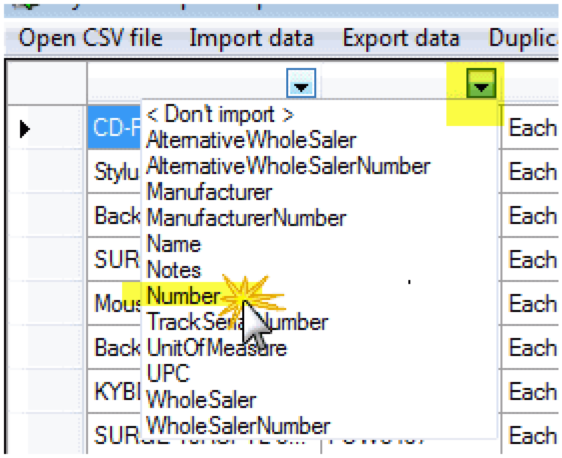


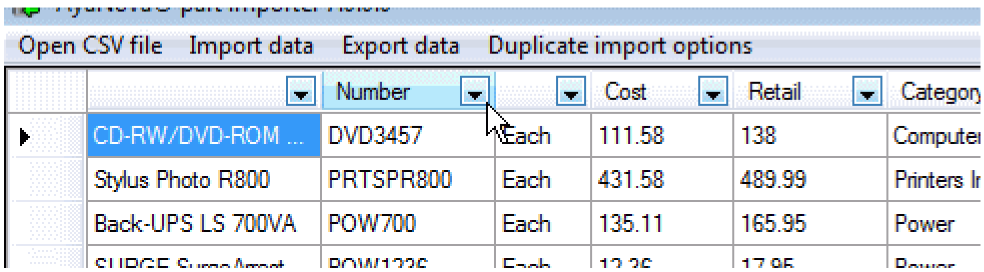
3. The records in your import file will display. Now you can select what AyaNova part field to import each into.

4. Drop down the column heading for each, and select the field you want that to import into. In the example below, we are selecting the Number field for that column. No problem if the order of your fields in your import file may be different - as you select which you want for your own columns.

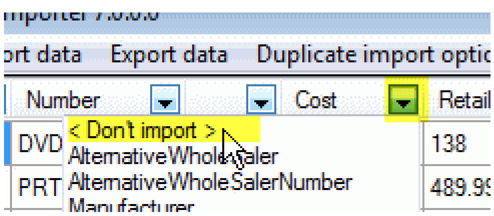
For a part record to be imported, you **must** specify at minimum the Number field





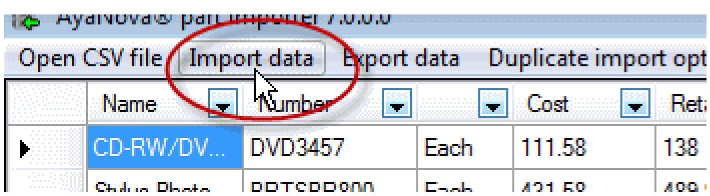


If you make an incorrect selection or selections from previous imports are showing, just drop down the list again and select <don't import> to free up that column and that selection again



5. If you have purchased an ImportExport.csv Duplicate subscription license, the Duplicate import options menu will display so that you can set what should overwrite or not. Refer to **Importexport.csv duplicate option** for more details

6. Once you have selected what fields you want to import, select the menu option **Import data**

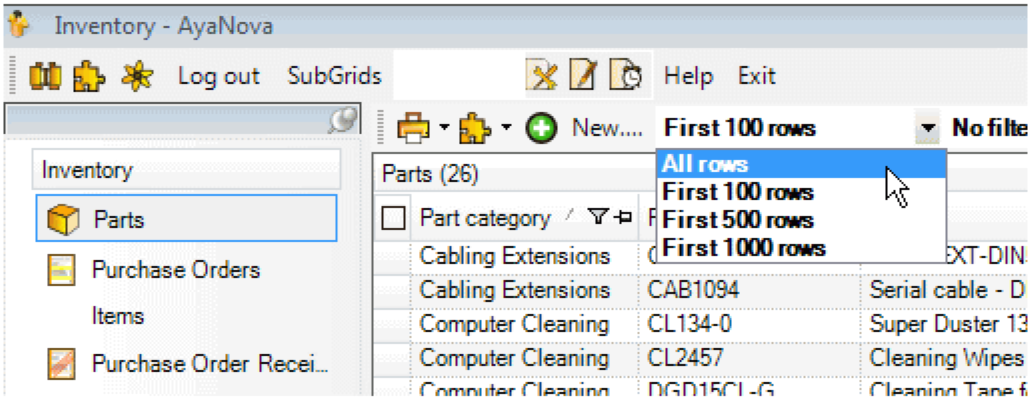


7. Your records from your import file will now be imported into AyaNova

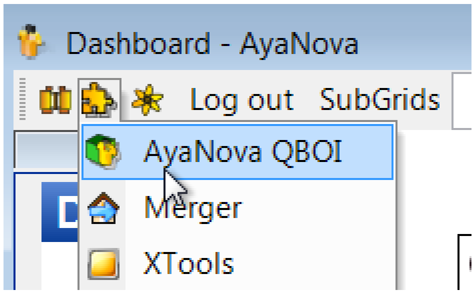
- The time it will take will depend on the number of records to import

8. When the import is finished, a message will display identifying the number of part records imported, the number not imported if duplicates, and if duplicate settings use, how many were updated.

9. Exit out and view your parts in the Parts grid. Don't forget that you can change the list of rows to view at any time as well as Refresh.



9.10 Remote access options



AyaNova remote access options.

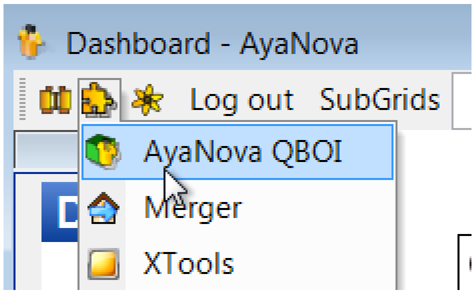
For use with your AyaNova database while away from your office, on the road, working from home, at a client's site - we offer four remote access options.

Some companies use all four to accommodate different remote access needs, some use one or two only - up to you!

Specifics on each please see:

- AyaNova DataPortal
- AyaNova RI
- AyaNova WBI
- AyaNova MBI

9.11 QBOI - QuickBooks Online Interface



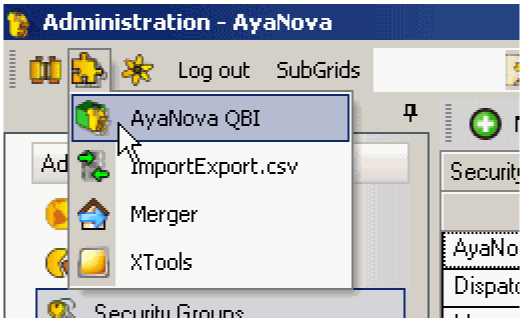
AyaNova QBOI

QBOI is an optional add-on that interfaces your AyaNova data and your QuickBooks Online accounting data.

Please refer to the QBOI Online Help file for requirements, installation, configuration and use.

A QBOI license is required to use this optional plug-in

9.12 QBI - Desktop QuickBooks interface



AyaNova QBI

QBI is an optional add-on that interfaces your AyaNova data and your QuickBooks accounting data.

Please refer to the [QBI Online Help file] for requirements, installation, configuration and use.

A QBI license is required to use this optional plug-in

9.13 PTI - US Sage 50 / Peachtree interface

AyaNova PTI

PTI is an optional add-on that interfaces your AyaNova data and your Peachtree / US Sage 50 accounting data.

Please refer to the PTI Online Help file for requirements, installation, configuration and use.

A PTI license is required to use this optional plugin.

Backup & Restore

10 Backup & Restore

10.1 Important information to review

Computer users fall into one of two categories:

1. those who have already experienced a significant data loss
2. and **those who will**

A backup of your data will enable you to get up and running again quickly in the event of database corruption, hardware failure, fire, theft or disaster.

The **costs of data loss can be quite high** not just in the time and money involved to re-enter information, but also customer dissatisfaction due to possible forgotten scheduled items whether workorders or preventive maintenance, as well as lost revenue.

Insurance can replace your computer but only a backup can replace your data. In a busy shop the value of the data can often exceed the value of all your computers combined; a backup is very cheap insurance.

The first step in developing a solid disaster recovery plan is to develop an idea of what constitutes an acceptable loss for your organization - the impact of losing data stored in your database.

Would you be able to recover from the loss of an hour's worth of data, a loss of 24 hours worth of data, a loss of a week of data, etc?

If you are running a small service shop with a couple of new or edited service workorders a day, re-entering that data from paper printout for any data loss in the last 24 hours may be acceptable.

Whereas if you are a huge service company, managing 1000's of new and edited service workorders a day, a loss of entered data of more than 60 minutes may be at most acceptable.

The second step is to consider the loss of access to the database itself.

What would be the result if your users were not able to access information for an extended period of time?

If you were running a small service shop with a couple of scheduled service workorders that you had already printed out dispatch reports for, a day's loss of access may be acceptable.

Whereas if you were a huge service company, managing 1000's of scheduled service workorders for that day, a loss of an hour may be acceptable.

Determining these acceptable levels will help you determine the type of backup you should provide for your data.

A small service company may invest in a tape drive with a backup performed ever night, and a 10 tape rotation

Whereas a large service company may invest in a retained 24 hourly snapshot, a nightly backup, a RAID system and a mirrored server.

If you have a question regarding the backup of your data, you want to have it answered before you need your backup. We do recommend highly that you contact your local computer support centre for available hardware and software options for your needs. Be sure to test your backup and restore on a regular basis.

Minimum backup recommendation

A snapshot of your database at a point in time is taken, and this snapshot is backed up (copied) onto a backup device. In the event of database loss, the snapshot is restored so it can be accessed and reintegrated into the database.

We recommend at minimum an automated daily tape backup using a standard 10 tape rotation system of a full snapshot of your database.

Incremental and differential backups are not recommended. We recommend full backups so that the complete database can be restored.

An automated backup ensures that you don't forget to do a backup as it will run automatically every night. You only have to remember to change the tape.

A 10-tape rotation consists of 10 tapes labeled and used as follows: Monday, Tuesday, Wednesday, Thursday, Friday1, Friday2, Friday3, Month1, Month2, Month3.

You use each tape in sequence and rotate through the Friday and monthly tapes in order. With a 10-tape rotation you can restore from as recently as the night before or up to 3 months previously.

This is important because a tape can go bad and not be restorable or you could delete something critical and not notice it for some time or corruption could have occurred many days previous, but not be immediately noticeable.

Your backup software should be configured to compare the tape immediately after backup to the data on the hard drive and report the success or failure of each night's backup. You should make a point of checking your backup log each morning to ensure it's working properly.

Each day you **must take the tape from the night before off site** for protection in the event of a fire or theft. This is commonly overlooked. A tape left beside the computer is no backup at all.

Burning data to a CD is good protection but it must be done on a regular basis. You can only restore data from your most recent backup and if too much time goes by between backups it can mean a lot of manual re-entry.

Insurance can replace your computer but only a backup can replace your data. In a busy shop the value of the data can often exceed the value of all your computers combined and a tape backup is very cheap insurance.

10.2 If using the stand-alone single computer default installation

How to backup if using the default stand-alone installation

How to restore if using the default installation
- **Situation #1 - database only restored to existing AyaNova installation**
- **Situation #2 - new AyaNova installation**

Backup if using the default stand-alone installation

To backup AyaNova, all you have to do is make a backup of the AyaNova database file.

1. Exit out of AyaNova

2. Backup the database file AYANOVA.FDB to your backup device (i.e. CD, REV, backup tape, etc)

3. Confirm the database file is now on your backup device

4. You are done.

The AyaNova database file **AYANOVA.FDB** holds all of your data, as well as your license. And the **AYANOVA.FDB** database file is the only file that needs to be backed up when using the default AyaNova installation.

This database file is located in the folder **%AllUsersProfile%\AyaNovaData**

- On a Windows 7 computer or newer, %AllUsersProfile% is usually **C:\ProgramData**
- On an older Windows such as XP Pro, %AllUsersProfile% is usually **C:\Documents and Settings\All Users\Application Data**

NOTE: Do **not** access the database when the backup is being performed (i.e. do not run the AyaNova program, or access the database directly when the backup is being performed)

NOTE: If your situation is such that the AyaNova database must be accessed and running on a continuous basis, you will want to move to at minimum the network Firebird database server configuration or SQL Express or SQL Server network configuration so that you can use the network backup steps with a network configured AyaNova database.

If you do not have a backup device, contact your local computer center to discuss what would be needed to backup your important data on a regular basis.

Restoring if using the default installation

How you restore depends on the situation.

Situation #1: The AyaNova program is still installed, but an issue with the database requires restoring from backup:

So all you have to do is restore your AyaNova database file from the backup you had previously made.

1. Make sure that the AyaNova program is shut down
2. Rename the existing database to **AYANOVA.FDB.BAD** in the AyaNova database folder **%AllUsersProfile%\AyaNovaData**
   - On a windows 7 and newer OS computer, %AllUsersProfile% is usually **C:\ProgramData**
   - On older OS such as XP or 2003 computer, %AllUsersProfile% is usually **C:\Documents and Settings\All Users\Application Data**
3. Restore the backed up **AYANOVA.FDB** file to this exact same folder where you just renamed
4. Log in via the AyaNova program and confirm successful

Situation #2: Computer has no previous AyaNova installation (clean installation)

So all you have to do is install the AyaNova program again, and replace the installed trial AyaNova database with the backup you had previously made.

1. Download the AyaNova installation file from the AyaNova web site http://www.ayanova.com

2. Perform the basic stand-alone default installation

3. Log in and ensure program installation successful (*Yes, this installs the trial database, the following steps deals with that*)

4. Exit out of the AyaNova program

5. Rename the existing AYANOVA.FDB trial database file that is in the folder folder **%AllUsersProfile%\AyaNovaData** to **AYANOVA.FDB.TRIAL**

6. Restore the backup **AYANOVA.FDB** to folder **%AllUsersProfile%\AyaNovaData**

   - On a Windows 7 and newer OS computer, %AllUsersProfile% is usually **C:\ProgramData**

   - On older OS such as XP or 2003 computer, %AllUsersProfile% is usually **C:\Documents and Settings\All Users\Application Data**

7. This restores all your data as well as your licenses as both are in the database file

8. Log in via the AyaNova program and confirm successful

10.3 If using the network Firebird Server configuration

10.3.1 Backup for AyaNova network Firebird Server configuration

****

Never make a direct copy of the AyaNova database file with the Firebird Server services running.

Do **not use** external proprietary backup utilities or file-copying tools such as WinZip, tar, copy, xcopy, etc., to make a copy of the actual database file. Not only will the backup be unreliable, but the disk-level blocking used by these tools can corrupt a running database.

Only use the gbak utility as outlined in the snapshot batch file example it is the approved Firebird utility for making a snapshot of the Firebird database.

****

Below are the easy steps to backup the AyaNova network Firebird Server database.

1. Edit the sample snapshot creation file
2. Test the edited snapshot creation file
3. Create a Scheduled Task to auto-run the snapshot creation file
4. Confirm that the snapshot creation file creates the Firebird Server database backup file
5. Backup the snapshot file to your backup device

1. Editing the snapshot creation file

When you initially installed AyaNova onto your server selecting the default installation, it installs a number of example config files and the example snapshot batch file to the folder C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\examples (or C:\Program Files\.... if a 32 bit computer)

- If you do not have the Examples folder, re-run the AyaNova installation again, but this time selecting the Default setup with sample database.
- Do note that this will uninstall the AyaNova program (but not your database) and then install again, so if you had previously installed the AyaNovaDP and Network Generator, do check to see if you need to install those again after.
- Be sure to click on No when it asks to overwrite your config.txt

This snapshot batch file is to be edited so that it creates a "snapshot" of your AyaNova database, and it is this snapshot file that is actually backed up and restored from - never the AYANOVA.FDB database file itself.

1. Make a copy of the *networkFirebirdsnapshot.bat* from the **C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\examples** folder and place it in your C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova folder.

   - You should rename this copy with your company name prefixed so that you know it is the edited file - such as *mycompanyname_networkFirebirdsnapshot*

2. Using NotePad, open your copy of the *networkFirebirdsnapshot.bat* file from the **C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova** for editing

3. Replace the default SYSDBA password “masterkey” with the password you set in the configuration of the network Firebird server if applicable

4. The example *networkFirebirdsnapshot.bat* file defaults to referring to the path of the database file as C:\Data\AyaNova\AYANOVA.FDB

   a. If this is NOT where your networked AyaNova database file is – then you need to edit the path of where it actually is throughout this batch file

   b. Refer to your aliases.conf file (from the Firebird folder) for the location of your networked Firebird Server AYANOVA.FDB database file

5. The *networkFirebirdsnapshot.bat* file defaults to referring to the path where the snapshot files will be created as C:\Data\AyaNova\backups

   a. If this is NOT where you want the snapshot files created at – then you need to edit the path of each line that refers to C:\Data\AyaNova\backups to the actual path where you want these files created

   b. It is recommended that the snapshot files be created to a separate folder than the live AyaNova database file so no confusion for the backup process – no accidental backup of the actual live database file.

6. The *networkFirebirdsnapshot.bat* file defaults to referring to the Firebird bin files in C:\Program Files\Firebird\Firebird_2_1\bin

   a. If this is NOT the folder where your Firebird bin files are – then you need to edit the path of each line that refers to C:\Program Files\Firebird\Firebird_2_1\bin to the actual path where your Firebird bin files are

7. Save and close the file

2. Testing the snapshot creation file

The first time the snapshot batch file is run, it creates a snapshot file AYANOVA.FBK

The second time it is run, it renames the first to AYANOVA02.FBK and creates a new snapshot file AYANOVA.FBK

The third time it is run, it renames AYANOVA02.FBK to AYANOVA03.FBK, renames the AYANOVA.FBK to AYANOVA02.FBK, and creates a new snapshot file AYANOVA.FBK and so on

Once 10 snapshots have been created, it will delete the oldest snapshot, shuffle renaming the existing and create a new snapshot, and so on.

There is no need to have users out of the AyaNova database to create this snapshot. The provided batch file (once edited with your information) takes a snapshot of the state of the database at the moment it starts, so users can continue working while a backup runs, allowing 24x7 operation.

NOTE: Only this utility can be used to create a snapshot of the live AyaNova database. And it's the snapshot file that is to be backed up – **never** the actual live database file.

1. Open a command window (Start -> Run -> cmd)
2. Move to AyaNova program directory where the snapshot batch file is located - for example:

    CD C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova\examples

3. Type the name of the snapshot batch file

    networkFirebirdsnapshot.bat

4. Press the Enter key
5. If a message occurs stating an issue and the snapshot does not run, check your editing of your snapshot file as you may have incorrectly entered the

location of the database, or incorrectly missed putting quotation marks around paths. Then repeat the above steps until snapshot is successful

6. Close the command window
7. Open Windows Explorer and move to the location where you specified the snapshots to be created
8. Confirm that the snapshot file AYANOVA.FBK was created.

3. Creating a Scheduled Task to auto-run the snapshot batch file

1. Once you have confirmed that the edited batch file successfully creates a snapshot of the AyaNova database file, open Control Panel and open Scheduled Tasks
2. Select Add Scheduled Task to start the task wizard
3. Select Next
4. Browse to the location of the *networkFirebirdsnapshot.bat* file and select it
5. Select to perform Daily; select Next
6. Select a time of day prior to your backup process; select Next
7. Enter the username and password for the administrator of this computer; select Next
8. Select Finish

4. Confirm that the snapshot creation file creates the Firebird Server database backup file

As with any backup, it is recommended that you confirm on a regular basis that the snapshots are actually being created

5. Backup the snapshot file to your backup device (i.e. FTP, CD, REV, backup tape, etc)

As with any backup, it is recommended that you confirm on a regular basis that your backup process is backing up the snapshots

10.3.2 Restoring for AyaNova network Firebird Server configuration

The restore steps you perform depend on what the situation is - whether you are just restoring the AyaNova database, or whether you are restoring to a new computer (i.e. moving to a new computer or hard drive, or the original has been replaced)

Situation #1: The AyaNova program is still installed, the network Firebird server is installed, but an issue with the database requires restoring from backup:

1. Make sure no one is accessing the AyaNova database (via any AyaNova program or directly)
2. Make sure the Generator is shut down (if installed)
3. Make sure AyaNova Data Portal is shut down (if installed)
4. Shut down the Firebird services (Control Panel -> Firebird Server Manager -> Stop)
5. Rename the existing database file to AYANOVA.FDB.BAD
   a. **Never ever** restore overtop of an existing AYANOVA.FDB database file.
6. Start the Firebird services (Control Panel -> Firebird Server Manager -> Start)
7. Restore the snapshot of the database – the AYANOVA.FBK file using the following:
   a. Open a command window and move to the Firebird program bin folder **C:\Program Files\Firebird\Firebird_2_1\bin**
   b. Extract the AyaNova database file from this restored file using similar to this command line substituting as needed the password, the snapshot file location and file name, and the location to restore the AyaNova database file to *(note enter this all on one line and do not copy – it must be manually typed)*

   gbak -c -v -user SYSDBA -password "masterkey" C:\Data\AyaNova\BACKUPS\AYANOVA.FBK C:\Data\AyaNova\AYANOVA.FDB
8. Check that the AYANOVA.FDB file is restored

9. Log in via the AyaNova program and confirm successful

<u>Situation #2:</u> Server has no previous AyaNova installation or network Firebird configuration

1. Perform the steps 1 through 5 only of Network Firebird Server configuration
2. Log in to the trial AyaNova database and ensure program installation successful
3. Close out of the trial AyaNova database
4. Shut down the Firebird services (Control Panel -> Firebird Server Manager -> Stop)
5. Rename the existing trial AyaNova database to AYANOVA.FDB.TRIAL
   - Because you **never** ever restore overtop of an existing database file
6. Start the Firebird services again (Control Panel -> Firebird Server Manager) and make sure is running
7. Restore using snapshot of your licensed database – the AYANOVA.FBK file by the following:
   a. Open a command window and move to the Firebird program bin folder
      C:\Program Files\Firebird\Firebird_2_1\bin
   b. Extract the AyaNova database file from this restored file using similar to this command line substituting as needed the password, the snapshot file location and filename, and the location to restore the AyaNova database file to: *(note enter this all on one line and do not copy – it must be manually typed)*

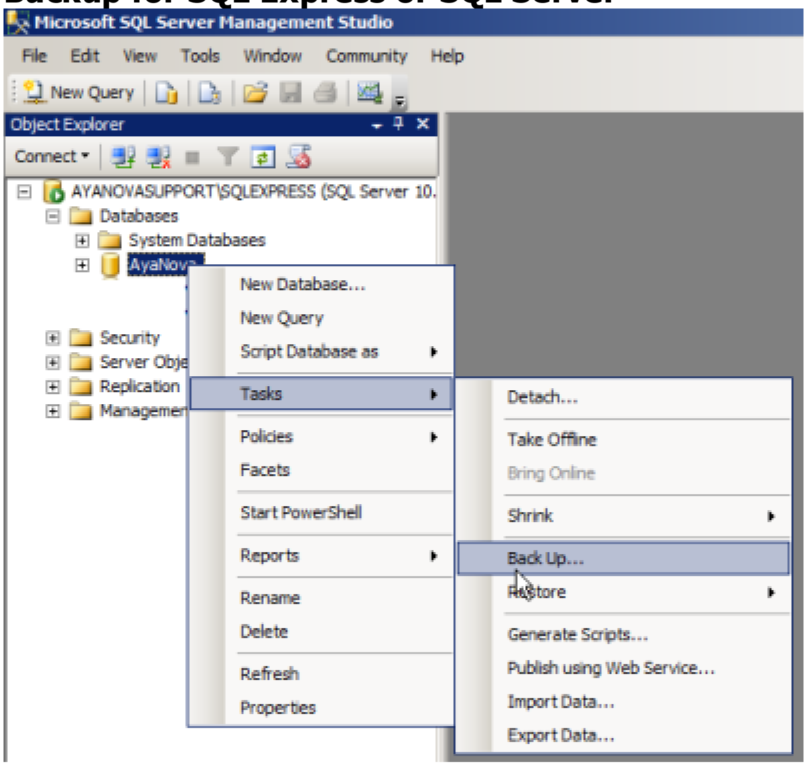
   gbak -c -v -user SYSDBA -password "masterkey" C:\Data\AyaNova\BACKUPS\AYANOVA.FBK C:\Data\AyaNova\AYANOVA.FDB
8. Check that the AYANOVA.FDB file is restored
9. Now perform Step #6 of of Network Firebird Server configuration steps to configure this server to access this newly restored database via the AyaNova program

10. If there are networked computers that were previously connected, you can just replace their config.txt file, otherwise perform Step #7 of Network Firebird Server configuration steps to configure networked computers.

10.4 If using the network SQL configuration

10.4.1 Backup for AyaNova SQL configuration

Backup for SQL Express or SQL Server



- You **must ONLY** use Microsoft SQL server approved backup and restore utilities.
- And you **ONLY** ever backup to a device the backup file that the SQL approved backup utility creates - you NEVER EVER directly backup or access in any way either the .MDF or the .LDF file of the SQL database - doing so can cause corruption of your database.

  Microsoft provides SQL Server Management Studio Express which can be used for backup and restore of a SQL Express database. Refer to Microsoft website to download and for instructions on use. Example location may be http://msdn.microsoft.com/vstudio/express/sql/

  MS SQL Server Management Studio (installed with SQL Server 2005 and higher)

- Do **not** copy the SQL database files themselves to a backup device, nor directly restore those files - it will more than likely result in corruption.

- It is recommended to test your backup of your SQL database by restoring it and confirming it restores correctly.
- It is recommended that you backup using the Simple Recovery Mode when using SQL Service Management Studio or SQL Service Management Studio Express so that you back up both the main database file MDF as well as the transaction log file LDF. And you should set up a regular database maintenance of shrink etc to maintain the size of the transaction log file.

10.4.2 Restoring for AyaNova SQL configuration

Restore for SQL Express or SQL Server

The restore steps you perform depend on what the situation is - whether you are just restoring the AyaNova database, or whether you are restoring to a new computer (i.e. moving to a new computer or new hard drive, or the original has been replaced)

Situation #1: The AyaNova program is still installed on the server and so is SQL, but an issue with the database requires restoring from backup:

1. Restore the SQL database using the restore steps of your SQL approved backup program.
   - For example, if have used SQL Server Management Express for backup, you would delete the existing AyaNova database that has an issue with it (as never ever want to restore overtop of an existing), and then to restore just right-click on Databases and select Restore Database... and it will lead you through selecting the backup file to restore etc. Refer to your SQL Express Help for steps.

Situation #2: Server has no previous AyaNova installation nor AyaNova database or SQL configuration:

1. Perform the steps 1 through 4 only of SQL network configuration - for SQL Express or SQL Server
   - ensure network TCPIP communication through your network
   - install stand-alone AyaNova trial to the server
   - install and configure SQL
   - set exceptions in server's firewall for SQL

2. Log in to the trial AyaNova database and ensure program installation successful

3. Close out of the trial AyaNova database

4. Restore your SQL database as per your SQL approved backup program

5. Now perform Step #6 of of the SQL network configuration to set the config.txt file so connect to the SQL server accessing this newly restored SQL database via the AyaNova program

6. If there are networked computers that were previously connected, you can just replace their config.txt file with the new config.txt file from the server, otherwise perform Step #7 of the SQL network configuration steps to configure networked computers.

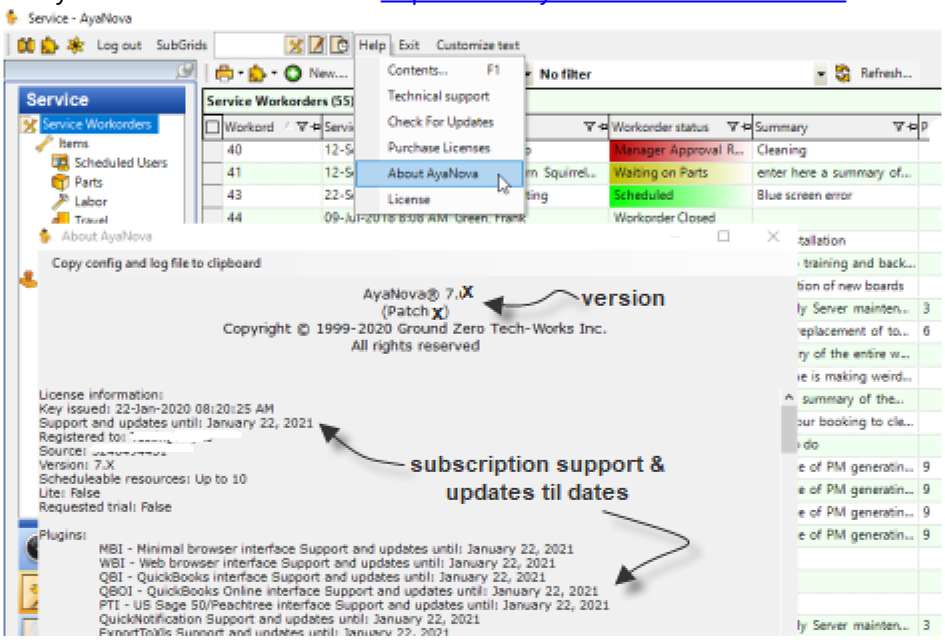
Updating from an older AyaNova version

11 Updating from an older AyaNova version

11.1 Updating if stand-alone AyaNova

Compare the AyaNova version listed on our Download web page with your version listed in Help -> About AyaNova to determine if your version needs updating.

NOTE: the version stated in the screenshot below **may not** be the actual latest version. Refer always to the latest available via https://www.ayanova.com/download.htm



NOTE: the version stated in the screenshot above **may not** be the latest version. Refer always to the latest available via https://www.ayanova.com/download.htm

Steps to update a stand-alone configuration of AyaNova (version 4.2, 5.1, 6.6 or 7.x)

1. **Requirements before proceeding**
2. **Create backup of your AyaNova database**
3. **AyaNova 7 installation**
4. **Apply your AyaNova subscription license(s) Activation Key**
5. **Update your AyaNova database**
6. **Install and configure AyaNova 7 optional plugins**
7. **Confirm your backup and restore procedure**

1. Confirm these three requirements BEFORE proceeding:

Do not proceed until you have confirmed **yes** to each of these requirements:

1) CONFIRM Do you know your <u>AyaNova Administrator login name and password</u>?

i. You NEED to know this to be able to correctly and fully perform the update in the steps further below. Failure to confirm this before you proceed WILL cause you issues.
ii. If you don't know it, it could still be the default login name *manager* and password *letmein* - try it and confirm!
iii. If you do **<u>not</u>** know your AyaNova Administrator username and password, log in as another user that does have rights to the Administration Users grid, and edit the AyaNova Administrator username and password. It would be suggested to write down that username and password and keep in a safe place for future use too.

2) CONFIRM Do you have an <u>active support & updates subscription</u> as shown in your AyaNova database?

i. Log into your AyaNova, select Help -> About
ii. View your database's "**Support and updates until:**" date:
  1. If your About AyaNova does <u>not</u> show a "Support and updates until:"
    a. this means your present version is older than version 7.4
    b. you MUST purchase subscription(s) for your database before proceeding to the next requirement.
  2. If your "Support and updates until:" date has passed:
    a. this means you have let your subscription(s) expire without renewing before the renewal date.
    b. you MUST purchase subscriptions for your database before proceeding to the next requirement.
  3. If your "Support and updates until:" date is a future date:
    a. this means you do have an active support and updates subscription
    b. proceed to the next requirement

3) CONFIRM Does your <u>version</u> of AyaNova program files require updating?

1) Refer to your Help -> About AyaNova to view your version
2) Compare your version in your Help -> About AyaNova to that of the latest version at https://www.ayanova.com/download.htm
3) Any questions, do include all text from your Help - About AyaNova when contacting support.

A. **If your AyaNova version <u>is already at the latest version</u> shown at** https://www.ayanova.com/download.htm :

4) If you have received a new or renewal subscription AyaNova License Key via email, just apply it as per its instructions for a database that is already at the latest version.
5) That's it, you are done! No further update steps are needed.

B. **If your AyaNova is version 7.4 or newer BUT not the latest version AND your *Support and Updates until:* is currently valid by showing a future date:**
1) As your subscription(s) are active and not expired, your database is eligible to upgrade as well as receive support.
2) Go ahead and follow the steps below to update your AyaNova.
   i. NOTE: Skip the steps below related to applying a Subscription Activation Key as your database already has its current Subscription Key applied

C. **If your AyaNova is version 7.4 or newer BUT not the latest version, AND your *Support and Updates until:* has expired by showing a date that has past:**
1) As your subscription(s) have expired, you will need to purchase new subscription(s) before proceeding.
2) Once you have received your AyaNova License Key email message, perform the update steps below.

D. **If your AyaNova is between version 7.0 and 7.3**
1) purchase your resource and optional add-on subscriptions
2) Once you have received your AyaNova License Key email message, perform the update steps below.

E. **If your AyaNova version is 6 or older:**
1) purchase your resource and optional add-on subscriptions.
2) Confirm your report templates (that you normally use) run successfully with the latest version of AyaNova.
   i. Download and install the latest AyaNova onto a separate stand-alone computer with a sample database.
   ii. Export your custom report templates to files.
   iii. Import into your testing setup of the latest version of AyaNova.
   iv. Confirm your custom report templates load successfully with your testing setup of the latest version of AyaNova
   v. If you encounter errors attempting to load your custom report template, refer to https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-7-users/1987 and https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-6-users/1832 to confirm the errors indicate that the report template must be replaced.

vi. Obtain copies of the latest sample report templates via https://www.ayanova.com/reporting.htm#replacement and customize as needed.

3) Proceed with the update steps below
4) Once the update is complete, you would remove the non-working report templates and import your new customized report templates into your live upgraded AyaNova

If have not previously purchased a subscription:
Subscriptions are required to receive support and to be able to apply upgrades to the latest version.
Refer to answers to common questions about licensing, pricing, purchasing on http://www.ayanova.com/purchase.htm
and/or contact us with all text from your present Help -> About AyaNova

If you had previously purchased subscription(s) but allowed your subscription to expire without paying the renewal(s):
Only active (non-expired) subscriptions are eligible for support and upgrades.
Only active (non-expired) subscriptions are eligible to renew at the discounted renewal subscription price.
You will need to purchase your subscriptions again, at the full subscription price.

If you have an active subscription with an upcoming expiration date for support and updates:
Your registered email address will receive a reminder from our payment processing partner that your renewal subscription will automatically be processed if your payment method is valid.
NOTE: your renewal at the discounted renewal price can only occur **if** your payment method provided (such as your credit card's expiry date) **is valid.**
Follow the email instructions to check your payment method is valid before the purchase date to ensure no loss of access to purchase at the discounted renewal price.
If your existing payment method with our payment processing partner is valid, your renewal subscription Key will be emailed following the process of the renewal charges (Monday to Friday).
If any issue or did not receive, contact us immediately with your details.

2. Create backup of your AyaNova database and config file

a. Make sure all AyaNova related programs connecting to the database are shut down fully.

b. Make a backup of your AyaNova stand-alone database

c. Make a backup of your **config.txt file** from your server's AyaNova program folder so that you can refer to it/copy back if needed in steps further down

3. AyaNova 7 installation

Either follow 3.A **or** 3.B below.
If you encounter an issue following A, then restore and start from step 1 this time following B when get to this step

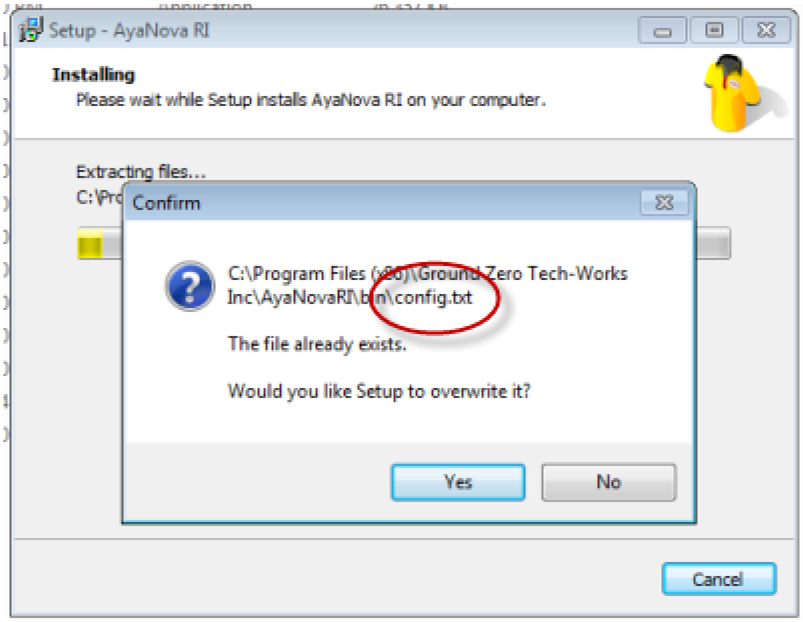
3.A. Install over top of existing AyaNova desktop program on your server

a. Make sure your AyaNova program is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

b. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

c. Install taking the check-marked previous selections that are already selected - this is OK, as long as you do not run before stated to do so

d. When installing overtop of an existing installation, select **No** if receive similar to the following message about the config.txt (so that you keep your existing custom config.txt configuration file)



e. Continue with step 4.
 OR if you experience any errors or issues upgrading, stop. Note the message. Then start again with 3.B below instead

OR

3.B. Remove all AyaNova programs from the computer -> install stand-alone -> copy back config.txt if overwrote

a. Make sure the AyaNova program is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

b. Uninstall any previous AyaNova programs via Control Panel -> Add/Remove Programs before installing a new version

- Uninstall plugins first if installed OLI, OutlookSchedule, ExportToXLS, QuickNotify, AyaScript, WBI, RI, MBI
- Then uninstall main program AyaNova
- if option to delete installed databases is displayed, select **No**.

c. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

d. Install as per stand-alone AyaNova installation steps

e. Continue with step 4.

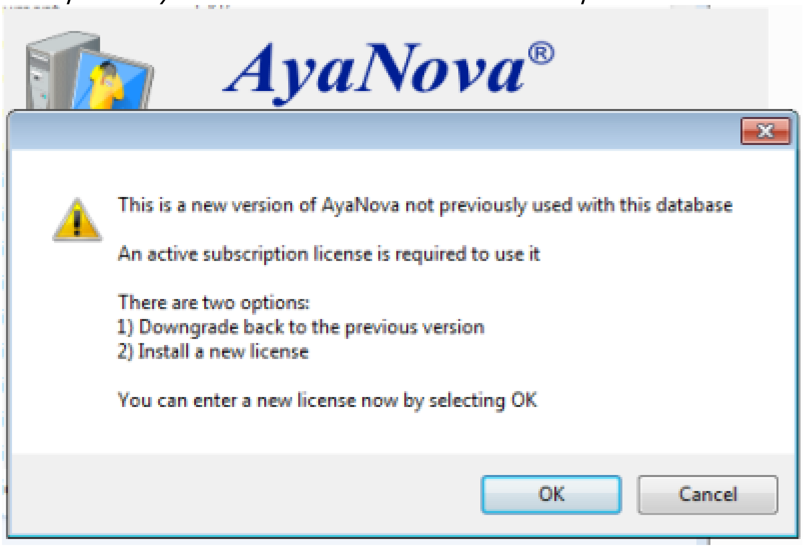
4. Apply your AyaNova subscription license(s) Activation Key **if applicable**

this step #4 will not occur if your existing AyaNova has an active current valid scheduleable resources subscription and is version is 7.4 or higher

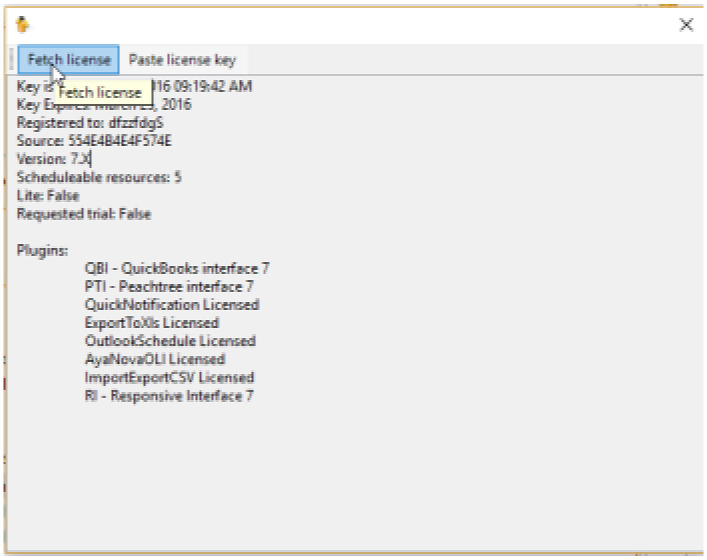
a. Run the AyaNova 7 desktop program on your server

b. Log in as your AyaNova Administrator account

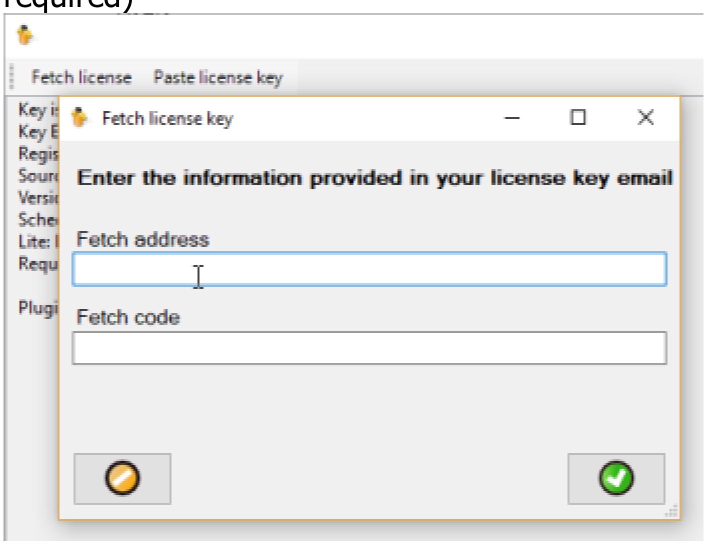
c. The following message will display (*reminder - this will ONLY display if your AyaNova does not presently have an active current valid subscription and is version 7.4 or higher*)



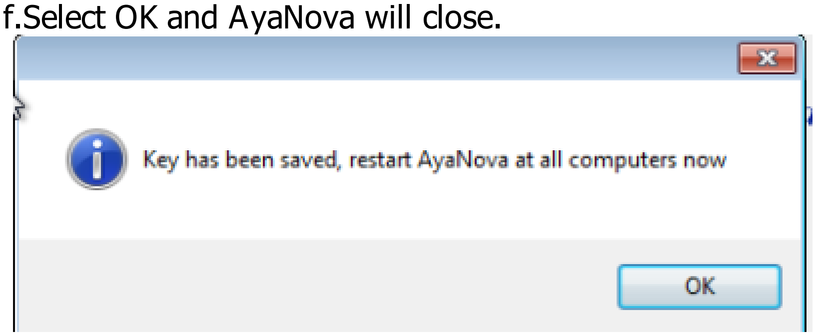
d. Click on Fetch License as per your Activation Key email instructions



e. Enter in your registered email address into the Fetch address field, and your Fetch code into the Fetch code (both the registered email address and the Fetch code are found in your AyaNova License Key email message). Click on the green checkmark OK button to complete the fetch (internet access is required)



f.Select OK and AyaNova will close.



We are not done yet! Go to the next step.

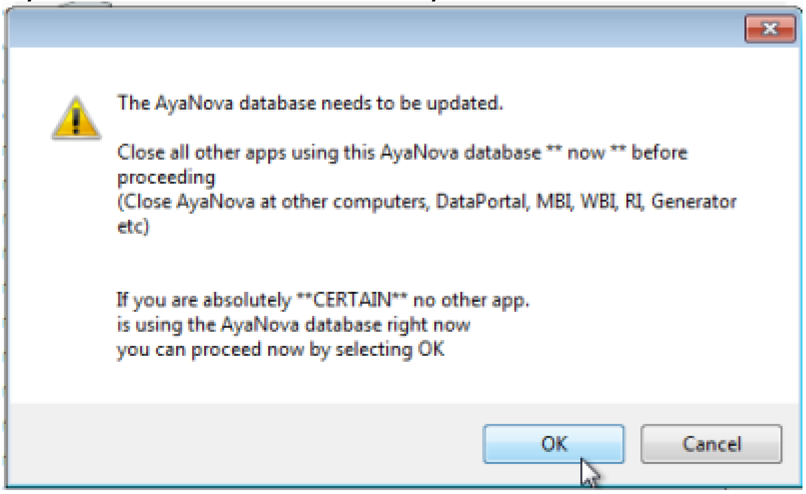
5. Update your AyaNova database

a. Run the AyaNova 7 program.

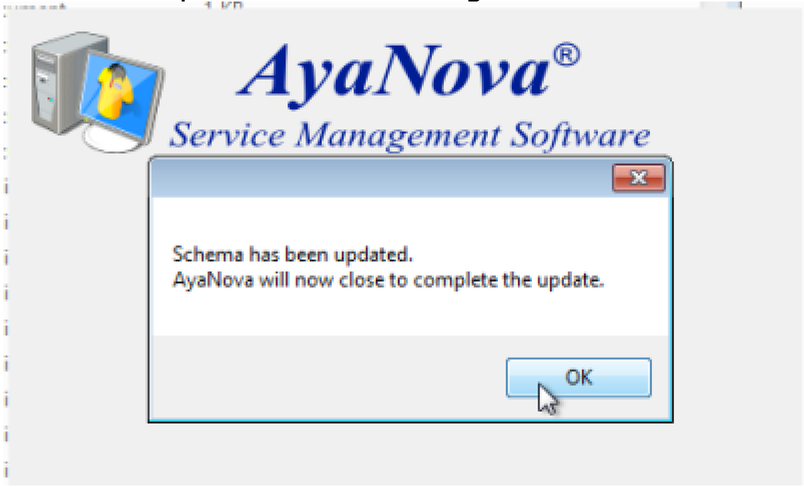
b. Log in ONLY as the AyaNova Administrator.

You MUST log in only as the AyaNova Administrator the first time AyaNova is run during these update steps. Failure to do so may cause problems requiring you to restore from backup and redo the steps.

c. As per the message, make sure no one and nothing else is accessing the AyaNova database other than you.



d. Schema update won't take long - let it finish!



I. Log back into your AyaNova.

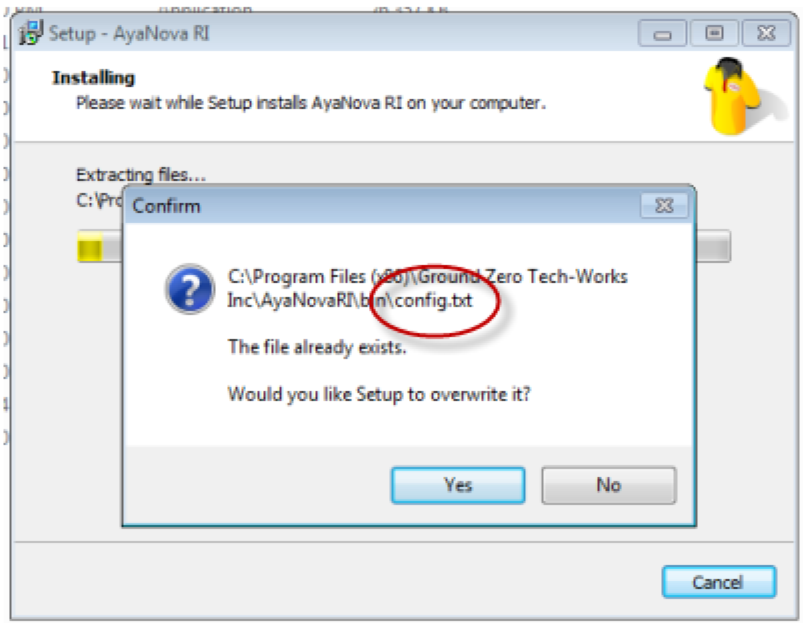
Check your Help -> About AyaNova to confirm your licenses and to confirm your version is showing as the latest.

m. Exit out of AyaNova 7

6. Install and configure your licensed AyaNova 7 optional plugins (such as ExportToXLS, OLI, OutlookSchedule, etc)

All options **must** also be updated to the latest version to run with your updated AyaNova database.

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



7. Confirm your backup and restore procedure

Check your back up on a regular basis, confirming that the backups are successfully and you can successfully restore.

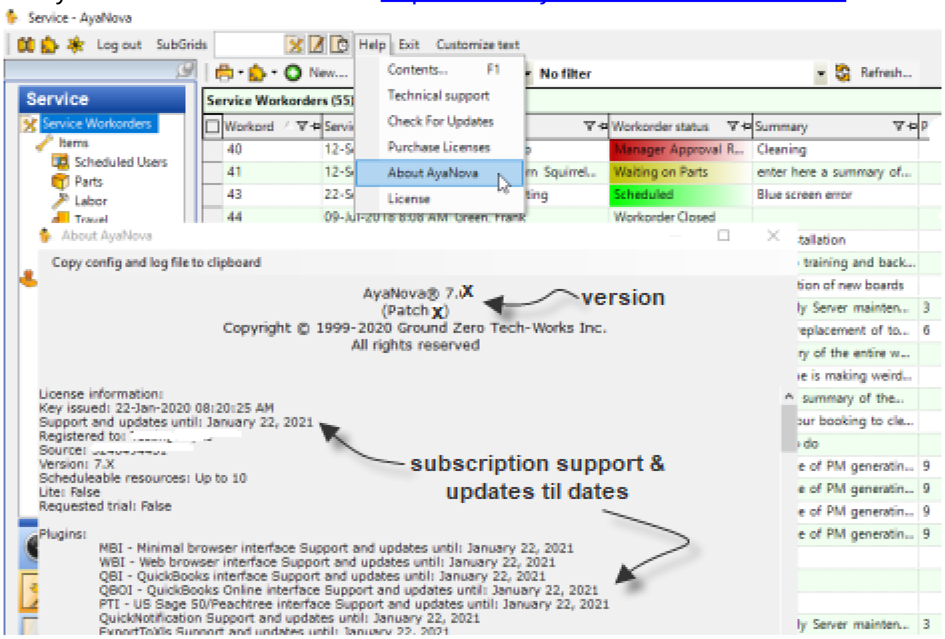
See also:
What's new in AyaNova 7
What's new in AyaNova 6

[What's new in AyaNova 5]

11.2 Updating if networked Firebird AyaNova

Compare the AyaNova version listed on our [Download](https://www.ayanova.com/download.htm) web page with your version listed in Help -> About AyaNova to determine if your version needs updating.

NOTE: the version stated in the screenshot below **may not** be the actual latest version. Refer always to the latest available via https://www.ayanova.com/download.htm



NOTE: the version stated in the screenshot above **may not** be the latest version. Refer always to the latest stated on https://www.ayanova.com/download.htm

Steps to update an AyaNova network Firebird Server configuration (version 4.2, 5.1, 6.6 or 7.x):

1. **Requirements before proceeding**
2. **Create backup of your Firebird Server AyaNova database**
3. **AyaNova 7 installation**
4. **Apply your AyaNova subscription license(s) Activation Key**
5. **Update your database**
6. **Prep and install AyaNova 7 on networked computers**
7. **Install and configure AyaNova 7 optional programs on the server**
8. **Confirm your backup and restore procedures**

1. Confirm these four requirements BEFORE proceeding:

Do not proceed until you have confirmed **yes** to each of these requirements:

1) CONFIRM Do you know your AyaNova Administrator login name and password?

i. You NEED to know this to be able to correctly and fully perform the update in the steps further below. Failure to confirm this before you proceed may cause issues that may only be resolved by restoring from backup and redoing the update steps.
ii. If you don't know it, it could still be the default login name *manager* and password *letmein* - try it and confirm!
iii. If you do **not** know your AyaNova Administrator username and password, log in as another user that does have rights to the Administration Users grid, and edit the AyaNova Administrator username and password. It would be suggested to write down that username and password and keep in a safe place for future use too.

2) CONFIRM Do you have an active support & updates subscription as shown in your AyaNova database?

i. Log into your AyaNova, select Help -> About
ii. View your database's "**Support and updates until:**" date:
   1. If your About AyaNova does not show a "Support and updates until:"
      a. this means your present version is older than version 7.4
      b. you MUST purchase subscription(s) for your database before proceeding to the next requirement.
   2. If your "Support and updates until:" date has passed:
      a. this means you have let your subscription(s) expire without renewing before the renewal date.
      b. you MUST purchase subscriptions for your database before proceeding to the next requirement.
   3. If your "Support and updates until:" date is a future date:
      a. this means you do have an active support and updates subscription
      b. proceed to the next requirement

3) CONFIRM Does your version of AyaNova program files require updating?

1) Refer to your Help -> About AyaNova to view your version
2) Compare your version in your Help -> About AyaNova to that of the latest version at https://www.ayanova.com/download.htm
3) Any questions, do include all text from your Help - About AyaNova when contacting support.

A. **If your AyaNova version is already at the latest version shown at** https://www.ayanova.com/download.htm :

4) If you have received a new or renewal subscription AyaNova License Key via email, just apply it as per its instructions for a database that is already at the latest version.
5) That's it, you are done! No further update steps are needed.

B. **If your AyaNova is version 7.4 or newer BUT not the latest version AND your *Support and Updates until:* is currently valid by showing a future date:**
1) As your subscription(s) are active and not expired, your database is eligible to upgrade as well as receive support.
2) Go ahead and follow the steps below to update your AyaNova.
   i. NOTE: Skip the steps below related to applying a Subscription Activation Key as your database already has its current Subscription Key applied

C. **If your AyaNova is version 7.4 or newer BUT not the latest version, AND your *Support and Updates until:* has expired by showing a date that has past:**
1) As your subscription(s) have expired, you will need to purchase new subscription(s) before proceeding.
2) Once you have received your AyaNova License Key email message, perform the update steps below.

D. **If your AyaNova is between version 7.0 and 7.3**
1) purchase your resource and optional add-on subscriptions
2) Once you have received your AyaNova License Key email message, perform the update steps below.

E. **If your AyaNova version is 6 or older:**
1) purchase your resource and optional add-on subscriptions.
2) Confirm your report templates (that you normally use) run successfully with the latest version of AyaNova.
   i. Download and install the latest AyaNova onto a separate stand-alone computer with a sample database.
   ii. Export your custom report templates to files.
   iii. Import into your testing setup of the latest version of AyaNova.
   iv. Confirm your custom report templates load successfully with your testing setup of the latest version of AyaNova
   v. If you encounter errors attempting to load your custom report template, refer to https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-7-users/1987 and https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-6-users/1832 to confirm the errors indicate that the report template must be replaced.

   vi. Obtain copies of the latest sample report templates via https://www.ayanova.com/reporting.htm#replacement and customize as needed.
3) Proceed with the update steps below
4) Once the update is complete, you would remove the non-working report templates and import your new customized report templates into your live upgraded AyaNova

<u>If have not previously purchased a subscription:</u>
Subscriptions are required to receive support and to be able to apply upgrades to the latest version.
Refer to answers to common questions about licensing, pricing, purchasing on http://www.ayanova.com/purchase.htm
and/or contact us with all text from your present Help -> About AyaNova

<u>If you had previously purchased subscription(s) but allowed your subscription to expire without paying the renewal(s):</u>
Only active (non-expired) subscriptions are eligible for support and upgrades.
Only active (non-expired) subscriptions are eligible to renew at the discounted renewal subscription price.
You will need to purchase your subscriptions again, at the full subscription price.

<u>If you have an active subscription with an upcoming expiration date for support and updates:</u>
Your registered email address will receive a reminder from our payment processing partner that your renewal subscription will automatically be processed if your payment method is valid.
NOTE: your renewal at the discounted renewal price can only occur <u>**if**</u> your payment method provided (such as your credit card's expiry date) **is valid.**
Follow the email instructions to check your payment method is valid before the purchase date to ensure no loss of access to purchase at the discounted renewal price.
If your existing payment method with our payment processing partner is valid, your renewal subscription Key will be emailed following the process of the renewal charges (Monday to Friday).
If any issue or did not receive, contact us immediately with your details.

4) CONFIRM your version of Firebird Server check and setup if needed

If you were running AyaNova version 6 or older, you *may* have been using an older version. AyaNova 7 requires Firebird 2.1.1

Check what version of Firebird Server you have installed on your server by going to Control Panel -> Firebird Server

a. If running a version of Firebird Server older than 2.1.1, you must uninstall the old version, reboot and install version 2.1.1 as per step #5 of the network Firebird Server configuration

Edit the new aliases.conf exactly as your previous aliases.conf file

NOTE: you can not have different versions of Firebird service running on a computer at the same time, so you must uninstall any older versions before installing Firebird 2.1.1

b. If running version 2.1.1, you can now proceed to the next step

2. Create backup of your Firebird Server AyaNova database and edited files

a. Make sure all users and all AyaNova related programs connecting to the database are shut down fully.

- Make sure all users have exited out of the AyaNova program
- Make sure all remote access options are shut down via your IIS (i.e. Data Portal, WBI and/or MBI)
- Make sure that your application pool(s) used by your AyaNova remote access options are shut down
- Make sure the network Generator service is shut down

b. Make a backup of your AyaNova database following the approved backup method for Firebird Server for your existing version of AyaNova (for example, backing up an AyaNova 7 Firebird Server steps)

c. Make a backup of your **config.txt file** from your server's AyaNova program folder so that you can refer to it/copy back if needed in steps further down

d. Make a backup of your **aliases.conf** file that is in your Firebird folder so that you can refer to it/copy back if needed in steps further down

If AyaNova 7, this would be located in C:\Program Files\Firebird\Firebird_2_1_1
If AyaNova 5 or 6, this would be located in C:\Program Files\Firebird\Firebird_2_1
If AyaNova 4, this would be located in C:\Program Files\Firebird\Firebird_2_0
If AyaNova 3.6, this would be located in C:\Program Files\Firebird\Firebird_1.5

e. Make a backup of your existing customized AyaNova **networkFirebirdsnapshot.bat** file

3. AyaNova 7 installation

Either follow A **or** B below.
If you encounter an issue following A, then restore and start from step 1 this time following B when get to this step

3.A. Install over top of existing AyaNova desktop program on your server

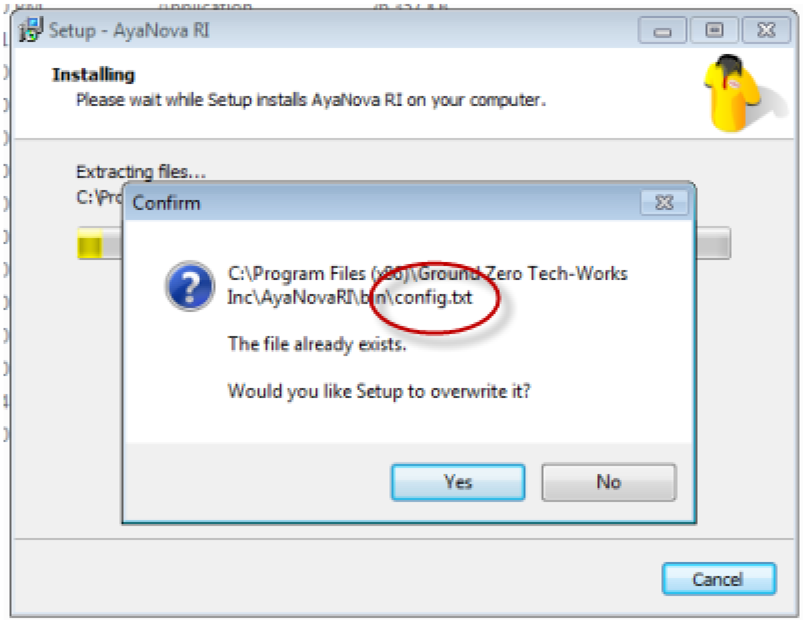
a. Make sure every AyaNova program and service is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

- On your server:
  - confirm that your Generator service is shut down
  - confirm that your IIS application pool(s) for your AyaNova remote access options are all shut down
  - confirm that any AyaNova desktop program and option is shut down
- On your workstations:
  - confirm that any AyaNova desktop program and option is shut down

b. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

c. Install taking the check-marked previous selections that are already selected - this is OK, as long as you do not run before stated to do so

When installing overtop of an existing installation, select **No** if receive similar to the following message about the config.txt (so that you keep your existing custom config.txt configuration file)



d. Continue to the next step 5.

3.B. Remove all AyaNova programs from the server -> install stand-alone -> copy back config.txt

a. Make sure every AyaNova program and service is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

- On your server:
  - o confirm that your Generator service is shut down
  - o confirm that your IIS application pool(s) for your AyaNova remote access options are all shut down
  - o confirm that any AyaNova desktop program and option is shut down
- On your workstations:
  - o confirm that any AyaNova desktop program and option is shut down

b. It is recommended to uninstall any previous AyaNova programs via Control Panel -> Add/Remove Programs before installing a new version

- Uninstall plugins if installed OLI, OutlookSchedule, ExportToXLS, QuickNotify, AyaScript
- Uninstall WBI, MBI, RI
- Uninstall AyaNova
  - o if option to delete installed databases is displayed, select Yes. These would be the stand-alone sample trial databases from your original install that should have been removed anyways.

c. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

d. Install as per stand-alone AyaNova installation steps (do not select to install anything else at this time - do NOT select to install the Generator, etc)

e. Run the AyaNova 7 program

f. Because this is a fresh install including installation of a sample database, the default AyaNova Administrator login and password will be pre-entered for you.

g. Log in and confirm loads successfully. Yes, it is expected that this opens to sample data, don't freak out.

h. Exit out.

i. Delete the existing sample configuration file config.txt that was just installed to your AyaNova program folder.

j. Paste in the backup of your original config.txt file

k. Continue with step 5.

(Generator install, remote access options and other options would be installed at a later step below)

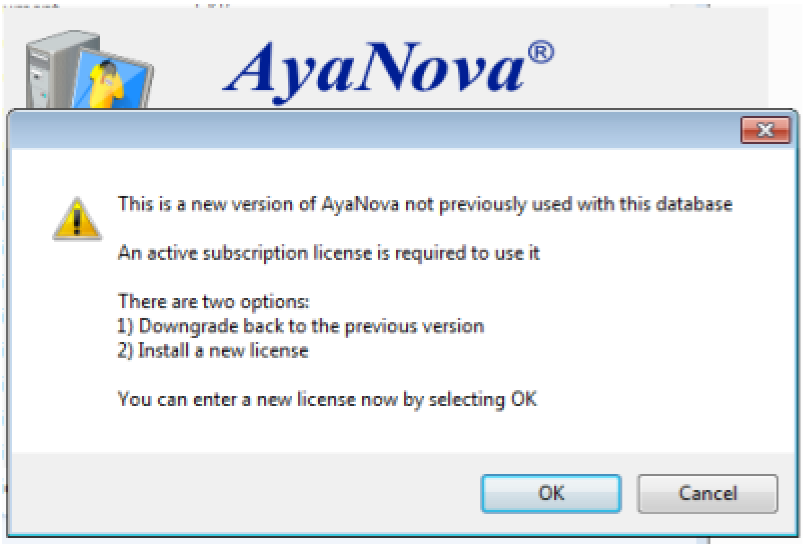
4. Apply your AyaNova subscription license(s) Activation Key **if applicable**

this step #4 will not occur if your existing AyaNova has an active current valid scheduleable resources subscription and is version is 7.4 or higher

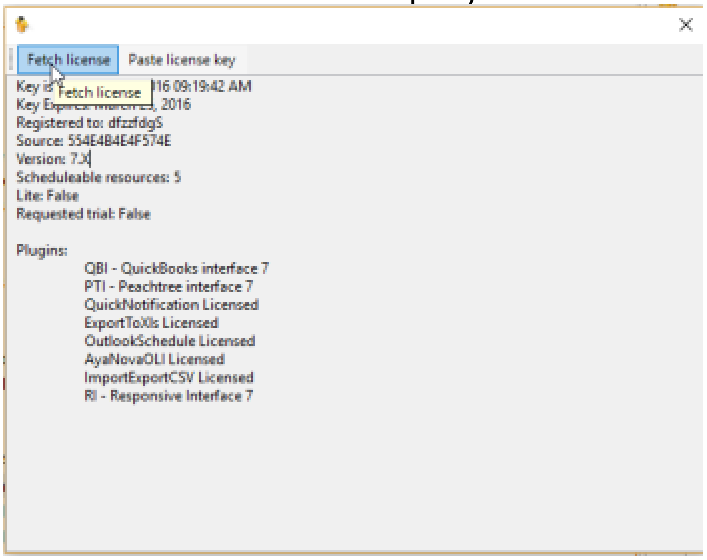
a. Run the AyaNova 7 desktop program on your server

b. Log in as your AyaNova Administrator account

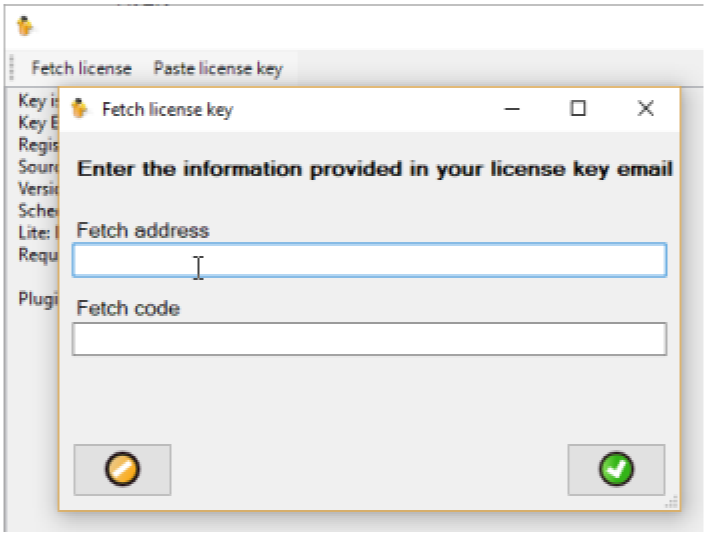
c. The following message will display (*reminder - this will ONLY display if your AyaNova does not presently have an active current valid subscription and is version 7.4 or higher*)



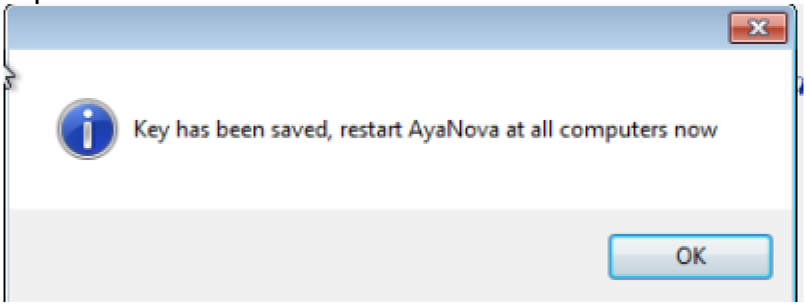
d. Click on Fetch License as per your Activation Key email instructions



e. Enter in your registered email address into the Fetch address field, and your Fetch code into the Fetch code. Click on the green checkmark OK button to complete the fetch (internet access is required)



f.Select OK and AyaNova will close. We are not done yet! Go to the next step.



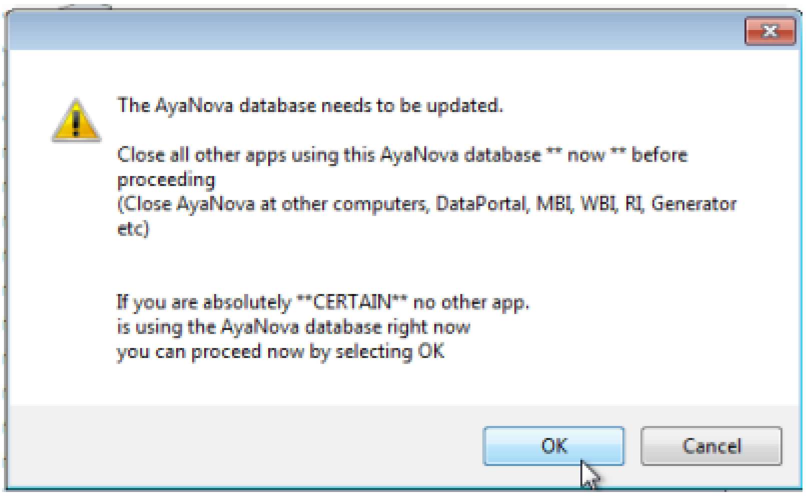
5. Update your database

Run the AyaNova 7 program.

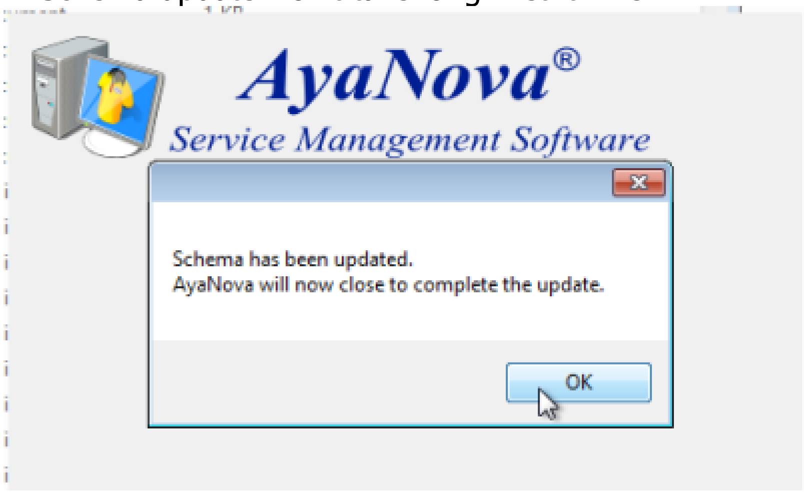
i. Log in as the AyaNova Administrator.

You MUST log in only as the AyaNova Administrator this first time.

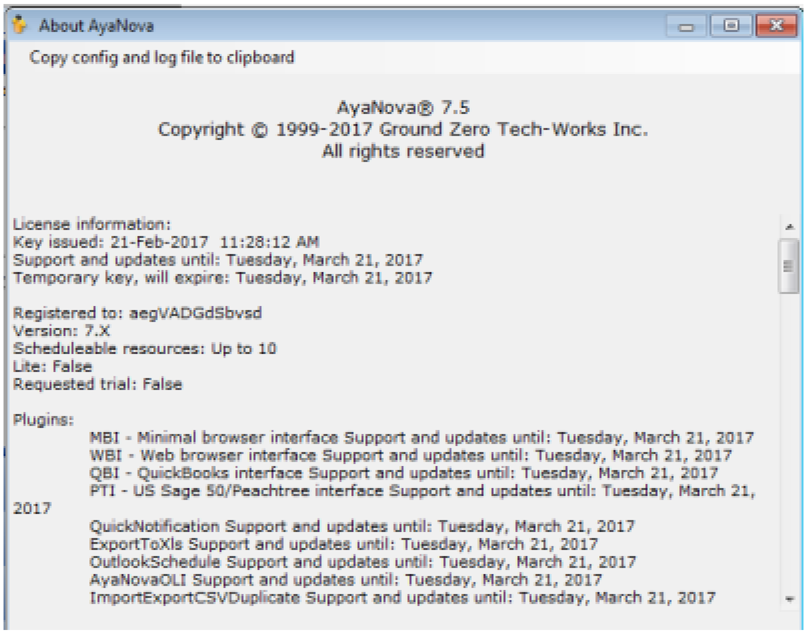
j. As per the message, make sure no one and nothing is accessing the AyaNova database



k. Schema update won't take long - let it finish!



l. Check your Help -> About AyaNova to confirm your licenses and to confirm your version.



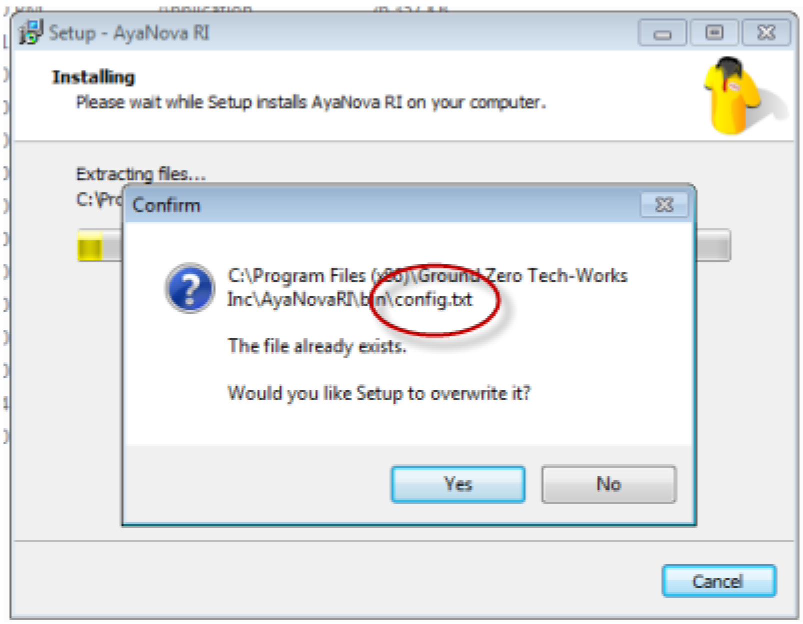
m. Now you can complete the update on the workstations and install any other options.

6. Prep and install AyaNova 7 on networked computers

a. perform step #7 of the network SQL Server configuration on your workstations so they too are updated to the latest AyaNova 7 program version.

b. Install and configure your licensed AyaNova 7 optional plugins (i.e. ExportToXLS, OLI, OutlookSchedule)

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)

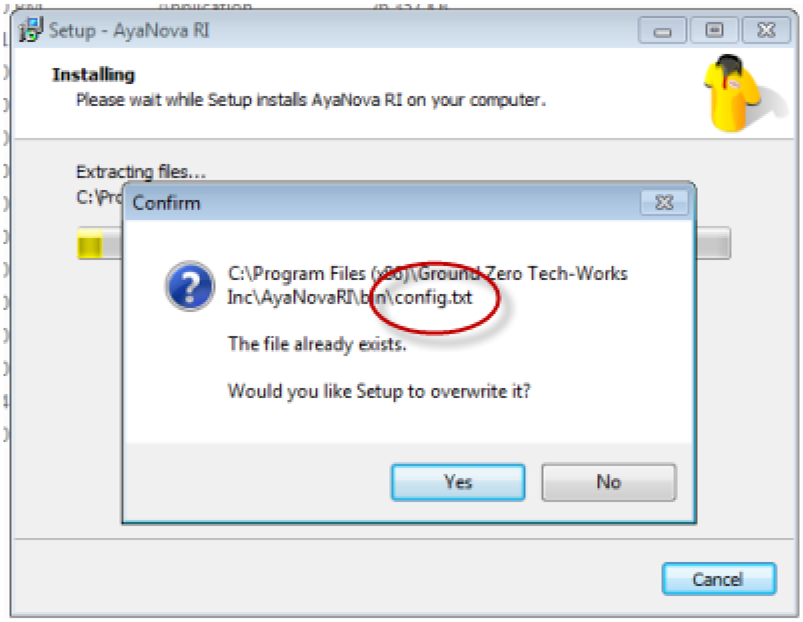


7. Install and configure AyaNova 7 optional programs on the server (Event Generator, RI, WBI, MBI, and/or DataPortal) as needed

See in this Help documentation:

- AyaNova Network Generator installation steps
- AyaNova Data Portal installation and configuration steps
- RI installation and configuration steps
- WBI installation and configuration steps
- MBI Help file for requirements, installation, configuration and use

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



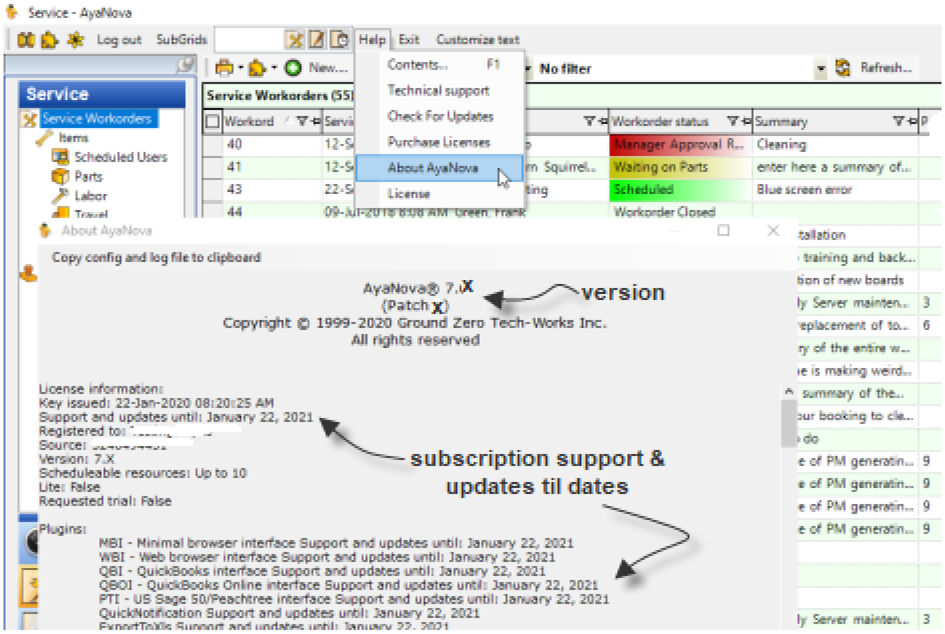
8. Confirm your backup and restore procedures for your AyaNova SQL database

See also:
What's new in AyaNova 7
What's new in AyaNova 6
What's new in AyaNova 5

11.3 Updating if networked SQL Express AyaNova

Compare the AyaNova version listed on our [Download](https://www.ayanova.com/download.htm) web page with your version listed in Help -> About AyaNova to determine if your version needs updating.

NOTE: the version stated in the screenshot below **__may not__** be the actual latest version. Refer always to the latest available via https://www.ayanova.com/download.htm



NOTE: the version stated in the screenshot above **__may not__** be the latest version. Refer always to the latest available via https://www.ayanova.com/download.htm

Steps to update an AyaNova network SQL Express configuration (version 4.2, 5.1, 6.6 or 7.x):

1. **Requirements before proceeding**
2. **Create backup of your SQL Express AyaNova database**
3. **AyaNova 7 installation**
4. **Apply your AyaNova subscription license(s) Activation Key**
5. **Update your database**
6. **Prep and install AyaNova 7 on networked computers**
7. **Install and configure AyaNova 7 optional programs on the server**
8. **Confirm your backup and restore procedures for SQL**

1. Confirm these four requirements BEFORE proceeding:

Do not proceed until you have confirmed **__yes__** to each of these requirements:

1) CONFIRM Do you know your __AyaNova Administrator login name and password__?

i. You NEED to know this to be able to correctly and fully perform the update in the steps further below. Failure to confirm this before you proceed may cause issues that may only be resolved by restoring from backup and redoing the update steps.
ii. If you don't know it, it could still be the default login name *manager* and password *letmein* - try it and confirm!
iii. If you do **not** know your AyaNova Administrator username and password, log in as another user that does have rights to the Administration Users grid, and edit the AyaNova Administrator username and password. It would be suggested to write down that username and password and keep in a safe place for future use too.

2) CONFIRM Do you have an active support & updates subscription as shown in your AyaNova database?

i. Log into your AyaNova, select Help -> About
ii. View your database's "**Support and updates until:**" date:
  1. If your About AyaNova does not show a "Support and updates until:"
     a. this means your present version is older than version 7.4
     b. you MUST purchase subscription(s) for your database before proceeding to the next requirement.
  2. If your "Support and updates until:" date has passed:
     a. this means you have let your subscription(s) expire without renewing before the renewal date.
     b. you MUST purchase subscriptions for your database before proceeding to the next requirement.
  3. If your "Support and updates until:" date is a future date:
     a. this means you do have an active support and updates subscription
     b. proceed to the next requirement

3) CONFIRM Does your version of AyaNova program files require updating?

1) Refer to your Help -> About AyaNova to view your version
2) Compare your version in your Help -> About AyaNova to that of the latest version at https://www.ayanova.com/download.htm
3) Any questions, do include all text from your Help - About AyaNova when contacting support.

A. **If your AyaNova version is already at the latest version shown at** https://www.ayanova.com/download.htm :

4) If you have received a new or renewal subscription AyaNova License Key via email, just apply it as per its instructions for a database that is already at the latest version.
5) That's it, you are done! No further update steps are needed.

B. **If your AyaNova is version 7.4 or newer BUT not the latest version AND your *Support and Updates until:* is currently valid by showing a future date:**
   1) As your subscription(s) are active and not expired, your database is eligible to upgrade as well as receive support.
   2) Go ahead and follow the steps below to update your AyaNova.
      i. NOTE: Skip the steps below related to applying a Subscription Activation Key as your database already has its current Subscription Key applied

C. **If your AyaNova is version 7.4 or newer BUT not the latest version, AND your *Support and Updates until:* has expired by showing a date that has past:**
   1) As your subscription(s) have expired, you will need to purchase new subscription(s) before proceeding.
   2) Once you have received your AyaNova License Key email message, perform the update steps below.

D. **If your AyaNova is between version 7.0 and 7.3**
   1) purchase your resource and optional add-on subscriptions
   2) Once you have received your AyaNova License Key email message, perform the update steps below.

E. **If your AyaNova version is 6 or older:**
   1) purchase your resource and optional add-on subscriptions.
   2) Confirm your report templates (that you normally use) run successfully with the latest version of AyaNova.
      i. Download and install the latest AyaNova onto a separate stand-alone computer with a sample database.
      ii. Export your custom report templates to files.
      iii. Import into your testing setup of the latest version of AyaNova.
      iv. Confirm your custom report templates load successfully with your testing setup of the latest version of AyaNova
      v. If you encounter errors attempting to load your custom report template, refer to https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-7-users/1987 and https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-6-users/1832 to confirm the errors indicate that the report template must be replaced.

vi. Obtain copies of the latest sample report templates via https://www.ayanova.com/reporting.htm#replacement and customize as needed.

3) Proceed with the update steps below
4) Once the update is complete, you would remove the non-working report templates and import your new customized report templates into your live upgraded AyaNova

If have not previously purchased a subscription:
Subscriptions are required to receive support and to be able to apply upgrades to the latest version.
Refer to answers to common questions about licensing, pricing, purchasing on http://www.ayanova.com/purchase.htm
and/or contact us with all text from your present Help -> About AyaNova

If you had previously purchased subscription(s) but allowed your subscription to expire without paying the renewal(s):
Only active (non-expired) subscriptions are eligible for support and upgrades.
Only active (non-expired) subscriptions are eligible to renew at the discounted renewal subscription price.
You will need to purchase your subscriptions again, at the full subscription price.

If you have an active subscription with an upcoming expiration date for support and updates:
Your registered email address will receive a reminder from our payment processing partner that your renewal subscription will automatically be processed if your payment method is valid.
NOTE: your renewal at the discounted renewal price can only occur **if** your payment method provided (such as your credit card's expiry date) **is valid.**
Follow the email instructions to check your payment method is valid before the purchase date to ensure no loss of access to purchase at the discounted renewal price.
If your existing payment method with our payment processing partner is valid, your renewal subscription Key will be emailed following the process of the renewal charges (Monday to Friday).
If any issue or did not receive, contact us immediately with your details.

4) CONFIRM Is your existing SQL version supported by Microsoft, is your SQL optimized, have you edited the StartUp Parameters ?

a) As of 2019, Microsoft no longer provides mainstream support of SQL 2012 or lower.
b) Additionally, you may want to look into whether you have optimized your SQL yet
c) Additional StartUp Parameters to enter when using SQL 2012 or newer

2. Create backup of your SQL Server AyaNova database and edited files

a. Make sure all users and all AyaNova related programs connecting to the database are shut down fully.

- Make sure all users have exited out of the AyaNova program
- Make sure all remote access options are shut down via your IIS (i.e. Data Portal, WBI and/or MBI)
- Make sure that your application pool(s) used by your AyaNova remote access options are shut down
- Make sure the network Generator service is shut down

b. Make a backup of your AyaNova database using an approved SQL Server utility such as SQL Server Management Studio
c. Make a backup of your config.txt file so that you can refer to it/copy back if needed in steps further down

3. AyaNova 7 installation

Either follow A **or** B below.
If you encounter an issue following A, then restore and start from step 1 this time following B when get to this step

3.A. Install over top of existing AyaNova desktop program on your server

a. Make sure every AyaNova program and service is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

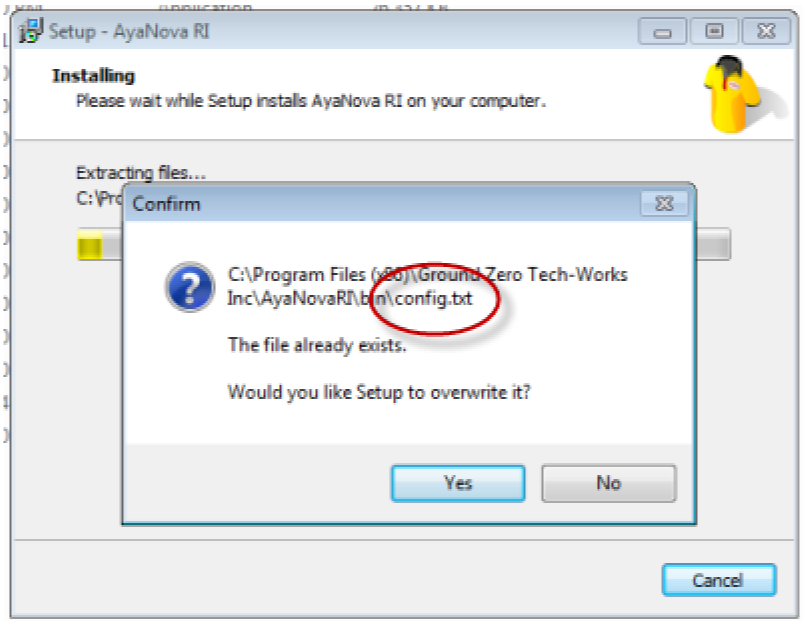
- On your server:
  - confirm that your Generator service is shut down
  - confirm that your IIS application pool(s) for your AyaNova remote access options are all shut down

- o confirm that any AyaNova desktop program and option is shut down
- On your workstations:
  - o confirm that any AyaNova desktop program and option is shut down

b. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

c. Install taking the check-marked previous selections that are already selected - this is OK, as long as you do not run before stated to do so

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



d. Continue with step 4.

3.B. Remove all AyaNova programs from the server -> install stand-alone -> copy back config.txt

a. Make sure every AyaNova program and service is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

- On your server:
  - o confirm that your Generator service is shut down
  - o confirm that your IIS application pool(s) for your AyaNova remote access options are all shut down
  - o confirm that any AyaNova desktop program and option is shut down

- On your workstations:
  - confirm that any AyaNova desktop program and option is shut down

b. It is recommended to uninstall any previous AyaNova programs via Control Panel -> Add/Remove Programs before installing a new version

- Uninstall plugins if installed OLI, OutlookSchedule, ExportToXLS, QuickNotify, AyaScript
- Uninstall WBI, MBI, RI
- Uninstall AyaNova
  - if option to delete installed databases is displayed, select Yes. These would be the stand-alone sample trial databases from your original install that should have been removed anyways.

c. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

d. Install as per stand-alone AyaNova installation steps (do not select to install anything else at this time - do NOT select to install the Generator, etc)

e. Run the AyaNova 7 program

f. Because this is a fresh install including installation of a sample database, the default AyaNova Administrator login and password will be pre-entered for you.

g. Log in and confirm loads successfully. Yes, it is expected that this opens to sample data, don't freak out.

h. Exit out.

i. Delete the existing sample database config.txt file in your AyaNova program folder.

j. Paste in the backup of your original config.txt file

k. Continue with step 4.

(Generator install, remote access options and other options would be installed at a later step below)

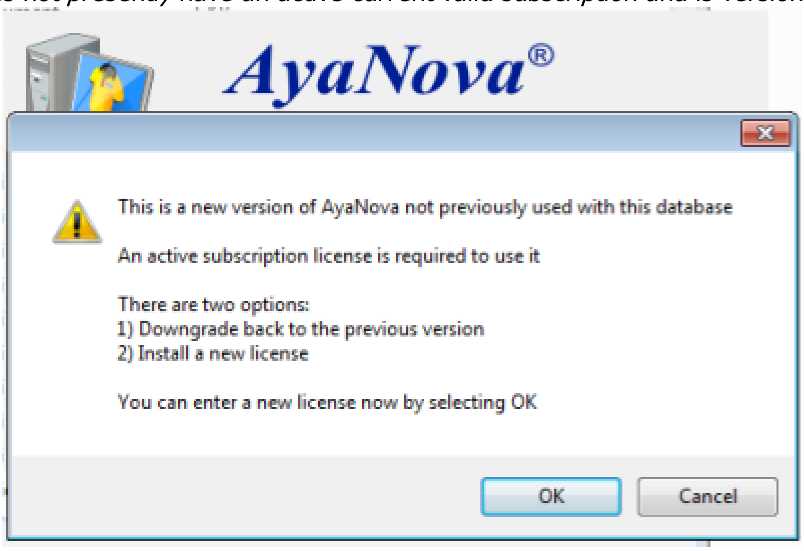
4. Apply your AyaNova subscription license(s) Activation Key

this step #4 will not occur if your existing AyaNova has an active current valid scheduleable resources subscription and is version is 7.4 or higher a

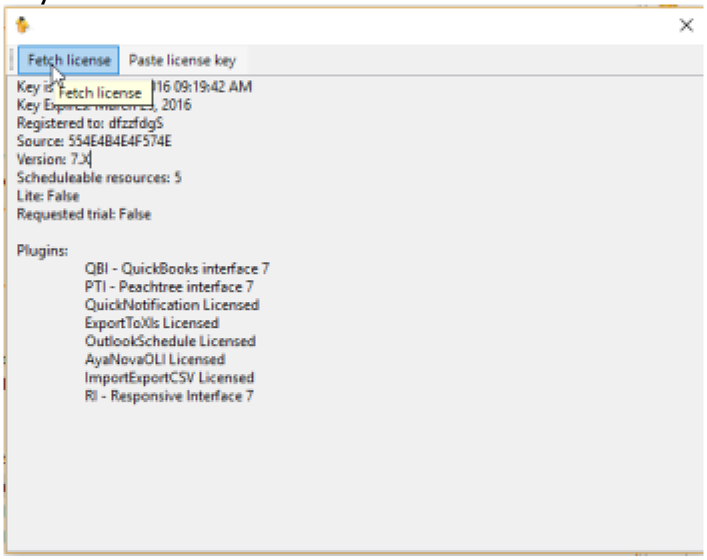
a. Run the AyaNova 7 desktop program on your server

b. Log in as your AyaNova Administrator account

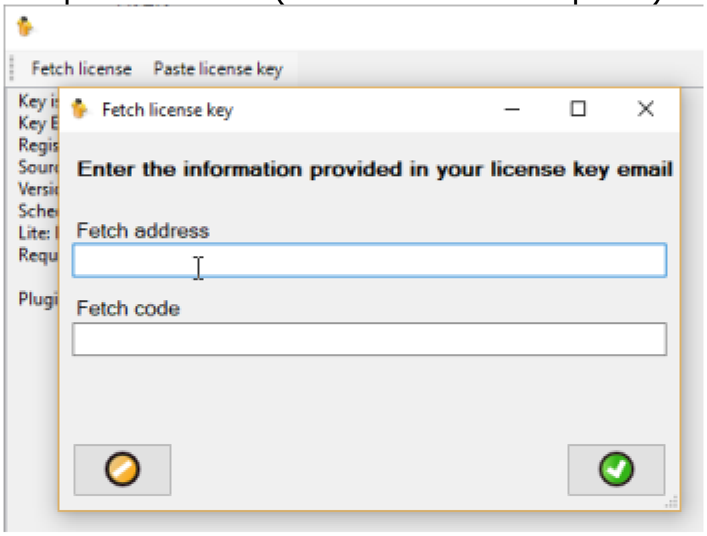
c. The following message will display (*reminder - this will ONLY display if your AyaNova does not presently have an active current valid subscription and is version 7.4 or higher*)



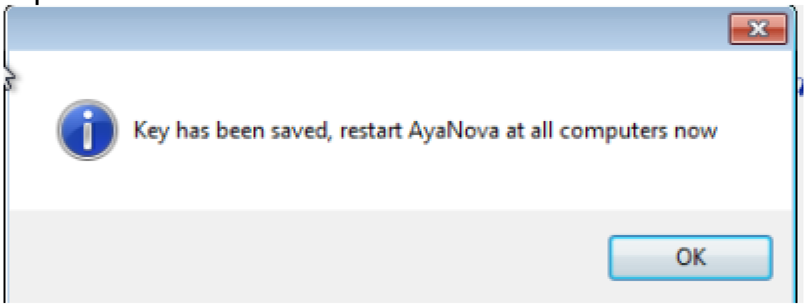
d. Select Help -> License -and click on Fetch License as per your Activation Key email instructions



e. Enter in your registered email address into the Fetch address field, and your Fetch code into the Fetch code. Click on the green checkmark OK button to complete the fetch (internet access is required)



f.Select OK and AyaNova will close. We are not done yet! Go to the next step.



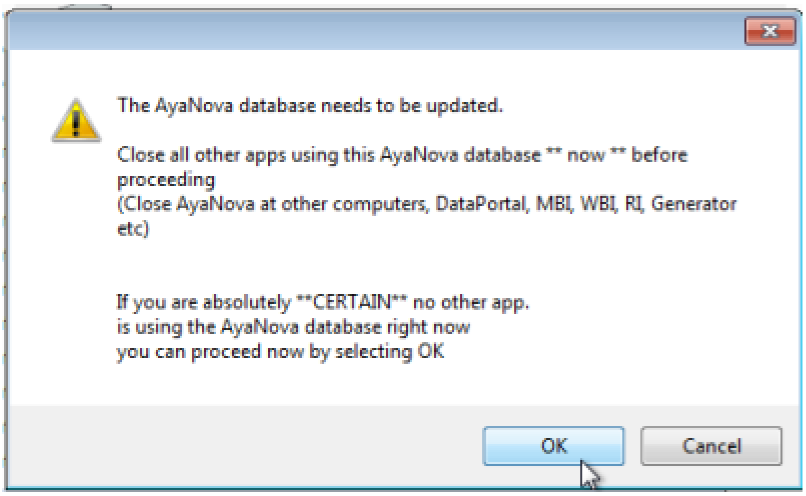
5. Update your database

Run the AyaNova 7 program.

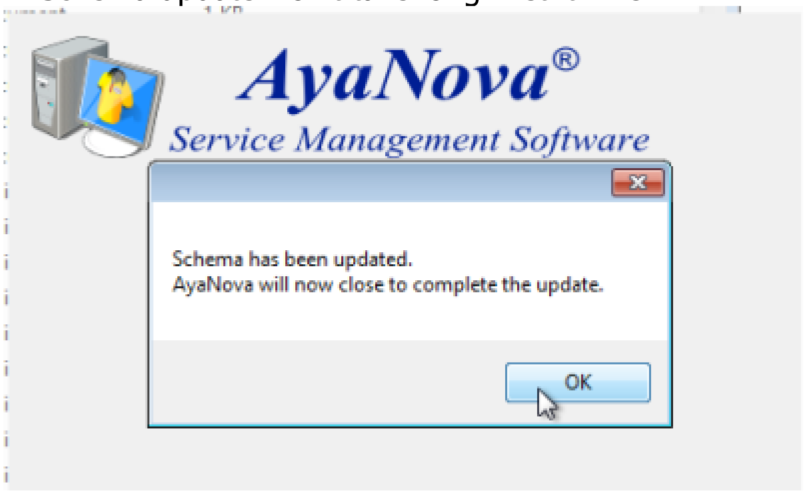
i. Log in as the AyaNova Administrator.

You MUST log in only as the AyaNova Administrator this first time.

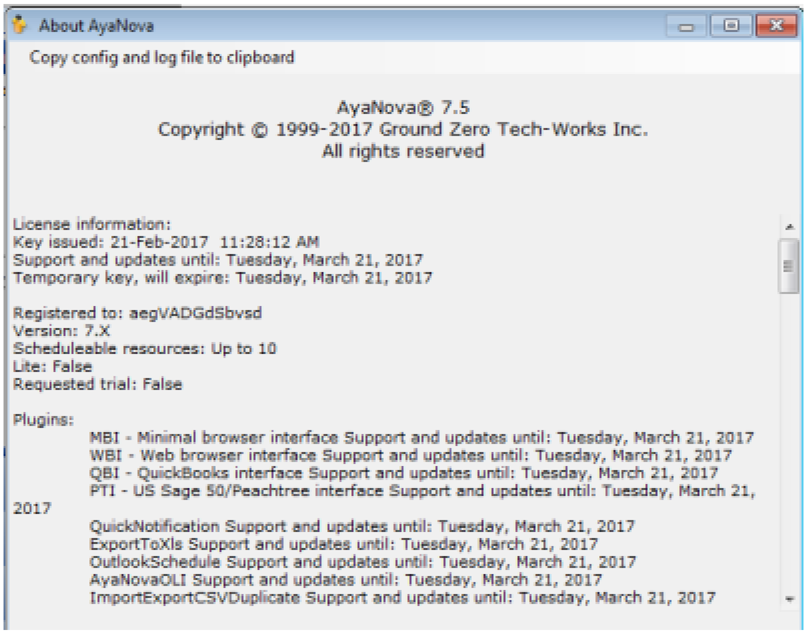
j. As per the message, make sure no one and nothing is accessing the AyaNova database



k. Schema update won't take long - let it finish!



l. Check your Help -> About AyaNova to confirm your licenses and to confirm your version.



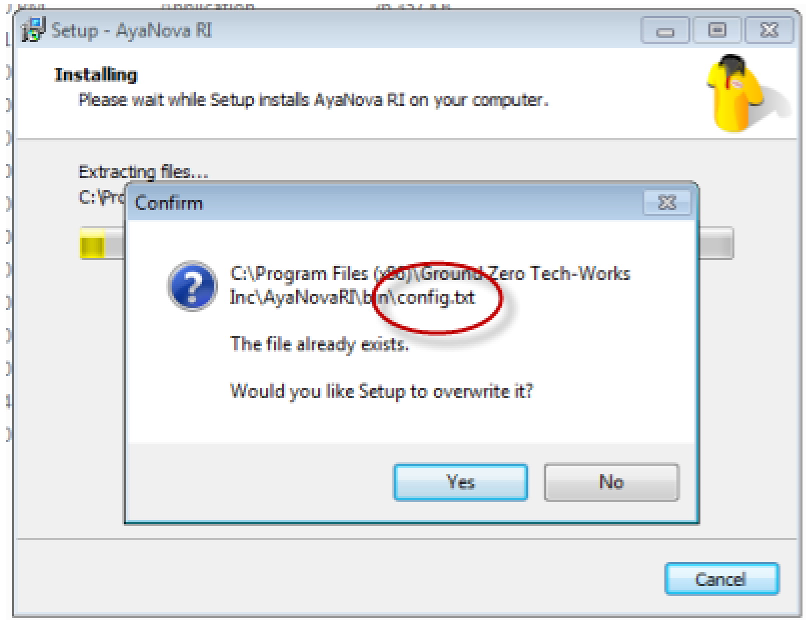
m. Now you can complete the update on the workstations and install any other options.

6. Prep and install AyaNova 7 on networked computers

a. perform step #7 of the network SQL Server configuration on your workstations so they too are updated to the latest AyaNova 7 program version.

b. Install and configure your licensed AyaNova 7 optional plugins (i.e. ExportToXLS, OLI, OutlookSchedule)

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)

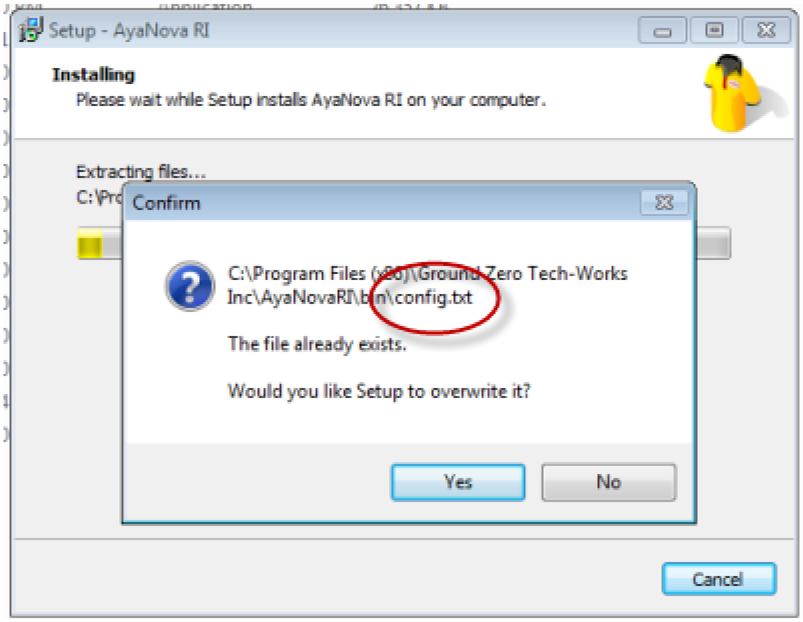


7. Install and configure AyaNova 7 optional programs on the server (Event Generator, RI, WBI, MBI, and/or DataPortal) as needed

See in this Help documentation:

- AyaNova Network Generator installation steps
- AyaNova Data Portal installation and configuration steps
- RI installation and configuration steps
- WBI installation and configuration steps
- MBI Help file for requirements, installation, configuration and use

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



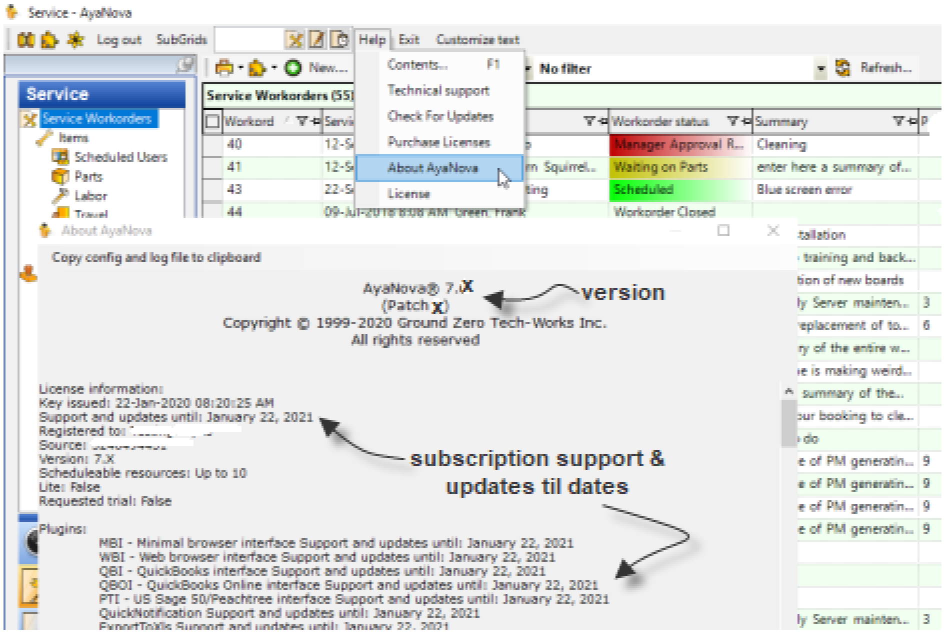
8. Confirm your [backup and restore procedures for your AyaNova SQL database]()

See also:
[What's new in AyaNova 7]()
[What's new in AyaNova 6]()
[What's new in AyaNova 5]()

11.4 Updating if networked SQL Server AyaNova

Compare the AyaNova version listed on our [Download](https://www.ayanova.com/download.htm) web page with your version listed in Help -> About AyaNova to determine if your version needs updating.

NOTE: the version stated in the screenshot below **__may not__** be the actual latest version. Refer always to the latest available via https://www.ayanova.com/download.htm



NOTE: the version stated in the screenshot above **__may not__** be the latest version. Refer always to the latest available via https://www.ayanova.com/download.htm

Steps to update an AyaNova network SQL Server configuration (version 4.2, 5.1, 6.6 or 7.x):

1. **Requirements before proceeding**
2. **Create backup of your SQL Server AyaNova database**
3. **AyaNova 7 installation**
4. **Apply your AyaNova subscription license(s) Activation Key**
5. **Update your database**
6. **Prep and install AyaNova 7 on networked computers**
7. **Install and configure AyaNova 7 optional programs on the server**
8. **Confirm your backup and restore procedures for SQL**

1. Confirm these four requirements BEFORE proceeding:

Do not proceed until you have confirmed **__yes__** to each of these requirements:

1) CONFIRM Do you know your AyaNova Administrator login name and password?

i. You NEED to know this to be able to correctly and fully perform the update in the steps further below. Failure to confirm this before you proceed may cause issues that may only be resolved by restoring from backup and redoing the update steps.
ii. If you don't know it, it could still be the default login name *manager* and password *letmein* - try it and confirm!
iii. If you do **not** know your AyaNova Administrator username and password, log in as another user that does have rights to the Administration Users grid, and edit the AyaNova Administrator username and password. It would be suggested to write down that username and password and keep in a safe place for future use too.

2) CONFIRM Do you have an active support & updates subscription as shown in your AyaNova database?

i. Log into your AyaNova, select Help -> About
ii. View your database's "**Support and updates until:**" date:
   1. If your About AyaNova does not show a "Support and updates until:"
      a. this means your present version is older than version 7.4
      b. you MUST purchase subscription(s) for your database before proceeding to the next requirement.
   2. If your "Support and updates until:" date has passed:
      a. this means you have let your subscription(s) expire without renewing before the renewal date.
      b. you MUST purchase subscriptions for your database before proceeding to the next requirement.
   3. If your "Support and updates until:" date is a future date:
      a. this means you do have an active support and updates subscription
      b. proceed to the next requirement

3) CONFIRM Does your version of AyaNova program files require updating?

1) Refer to your Help -> About AyaNova to view your version
2) Compare your version in your Help -> About AyaNova to that of the latest version at https://www.ayanova.com/download.htm
3) Any questions, do include all text from your Help - About AyaNova when contacting support.

A. **If your AyaNova version is already at the latest version shown at** https://www.ayanova.com/download.htm :

4) If you have received a new or renewal subscription AyaNova License Key via email, just apply it as per its instructions for a database that is already at the latest version.
5) That's it, you are done! No further update steps are needed.

B. **If your AyaNova is version 7.4 or newer BUT not the latest version AND your *Support and Updates until:* is currently valid by showing a future date:**
1) As your subscription(s) are active and not expired, your database is eligible to upgrade as well as receive support.
2) Go ahead and follow the steps below to update your AyaNova.
   i. NOTE: Skip the steps below related to applying a Subscription Activation Key as your database already has its current Subscription Key applied

C. **If your AyaNova is version 7.4 or newer BUT not the latest version, AND your *Support and Updates until:* has expired by showing a date that has past:**
1) As your subscription(s) have expired, you will need to purchase new subscription(s) before proceeding.
2) Once you have received your AyaNova License Key email message, perform the update steps below.

D. **If your AyaNova is between version 7.0 and 7.3**
1) purchase your resource and optional add-on subscriptions
2) Once you have received your AyaNova License Key email message, perform the update steps below.

E. **If your AyaNova version is 6 or older:**
1) purchase your resource and optional add-on subscriptions.
2) Confirm your report templates (that you normally use) run successfully with the latest version of AyaNova.
   i. Download and install the latest AyaNova onto a separate stand-alone computer with a sample database.
   ii. Export your custom report templates to files.
   iii. Import into your testing setup of the latest version of AyaNova.
   iv. Confirm your custom report templates load successfully with your testing setup of the latest version of AyaNova
   v. If you encounter errors attempting to load your custom report template, refer to https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-7-users/1987 and https://forum.ayanova.com/t/report-error-issue-for-some-ayanova-6-users/1832 to confirm the errors indicate that the report template must be replaced.

vi. Obtain copies of the latest sample report templates via https://www.ayanova.com/reporting.htm#replacement and customize as needed.

3) Proceed with the update steps below
4) Once the update is complete, you would remove the non-working report templates and import your new customized report templates into your live upgraded AyaNova

If have not previously purchased a subscription:
Subscriptions are required to receive support and to be able to apply upgrades to the latest version.
Refer to answers to common questions about licensing, pricing, purchasing on http://www.ayanova.com/purchase.htm
and/or contact us with all text from your present Help -> About AyaNova

If you had previously purchased subscription(s) but allowed your subscription to expire without paying the renewal(s):
Only active (non-expired) subscriptions are eligible for support and upgrades.
Only active (non-expired) subscriptions are eligible to renew at the discounted renewal subscription price.
You will need to purchase your subscriptions again, at the full subscription price.

If you have an active subscription with an upcoming expiration date for support and updates:
Your registered email address will receive a reminder from our payment processing partner that your renewal subscription will automatically be processed if your payment method is valid.
NOTE: your renewal at the discounted renewal price can only occur **if** your payment method provided (such as your credit card's expiry date) **is valid.**
Follow the email instructions to check your payment method is valid before the purchase date to ensure no loss of access to purchase at the discounted renewal price.
If your existing payment method with our payment processing partner is valid, your renewal subscription Key will be emailed following the process of the renewal charges (Monday to Friday).
If any issue or did not receive, contact us immediately with your details.

4) CONFIRM Is your existing SQL version supported by Microsoft, is your SQL optimized, have you edited the StartUp Parameters ?

a) As of 2019, Microsoft no longer provides mainstream support of SQL 2012 or lower.
b) Additionally, you may want to look into whether you have optimized your SQL yet
c) Additional StartUp Parameters to enter when using SQL 2012 or newer

2. Create backup of your SQL Server AyaNova database and edited files

a. Make sure all users and all AyaNova related programs connecting to the database are shut down fully.

- Make sure all users have exited out of the AyaNova program
- Make sure all remote access options are shut down via your IIS (i.e. Data Portal, WBI and/or MBI)
- Make sure that your application pool(s) used by your AyaNova remote access options are shut down
- Make sure the network Generator service is shut down

b. Make a backup of your AyaNova database using an approved SQL Server utility such as SQL Server Management Studio

c. Make a backup of your config.txt file so that you can refer to it/copy back if needed in steps further down

3. AyaNova 7 installation

Either follow A **or** B below.
If you encounter an issue following A, then restore and start from step 1 this time following B when get to this step

3.A. Install over top of existing AyaNova desktop program on your server

a. Make sure every AyaNova program and service is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

- On your server:
  - confirm that your Generator service is shut down

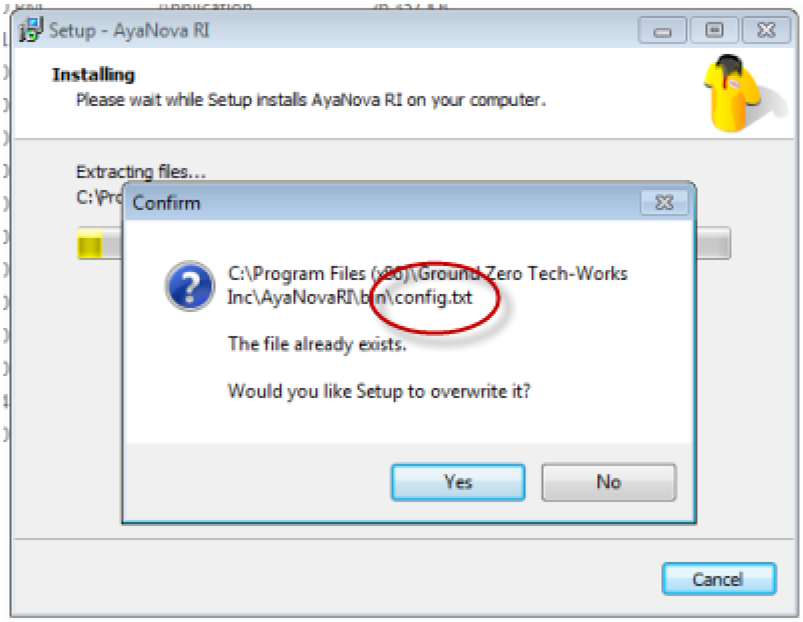
- o confirm that your IIS application pool(s) for your AyaNova remote access options are all shut down
- o confirm that any AyaNova desktop program and option is shut down

- On your workstations:
  - o confirm that any AyaNova desktop program and option is shut down

b. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

c. Install taking the check-marked previous selections that are already selected - this is OK, as long as you do not run before stated to do so

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



d. Continue with step 4.

3.B. Remove all AyaNova programs from the server -> install stand-alone -> copy back config.txt

a. Make sure every AyaNova program and service is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

- On your server:
  - o confirm that your Generator service is shut down

  - o confirm that your IIS application pool(s) for your AyaNova remote access options are all shut down
  - o confirm that any AyaNova desktop program and option is shut down
- On your workstations:
  - o confirm that any AyaNova desktop program and option is shut down .

b. It is recommended to uninstall any previous AyaNova programs via Control Panel -> Add/Remove Programs before installing a new version

- Uninstall plugins if installed OLI, OutlookSchedule, ExportToXLS, QuickNotify, AyaScript
- Uninstall WBI, MBI, RI
- Uninstall AyaNova
  - o if option to delete installed databases is displayed, select Yes. These would be the stand-alone sample trial databases from your original install that should have been removed anyways.

c. Download the latest AyaNova 7 setup file from https://www.ayanova.com/download.htm

d. Install as per stand-alone AyaNova installation steps (do not select to install anything else at this time - do NOT select to install the Generator, etc)

e. Run the AyaNova 7 program

f. Because this is a fresh install including installation of a sample database, the default AyaNova Administrator login and password will be pre-entered for you.

g. Log in and confirm loads successfully. Yes, it is expected that this opens to sample data, don't freak out.

h. Exit out.

i. Delete the existing sample database config.txt file in your AyaNova program folder.

j. Paste in the backup of your original config.txt file

k. Continue with step 4.

(Generator install, remote access options and other options would be installed at a later step below)

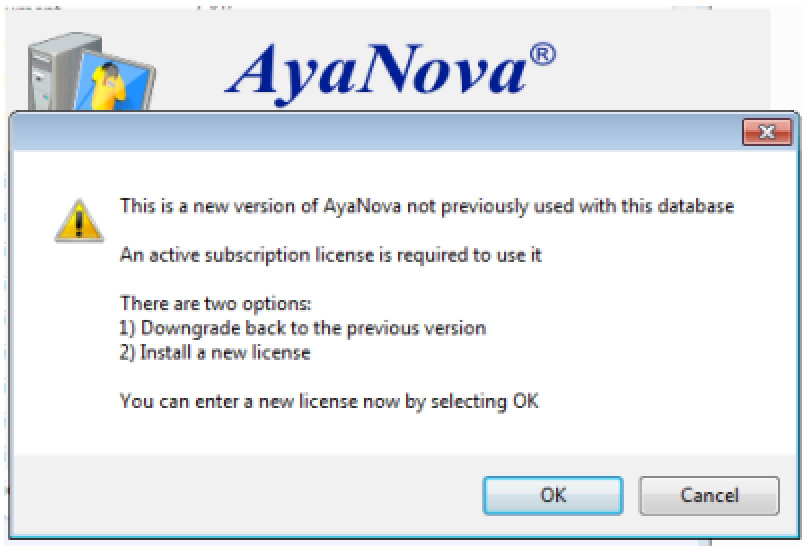
4. Apply your AyaNova subscription license(s) Activation Key **if applicable**

this step #4 will not occur if your existing AyaNova has an active current valid scheduleable resources subscription and is version is 7.4 or higher

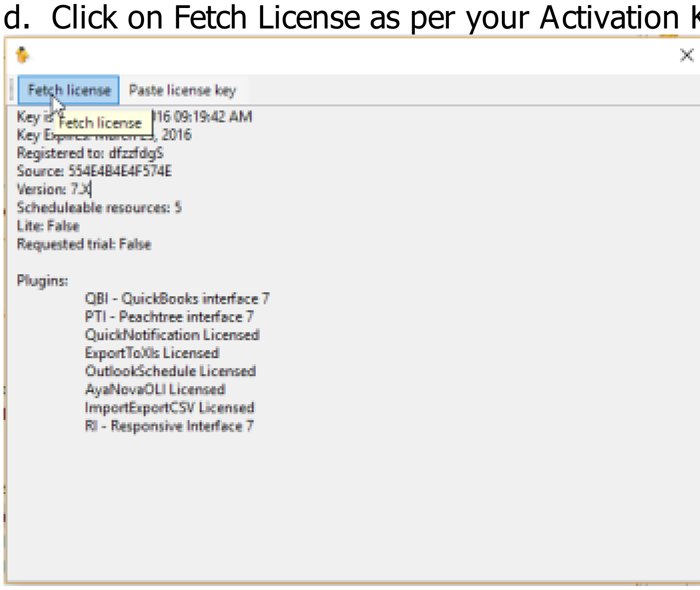
a. Run the AyaNova 7 desktop program on your server

b. Log in as your AyaNova Administrator account

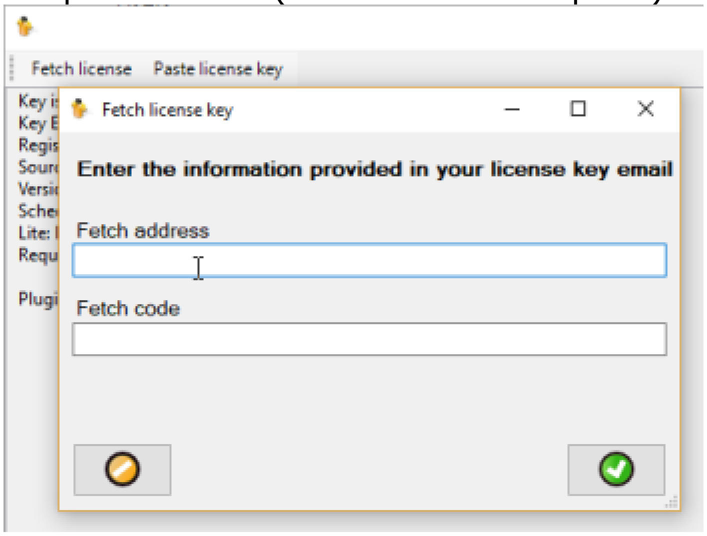
c. The following message will display (*reminder - this will ONLY display if your AyaNova does not presently have an active current valid subscription and is version 7.4 or higher*)



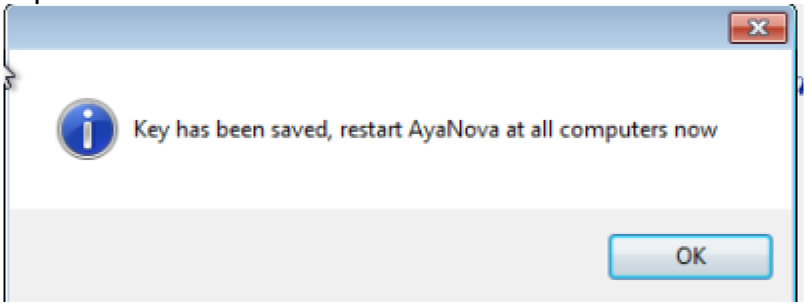
d. Click on Fetch License as per your Activation Key email instructions



e. Enter in your registered email address into the Fetch address field, and your Fetch code into the Fetch code. Click on the green checkmark OK button to complete the fetch (internet access is required)



f.Select OK and AyaNova will close. We are not done yet! Go to the next step.



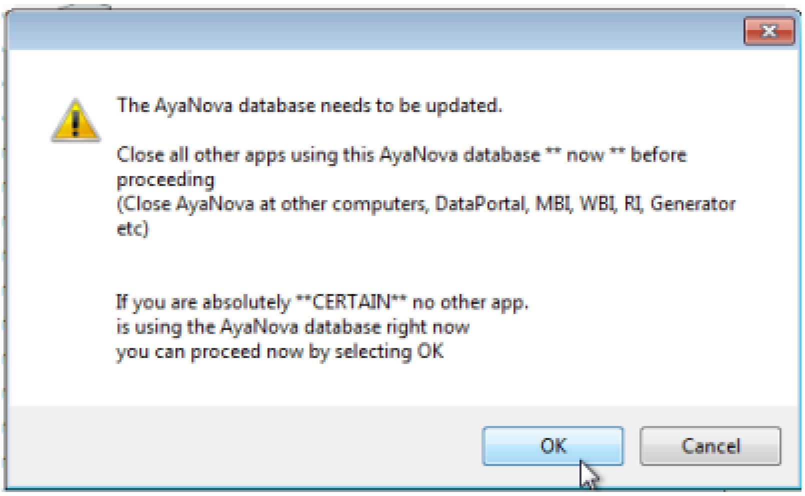
5. Update your database

Run the AyaNova 7 program.

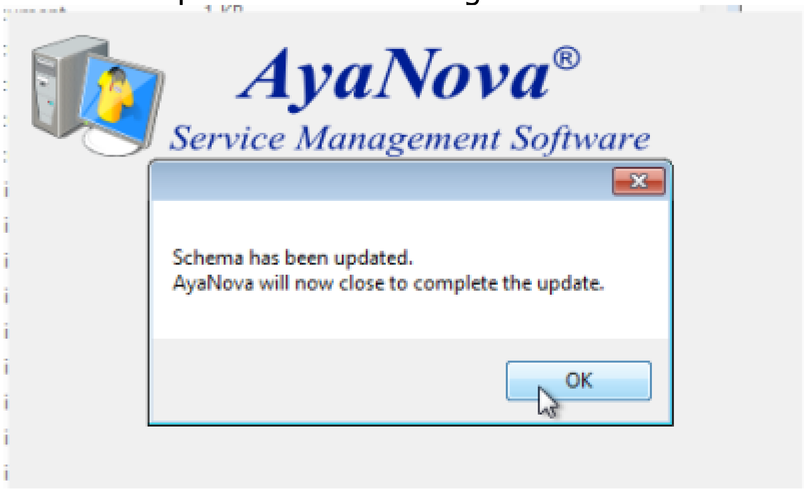
i. Log in as the AyaNova Administrator.

You MUST log in only as the AyaNova Administrator this first time.

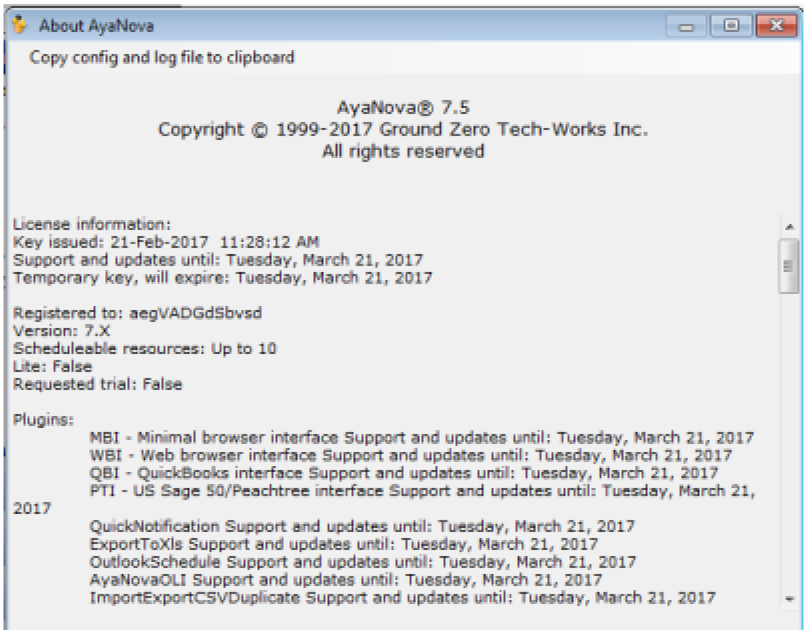
j. As per the message, make sure no one and nothing is accessing the AyaNova database



k. Schema update won't take long - let it finish!



l. Check your Help -> About AyaNova to confirm your licenses and to confirm your version.



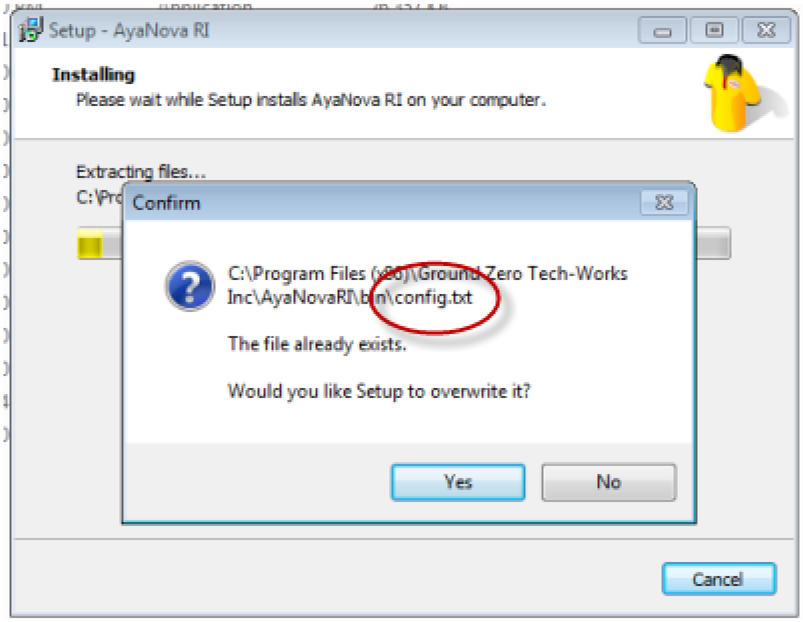
m. Now you can complete the update on the workstations and install any other options.

6. Prep and install AyaNova 7 on networked computers

a. perform step #7 of the network SQL Server configuration on your workstations so they too are updated to the latest AyaNova 7 program version.

b. Install and configure your licensed AyaNova 7 optional plugins (i.e. ExportToXLS, OLI, OutlookSchedule)

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



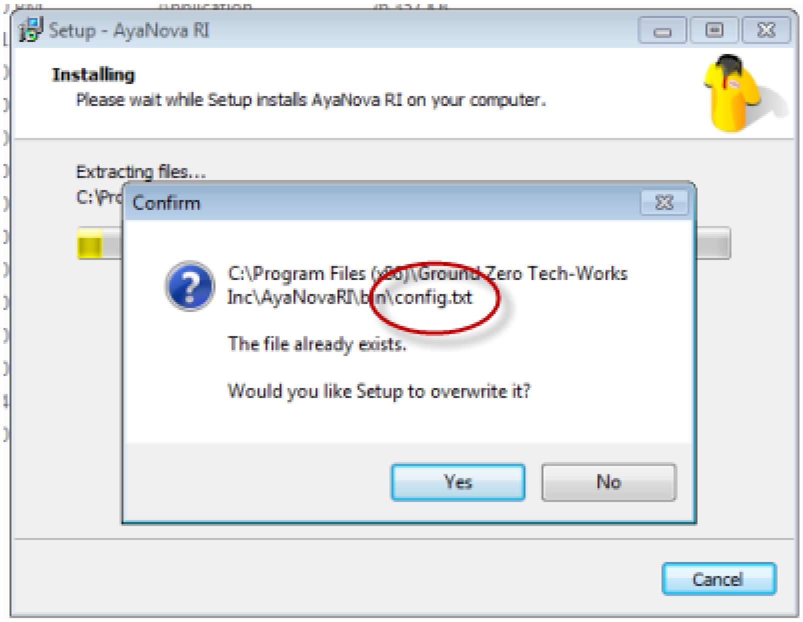
7. Install and configure AyaNova 7 optional programs on the server (Event Generator, RI, WBI, MBI, and/or DataPortal) as needed

It is recommended to install after having uninstalled, so no accidental

See in this Help documentation:

- AyaNova Network Generator installation steps
- AyaNova Data Portal installation and configuration steps
- RI installation and configuration steps
- WBI installation and configuration steps
- MBI Help file for requirements, installation, configuration and use

When installing overtop of an existing installation, select **No** when receive the following message (so that you keep your existing custom config.txt confiugration connection file)



8. **Confirm your** backup and restore procedures for your AyaNova SQL database

See also:
What's new in AyaNova 7
What's new in AyaNova 6
What's new in AyaNova 5

Moving from AyaNovaLite to full AyaNova

12 Moving from AyaNovaLite to full AyaNova

NOTE: AyaNova Lite is no longer available for new subscribers.

NOTE: You can move from AyaNovaLite up to AyaNova, but can not move from the full AyaNova to the previously provided AyaNova Lite.

NOTE: the Activation Key you apply to your database is what determines whether you are accessing an AyaNovaLite database or a full version AyaNova database.

If you were previously licensed for AyaNovaLite, and have purchased the AyaNova Upgrade from AyaNovaLite schedulable user license, follow these steps to move to the full version of AyaNova

1. Make sure you have exited out of your AyaNova Lite

2. Create a backup of your AyaNovaLite database.

   Refer to the AyaNovaLite Help file for Backup & Recovery for backup steps

3. Load your AyaNova Lite and apply the AyaNova 7.x Activation Key

   a. Double-click on your AyaNova desktop icon to load your AyaNova Lite

   b. Copy the unaltered text from between the -=-=-=-=-=- in your Activation Key message, to the Windows clipboard by highlighting the text, right-click, select Copy.

   c. Select Help->License from the main menu to open the license key entry window.

   d. Select the menu option to Fetch license. Enter as needed from your Activation Key email message. Exit out of your AyaNova Lite

   e. Now double-click on your AyaNova desktop icon, this time the full AyaNova will load because your database is now licensed for the full AyaNova

   f. Log in as the AyaNova Administrator (default login name is manager with password letmein).

4. Your database is now licensed for full AyaNova.

6. It is recommended that you rename your database so that it is easier to follow the networking steps and backup/recovery steps in this Help file.

a. Exit out of your AyaNova

b. Move to your AyaNova database folder %AllUsersProfile%\AyaNovaData folder which would have been the same folder and file you backed up as per step #1 above.

- On a Windows 7 and newer OS computer, this usually is the C:\ProgramData\AyaNovaData folder
- On older OS such as XP or 2003 computer, this usually is the C:\Documents and Settings\All Users\Application Data\AyaNovaData folder

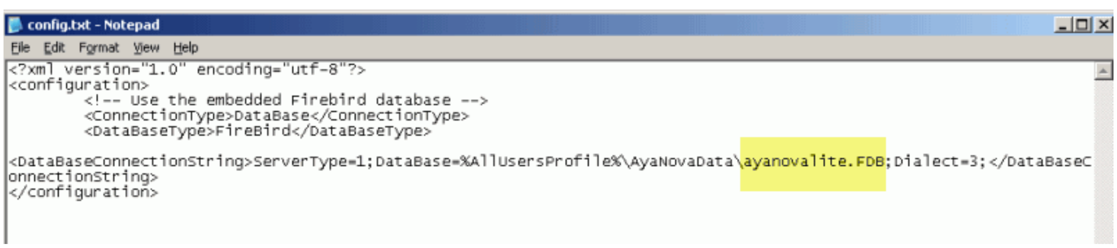
c. Rename your AYANOVALITE.FDB database file to AYANOVA.FDB

d. Open Windows Explorer and move to your AyaNova program folder

- This is usually C:\Program Files (x86)\Ground Zero Tech-Works Inc\AyaNova (or C:\Program Files\... if on a 32 bit computer)

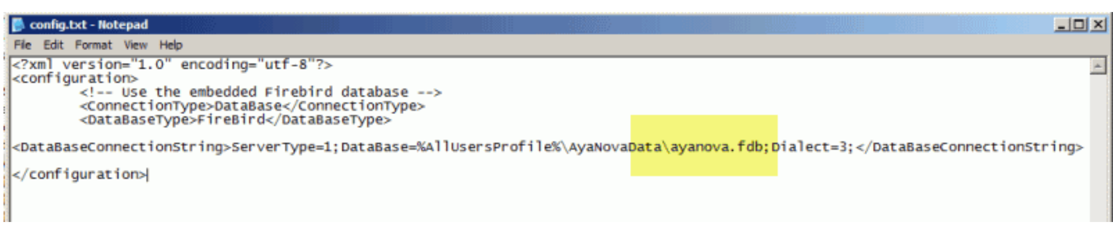
c. Open the config.txt file using only NotePad

d. Edit the database name in this file from AYANOVALITE.FDB to AYANOVA.FDB



```
config.txt - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
        <!-- Use the embedded Firebird database -->
        <ConnectionType>DataBase</ConnectionType>
        <DataBaseType>FireBird</DataBaseType>

<DataBaseConnectionString>ServerType=1;DataBase=%AllUsersProfile%\AyaNovaData\ayanovalite.FDB;Dialect=3;</DataBaseConnectionString>
</configuration>
```



```
config.txt - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
        <!-- Use the embedded Firebird database -->
        <ConnectionType>DataBase</ConnectionType>
        <DataBaseType>FireBird</DataBaseType>

<DataBaseConnectionString>ServerType=1;DataBase=%AllUsersProfile%\AyaNovaData\ayanova.fdb;Dialect=3;</DataBaseConnectionString>

</configuration>
```

e. Save the file

- If you get a message that you do not have rights to save this file, or your computer attempts to force you to save with a different name, STOP.
- Exit out of the config.txt without saving
- Go to Start -> All Programs -> Accessories -> right-click on Notepad -> select Run as Administrator
- With Notepad opening now, browse to your AyaNova program folder and open the config.txt file

- Now you can edit and save the config.txt file.

f. Now run your AyaNova program to confirm connecting to the correct licensed database still.

- If you encounter any issues doing these steps - let us know so we can help!
- Email AyaNova Support at support@ayanova.com providing details of what your AyaNova Lite database was originally called and where located; provide details of exactly what you renamed it to, provide details of what you edited in the config.txt, attach copy of your edited config.txt file and attach copy of your ayalog.txt file to your email request

7. Refer to the networking steps to configure AyaNova for network use if desired

8. Refer to the Backup & Recovery section for backing up your configuration of AyaNova

End User Software License

13 End User Software License

END-USER SOFTWARE LICENSE AGREEMENT

THIS IS AN IMPORTANT LEGAL AGREEMENT. PLEASE READ IT CAREFULLY.

This End-User License Agreement (the "Agreement") is a legal agreement between you and Ground Zero Tech-Works Inc. ("Ground Zero") for Ground Zero's AyaNova software, including all previous versions thereof and all replacements, supplements, upgrades and updates thereto provided to you by Ground Zero (the "Software") and all associated documentation (the "Documentation").

If you are installing or using the Software at work or under contract, then you are contracting on behalf of the corporation or organization for which you are working. You must ensure you have the legal authority and ability to do so.

IF YOU CLICK "YES", YOU ACCEPT THE TERMS AND CONDITIONS OF THIS AGREEMENT IN THEIR ENTIRETY AND AGREE TO BE LEGALLY BOUND BY THEM.
If you do not agree to the terms of this Agreement, you may not use the Software.

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3. Evaluation Version. The Software is available in either an "evaluation" version or a "registered" version. All copies of the Software downloaded from Ground Zero's web-site begin as evaluation versions. If Ground Zero has not given you a license key and permission to use the registered version, you may only use the evaluation version. The functionality of the evaluation Software will be significantly limited. The evaluation version may only be used for evaluating the software in preparation of purchase, but Use of the evaluation software with no intention of purchase constitutes violation of Restriction on Use. You may not modify the Software or any part of the Software to gain access to additional features or functionality. You may register the Software by paying the fee and agreeing to the terms and conditions set-out on Ground Zero's website at www.ayanova.com.

4. Databases. The Software stores all user data in a single database file (the "Database"). If Ground Zero has given you a license key and permission to use the registered version of the Software, you may only use that license key in association with one Database. A separate, unique license key is required for each Database you create, maintain or access using the registered version of the Software. You may also purchase a replacement license key from Ground Zero to further increase the functionality of the Software; however, once you have installed the replacement license key you may no longer use

the original license key, and you may still only use the replacement license key in association with only one Database. You may copy the Databases to any storage medium other than a computer, but only for backup purposes.

5. Ownership and Copyright. Ground Zero is the sole owner of all right, property and title in and to the Software, the Documentation, and the copyright, logos, trade-marks, trade names, trade secrets, confidential information, patents, inventions, images, text, video, audio, and designs therein.

6. Service. Ground Zero may provide technical support and service to you upon your request based on your subscription(s). The price and other terms and conditions of Ground Zero's services are set-out on Ground Zero's website at www.ayanova.com, and may be changed at any time by Ground Zero.

7. Termination. Without prejudice to any of Ground Zero 's other rights in this Agreement or at law or equity, this Agreement will immediately terminate if you fail to comply with any of these terms and conditions. Upon termination, you must destroy all copies of the Software and Documentation. The provisions in sections 7, 8, 9 and 10 of this Agreement will survive the termination of this Agreement.

8. Disclaimer of Conditions and Warranties. To the maximum extent permitted by applicable law, GROUND ZERO PROVIDES THE SOFTWARE "AS IS" WITHOUT WARRANTY OR CONDITION OF ANY KIND, INCLUDING BUT NOT LIMITED TO EXPRESS OR IMPLIED WARRANTIES OR CONDITIONS OF TITLE, NON-INFRINGEMENT, CORRESPONDENCE TO DESCRIPTION, MERCHANTABLE QUALITY AND FITNESS FOR A PARTICULAR PURPOSE. GROUND ZERO DOES NOT WARRANT THAT THE SOFTWARE WILL MEET YOUR REQUIREMENTS, THAT ITS OPERATION WILL BE ERROR-FREE, THAT IT WILL PERFORM OR APPEAR EXACTLY AS DESCRIBED IN THE DOCUMENTATION, OR THAT ITS OPERATION WILL NOT NEGATIVELY AFFECT OTHER SOFTWARE OR HARDWARE. THE ENTIRE RISK AS TO THE QUALITY AND PERFORMANCE OF THE SOFTWARE REMAINS WITH YOU.

9. Exclusion of Liability. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT WILL GROUND ZERO BE LIABLE TO YOU OR ANY THIRD-PARTY FOR ANY DIRECT, INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES (INCLUDING BUT NOT LIMITED TO DAMAGES FOR LOSS OF PROFITS, INFORMATION OR PRIVACY, FOR BUSINESS INTERRUPTION, FOR PERSONAL INJURY, FOR FAILURE TO MEET ANY DUTIES INCLUDING THOSE OF GOOD FAITH AND OF REASONABLE CARE, FOR NEGLIGENCE, AND FOR ANY OTHER LOSS WHATSOEVER) ARISING OUT OF OR IN ANY WAY CONNECTED TO THE USE OF OR INABILITY TO USE THE SOFTWARE, EVEN IN THE EVENT OF THE FAULT, TORT, NEGLIGENCE, STRICT LIABILITY, BREACH OF CONTRACT OR BREACH OF WARRANTY OF GROUND ZERO, AND EVEN IF GROUND ZERO HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. .

10. Limitation of Liability. If, despite the limitations in this Agreement, Ground Zero becomes liable to you or to any third party, in no event will Ground Zero be liable for any monetary amount that, in the aggregate, is greater than the total amounts paid or due Ground Zero pursuant to this Agreement.

11. Governing Law. This Agreement and the relationship between the parties will be interpreted according to the laws in force in British Columbia, Canada. The courts of British Columbia will have jurisdiction over all claims, disputes, and actions related to this Agreement, and the parties attorn to the jurisdiction of those courts.

12. Enurement. This Agreement will bind and enure to the parties hereto and their respective lawful successors and permitted assigns.

13. Entire Agreement. This Agreement forms the entire agreement between you and Ground Zero and there are no agreements collateral to this Agreement. This Agreement supercedes all prior written,

oral and other agreements between you and Ground Zero with respect to the Software and Documentation and any parts or components thereof. No term or provision of this Agreement may be changed, waived or terminated except by a further written or electronic agreement between you and Ground Zero.

14. Assignment. Only Ground Zero may transfer or license any of its rights under this Agreement. You may not license any of your rights under this Agreement, but you may transfer the Software and Documentation to another user if you transfer all of your rights under this Agreement to that new user, cease using all the Software and Documentation, erase and destroy all copies you have of the Software or Documentation, ensure the new user agrees to the terms and conditions of this Agreement, and provide Ground Zero of all these transfer agreements via signed and dated letterhead from both parties. Administration fees will be charged for replacement license keys required.

15. Severability. If any provision of this Agreement is held to be invalid, illegal or unenforceable, the validity, legality and enforceability of the remaining provisions will not in any way be affected or impaired.

16. Further Assurances. You will execute and deliver to Ground Zero any additional documents and take any additional steps that may be required to give full effect to the intent expressed in this Agreement.

17. Notice. All notices and other communication to Ground Zero to be made in writing and delivered to 05 - 3610 Christie Parkway, Courtenay BC CANADA V9N 9T6 or emailed to legal@ayanova.com

18. Processing of Personal Data - Ground Zero will comply with all applicable laws pertaining to personal data including GDPR (General Data Protection Regulation).

A: Data obtained

Information about you (such as your email address, name, company information) is provided to us when you email us (such as when you email us directly or email us via our online form) or when you register on our AyaNova Support Forum.

Information you provided in your order (such as your company name, company contact information, contact name, along with the AyaNova products/services/subscriptions purchased) is sent to us from our payment processing partner with whom you placed your order.

B: Marketing

Ground Zero will not share your information for marketing purposes with companies outside Ground Zero Tech-Works Inc.

C: Use and Sharing of Data

Personal data you provided when you contact us (such as when you email us directly, email us via our online form, or register on our AyaNova Support Forum) will be used to provide technical support, to respond to user inquiries, to provide temporary Key(s), to maintain case and bug issues reported by you, and to send you relevant AyaNova information.

Ground Zero will also receive your company information you provided to our payment processing partner, so that we may process your product/service/subscription order.

Ground Zero may monitor usage of Ground Zero websites to gather statistical information that it may disclose to third parties. This data will only be shared in an anonymised form.

In the event that your AyaNova database is hosted with a third party and support is requested by you or your hosting company, exchange of your contact information and company information may occur so that we may confirm eligibility for support and to provide support.

D: Data Security

Ground Zero has implemented measures to protect customer data against improper access, disclosure, or loss. The security measures and processes that are in effect include but are not limited to:

(i) Ground Zero expressly commits to restrict access to customer data to only those individuals who require such access to perform their job function.

(ii) Login transactions are encrypted with HTTPS (TLS) and passwords are stored hashed.

(iii) Encryption of all data stored in backup.

(iv) Ground Zero will only provide your personal data to third parties where it is obliged to do so by law.

E: Deleting of Data

(i) Temporary key requests without subsequent purchase will be deleted within one year.

(ii) Email correspondence without subsequent purchase will be deleted within two years except where required for maintaining case and support history.

(iii) Email correspondence including temporary key requests with subsequent subscription purchase will be retained for the life of your subscription. Once a subscription has been allowed to lapse (not renewed), correspondence will be deleted within two years except where required for maintaining case and support history.

(iv) Customer information obtained through AyaNova Support Forum registration will be deleted within three years of forum login inactivity.

(v) Purchase information along with company information as provided by our payment processing partner will be retained for a minimum of six years after the end of the taxation year to which they relate as per the Canada Revenue Agency and no longer than 10 years after which will be deleted within one year.