

WBI 7 Help

USER MANUAL

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Ground Zero Tech-Works Inc**

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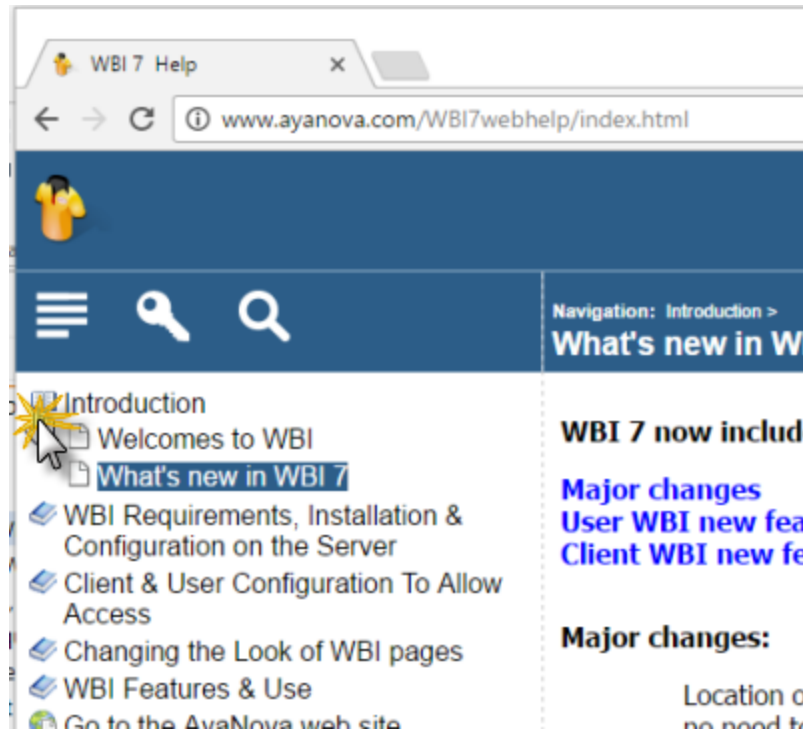
Introduction

1 Introduction

1.1 Welcomes to WBI

Use of this online manual:

To view topics, click on the chapter headings to expand



This online manual provides information on configuring and setting up the optional AyaNova WBI server, configuring users and clients to access, and on feature use different from that of the AyaNova program.

Screenshots depicted in this manual may not display exactly as your copy of WBI does, as dependant on screen size and skin in use.

You should be familiar with the AyaNova program before using WBI, as only differences between AyaNova and WBI will be outlined in this manual.

Review the AyaNova Help File along with the trial AyaNova program if you are not yet familiar with the AyaNova program.

Note that there is a separate Client's online manual for the client's account WBI interface.

WBI Features & Use:

We have made every effort to ensure that the optional add-on WBI is as easy to use and similar as possible to AyaNova for windows, however due to the nature of web applications and technology there are some differences that are inevitable and out of our control. If a *completed* form in WBI does not operate exactly as it does in AyaNova for Windows or is missing certain features or they operate differently this is a result of what is possible with the current state of the art technology we are working with.

You should expect some differences which are outlined in the section "WBI Features & Use".

1.2 What's new in WBI 7

WBI 7 now includes the following new features and changes:

Major changes

User WBI new features and improvements

Client WBI new features and improvements

Major changes:

Location of installation folder is C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI - no longer includes the version number in the folder name so no need to change your URL when upgrade to future versions.

Name of WBI web site created is AyaNovaWBI - - no longer includes the version number in the folder name.

Make a note of this for yourself and your customers for the URL used when logging in may affect your URL.

Object.Workorder right no longer relevant. If have clients that log into WBI, make sure their security group has Object.WorkorderService set to minimum Read Only

User WBI new features and improvements:

Signature capture via remote access options MBI and WBI

Capture a signature online via WBI from your client without additional software nor with special hardware - just a mouse is needed! And have your client's signature show on the report preview / printout too!

Framework .NET 4 compatibility:

Using the latest Microsoft.NET Framework not only provides you with the latest performance improvements of Framework.NET 4, but also simplifies the WBI installation as no need to also make sure IIS 6 Mgmt capability and its files are properly installed.

Set fields of the workorder, quote and preventive maintenance header to not display:

If you customize via the full AyaNova Windows user interface the workorder, quote or PM header fields to not display to minimize what fields your staff works with, those same disabled fields also will not display when logged in via WBI.

Set subsections of workorder entry screen to not show (i.e. Expenses, Loans, etc):

If you set via the full AyaNova Windows user interface whether users of a security group can even see a subsection or not of the service workorder (and quote and PM), the same will apply when viewing via WBI.

This is useful for those that would like to "clean up" the order entry screen to not show sections not used such as for example if don't provide Outside service or Loans) or useful for those that don't want certain users to see certain subsections of a workorder (i.e. may not want a user to see Outside service details)

Custom Fields grid only shows if enabled:

As with the full AyaNova, the Custom Fields grid now only shows in the Service navigation pane if you have enabled custom fields for workorder items. If you have enabled Custom Fields for workorder items and not showing in WBI, just exit out and log back in.

Combo boxes now multi-character autocomplete:

Instead of having to only use your mouse to scroll down lists, the multi-character autocomplete feature means you can just start typing in the characters of the item's name and WBI will "jump" to it for you to save you time!

Client WBI new features and improvements:**Header and Footer html for Client's WBI:**

Keep your customer assured that they are logged in to your approved site
- include either or both a footer and header to display on each Client WBI web page with your own logo and contact information, or any other information you would like to include for your client to see.

Header and Footer html for WBI login page:

You can also have this header/footer display on the login page itself in addition to the your company logo on the login page

Wikipage associated with service workorder now accessible by Client through WBI if given rights to do so:

Set the security group object rights for Object.WikiPage for your WBI client, and when they are logged in, they can view the associated Wiki page with each service workorder

Unit serviced now displays in Client's WBI workorders grid:

The unit selected in the workorder now displays in the service workorder grid column Unit: for the client when logged in via WBI.

If multiple workorder items each with a unit selected in one workorder, each unit will display one after the other in the column. The client can easily change the size of the column by adjusting the column header with their mouse if needed.

And the client can easily use the filter feature to filter to view only workorders where a specific unit is selected.

Easier menu option to quickly select to view only non-Closed workorders or all:

In addition to the existing filter feature, the Service Workorders grid now includes a menu option for your client to easily click and select Refresh to see all open and Closed workorders, or just open workorders.

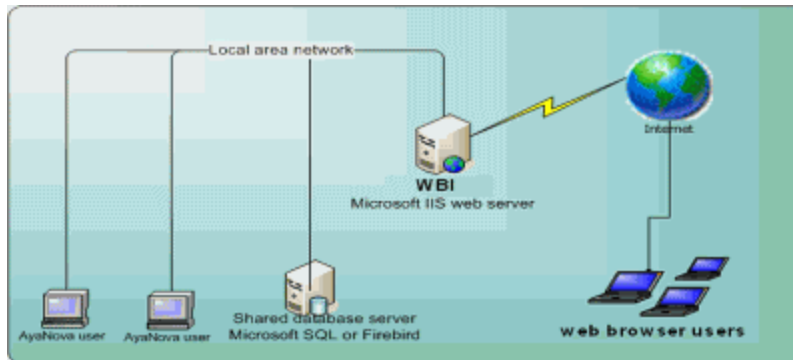
Combo boxes now multi-character autocomplete:

Instead of having to only use your mouse to scroll down the client selection list if logged in as a head office, the multi-character autocomplete feature means you can just start typing in the characters of the client's name and WBI will "jump" to it for you to save you time!

WBI Requirements, Installation & Configuration on the Server

2 WBI Requirements, Installation & Configuration on the Server

2.1 WBI Server Requirements Prior to Installation & Configuration



The AyaNova WBI (Web Browser Interface) works with Microsoft Internet Information Server (IIS) to provide web browser access to the AyaNova database.

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 WBI
- Computer requirements:
 - Recommended minimum is Windows 7 with IIS7 but is compatible with as old as XP Pro and IIS5
 - approximately 55MB 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

WBI Requirements, Installation & Configuration on the Server¹²

- Your router/firewall has a static external IP address
- Your router/firewall configured for port forwarding of your IIS computer.

NOTE regarding dynamic or static ip:

- 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 bring up your WBI login.

OR

- if your company is unable to obtain a static IP address, a possible suggestion may be to follow <http://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 WBI confirming you can successfully access, and only then make any changes, being sure to check after each change to see if affects WBI 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+
- If your browser version is older than those listed in the example browsers above and you want to check if it is compatible or not, just go to the online demo RI at the bottom of and try out all features including performing the signature capture steps to confirm works with your device's web browser.
- Due to the screen size requirements of WBI, it is not expected that WBI would be used with mobile devices. Refer to the optional remote access add-on RI and the optional add-on MBI for your schedulable users with mobile devices to use on the road.
- Opera may have the problems with filter drop down lists due to some funky programming on their part that we continue to await word on.
- The web.config file for WBI 7 includes the line `<add key="IE9ForceCompatibilityMode" value="true"/>` to force compatibility mode if using Internet Explorer 9 (IE9) as at the time of this Help documentation page last update, the third party controls (combo boxes, printing, etc) used by WBI were not specifically compatible with the beta Internet Explorer 9. When these IE9 issues are resolved, you can easily edit the web.config for this statement to "false" if you wish to use IE9.
- The faster the Internet connection the faster the response of data displaying on your web browser.

2.2 Step #1: WBI Server 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 WBI on**
- B. AyaNova is networked and is the latest version.**
- C. AyaNova is installed on this computer and successfully runs**
- D. Run the AyaNovaWBI setup file to install WBI**

A. Is IIS (Internet Information Services) installed on the computer you want to run WBI 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.

- Once installed, run Windows Updates again and apply **all** recommended updates
- Reboot again and check Windows Updates again, before proceeding with the installation.

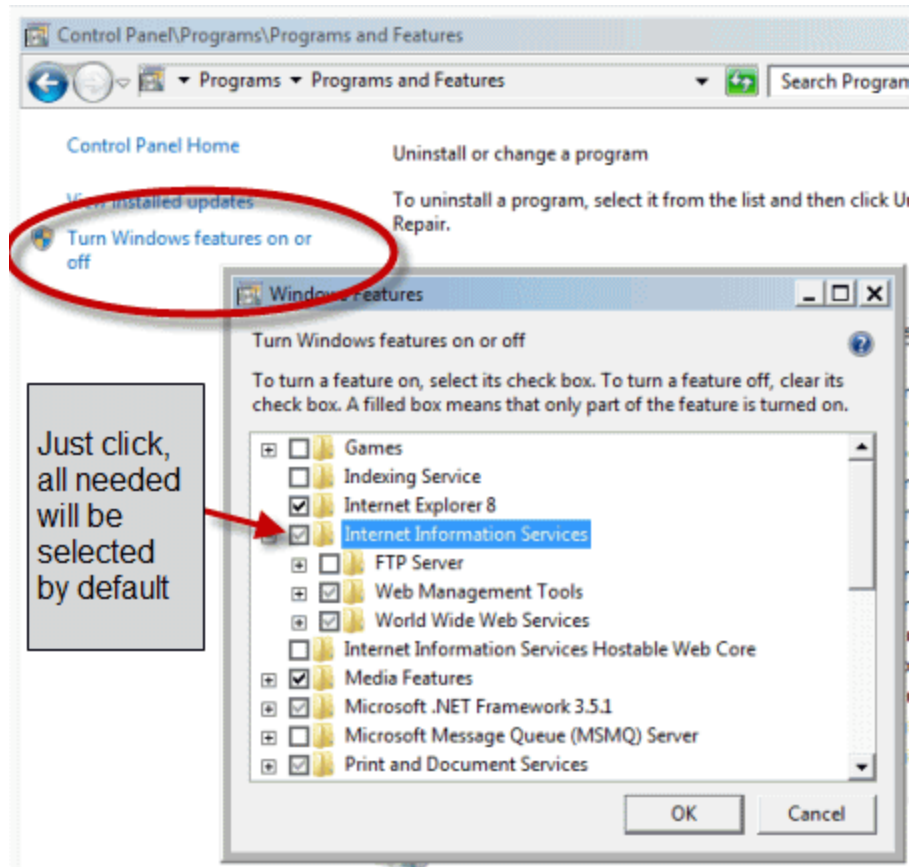
Below is example screenshot of selecting Internet Information Service on a Windows 7 32bit operating system

FTP Server is not needed

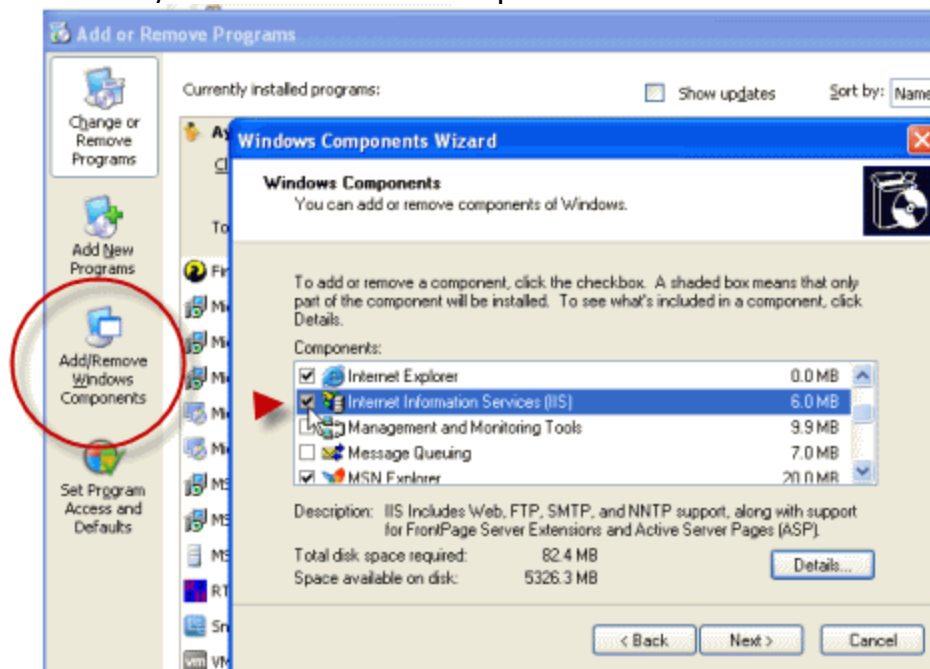
Do make sure that **all** IIS Web Management Tools and WWW Services are checkmarked

Do make sure that **all** IIS 6 aspects listed under Web Management Tools and WWW Services of IIS are checkmarked

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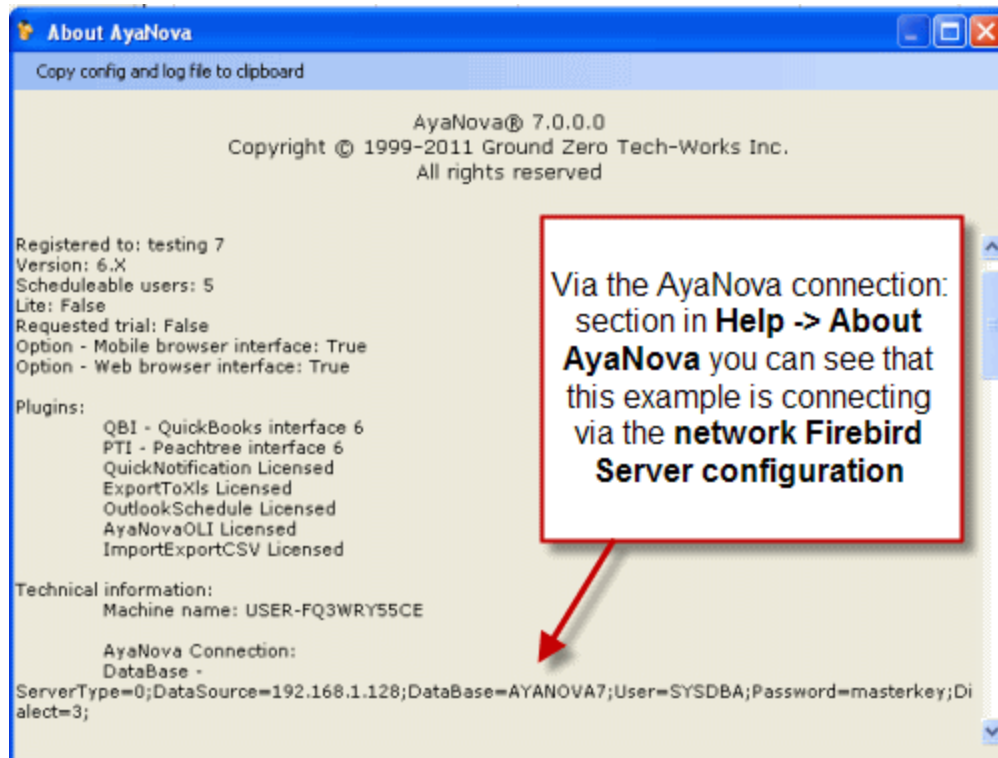


Below is example screenshot of adding IIS onto an older operating system XP 64 via Add/Remove Windows Components



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 WBI will not run correctly if using the default stand-alone installation of AyaNova database.
- 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 WBI setup file

- a. Download the WBI installation file **AyaNovaWBISetup.exe** from <https://www.ayanova.com/download.htm> to the local hard drive of the computer where you will be installing.
- b. Run the **AyaNovaWBISetup.exe** file to begin the installation, read all messages and select **Next** where indicated until installation is complete

c. By default, WBI will be installed to the folder C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI

d. Once installation is complete, continue with configuration and testing

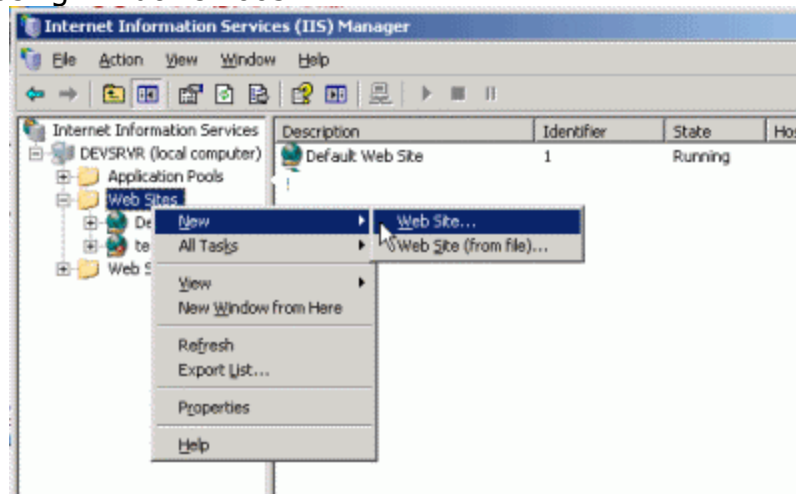
If you encounter any errors or issues refer to WBI Server Common Issues

2.3 Extra: If can not use Default Web Site

NOTE: If on your server you can not 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:

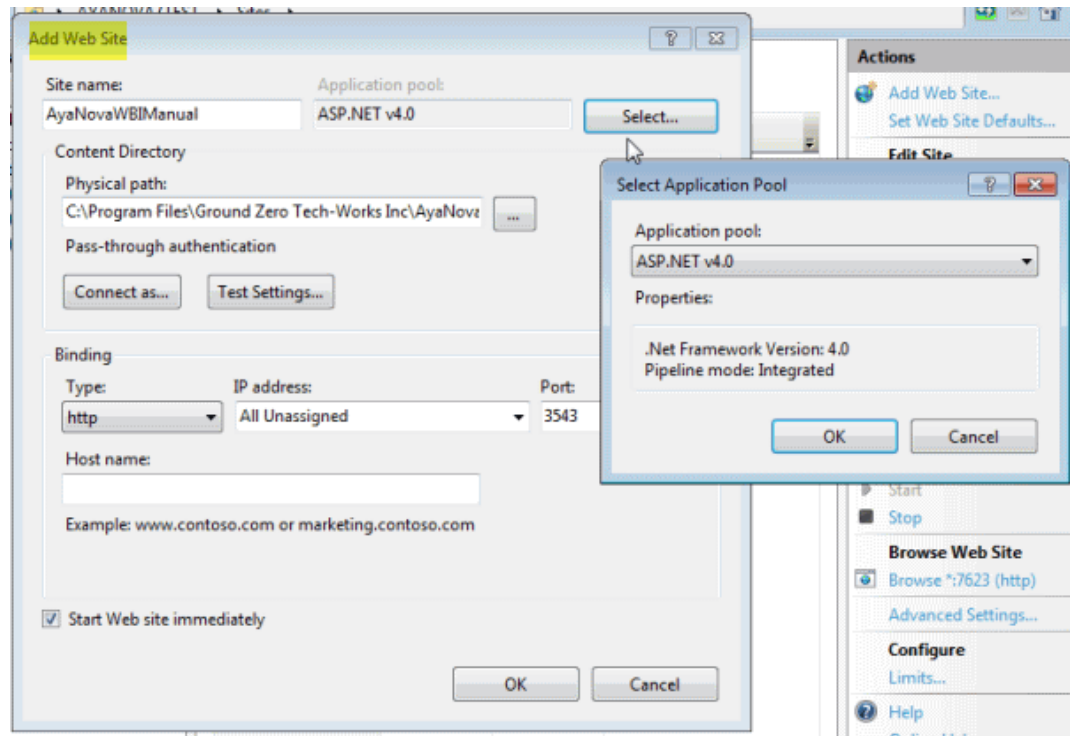
1. Perform all steps as per Step #1: WBI Service Installation
2. In IIS Manager, delete the installed web site AyaNovaWBI under Default Web Site (this should not remove the installed files)
3. In IIS Manager, create a new web site pointing to the C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI folder with its own port #

If using Windows 2003:

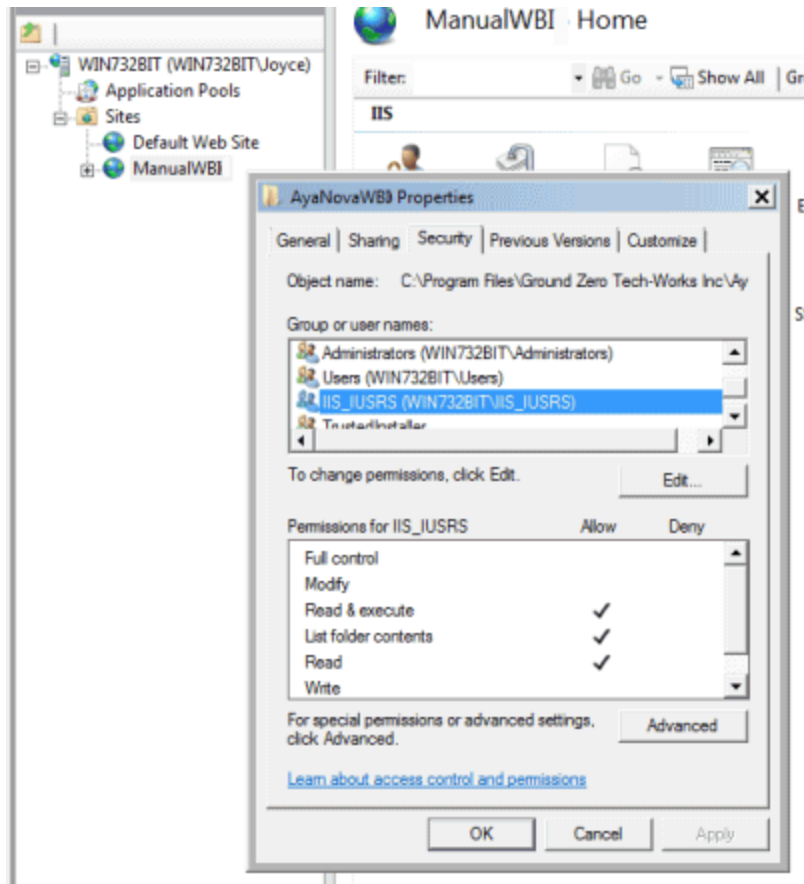


- Allow anonymous access to the web site
- The web site access permissions must be at minimum Read, Run scripts and Execute
- Make sure .NET 4 is selected in the ASP.NET tab for this new site
- You may or may not have to set the IP Address property of your new website to the computer's actual internal ip address instead of (All Unassigned)

If using Windows 7 and newer:

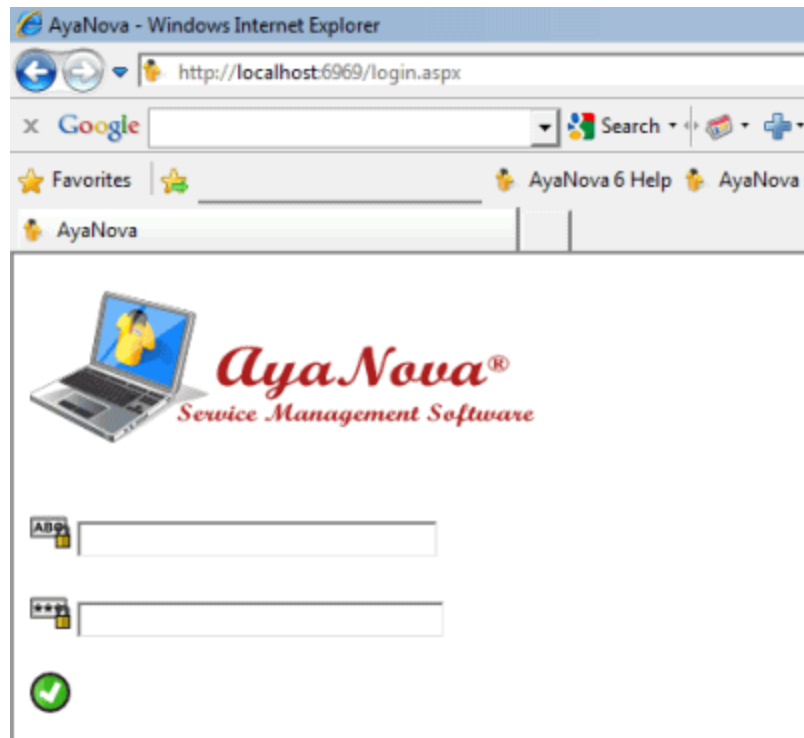


- Add web site
- Select **ASP.NET v4.0** application pool (uses Integrated managed pipeline mode)
- Browse to location of WBI
- Set port number if needed
- Right-click on the newly created site, select Security tab, see that IIS_USERS is listed. Add if not.



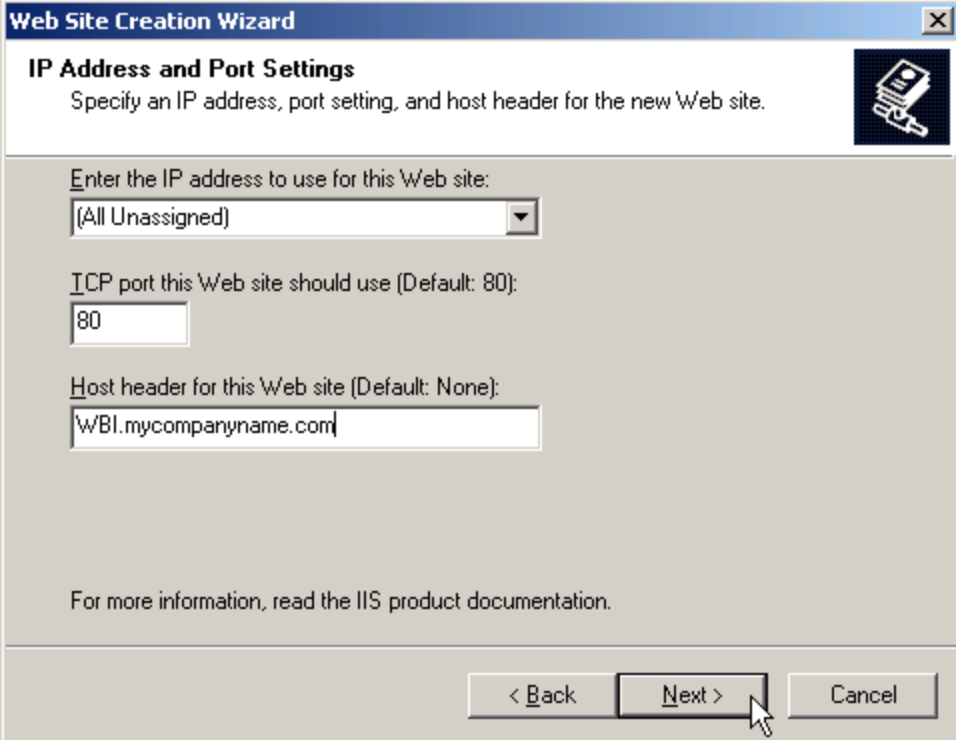
4. Stop and Start this new web site that you just created
5. As the site is not under Default Web Site, note of course that the port # you set for your router in the Configuration steps would be for this new AyaNova WBI site itself, not for Default Web Site.
6. As the site is not part of Default Web Site, the URL for testing on the server initially would now no longer include the folder name AyaNovaWBI as per the screenshot example below:

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NOTE: If you want a new virtual web site pointing to the AyaNovaWBI folder and you also want to use a host name instead of an IP address in your URL, try the following:

- a. Install as above
- b. Be sure to enter in a Host Name: in the steps



The image shows a Windows-style dialog box titled "Web Site Creation Wizard". It has a blue title bar with a close button (X) in the top right corner. Below the title bar, the text "IP Address and Port Settings" is displayed in bold. Underneath, a subtitle reads "Specify an IP address, port setting, and host header for the new Web site." To the right of this text is a small icon of a floppy disk with a plus sign. The main area of the dialog contains three input fields: a dropdown menu for the IP address set to "(All Unassigned)", a text box for the TCP port set to "80", and a text box for the host header set to "WBI.mycompanyname.com". Each field is preceded by a label: "Enter the IP address to use for this Web site:", "TCP port this Web site should use (Default: 80):", and "Host header for this Web site (Default: None):". At the bottom of the dialog, there is a line of text: "For more information, read the IIS product documentation." Below this text are three buttons: "< Back", "Next >", and "Cancel". A mouse cursor is pointing at the "Next >" button.

Web Site Creation Wizard

IP Address and Port Settings
Specify an IP address, port setting, and host header for the new Web site.

Enter the IP address to use for this Web site:
(All Unassigned)

TCP port this Web site should use (Default: 80):
80

Host header for this Web site (Default: None):
WBI.mycompanyname.com

For more information, read the IIS product documentation.

< Back Next > Cancel



- Note of course that if use port 80, to make sure no other application or web site is using that port number (such as Default Web Site).
- And if you try to go to your host name URL as per above, and instead you just get an error page, but if you go to the IP address of the server or localhost and it definitely works, it may be that you need to actually **create a custom DNS entry for your host header** so that the changes propagate to the rest of the root DNS servers throughout the world so everyone knows how to get there now. Providing help with this is outside of our AyaNova support. You will want to contact your DNS person and computer support for your network.

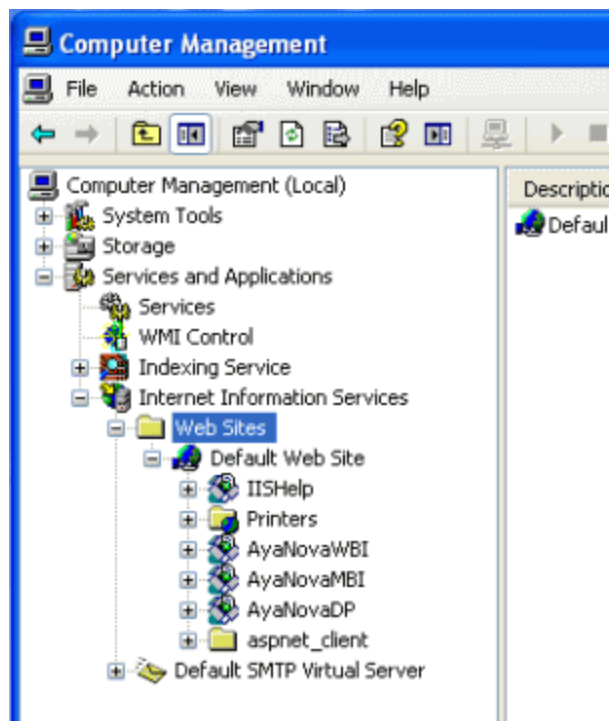
2.4 Step #2: WBI Server Configuration

Configuration of WBI 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 then second after that are the steps **if using Windows 7 and newer**.

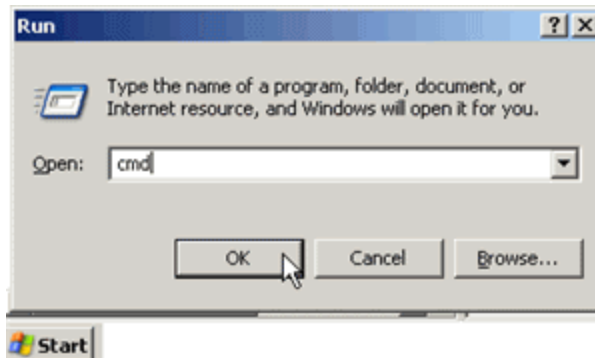
Steps to perform if using older OS such as Windows XP Pro or Windows 2003

A. Open the IIS Manager and confirm that AyaNovaWBI is present as an application site of Default Web Site

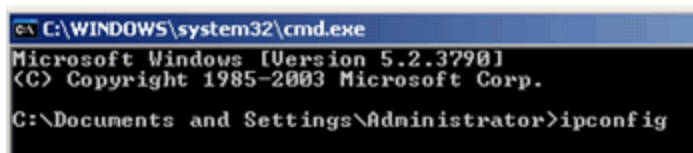


B. Determine the internal private IP address of this IIS server:

- a. On this WBI server, open a DOS command prompt by selecting Start -> Run and typing in the following **cmd** and selecting OK

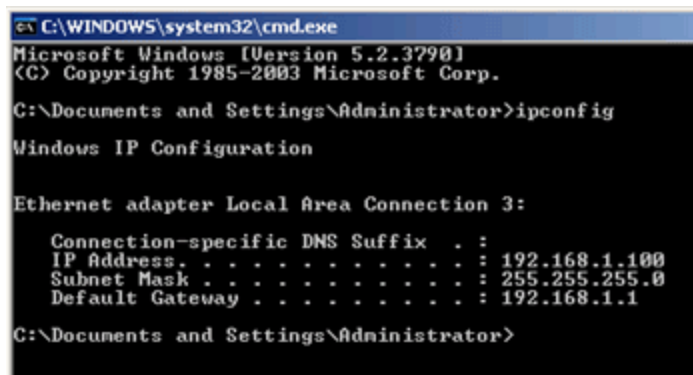


b. Type in the following **ipconfig** at the DOS prompt that appears



c. This will now display the Local Area Connection's IP Address as well as the Subnet Mask and Default Gateway.

d. Note 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.



C.1 If you have a Static IP: (see C.2 below if you have a dynamic IP)

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) and configure your router to forward outside Internet requests to the IIS server via its internal private ip address

Check with your ISP what static IP address given to you

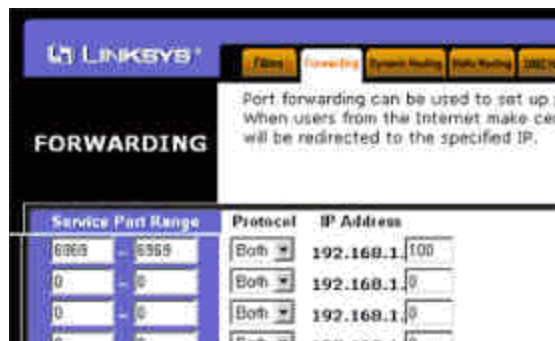
Every model router is different so we can not provide specific directions here.

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 WBI server, enter the Port number outside Internet users would enter to be redirected to the WBI 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 (this is the external ip address)
 2. The Default Web Site TCP Port is set to 6969
 3. The WBI server's internal IP address is 192.168.1.100
 4. You install and configure WBI 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/AyaNovaWBI/login.aspx** to bring up the login page for accessing via WBI. (whereas if the port number is 80 (the default web server port) then it can be left off of the URL in the browser and it would be http://333.222.101.12/AyaNovaWBI/login.aspx)
- 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

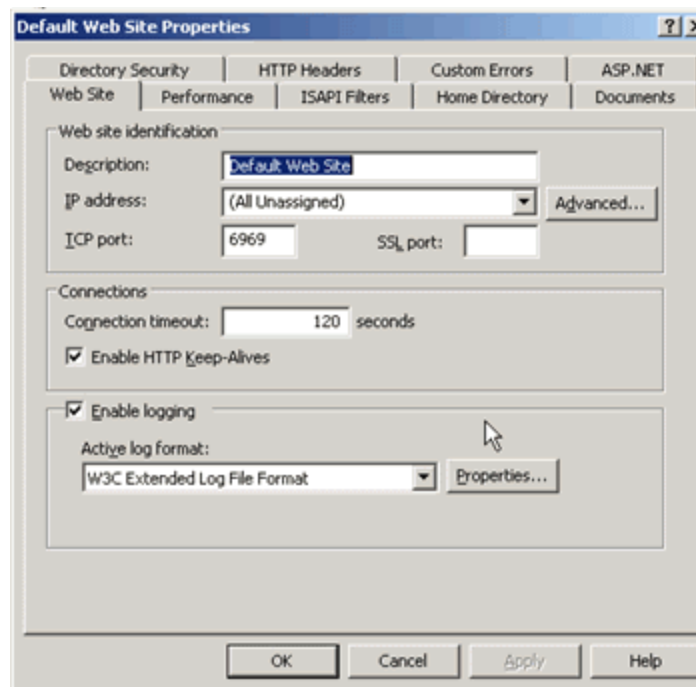
You can certainly use a dynamic IP address for your public router/firewall, but of course as dynamic ip changes constantly, you and your staff would need to know what the changed IP address is every time it changes.

OR

If your company is unable to obtain a static IP address, a possible suggestion may be to follow <http://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.



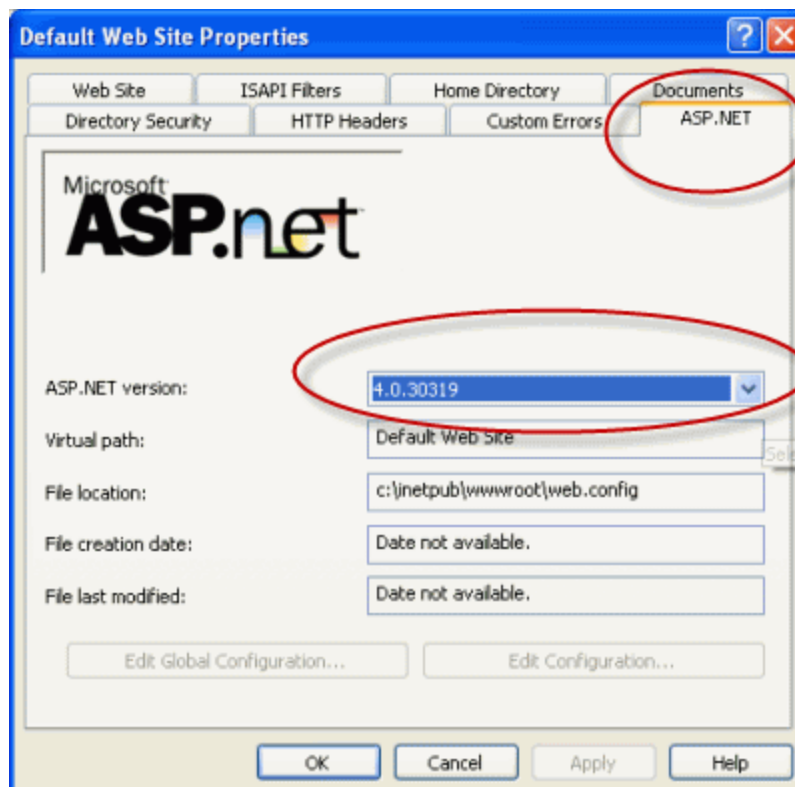
E. WBI uses the same config.txt that the AyaNova program uses to connect to the networked database.

- 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 WBI. Check your version by select menu Help -> About AyaNova Once confirmed AyaNova is the latest, then continue.

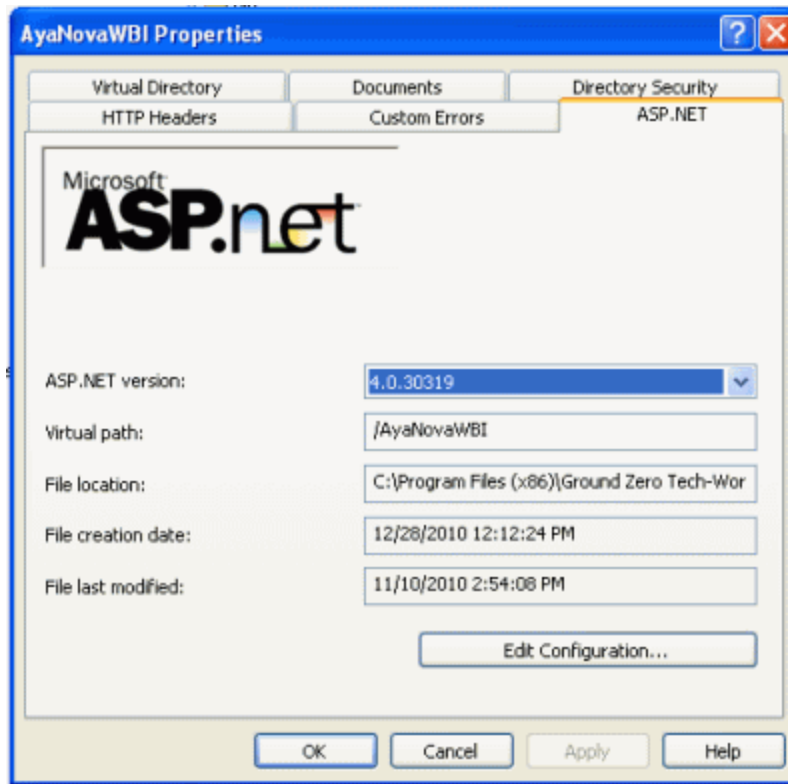
- b. Use Windows Explorer to open C:\Program Files\Ground Zero Tech-Works Inc\AyaNova folder, and **copy the config.txt file**
- c. Move to the C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI\bin directory and **paste the config.txt into this folder**
- d. You will be asked to confirm overwriting 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 **AyaNovaWBI site** are using Microsoft.NET Framework 4

- a. Right-click on the **Default Web Site**, select Properties. Click on the ASP.NET tab of this Default Web Site and make sure the .NET Framework selected is 4



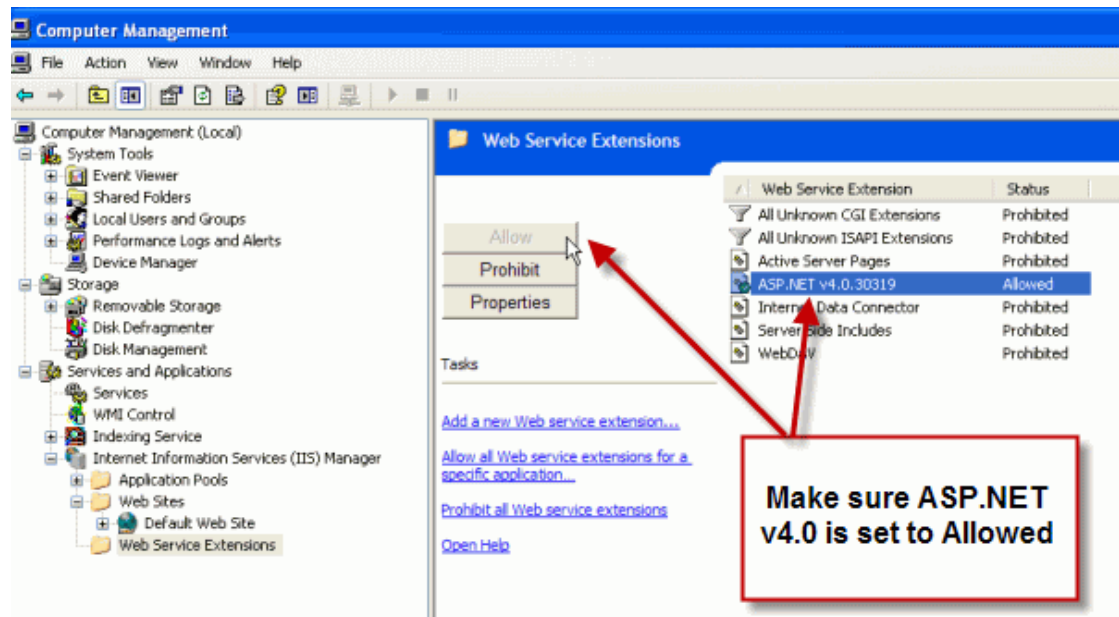
- b. Right-click on the **AyaNovaWBI site**, and select Properties, view the ASP.NET tab and make sure the .NET Framework selected is 4



G. If using an older OS such as Windows 2003 or Windows XP 64 bit, select the Web Service Extensions and make sure ASP.NET v4.0 is set to Allowed (*if not set to Allowed, will get 404 error Page Not Found when performing the initial testing on the server*)

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.

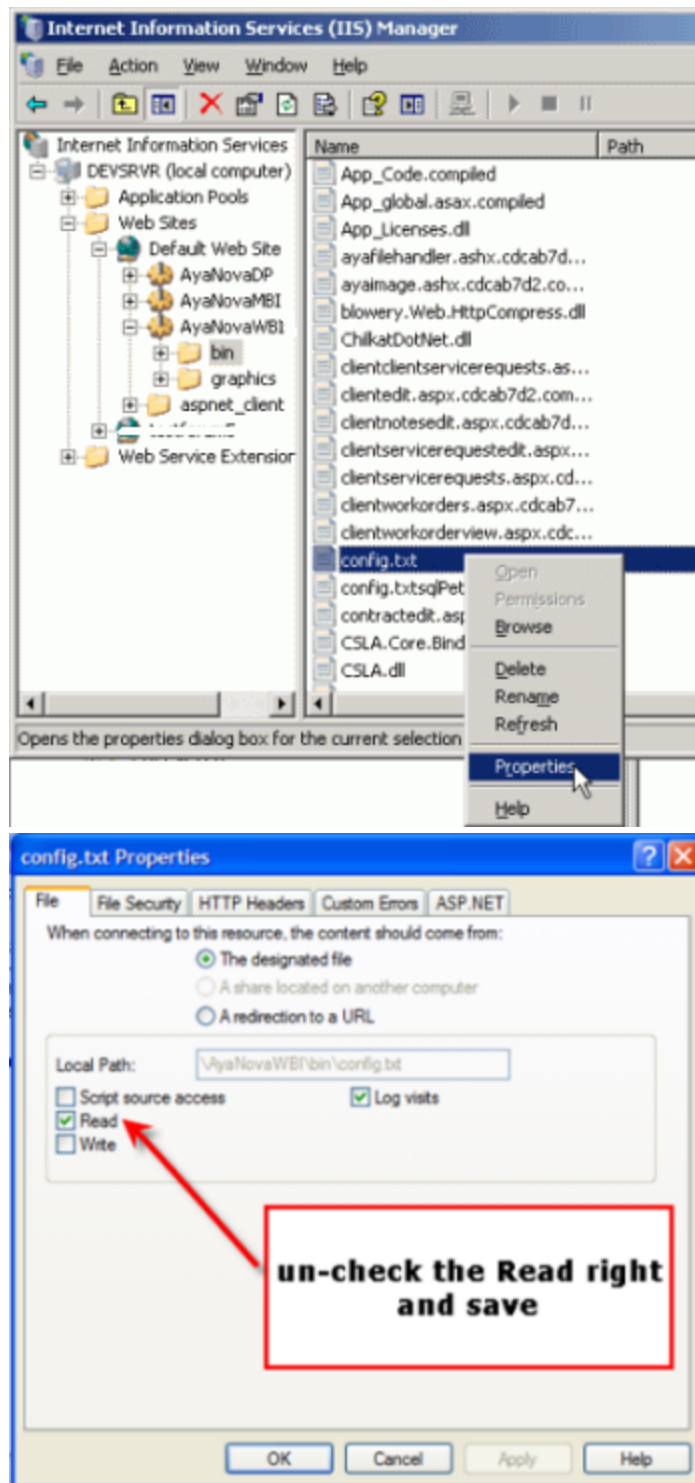
WBI Requirements, Installation & Configuration on the Server



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 AyaNovaWBI/bin site
3. Select Properties
4. Un-check the Read right, and save.

WBI Requirements, Installation & Configuration on the Server 31

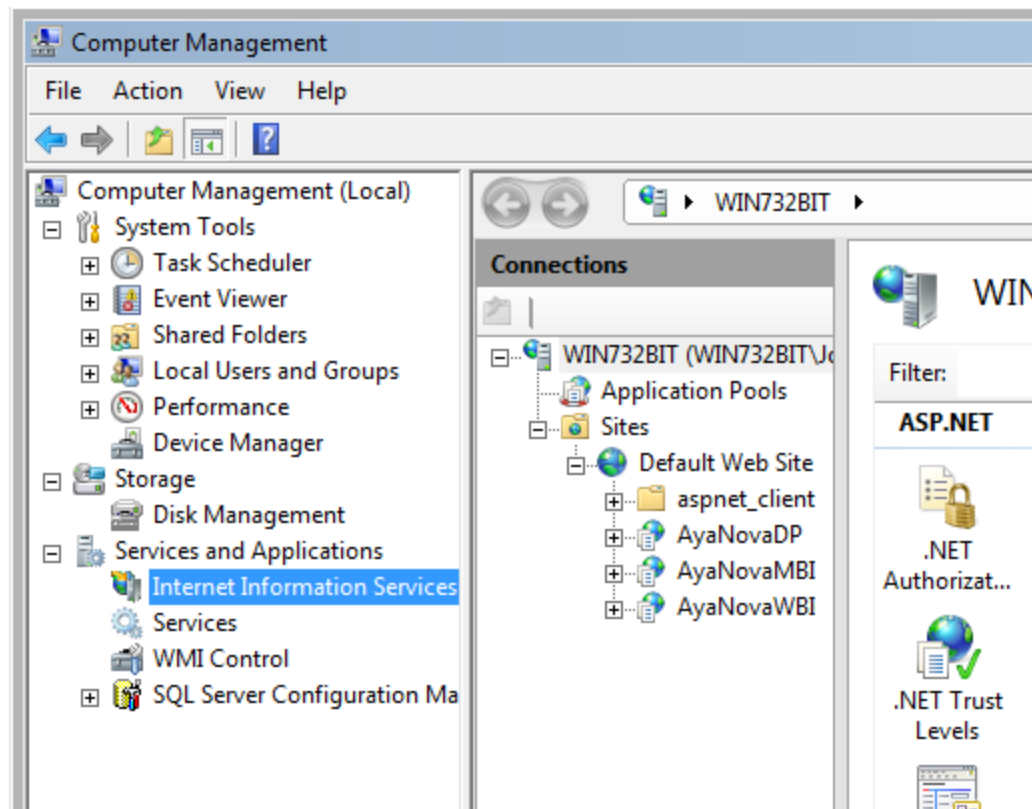


I. Stop and Start the default web site

J. Continue to Step #3: WBI Server Testing

Steps to perform if Windows 7 and newer

A. After installation has completed, open the IIS Manager and confirm that AyaNovaWBI is present



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. 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.

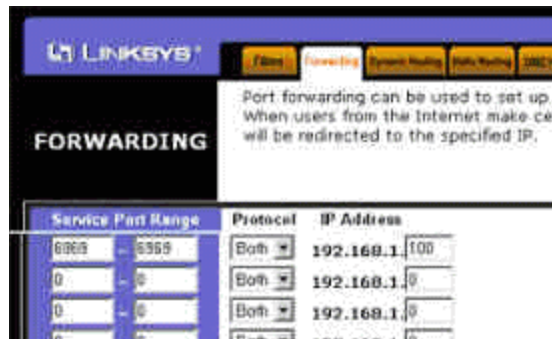
You will need to check your router documentation manual on how to configure forwarding

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 WBI server, enter the Port number outside Internet users would enter

to be redirected to the WBI server (same port number the Default Web Site is set to use in Computer Management)

For example:

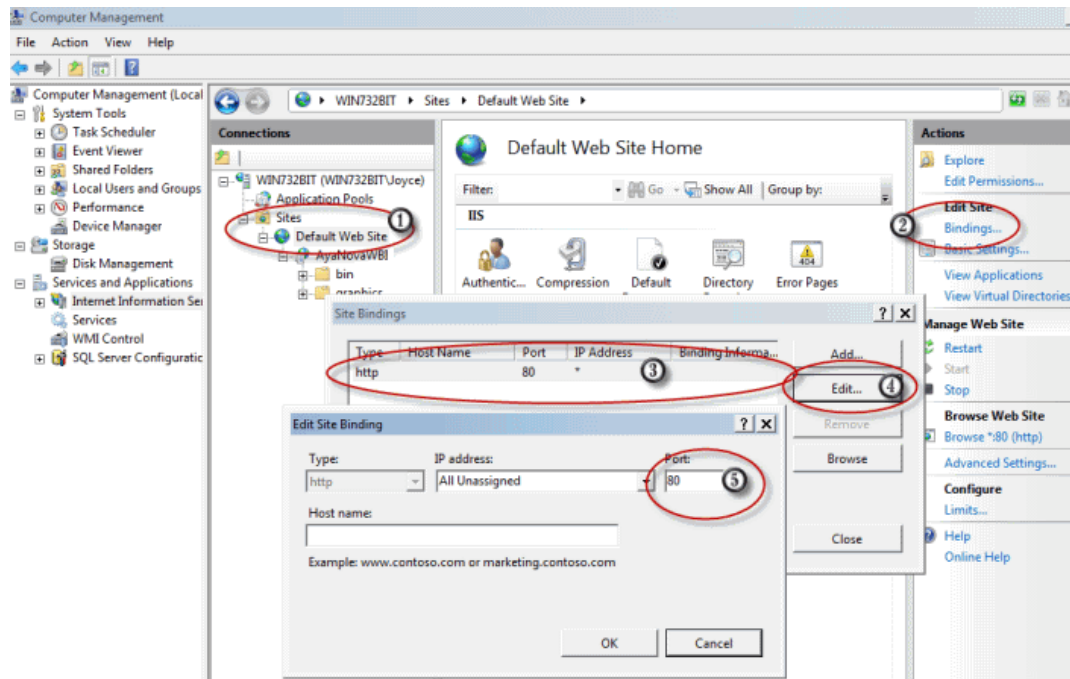
1. Your router's static Internet IP address is 333.222.101.12
 2. The Default Web Site TCP Port is set to 6969
 3. The WBI server's internal IP address is 192.168.1.100
 4. You install and configure WBI to this computer
 5. You configure your router to forward port 6969 to 192.168.1.100
 6. Remote Internet users would enter the URL of **http://333.222.101.12:8989/AyaNovaWBI/login.aspx** to bring up the login page for accessing via WBI. (whereas if the port number is 80 (the default web server port) then it can be left off of the URL in the browser and it would be http://333.222.101.12/AyaNovaWBI/login.aspx)
- 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



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, or whatever port your router is set for

WBI Requirements, Installation & Configuration on the Server 4



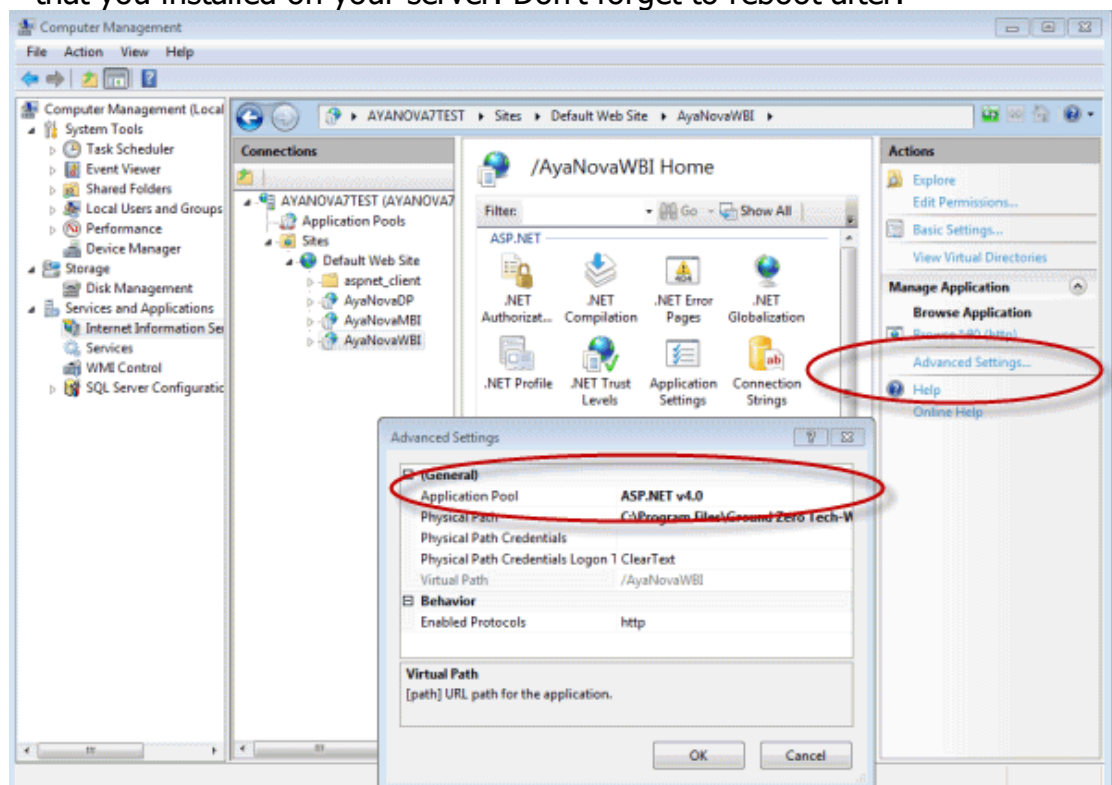
E. WBI uses the same config.txt that the AyaNova program uses to connect to the networked database.

- 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 WBI. Check your version by select menu Help -> About AyaNova Once confirmed AyaNova and WBI are the latest, then continue.
- b. Use Windows Explorer to open C:\Program Files\Ground Zero Tech-Works Inc\AyaNova folder, and **copy the config.txt file**
- c. Move to the C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI\bin directory and **paste the config.txt into this folder**
- 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. View the the Advanced Settings for the AyaNovaWBI web site, and select to use the Application Pool **ASP.NET v4.0**

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- This ASP.NET v4.0 app pool is **created automatically** for you when you installed the IIS components in Step #1 - WBI Server Installation with .NET 4 installed
- The application pool uses .NET 4 Framework with managed pipeline mode of Integrated
- 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 `%windir%` 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.



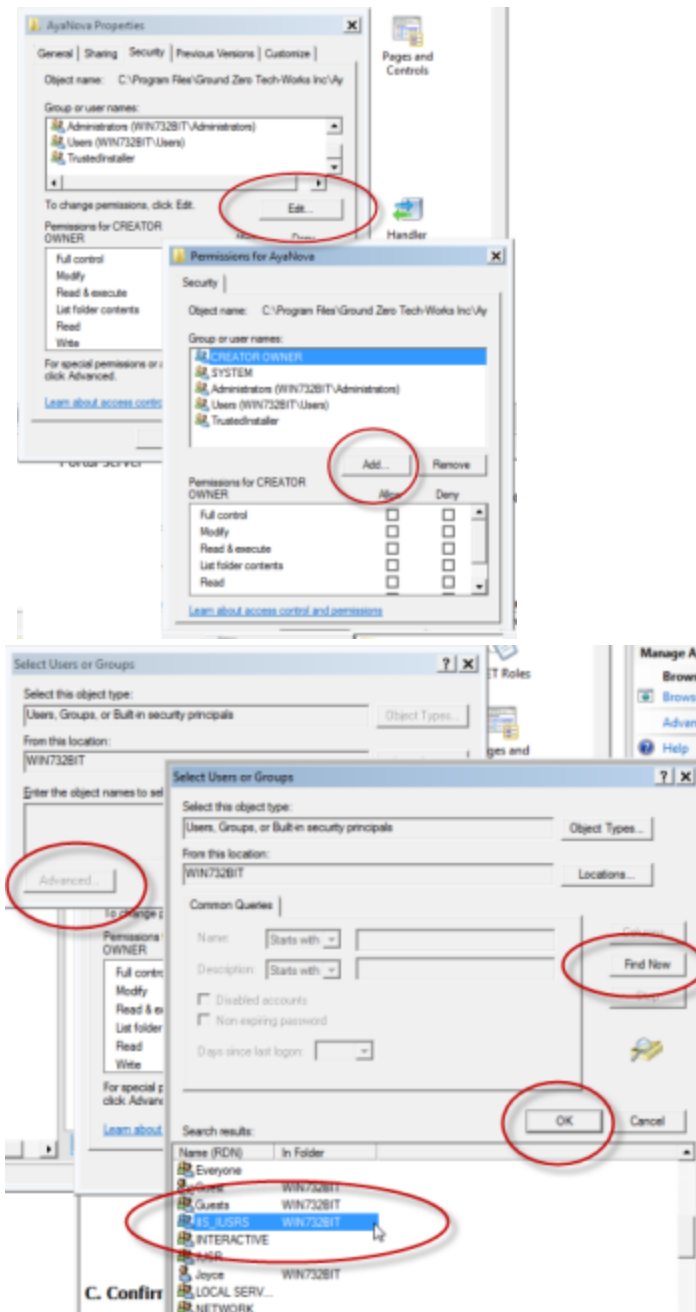
G. Check that IIS_Users has permissions

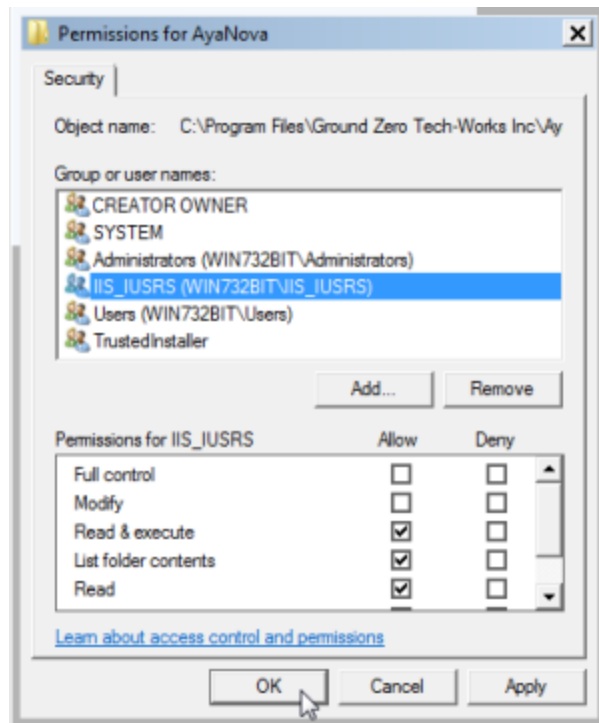
Right-click on **Default Web Site** -> Select **Edit Permissions...** -> Select the **Security** tab

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.

WBI Requirements, Installation & Configuration on the Server 36

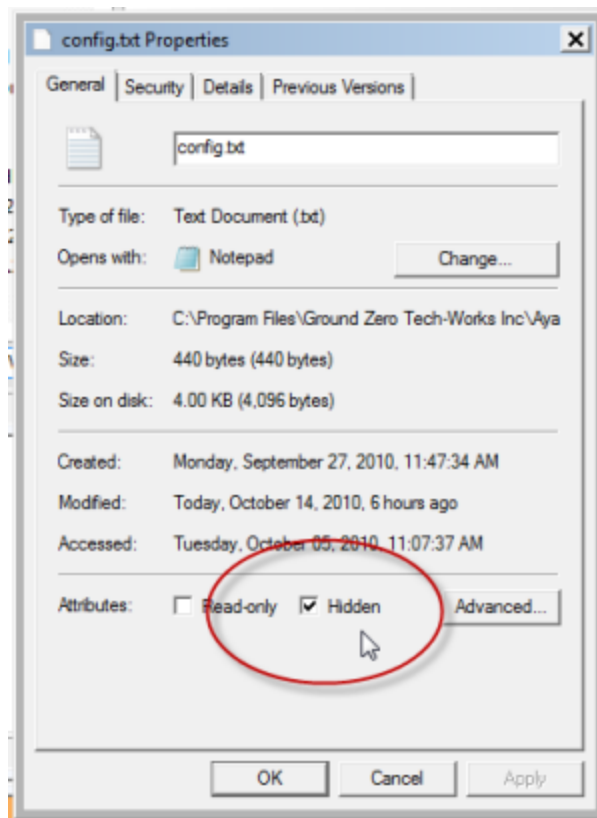




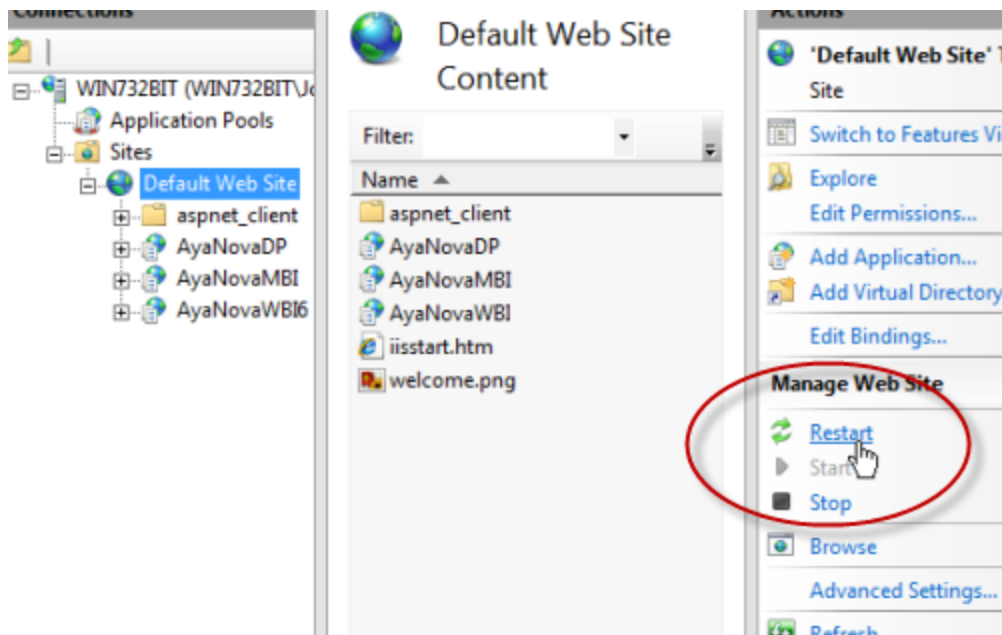
H. Additional access settings may want to be set so that external users can not view the contents of the config.txt file

1. Switch to Content View for AyaNovaWBI
3. Right-click on the config.txt file and edit permissions
4. Check-mark Hidden

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5. Restart the default web site



I. Continue to Step #3: WBI Server Testing

2.5 Step #3: WBI Server 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 WBI on the computer (server) where you installed it**
- D. Test WBI on a local area networked computer**
- E. Test WBI on a remote computer**

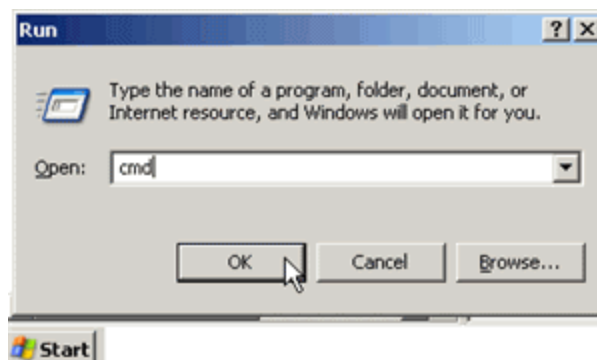
A. Confirm AyaNova itself runs successfully on this server and AyaNova is networked

Again confirm again before anything that you can run the AyaNova program itself successfully on the WBI server and on local networked computers connecting to the networked AyaNova database first **before** proceeding.

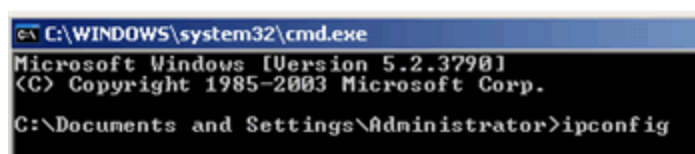
If any issues at this point, they **must** be resolved before proceeding with WBI.

B. Determine the internal private IP address of this IIS server:

- a. On this WBI server, open a DOS command prompt by selecting Start -> Run and typing in the following **cmd** and selecting OK

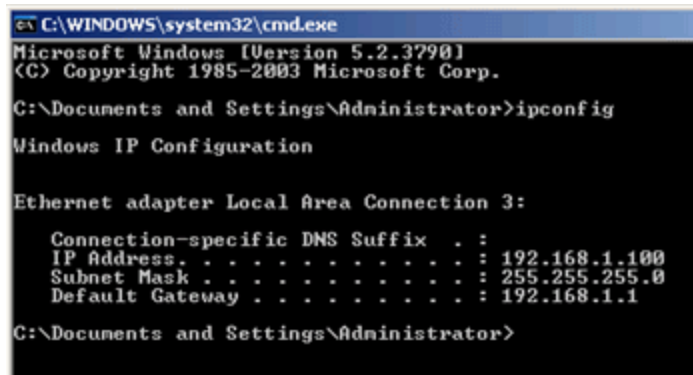


- b. Type in the following **ipconfig** at the DOS prompt that appears



c. This will now display the Local Area Connection's IP Address as well as the Subnet Mask and Default Gateway.

d. Note 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.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows [Version 5.2.3790]
(C) Copyright 1985-2003 Microsoft Corp.

C:\Documents and Settings\Administrator>ipconfig

Windows IP Configuration

Ethernet adapter Local Area Connection 3:

    Connection-specific DNS Suffix  . : 
    IP Address. . . . . : 192.168.1.100
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : 192.168.1.1

C:\Documents and Settings\Administrator>
```

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 WBI at the IIS server:

- Open up a web browser on the WBI server itself (where you installed WBI)
- Enter in the path ***http://localhost/AyaNovaWBI/login.aspx*** if you have not specified a port or ***http://localhost:XXXX/AyaNovaWBI/login.aspx*** 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

(TCP Port determined from step B of WBI Server Configuration)

- You can bring up the WBI login screen
- Confirm you can log in using a valid AyaNova User username and password
- 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 WBI server itself
`http://192.168.1.100:9632/AyaNovaWBI/login.aspx`

- f. If the WBI 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 WBI login page when performing step #2 of testing on the server itself, check out the forum topic <http://forum.ayanova.com/t/if-receive-page-not-found-or-404-error-or-400-error-testing-wbi/1125>
 - If any issues, refer to WBI Server Common Issues

D. Second - test connecting to WBI via a local network computer:

a. Open up a web browser on a computer on the same **internal** network as the WBI server

b. Enter in the path

`http://xxx.xxx.xxx.xxx:XXXX/AyaNovaWBI/login.aspx` where
xxx.xxx.xxx.xxx is the **internal** local area connection IP address of the WBI server and XXXX is the TCP Port number of the Default Web Site on the WBI server

(Local area connection IP address determined from step D of Configuration) WBI Server

For example, if I installed WBI 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/AyaNovaWBI/login.aspx` as the URL address.

- c. If the WBI 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 WBI server. Check.
 - **or** your WBI server may have a firewall enabled that is preventing access. Check.

E. Third - test connecting to WBI via a remote Internet connection:

a. On a remote computer that is connected to the Internet, open up a compatible web browser

b. Enter in the path

`http://xxx.xxx.xxx.xxx:XXXX/AyaNovaWBI/login.aspx` 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/AyaNovaWBI/login.aspx> into the web browser URL address.

c. If the WBI 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.

2.6 WBI Server Common Issues

The following is a list of common reasons why you maybe unable to use WBI - check each and confirm not the issue:

1. AyaNova has not been configured for network access:

- You **can not** access via WBI a default stand-alone installation of the AyaNova database
- You can only access via WBI a networked AyaNova database
- Refer to the AyaNova Help documentation on configuring for network access using network Firebird, SQL Express or SQL Server.

2. Your computer is not 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 at minimum v4 listed

3. IIS has become un-registered to use Microsoft.NET Framework 4 and needs to be re-registered:

Below is an example specifically for Microsoft.NET Framework 4.0.3
Newer versions of .NET would of course have a different path. Check your computer for your actual path.

- 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 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 that is the version of 4 you have installed - confirm what yours actually is.

4. If you encounter an error message installing WBI - make sure that you do have a Default Web Site in your IIS (Internet Information Services) - see the

forum topic <http://forum.ayanova.com/t/unable-to-install-wbi-because-default-web-site-is-no-longer-in-iis/1791>

5. If you encounter a 404 error bringing up the WBI login page when performing step #2 of testing on the server itself, check out the forum topic <http://forum.ayanova.com/t/if-receive-page-not-found-or-404-error-or-400-error-testing-wbi/1125>

Also check out other forum topics regarding WBI, RI and MBI common issues in the forum section

<http://forum.ayanova.com/c/ayanova-remote-access-options>

6. Port used is not configured on your router to be forwarded to the WBI server:

If you are able to perform the internal network testing using the local IP address of the WBI 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 WBI server, enter the Port number outside Internet users would enter to be redirected to the WBI 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 WBI server's internal IP address is 192.168.1.100

You install and configure WBI

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/AyaNovaWBI> to bring up the login page for accessing via WBI

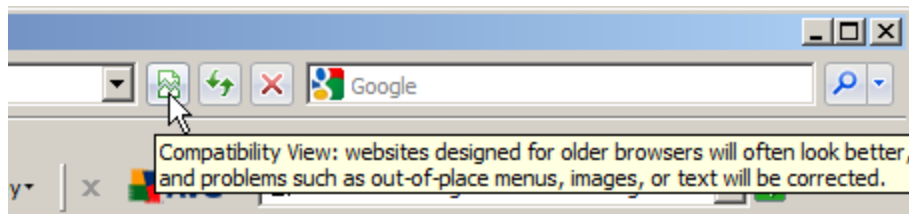
7. Check your IIS logs

- 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 then 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 then search for online.

8. Check to see if Compatibility View in Internet Explorer resolves the issue

If issue has to do with accessing a feature within WBI, check to see if enabling Compatibility View in Internet Explorer resolves it or not.



If you encounter an issue and the above does not resolve:

1. If you encounter an issue, double-check that all 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, provide **ALL** of the following information in an email to support@ayanova.com:

1. Operating system of your IIS WBI server
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 identify what does actually happen.
 - If any messages, be sure to provide all text and the order messages appear in.
3. Copy of your config.txt file from the WBI 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\AyaNovaWBI\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 WBI installed? (i.e on the same computer where database is installed; or on a computer within the same local network as the AyaNova database server; or ?)
 6. Confirmation of the internal ip address of your WBI 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 re-registry of ASP.NET 4 with IIS using aspnet_regiis.exe and that it was successful.

2.7 If unable to bring up the login page

If you can not access your WBI login page via a web browser, please refer to WBI Server Common Issues.

As outlined, do check all that listed, and if not resolved, send ALL as requested so we can help.

2.8 If unable to login

If you are unable to login via WBI, you will just stay on the login page until you enter a valid login name and password:

Possible reasons why you are not able to log in:

1. **The username you have entered must be a valid AyaNova user.**
Contact your AyaNova Administrator to confirm what is your valid username to log in with.
2. **Username and password are case sensitive.** Check that you do not have CAPS LOCK on your keyboard set. Make sure you are entering the username and the password exactly as provided to you by your AyaNova Administrator.
3. As the password is masked when it is entered, test entering the password in a NotePad document to ensure what you are typing in is exactly what your AyaNova Administrator provided.
4. The AyaNova Administrator password can not be used to login to WBI **unless** it's password has been changed from the default of "letmein". This is for your protection as this login is common knowledge.
5. **If using a trial AyaNova database,** login using one of the many sample AyaNova users (not possible to log in using the AyaNova Administrator account as it is using the known username and password)

Username:	Password:	Security Group a member of:	Locale:
test	test	AyaNova Administrator	English
abc	abc	Client WBI	English
hank	hank	Technicians	English
bubba	bubba	Shipping / Receiving	English
dagny	dagny	Dispatching	English
german	german	AyaNova Administrator	Deutsch
spanish	spanish	AyaNova Administrator	Español
french	french	AyaNova Administrator	Français

Client & User Configuration To Allow Access

3 Client & User Configuration To Allow Access

3.1 WBI Client Configuration

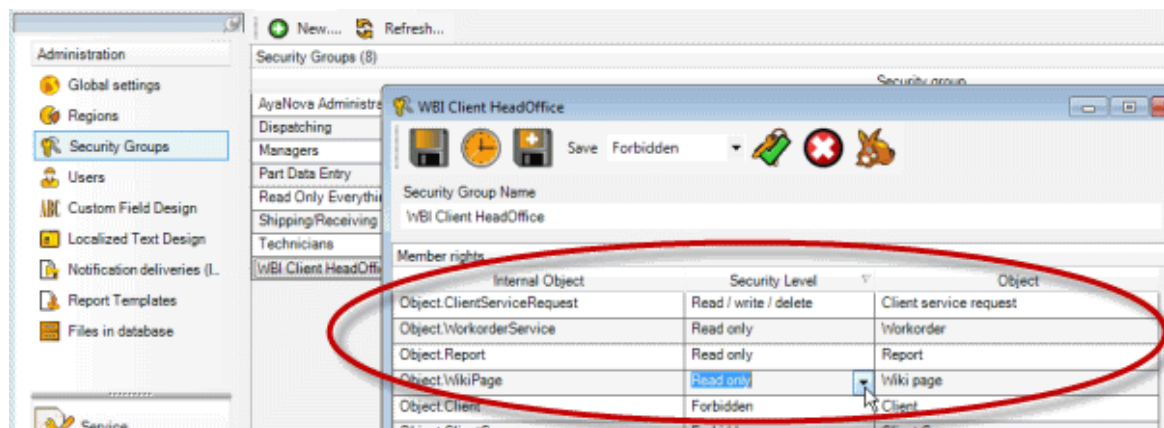
Configuring a client's access via WBI is similar to doing so for an AyaNova user - but with a few major differences that makes AyaNova recognize the client logging in as a client.

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

Alby Billington-Cook

Active ☒

First Name: Alby

Last Name: Billington-Cook

Initials: abc

Security group: WBI Client HeadOffice

User type: Client user

Client: ABC Accounting

Region: REGION 2

Default warehouse: Default

Default language: English

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)

Client service request

Client: ABC Accounting

Record Created: 5/19/2010 4:51 PM

Status: Open

Enter unique text via WBI Administration's Global Settings | display for your WBI clients

Title: _____

Reference Number: _____

Requested by: Alby Billington-Cook

Serial Number: _____

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.

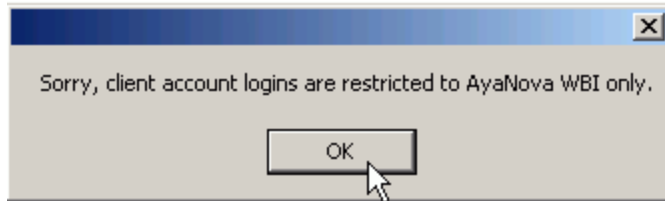
The screenshot shows the WBI User Entry screen for a user named Molly Howard. The 'User type' dropdown is set to 'Head office client user'. The 'Head Office' dropdown is set to 'Molly's Bakery'. A red box highlights a note: 'Note this is a "Head Office client user" so only Head Offices are available for selection'. Red arrows point from the note to the 'User type' and 'Head Office' dropdowns.

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.

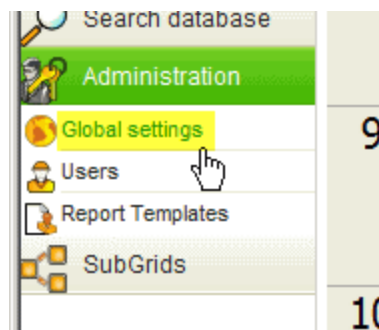
A User Type of Client user or Head office client user **is not able to log in via the AyaNova program** - only via WBI. If a client/head office attempts to log in via the AyaNova program, they will receive the following message:



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



Client login workorder report:
 Sample Detailed Service Workorder with Grand Total and Signature

Client service request info text:

```
<h1>Important!</h1>
<p>Be sure to enter <span style="color: #ff0066">all</span> fields <u><strong>strongly and
accurately</strong></u></p>
<p>Don't skimp on the details!</p>
```

☒ Client can view their workorder's wiki page

SAVE

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)

Client login workorder report:

- Sample Detailed Service Workorder with Grand Total and Signature
- No report
- Sample Service Workorders Invoiced
- Sample Service Workorders Invoiced Signature
- Dispatching Report with Signature
- Sample Banked Detailed Service Workorder with Grand Total Repeats
- Sample Billable Grouped By Client with Details and Total
- Sample Call Back Report
- Sample Client Claim Receipt
- Sample Detailed Service Workorder with Grand Total
- Sample Detailed Service Workorder with Grand Total and Signature**
- Sample Detailed Service Workorder with Grand Total Head Office Billed
- Sample Dispatching Report

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.

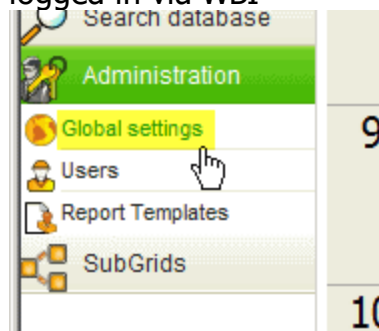
iii. The report template selected applies to **all** clients/head offices that have the security group right to view their workorders.

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 link 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:

Client login workorder report:
Sample Detailed Service Workorder with Grand Total and Signature

Client service request info text:

```
<p><span style="color: #ff0066">Important!</span> Be sure to enter <span style="color: #ff0066">all</span> fields <u><strong>strongly and accurately.</strong></u> Don't skip on the details!</p>
```

☒ Client can view their workorder's wiki page

SAVE

http://192.168.1.104:8080/WBI/ClientService.j2

Google

All-star Services

Call us at 333-333-3333 if any questions - we are here to help!

Client: ABC Accounting
Record Created: 1/4/2011 11:57 AM
Status: Open

Important! Be sure to enter all fields strongly and accurately. Don't skip on the details!

TRD

Reference Number

Requested by
abc abc

Serial Number

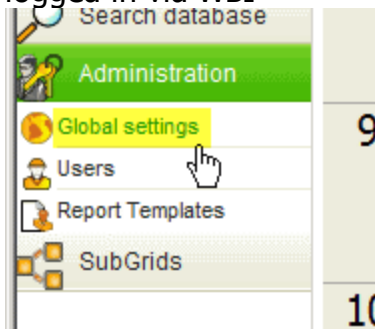
Details

☒ Not urgent
☐ ASAP
☐ Emergency

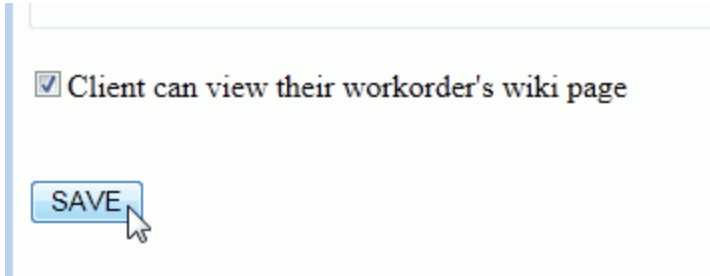
5. Via WBI - set ability to see Wikipage of the service workorder

- 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

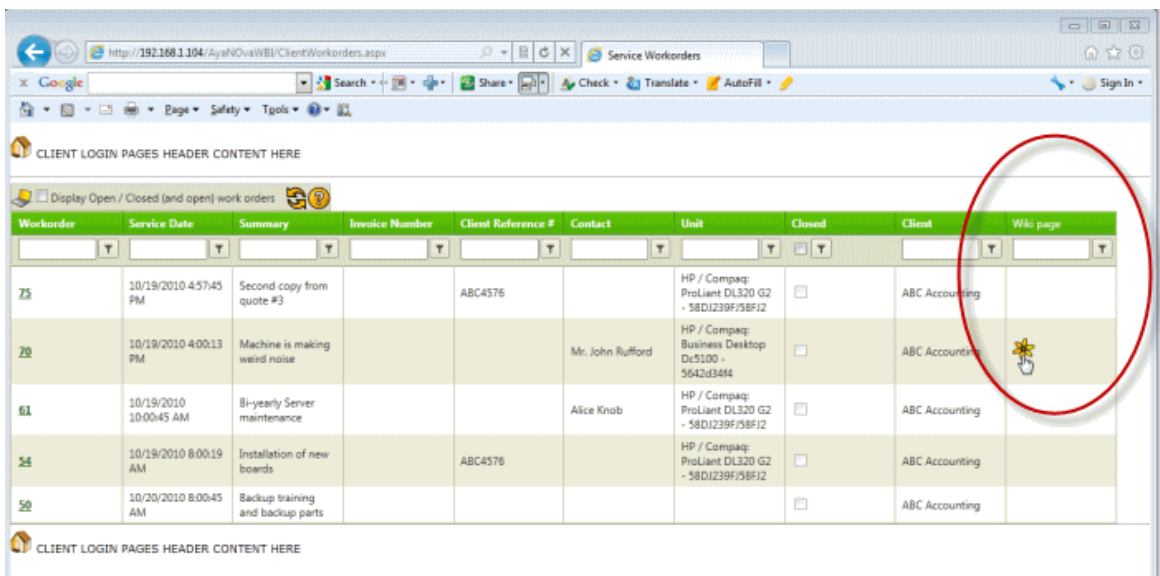


c. Checkmark the field Client can view their workorder's wiki page



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



3.2 WBI AyaNova User Configuration

To configure an AyaNova user for WBI user access is the same as configuring an AyaNova user for access to the AyaNova program.

- A user that has access via the AyaNova program will have the same access via WBI.
- Refer to the AyaNova Help file from <https://www.ayanova.com/onlinehelp.htm> section which includes information on creating Security Groups and Users.

Changing the Look of WBI pages

4 Changing the Look of WBI pages

4.1 Placing your company logo on login page

When you bring up your WBI login screen, it will display with a default "banner" showing the WBI logo



- You can have your own banner display by **replacing the existing loginbanner.png** file in the C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI folder
- It is recommended that your banner image be no more than 300 pixels by 100 pixels

For example:

1. The company Advanced Service has purchased the AyaNova user licenses and the optional add-on WBI license, installed and configured, and wants their company logo to display on login via WBI.

2. They create a png format image file and save it with the file name **loginbanner.png**
3. In the folder C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI they rename the existing file **loginbanner.png** to **loginbanner.png.old** as a backup
4. They copy their custom **loginbanner.png** image file they had created to the C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI folder
5. They delete the cache for their browser (*as some browsers will not automatically get the latest image file even if set to do so via the browser properties*)
6. Then they log into AyaNova via the WBI login page, can now view their new image that displays.

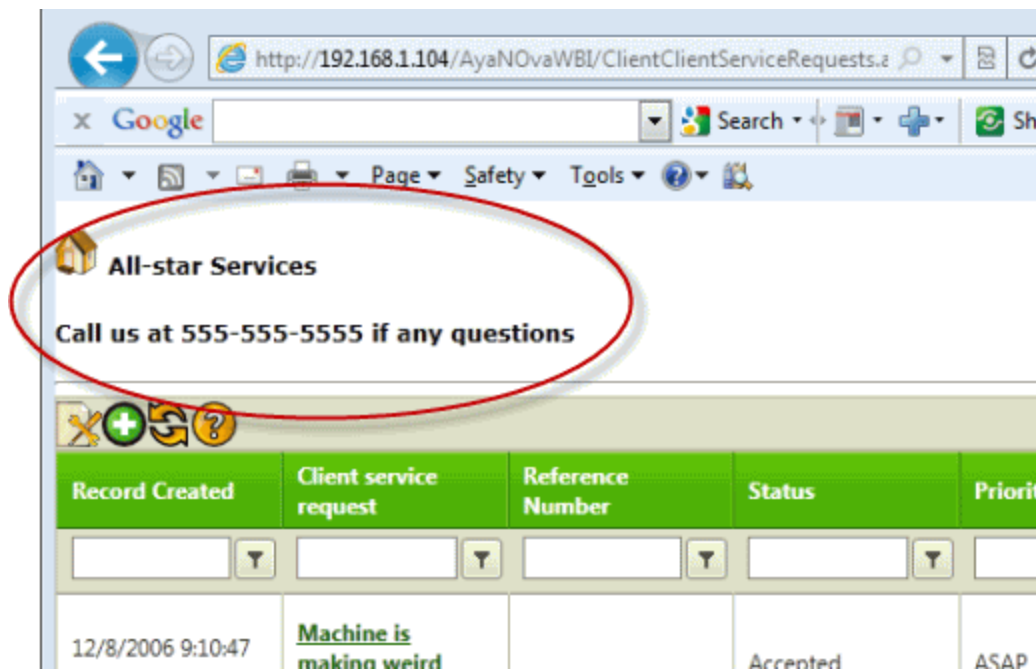


4.2 Adding header and/or footer html to WBI Client pages

When your client logs into WBI, the following WBI Client pages are available:

- the Client Service Request grid;
- or if select to create a new service request, the Client Service Request entry screen;
- or the Workorders grid from where they can select the workorder number to view its report or the Wiki link to view the wiki page for that workorder.

You can include additional text on the header of these pages or the footer of these pages or both header and footer, as well as display on the login page.



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 provide additional means of contact if they have any questions.

The WBI setup file will install two example files to the folder C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI:

xxCustomClientHeaderContent.txt
xxCustomClientFooterContent.txt

WorkorderDetail.aspx	12/13/2010 11:16 ...	Text Document	1 KB
XXXXCustomClientFooterContent.txt	12/13/2010 11:16 ...	Text Document	1 KB
XXXXCustomClientHeaderContent.txt	12/13/2010 11:16 ...	Text Document	1 KB

If WBI sees a file called CustomClientHeaderContent.txt, it will load its HTML code as the header for the Client's WBI

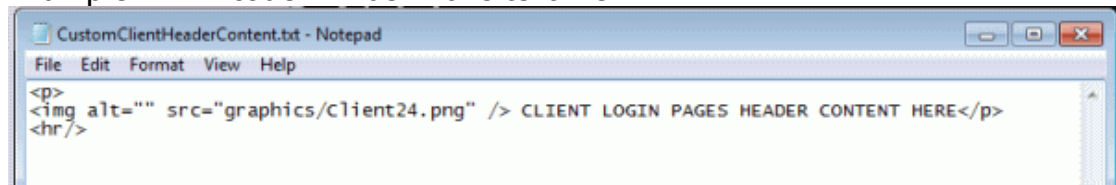
If WBI sees a file called CustomClientFooterContent.txt, it will load its HTML code as the footer for the Client's WBI

For a custom header:

Rename the xxCustomClientHeaderContent.txt file to CustomClientHeaderContent.txt

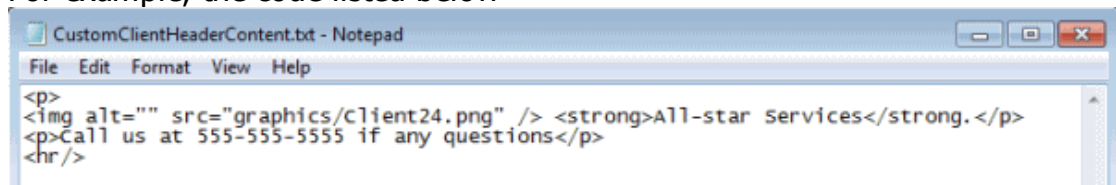
Open the CustomClientHeaderContent.txt file using Notepad

Example HTML code will be in this text file.



Edit as you wish, using HTML code

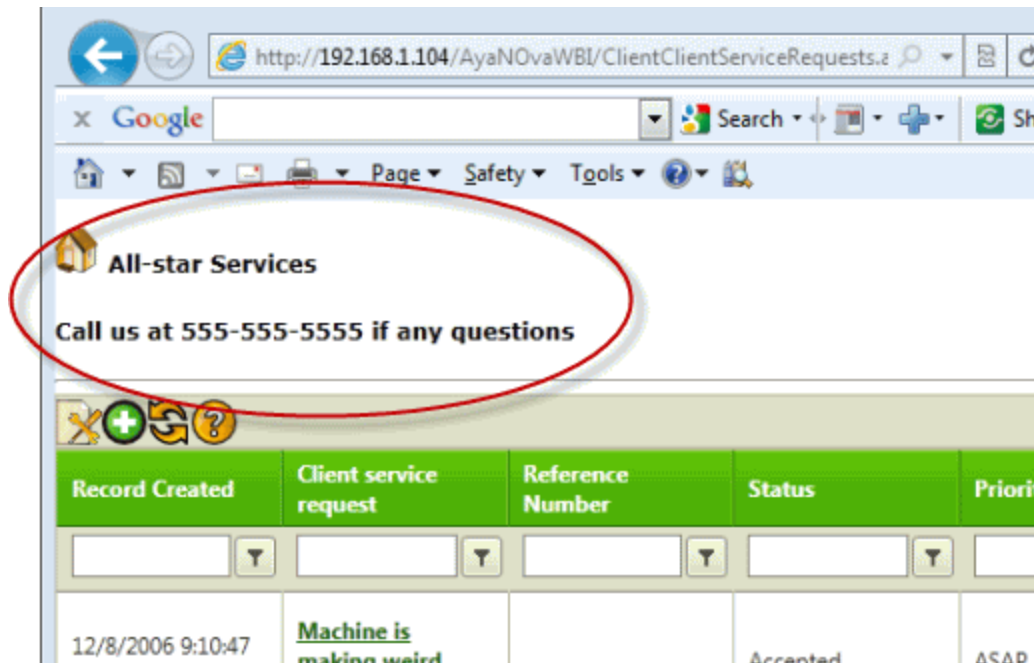
For example, the code listed below



You will need to restart the IIS application pool for your AyaNova WBI so that this change is identified.

Either recycle the application pool assigned to your AyaNova WBI; or restart your server; or edit a comment area of the WBI's web.config

Log in as a client and confirm that your header now shows as edited.



For a custom footer:

Same as above steps, but rename the `xxCustomClientFooterContent.txt` file to `CustomClientFooterContent.txt`, and edit that file, etc etc.

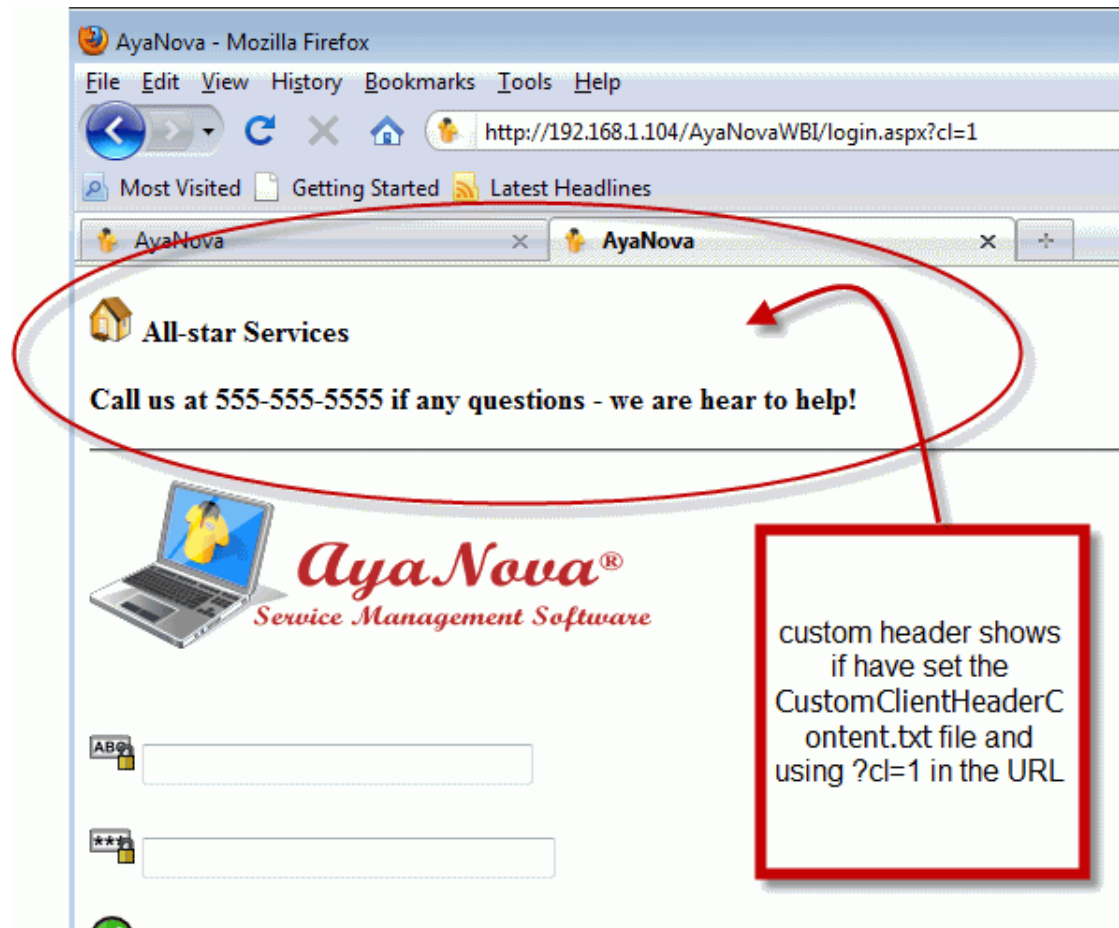
For the custom footer and header to show on the login page:

Perform the steps above, but append to your URL that you provide to your client the text `?cl=1`

For example, if the URL your client uses to bring up your WBI login page is normally `http://192.168.1.104/AyaNovaWBI/login.aspx`, provide to your client the following URL link instead

`http://192.168.1.104/AyaNovaWBI/login.aspx?cl=1`

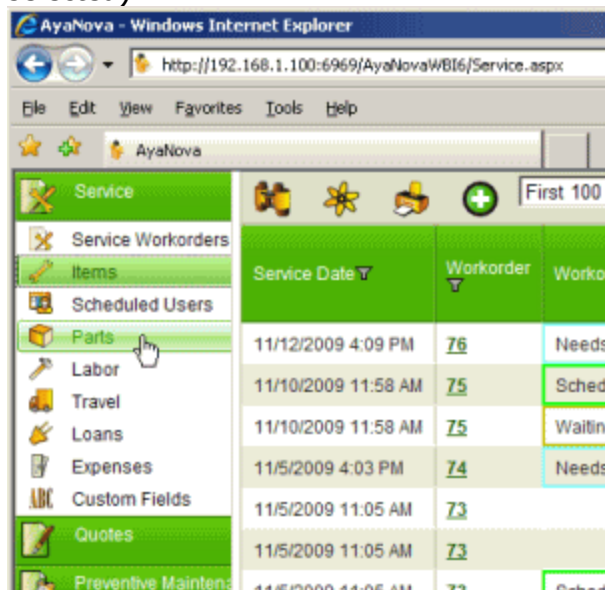
This way the custom footer/header/both will display on the login page itself



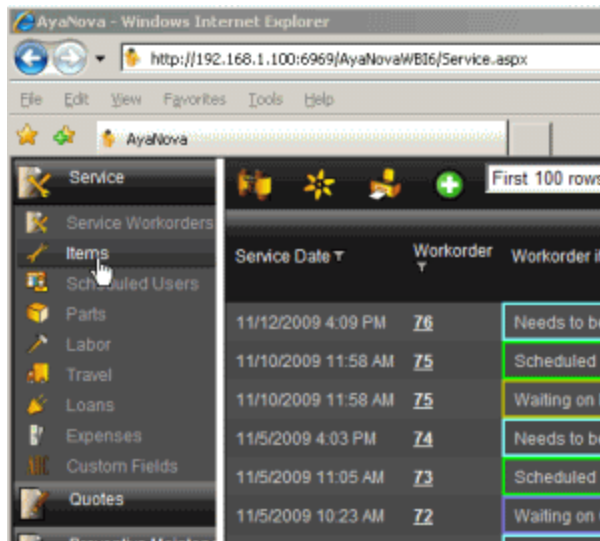
Skins names that can be used by setting in the web.config of your WBI server are:

Hay
Black
Default
Forest
Office2007
Outlook
Simple
Sunset
Telerik
Vista
Web20
WebBlue

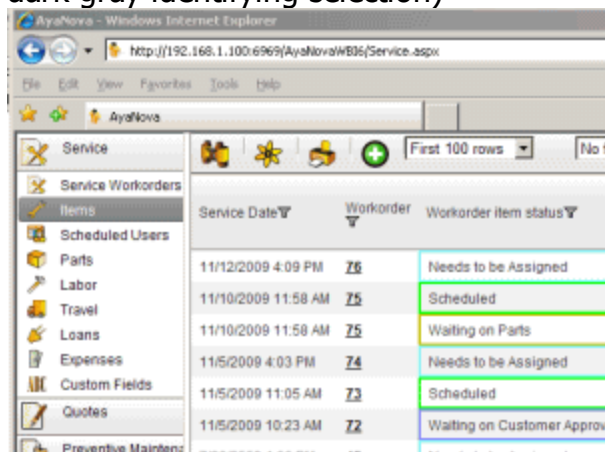
Hay (default skin entered in the installed web.config file - shows grids rows in alternating color for better visual, column headers in bright green, and when selected)



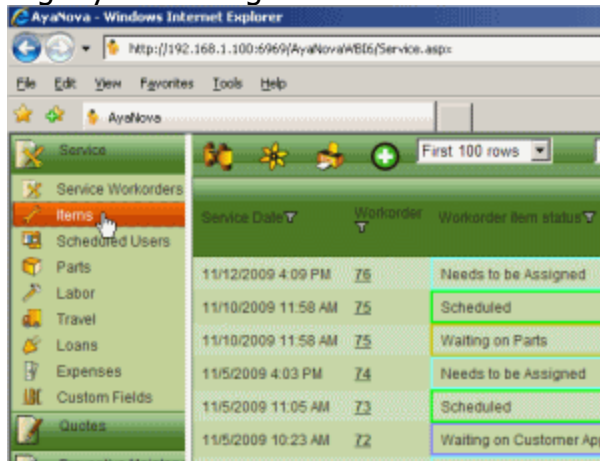
Black (very black with shades of gray for rows)



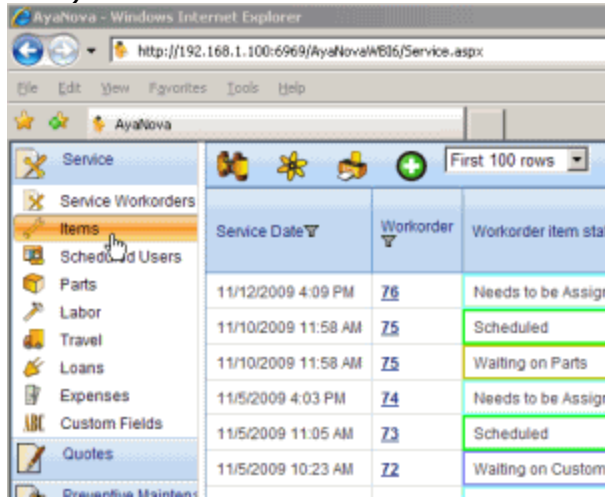
Default (shades of gray for column headers, and rows alternating color, with dark gray identifying selection)



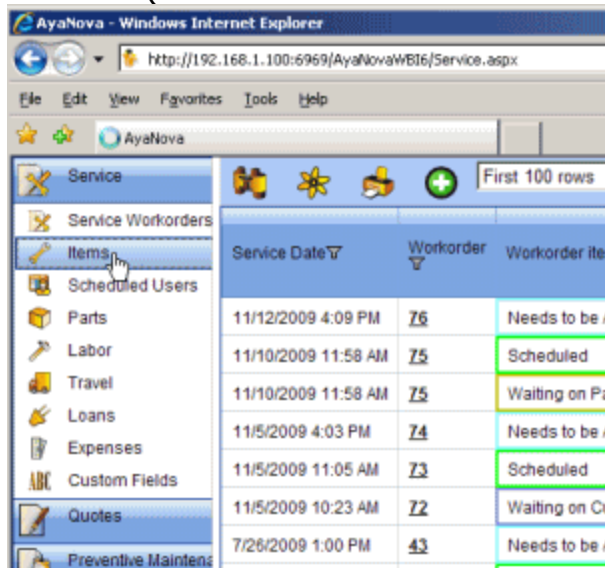
Forest (shades of moss green with bright orange identifying selection with slightly different greens for row alternates)



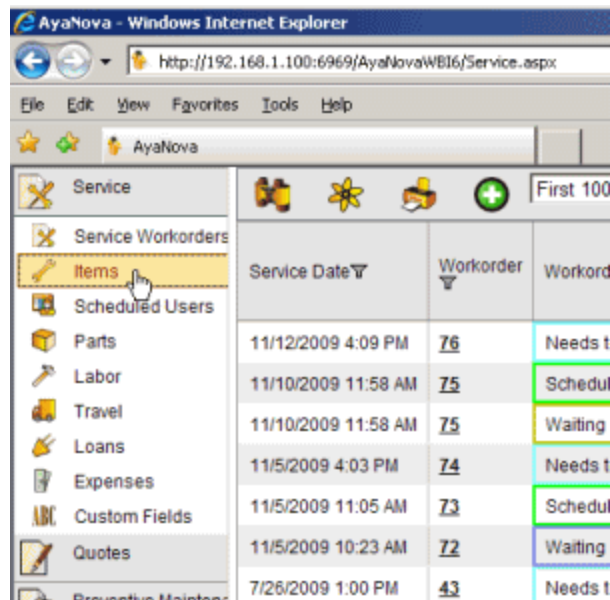
Office2007 (Blue column headers with orange identifying selection and row lines)



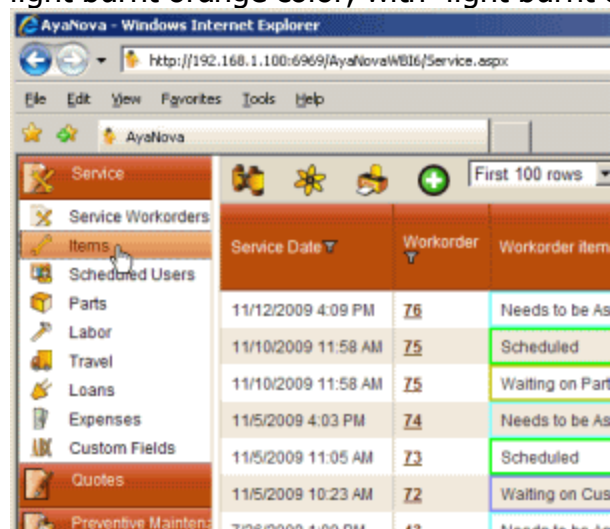
Outlook (Blue column headers with blue identifying selection and row lines)



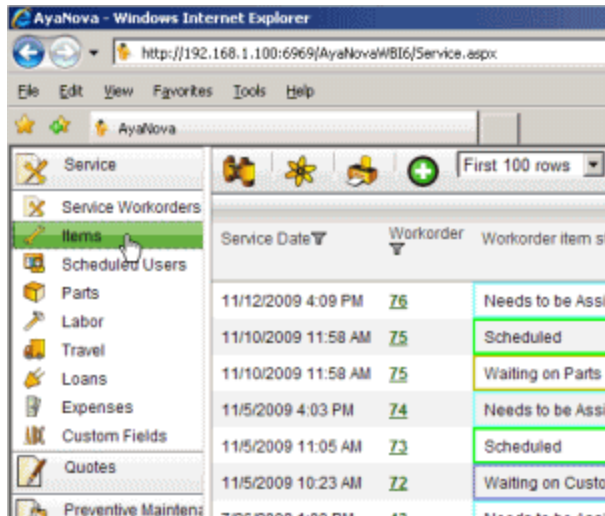
Simple (gray column and field labels, alternating row identification with gray color, with light orange for selection)



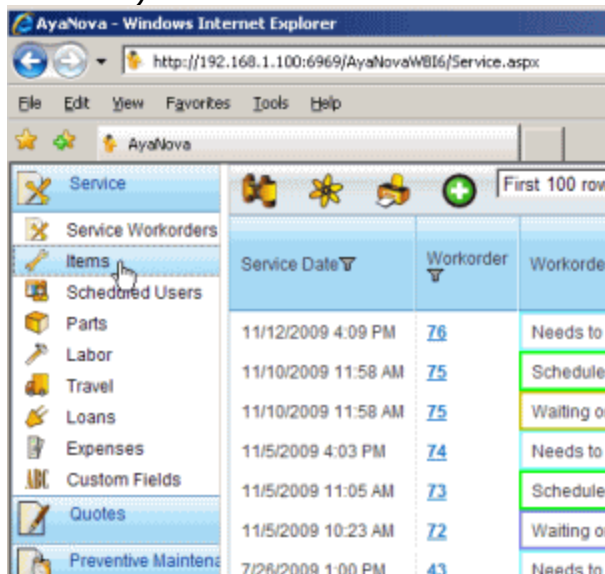
Sunset (Burnt orange column and field labels, alternating row identification with light burnt orange color, with light burnt orange for selection)



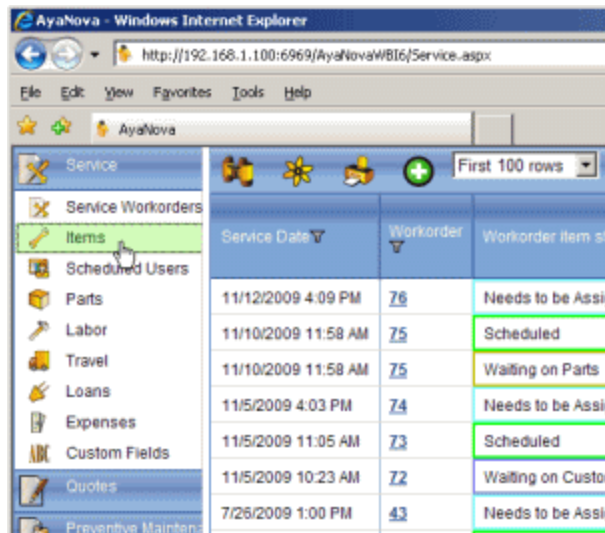
Telerik (light gray column and field labels, alternating row identification with light gray color, with moss green for selection)



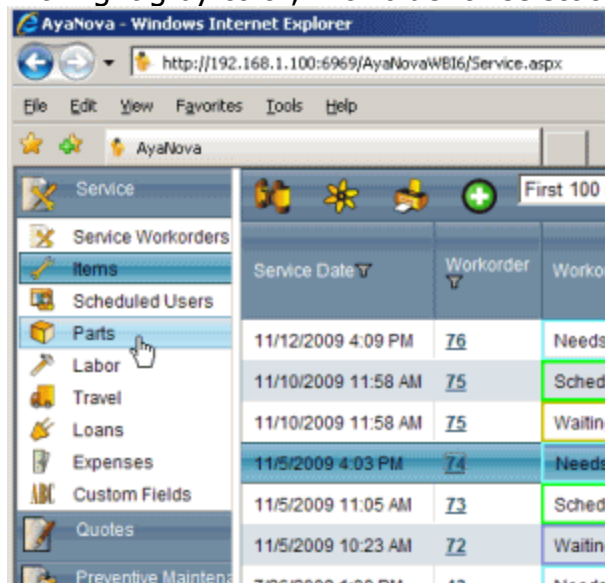
Vista (light blue column and field labels, with light blue for selection, and no row lines)



Web20 (blue column and field labels, with light green for selection, and row lines)



WebBlue (medium gray column and field labels, alternating row identification with light gray color, with blue for selection)



4.4 Language Settings

You can set language settings in your browser that will dictate how some **controls** on pages display, such as calendar formats, and currency.

Internet Explorer 7: Tools > Internet Options > General (tab) > Languages > Language preference

Firefox : Tools -> Options -> Advanced (tab) -> General (tab) -> Languages

Opera : Tools > Preferences > Language > Details (button) -> Preferred languages for Web pages

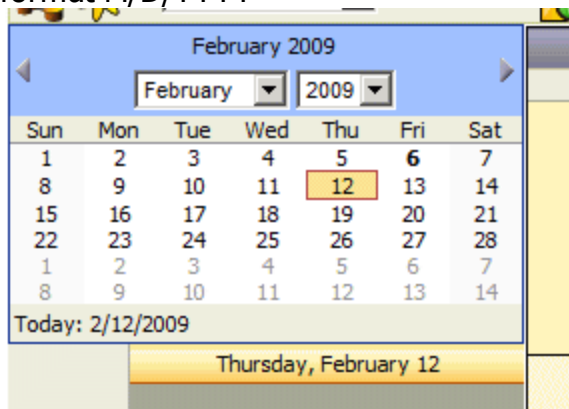
An example:

Advanced Service is an international company using AyaNova for its service management needs.

Bob and John are two users of this company.

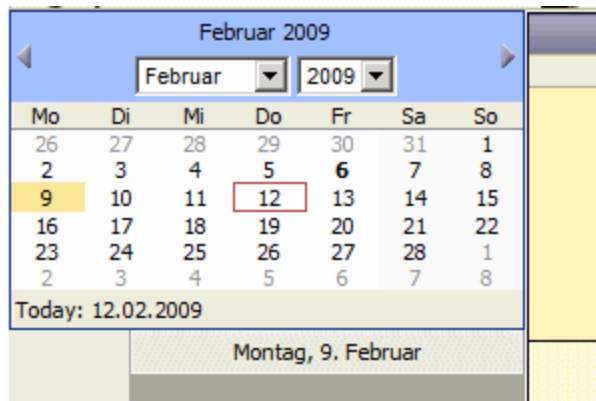
- Even though both users will connect to the same AyaNova database, their browser settings will dictate how some aspects display.
- Bob prefers viewing US regional settings, and has his web browser set to US English defaults.
-
- Whereas Peter prefers displaying the German format, and has his web browser set to German defaults.

When Bob views the Schedule screen via WBI, the screen will display the month name March, the day of the week selected in English, and today's date in the format M/D/YYYY



Whereas when John views the Schedule screen logged into the same AyaNova database WBI but via his web browser that has specific language settings set, the

screen will display the month name Februar, the day of the week selected in German, and today's date in the format DD.MM.YYYY

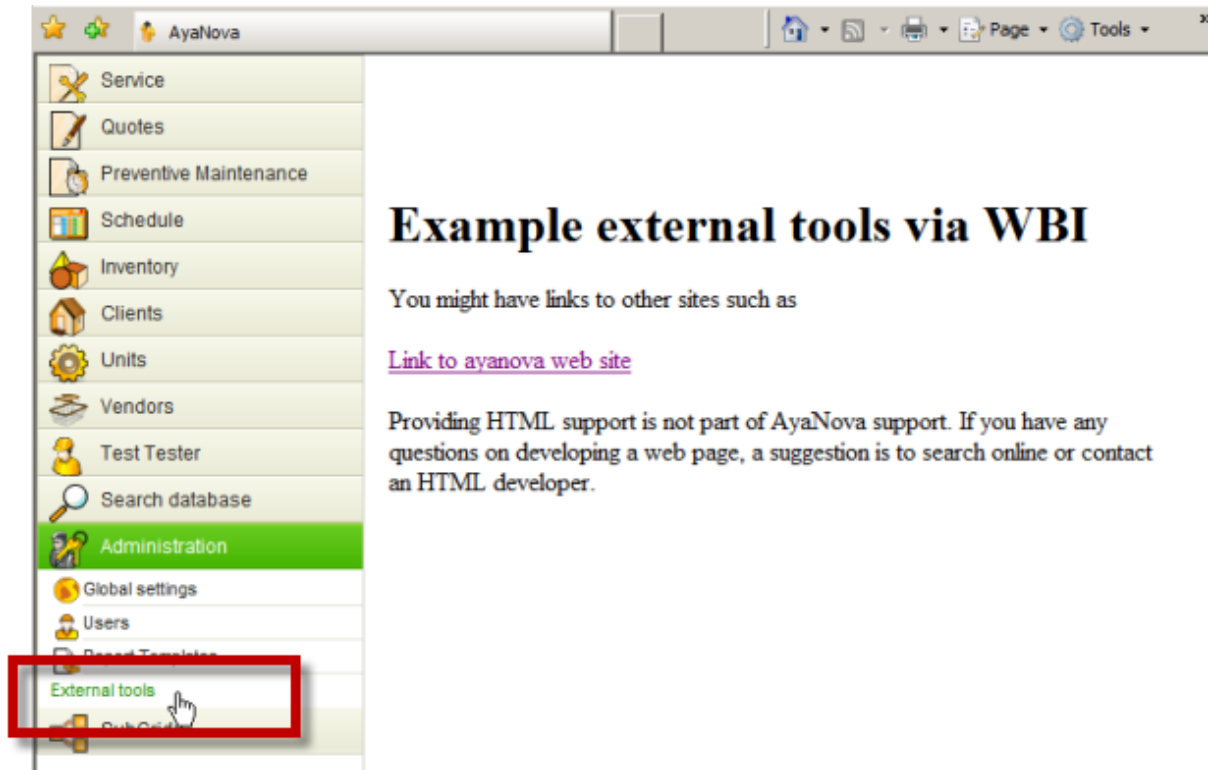


Here is a great site that provides information on setting language preferences in a browser <http://www.w3.org/International/questions/qa-lang-priorities>

Note that this is completely separate from the locale settings in AyaNova which allow for different languages to display. WBI will use the logged in users localized text setting to display program titles and other text just as the AyaNova program does, the above information pertains to how the controls work in the pages where data is culture dependant.

4.5 External Tools

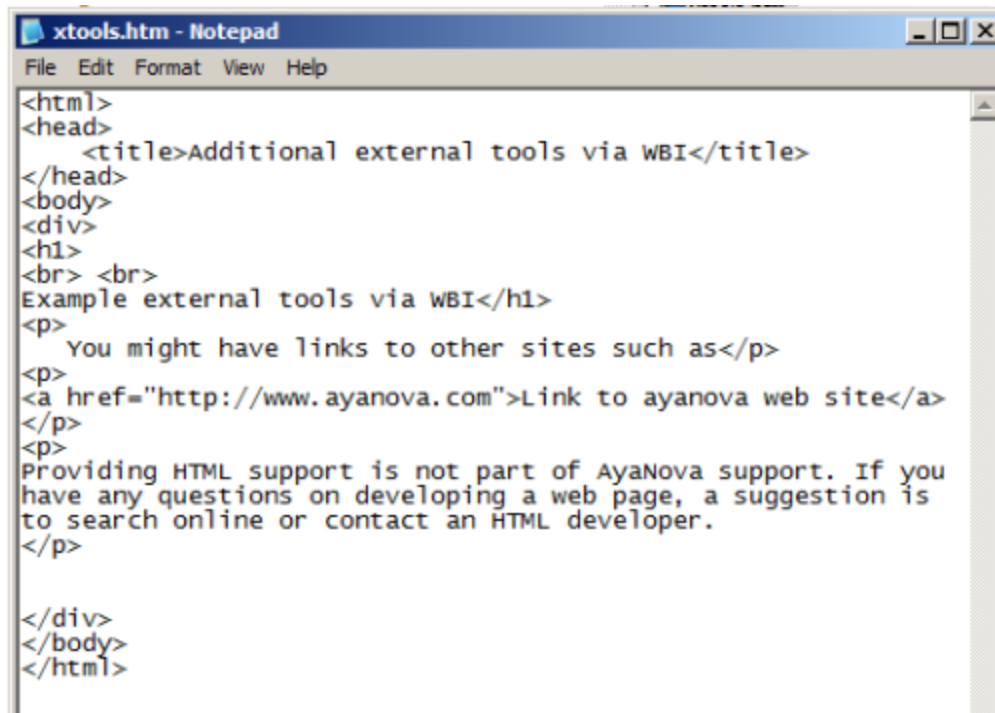
Take advantage of the External Tools feature of WBI to display links elsewhere for AyaNova users that are of the type Administrator User.



You might have links to other sites, you might have links to server side scripts - up to you.

1. Create a htm file called xtools.htm containing the HTML code to display

For example, for the page above, the xtools.htm file has the following:



```
<html>
<head>
  <title>Additional external tools via WBI</title>
</head>
<body>
<div>
<h1>
<br> <br>
Example external tools via WBI</h1>
<p>
  You might have links to other sites such as</p>
<p>
<a href="http://www.ayanova.com">Link to ayanova web site</a>
</p>
<p>
Providing HTML support is not part of AyaNova support. If you
have any questions on developing a web page, a suggestion is
to search online or contact an HTML developer.
</p>

</div>
</body>
</html>
```

2. Place the xtools.htm file into the root of the WBI folder (i.e. C:\Program Files\Ground Zero Tech-Works Inc\AyaNovaWBI)

3. Log in as a user who is of user type Administrator User. The External Tools selection will now show under the Administration navigation pane.

Note that the Administration navigation pane only displays for AyaNova users that are of the Administrator user type

AyaNova support does not provide HTML support for frames or web page design. If you have a question about web page design, please check with a web designer or search online for tips.

WBI Features & Use

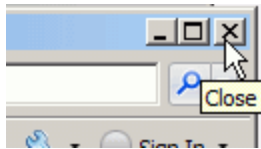
5 WBI Features & Use

5.1 Logging Into and Out of AyaNova via WBI

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI:

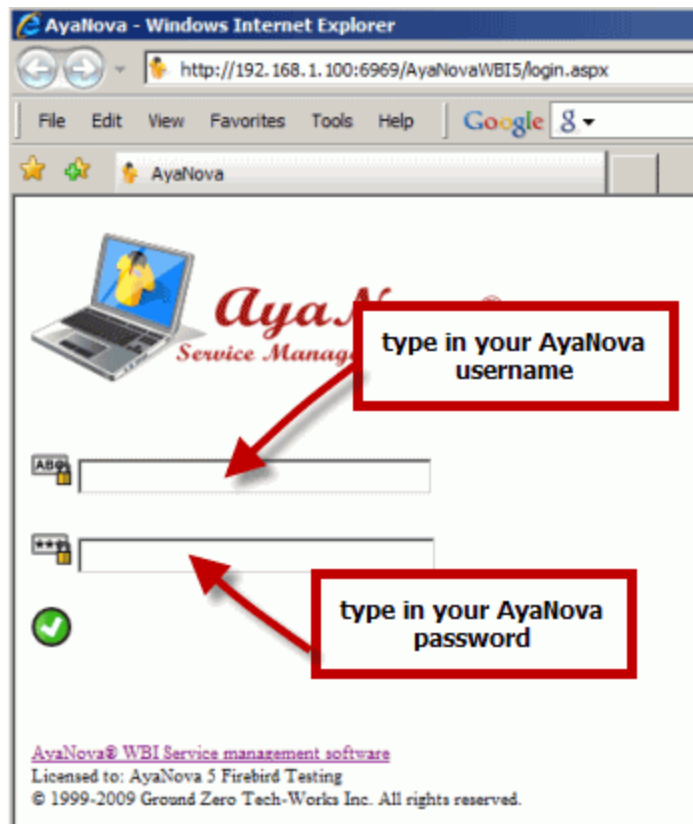
Logging out:

- There is no Log Out selection in WBI. If you want to log in as a different user simply exit out of the web page and browser and navigate to the login.aspx page again
- Exit by selecting the X in the upper right hand corner of your Internet web browser to close the Internet web browser.



Logging in and what you see:

- Obtain the URL address from the person who has configured WBI for you and enter in the address bar of your web browser.
- The username and password you log in as authenticates who you are and what you have rights to.

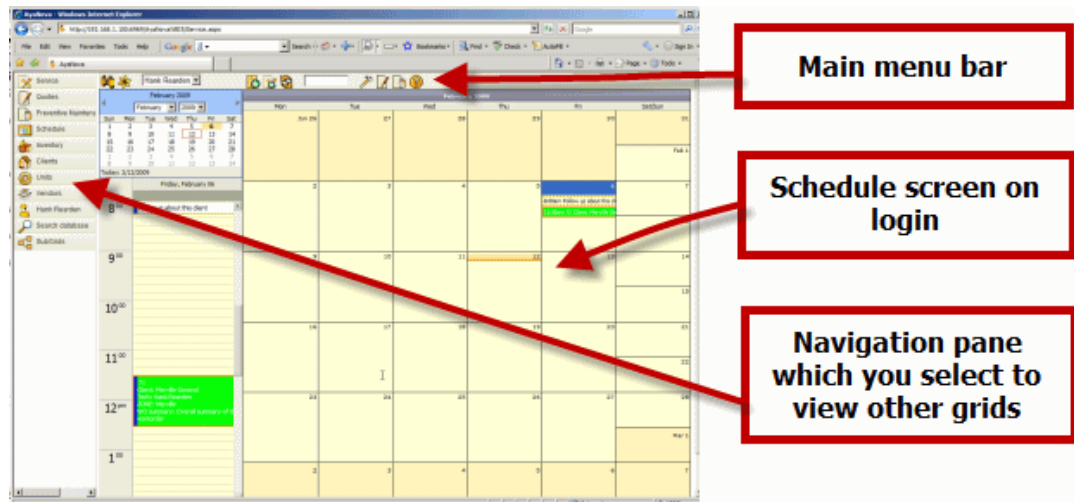


- Do note that you **can** change the login banner image at the top.
- Do note that you can not customize any of the other layout aspects of WBI
- If the database is the default trial database, login using one of the many sample AyaNova users (*not possible to log in using the AyaNova Administrator account "manager" with password "letmein" as it is using the known username and password unless you have changed it*)

Username:	Password:	Security Group a member of:	Locale:
test	test	AyaNova Administrator	English
eva	eva	Read Only	English
hank	hank	Technicians	English
abc	abc	Client WBI	English
molly	molly	Head Office WBI	English
german	german	AyaNova Administrator	Deutsch
spanish	spanish	AyaNova Administrator	Español
french	french	AyaNova Administrator	Français

- Once an AyaNova user logs into AyaNova via WBI, the main WBI page will display with the navigation panes on the left, and the Schedule screen

displaying on the right. If the user logged in is a schedulable user, their name will be selected, and their workorder items will be displaying. If user logged in is not a schedulable user, by default Unassigned will be selected. (And if the user logged in is a client or head office, they will see completely difference web pages)



- If after logging in, the web browser page displays similar in format to the screenshot below, that is because you have logged in as an AyaNova Client

The screenshot shows a web browser window displaying a table titled 'Customer service requests'. The table has the following columns: Record Created, Client service request, Reference Number, Status, Priority, Record Created By, and Client. The data rows show various requests with their respective details.

Record Created	Client service request	Reference Number	Status	Priority	Record Created By	Client
2/12/2009 2:01:18 PM	another new CSR	csr #4545	Closed	Not urgent	abc	ABC Acco
2/12/2009 1:21:29 PM	22	33	Accepted	Not urgent	abc	ABC Acco
2/12/2009 11:28:26 AM	22	22	Accepted	Not urgent	abc	ABC Acco
2/12/2009 11:25:31 AM	11	11	Accepted	Not urgent	abc	ABC Acco
2/12/2009 9:43:06 AM	CSR Title	CSR Reference Number	Closed	ASAP	abc	ABC Acco
12/8/2008 9:10:47 AM	Machine is making weird noise		Accepted	ASAP	abc	ABC Acco

- Unlike the full AyaNova Windows program, the last grid you were viewing will **not** automatically display when you log in. To view a grid, you need to select the navigation pane on the left, and then the grid you want to view.

For example:

- Once we have logged in, we want to view the Unit Models grid in the Units navigation pane

- Click on the Units navigation pane to expand it so you can see what grids are available for selection
- Click on the Unit Models grid in this navigation pane
- The grid on the right will now display the Unit Models grid along with its menu



5.2 Client's WBI vs AyaNova User's WBI

The WBI web pages a client views are very different than what an AyaNova user can access in WBI.

- We have provided a separate HTML Help file for Client's accessed from within the WBI web page menu at the top when a client logs in via WBI
- To become familiar with what the client sees and uses via WBI, it is suggested to configure a WBI client account, and log in as that account.
- Also review the Client's WBI Help via the How To Documentation web page to become familiar with the web pages provided for a client logged in via WBI. You can also access this Client's WBI Online Help from within WBI when logged in as a client.

5.3 Override TimeZone

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 format. How date/times display to the user depends what time they are in relation to GMT.

By default, the time zone of that users computer is used if connecting via a direct network connection configuration. Whereas 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.

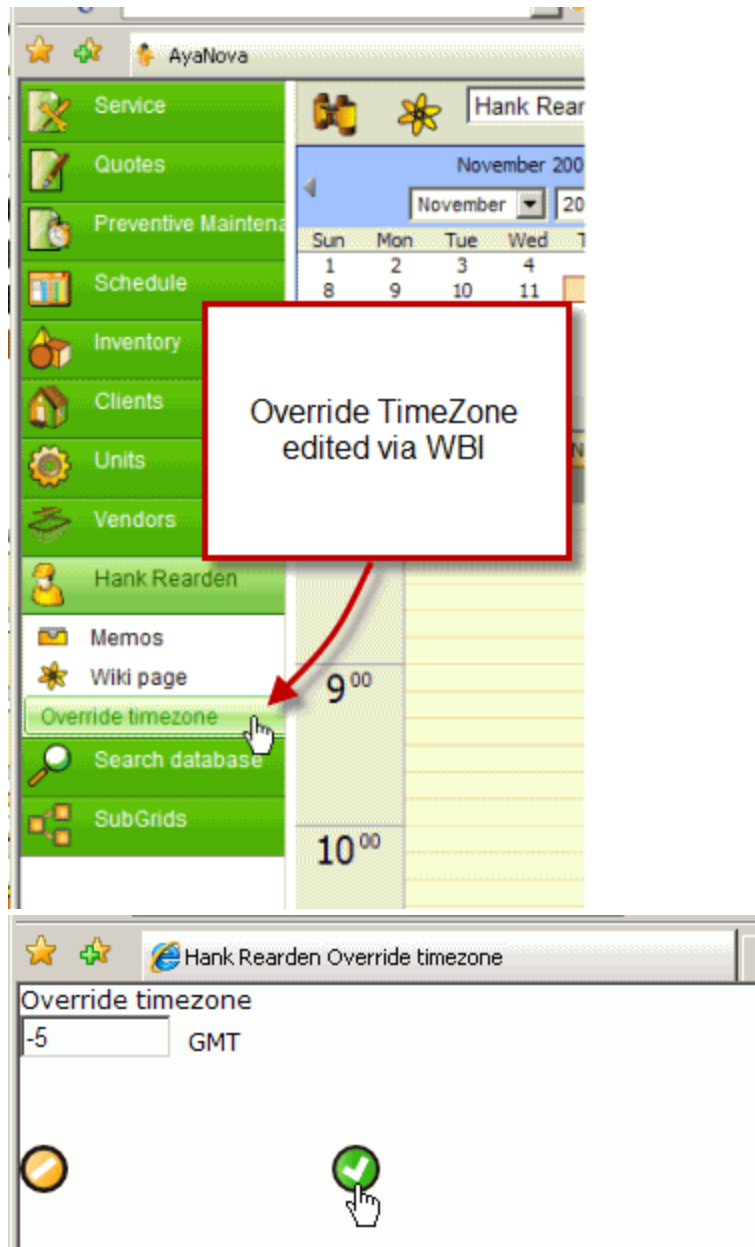
If a user is in a different time zone than where the server is set for and the user wants to view date/times based on where he actually is, then:

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 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 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 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 does not 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 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 in relation to 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 5 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



5.4 Use of Main Grids in WBI

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program grids and WBI grids

Grid menu options via WBI:



Recent... menu option

- WBI will display a list of recently accessed objects that you can select and go to directly from here.
- **NOTE:** If you were just recently in an object's entry screen (for example, a workorder entry screen), you will need to click the Refresh menu option before that object will display in WBI's Recent... list.

Grid Use:

Use of the Filter Drop List

Column order

Sorting by first column

Pinning columns

Filter column

Ability to set what columns do or do not display in a grid



Use of the Filter Drop List:

- Existing filter views created and saved via the main AyaNova program are available for selection within WBI.
- The ability to create new views or edit / delete existing views is not a feature via WBI. Refer to feature limitations that WBI presently does not provide
- Selectable saved filter views are determined at log in. If a new view is created in AyaNova while a user is logged into WBI they will not see that filter until they log back in again to WBI
- The default view selected is obtained from the settings of the user when last logged out of the main AyaNova program.

Column order:

- The column order for users via WBI is determined from the last time that user logged out of the AyaNova program.
- The ability to change which columns are in which order in a grid is **not** a feature of WBI for users. Refer to feature limitations that WBI presently does not provide

Sorting by first column:

- Sort order of the first column of a grid is obtained from the settings of the user when last logged out of the AyaNova program.
- The ability to change the sort (from Ascending to Descending or vice versa) by the first column is **not** a feature via WBI. Refer to feature limitations that WBI presently does not provide

Pinning columns:

- The ability to pin a column is **not** a feature via WBI. Refer to feature limitations that WBI presently does not provide

Filter column:

- Filtering via WBI uses different controls than that of the main AyaNova program. Refer to Filtering via WBI for users for more details.

Ability to set what columns do or do not display in a grid:

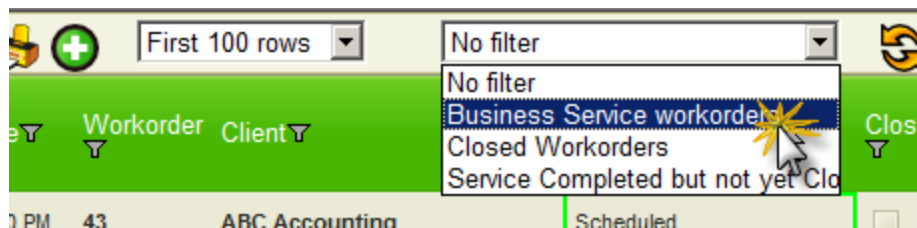
- What columns do or do not display is determined from the last time the user logged out of the AyaNova program.
- The ability to set what columns do or do not display in a grid via WBI is **not** a feature via WBI. Refer to feature limitations that WBI presently does not provide


5.5 Filtering via WBI for Users

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI


Selecting an existing saved filter from the Filter Drop List:

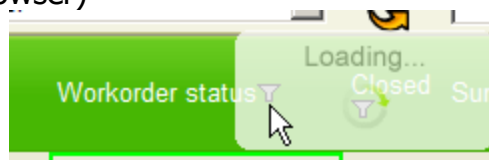
- Just like with the main AyaNova program, you can select a previously saved filter list from the Filter Drop List.

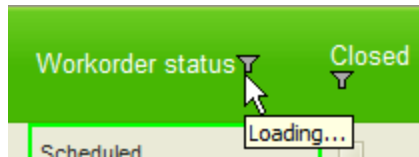


- And note that you **must** select the Refresh  menu option **after** selecting a saved filter for it to know to apply it to your list of records in the grid you are viewing.
 - A selected pre-saved grid is not able to automatically get the list of records for you until you click the Refresh menu option to allow for the manual filtering feature described below.
- Do note that you can not save a new filter or make changes to an existing saved filter from the Filter Drop List via WBI

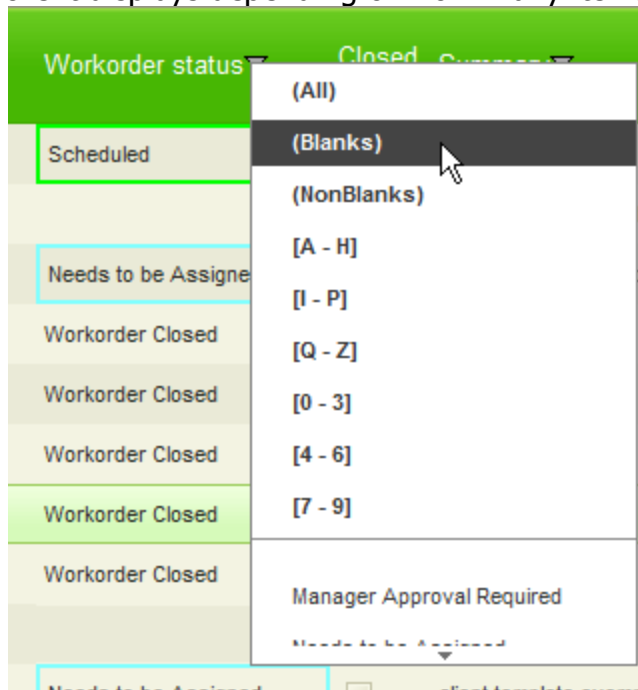
Filtering via WBI:

1. Click on the filter image  next to the column name
2. As it has to go back to the WBI server to get the list of possible selections, you will see that it shows Loading.... (how the Loading... shows depends on your web browser)

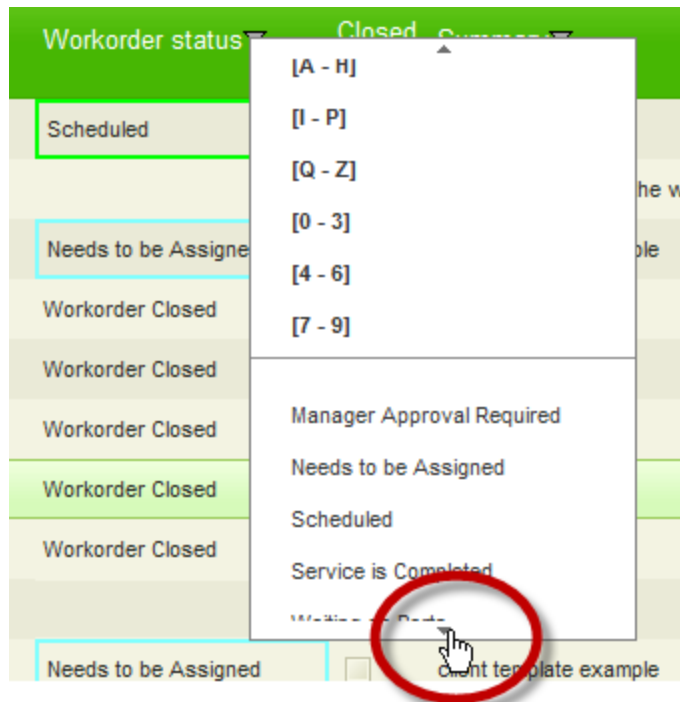




3. Once the possible list of selections is retrieved, it will then display as a drop down list next to that column you are filtering on (note it can take some time before it displays depending on how many items are to be listed)



4. The first 10 items will show in the list - to see more, hover your mouse over the down arrow at the bottom, and it will scroll automatically for you so that you can see more.



5. Select what you want to filter by, and the grid will refresh to show only records that match that.

Filters made via WBI can not be saved for future selection via the Filter Drop List.

When you exit out of your web browser, and log back in, the grid will display as the last saved grid setting when you actually exited out of via the main AyaNova program.

5.6 Entry screens - Creating new

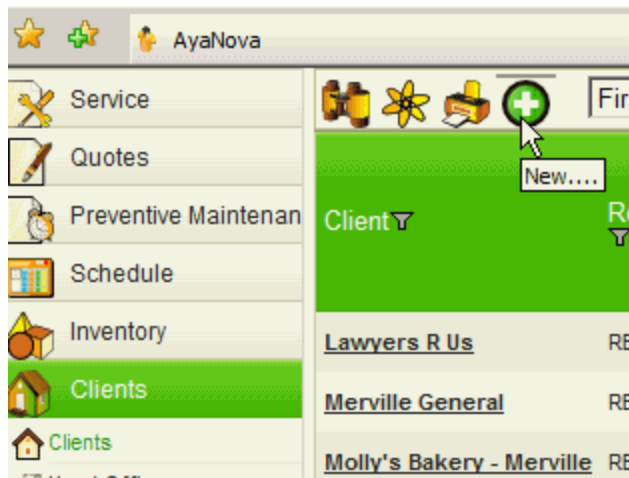
Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program grids and WBI grids

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

Creating a new record:

Just like in the main AyaNova program, when you select the New.. menu option on a grid, it will open an empty entry screen for that object where you can enter in the needed data, save and exit to return to the previously viewed grid.

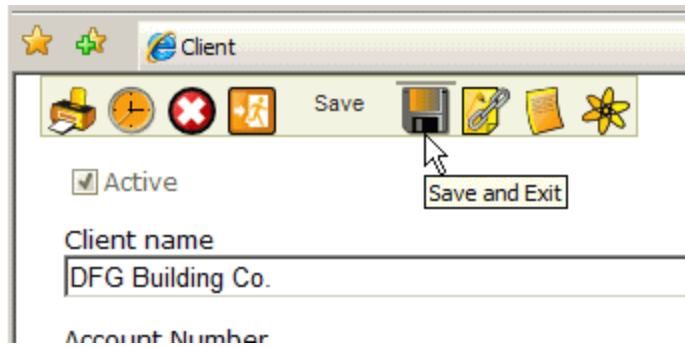
For example, to create a new client, from the Clients grid, select the New.. menu option




An empty client entry screen will open in a second web browser window.

Enter in data for that client such as Name, Dispatch Zone, etc.

To save this new entry and return to the Clients grid, select the Save & Exit menu option for that client's entry screen.



If you instead close the browser webpage directly (X in the upper right-hand corner if IE, or page if Mozilla FireFox), you **will lose** any changes you have made.

The grid you are returned to will **not** automatically update to reflect the new entry. You **must** use the  Refresh button to refresh the grid so as to view any new records or edits of existing records.

For example, if you just entered a new client via WBI, when you save the client entry screen you are returned to the previous grid. If you want to see that new client in the grid, you **must** select the Refresh menu option

5.7 Entry screens - Viewing existing

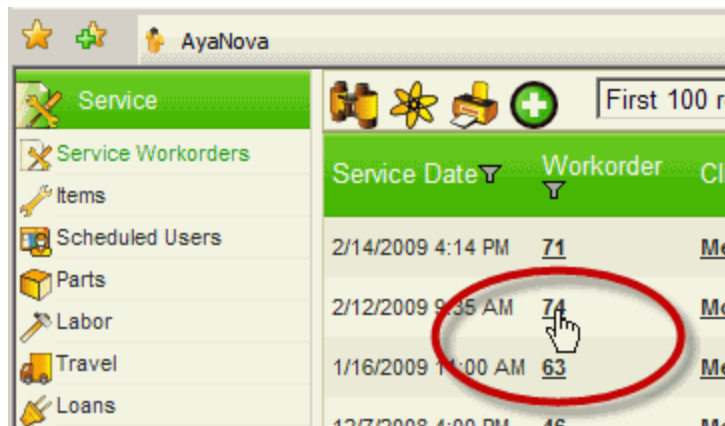
Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

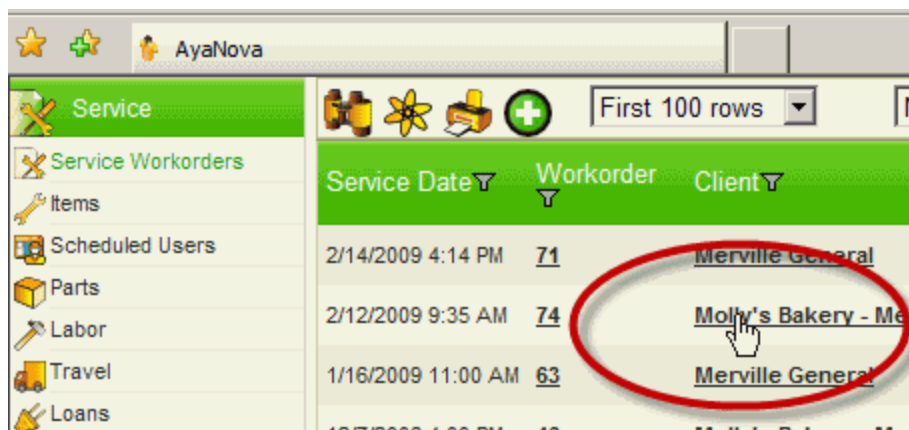
Viewing an existing record's entry screen:

Just like with the main AyaNova program, from a navigation page grid, select the data field for the object to open its entry screen.

For example, to open an existing workorder, select the workorder number.




For example, to open an existing client, select the client name.



If you make any changes to the entry screen, you **must** Save, or Save & Exit - this is the only way your web browser can know to "tell" the AyaNova database it is to be updated.

If you instead close the browser webpage directly (X in the upper right-hand corner if IE, or page if Mozilla FireFox), you **will lose** any changes you have made.

The grid you are returned to will **not** automatically update to reflect the new entry. You **must** use the  Refresh button to refresh the grid so as to view any new records or edits of existing records.

5.8 Entry screens - read only access

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

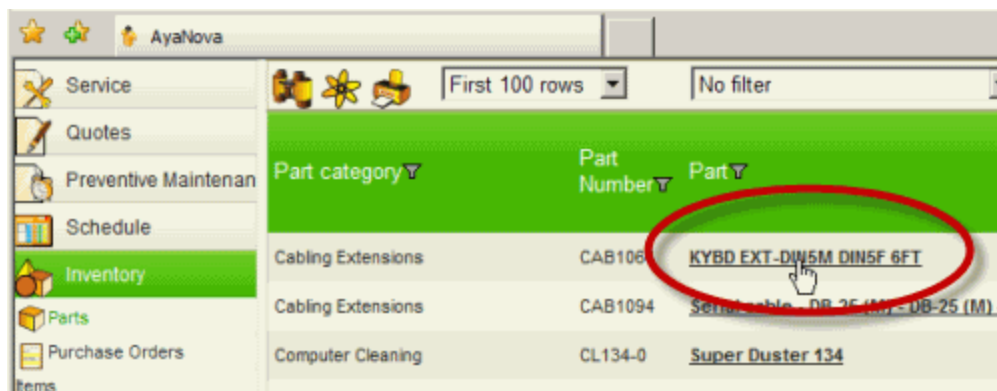
Read-only pop-ups screens

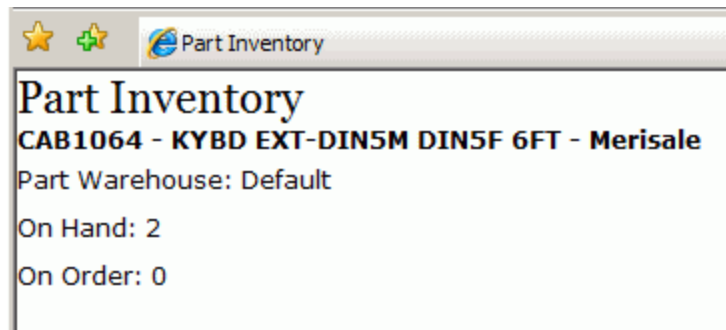
NOTE: some screens display only a "read-only" text view of an object's entry screen or grid. This is regardless whether you are logged in via WBI with full security group rights to the object or not.

Read only screens display for Parts, Contracts, Part inventory information, and Rates.

For example, you can view the Parts grid and view the data that is displaying in the Parts grid columns

But if you want to view what the On Hand amount, or On Order amount etc is for this particular part - let's say because you want to know if the part is in stock to be able to perform a particular job - you click on the Part number's hyperlink and a read-only popup will display inventory related information such as On Hand, On Order and for which warehouse.





5.9 Adding & Saving New Records in a SubGrid

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: *As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.*


- A subgrid is any of the grids available from the SubGrids navigation pane such as Workorder Statuses, Priorities, etc
-
- A sub-grid can also be in an entry screen such as the workorder item sub-grid in a workorder entry screen, the Labor sub-grid in a workorder item, etc.

You can add a new record to a sub-grid (such as create a new Workorder Status). Do not forget to save the new record when have created via WBI when have done so!

Adding a new record to a sub-grid:

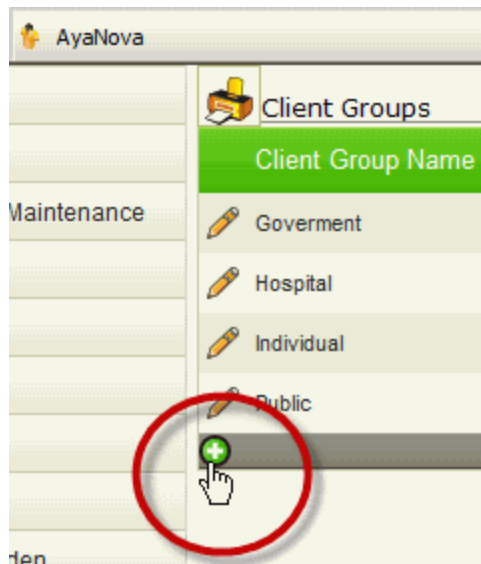
There is a difference with how you add data to a sub-grid then how it is performed via the main AyaNova program.

In the main AyaNova program, you begin typing in the gray bottom row of a sub-grid to start a new record.

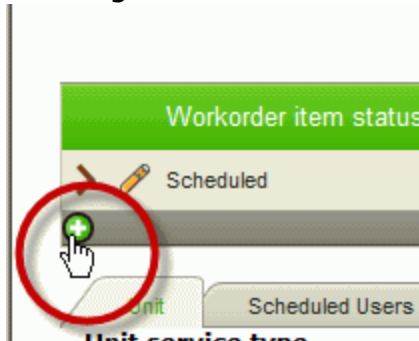
Whereas via WBI, you need to select the  to **request** creation of a new record for that sub-grid through the internet to the AyaNova database.

For example:

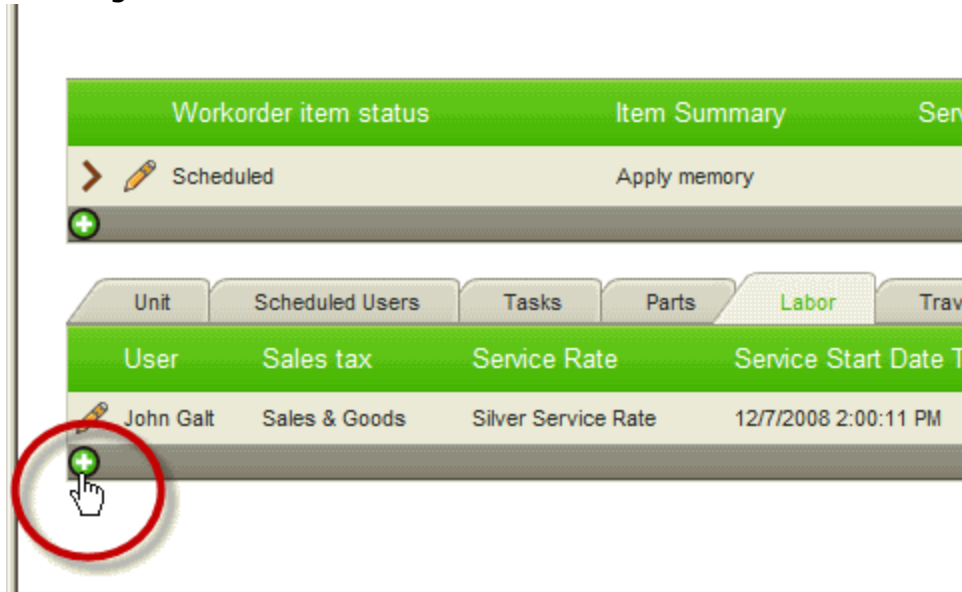
- adding a new Client Group.




- adding a new workorder item record




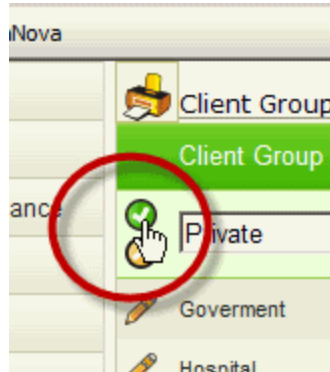
- adding a new labor record.





If the  option does not show, that means that your security group you belong to does not have rights to create new for this subgrid.

Saving the new record in a sub-grid:

You **must** select the  to accept the new entry



If you instead close the entry screen where the sub-grid resides or select the  Cancel option, even if you select Save & Exit on the entry screen, your new sub-grid entry record **will be discarded**.

You have to **tell** the database to save any new entries - and you do this by selecting the  to accept the new entry


5.10 Editing or Deleting an Existing Record in a SubGrid

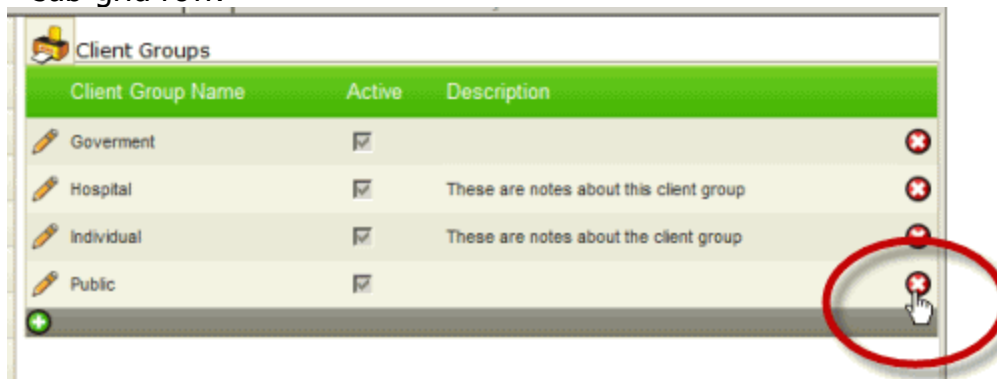
Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

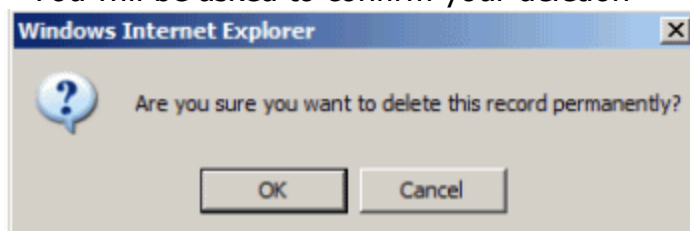
- A subgrid is any of the grids available from the SubGrids navigation pane such as Workorder Statuses, Priorities, etc
- A sub-grid can also be in an entry screen such as the workorder item sub-grid in a workorder entry screen, the Labor sub-grid in a workorder item, etc.

Deleting an existing subgrid record:

- If the subgrid provides the ability to delete, and you have the rights to do so, to delete a sub-grid record, select the Delete image  on the far right of the sub-grid row.




- You will be asked to confirm your deletion

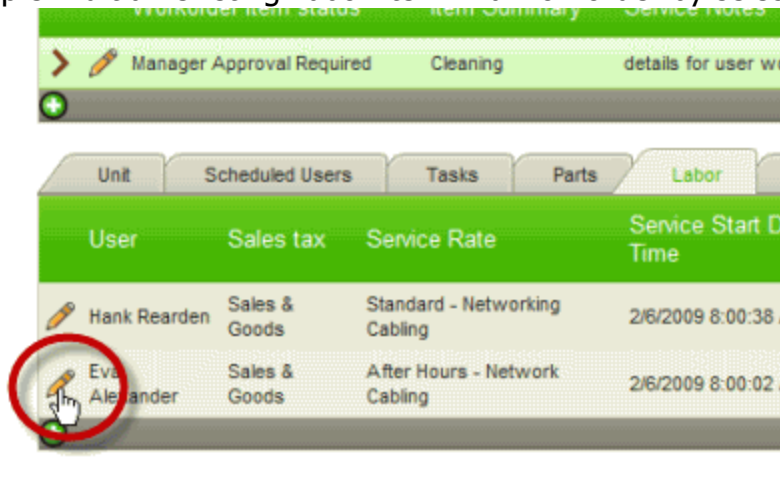



- If you get the following message, it is self explanatory - that object you are trying to delete is presently selected elsewhere in AyaNova so it won't allow you to delete it to maintain database integrity

This object can not be deleted because it is linked to one or more related objects



Editing an existing subgrid record:

- If the sub-grid provides the ability to edit, and you have the rights to do so, to edit an existing sub-grid record, select the Edit image  on the far left column of the sub-grid.
- Example: Edit an existing Labor item in a workorder by selecting its Edit option



- The screen will display the image  that indicates the row is being retrieved from the database
- The sub-grid row will now display so that it can be edited

The screenshot displays a software interface for entering service details. At the top, a header bar contains the user name 'Eva Alexander', the service type 'Sales & Goods', the specific service 'After Hours - Network Cabling', and two timestamps: '2/6/2009 8:00:02 AM' and '2/6/2009 9:00:02 AM'. Below this, the form includes several fields: 'User:' with a dropdown menu showing 'Eva Alexander'; 'Sales tax:' with a dropdown menu showing 'Sales & Goods'; 'Service Rate:' with a dropdown menu showing 'After Hours - Network Cs'; 'Service Start Date Time:' with a date/time picker set to '2/6/2009 8:00 AM'; and 'Service Stop Date Time:' with a date/time picker set to '2/6/2009 9:00 AM'. A large text area for 'Service Details' contains the placeholder text 'details of the work I performed would be entered here'. At the bottom, there are two input fields: 'Service Rate Quantity:' with the value '1' and 'No Charge Quantity:' with the value '0'. In the bottom-left corner, there are three circular icons: a green circle with a white checkmark, a yellow circle with a black border, and a red circle with a white 'X'.

- Note after editing, you **must** accept any changes by selecting the  ok option otherwise changes will be lost.
- If instead you do not want to save any changes, select the  Cancel option

5.11 Entering Dates & Times

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

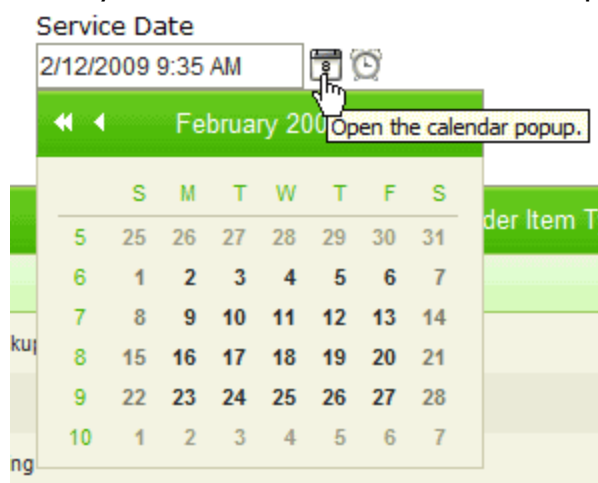
The Date & Time Picker

Many entry screens and grids within AyaNova have a Date & Time Picker field - where you select a date and enter a time.

Some fields may automatically default to today's date and time - for example, the Service Date in a new workorder. This is a feature for date & time fields that usually will be a certain date - for example, if you are creating a new service workorder on the road, it more then likely is for service you are providing at that time.

Selecting the Date:

- Use your mouse to select the calendar popup and select the date



Selecting the Time:

- Use your mouse to select the time view popup and select the time you want

Service Date

2/13/2009 9:35 AM

8:00 AM 8:15 AM 8:30 AM 8:45 AM

9:00 AM 9:15 AM 9:30 AM 9:45 AM

10:00 AM 10:15 AM 10:30 AM 10:45 AM

11:00 AM 11:15 AM 11:30 AM 11:45 AM

12:00 PM 12:15 PM 12:30 PM 12:45 PM

1:00 PM 1:15 PM 1:30 PM 1:45 PM

2:00 PM 2:15 PM 2:30 PM 2:45 PM

3:00 PM 3:15 PM 3:30 PM 3:45 PM

4:00 PM 4:15 PM 4:30 PM 4:45 PM

5:00 PM 5:15 PM 5:30 PM 5:45 PM

6:00 PM 6:15 PM 6:30 PM 6:45 PM

7:00 PM 7:15 PM 7:30 PM 7:45 PM

8:00 PM 8:15 PM 8:30 PM 8:45 PM

9:00 PM

Type

Outside S

Open the time view popup.

Manually editing the Date or Time:

- Highlight what you want to manually edit and type in what you want

Service Date

2/13/2009 10:00 AM

8:00 AM 8:15 AM 8:30 AM 8:45 AM

9:00 AM 9:15 AM 9:30 AM 9:45 AM

10:00 AM 10:15 AM 10:30 AM 10:45 AM

11:00 AM 11:15 AM 11:30 AM 11:45 AM

12:00 PM 12:15 PM 12:30 PM 12:45 PM

1:00 PM 1:15 PM 1:30 PM 1:45 PM

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3:00 PM 3:15 PM 3:30 PM 3:45 PM

4:00 PM 4:15 PM 4:30 PM 4:45 PM

5:00 PM 5:15 PM 5:30 PM 5:45 PM

6:00 PM 6:15 PM 6:30 PM 6:45 PM

7:00 PM 7:15 PM 7:30 PM 7:45 PM

8:00 PM 8:15 PM 8:30 PM 8:45 PM

9:00 PM

Type

Outside S

- Or highlight what you want to manually edit, and use the **up and down arrow keys** on your keyboard

5.12 Selecting via a Combo Drop Down Box

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: *As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.*

WBI will **only** automatically fill combo box lists if they are for items that are known to be a small quantity - such as the Status field in a Quote entry screen as would only ever contain six choices.

For any item that could contain an unlimited number of items the list is only fetched on your command in order to ensure that pages will load quickly and respond to your commands efficiently if not selecting from a drop down list.

In fact the full AyaNova does this as well, but it's more transparent to the user. As a web browser is not connected to the AyaNova database at all times so data has to be fetched on command.

Also too, with WBI you can "jump" to an item in the list of options (i.e. part selection, Workorder Status, rates, etc) via the **auto-complete multi-character** feature instead of only using your mouse to scroll down and select.

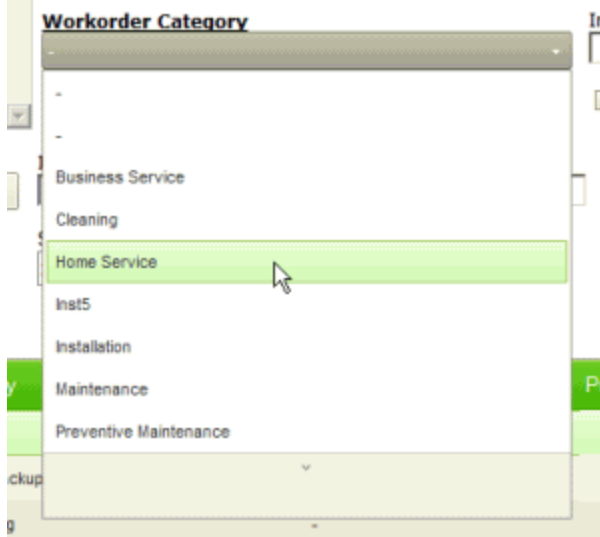
1. If nothing is selected yet, select the arrow image to the right or click in the drop down box itself



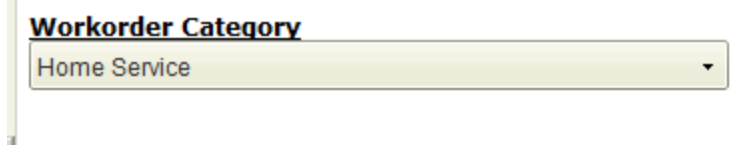
2. Now select on the "get more" image at the bottom of the drop down. This will send a request to WBI that you want the list filled.



3. A list of possible selections will now display and click on the selection you want



4. What was selected will now display



For efficiency, data is only retrieved for the combo box you wish to select from. It would cause the workorder to take a lot longer to obtain data on every single possible combo box, therefore a lot longer before you could view it and/or edit it. This would not be efficient, especially if all you want to do is just view existing data while out on a service call, or edit one combo box.

Multi-character auto-complete feature

Also too not only can you use your mouse to scroll down to find the item you wish selected, but you can also begin typing in the first letters of what you want to have WBI "jump" to so that you can quickly select.

For example, when creating a part records in the Parts subsection of a service workorder, start typing in the first letter and WBI will jump to that item.

Service Date
12/31/2010 11:36 AM

Summary Service Notes
summary stuff enter here details about the service that is to be performed

Parts Labor Travel Expenses Location

Serial Number	Description
INP1345	Mouse-in-a-Box Rechargeable Wireless - Kensington
INP1346	Preferred Pro Keyboard - HP / Compaq
NET3466	OfficeConnect Wireless 54Mbps 11g Print Server - 3COM
POW1236	SURGE SurgeArrest Notebook Pro - APC
POW3457	SURGE 10RCPTL 357J WM 5K 15FT CORD - Belkin
POW650	Back-UPS CS 650VA - APC
POW700	Back-UPS LS 700VA - APC
PRT3428	i80 - Canon
PRTSPR800	Stylus Photo R800 - Canon
SPT355	Sport Cups - Blue - Blaupunkt
TEP12	Thompson eyephones - Belkin
TON3964A	Toner - Black - HP / Compaq

P Sales Only 1

NET3466 - OfficeConnect wireless 54Mbps 11g Print Server - 3COM

POW1236 - SURGE SurgeArrest Notebook Pro - APC

POW3457 - SURGE 10RCPTL 357J WM 5K 15FT CORD - Belkin

POW650 - Back-UPS CS 650VA - APC

POW700 - Back-UPS LS 700VA - APC

PRT3428 - i80 - Canon

PRTSPR800 - Stylus Photo R800 - Canon

SPT355 - Sport Cups - Blue - Blaupunkt

TEP12 - Thompson eyephones - Belkin

TON3964A - Toner - Black - HP / Compaq

POW1236 - SURGE SurgeArrest Notebook Pro - APC Sales Only 1

5.13 Service Workorder - Service Completed / Closed

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

Service Completed and the Closed: checkbox fields

- As WBI is a web application, saving any changes you make is the only way that information for that object is updated in the AyaNova database, and displayed back to you.
- Therefore if you check-mark the Service Completed field, you must Save and exit out of the workorder **before** editing anything further.
 - The Closed checkbox will display gray until Service Completed is check-marked and has been saved and exited out of at least once.
 - Do note of course that if the security group your AyaNova username belongs to does not have Read/Write or read/Write/Delete rights to the Object.Workorder.Close , than even with Service Completed check-marked, Closed field will remain grayed.
- And along the same lines, as the object loads with data obtained from the AyaNova database, if you uncheck the Service Completed, you must Save and exit out of that workorder **before** the workorder's fields will again be editable.

Workorder 46 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://192.168.1.104/AyaNovaWBI/WorkorderEdit.aspx?id=0a2

Most Visited Getting Started Latest Headlines

AyaNova Workorder 46

Save

Client
Molly's Bakery - Merville
207 - 112st Ave
Merville AT 10256-12365
United States
Business: (555) 555-8989
Fax: (555) 555-9999
Scheduleable User Notes:
Sample tech notes.

Summary
Apply memory

Contact

Project
-

Client Reference #
MOL7878

Workorder Category
Installation

Internal Reference #

☐ Onsite

Workorder status
Service is Completed

Invoice Number

☒ Service Completed

☒ Closed

Close by date
8/23/2010 4:09 PM

Service Date
8/19/2010 4:00 PM

Item Summary	Service Notes	Workorder Item Type	Workorder item status	Priority
Appl...		Hardware Configuration	Service is Completed	High

5.14 Service Workorder - signature capture

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: *WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost***

NOTE: Signature capture requires HTML 5 compliancy - such as the following web browsers - IE 9.0+, FIREFOX 3.0+, SAFARI 3.0+, CHROME 3.0+, and OPERA 10.0+

If your web browser is not listed and you want to check if it is or not, just go to the online demo WBI at the bottom of the WBI feature web page and perform the capture steps below to see if it works for you

**Where to set what displays for the signature title, header and/or footer
How to capture a signature from your client for a specific service
workorder via WBI**

Where to set what displays for the signature title, header and/or footer:

- Set these via Global Settings when logged into the full AyaNova program as the AyaNova Administrator.
- Save.
- You will need to restart the IIS application pool for your AyaNova WBI so that this change is identified. Do so by either recycling the application pool assigned to your AyaNova WBI; or restarting your server; or edit a comment area of the WBI's web.config and save which will force will itself force a restart of the site.

Use Notification	true
SIGNATURE	
Signature footer	
Signature header	PLEASE SIGN BELOW
Signature title	BY SIGNING BELOW YOU AGREE TO TERMS OF SERVICE PROVIDED
Signature title	
Text displayed as title above signature area	

How to capture a signature from your client for a specific service workorder via WBI:

- User logged in must have minimum Read/Write rights to Object.WorkorderService
- The workorder must be set to Service Completed (if not yet, checkmark it, Save, open the workorder again)

<input type="checkbox"/>	<input checked="" type="checkbox"/> Service Completed
<input type="checkbox"/>	<input type="checkbox"/> Closed

- Select to print preview a specific workorder report and show that preview to your client.

The example workorder report template below is the Sample Detailed Service Workorder with Signature report template

AyaNova Workorder# 45
Monday, January 10, 2011

Green, Frank

Physical Address: 12 - 1289 Pleasant Lane
Bedbury, NY 11710-0000

Service Date: 10/11/2011 8:30-9:00 AM
Customer Reference #: 00000000
Service #: 00000000

Service Item Summary: Initial UPS

Unit Service: Service Item 10100 - 10100-0000

Qty	Rate	Price Per	Ext	Tax A	Tax B	Line Total
1	10100-0000 - 10100-0000	\$11.00	\$11.00	\$0.00	\$0.00	\$11.00
Part Tot Total		Part Tax A	Part Tax B	Part Total For This Service Item		
\$11.00		\$0.00	\$0.00	\$11.00		

Description of Misc. Charge	Total Cost	Tax A	Tax B	Line Total
Working Fee	\$0.00	\$0.00	\$0.00	\$0.00
Misc. Exp. Tot Total	\$0.00	\$0.00	\$0.00	\$0.00

Net Labor	Net Transp	Net Parts	Net M & M	Net Lease	Total Tax A	Total Tax B	Workorder Total
\$0.00	\$0.00	\$11.00	\$0.00	\$0.00	\$0.00	\$11.00	\$11.00

Client Signature: _____ Date: _____

BY SIGNING BELOW YOU AGREE TO TERMS OF SERVICE PROVIDED

PLS SIGN HERE

d. At the top will be a hyperlink with the text you have set in Signature Title in Global Settings via AyaNova which when selected will jump you to the bottom where the Signature field is (or just scroll down to the bottom if haven't set a Signature Title)

AyaNova Workorder# 45
Monday, January 10, 2011

Green, Frank

Service Date: 10/11/2011 8:30-9:00 AM
Customer Reference #: 00000000
Service #: 00000000

Service Item Summary: Initial UPS

Unit Service: Service Item 10100 - 10100-0000

Qty	Rate	Price Per	Ext	Tax A	Tax B	Line Total
1	10100-0000 - 10100-0000	\$11.00	\$11.00	\$0.00	\$0.00	\$11.00
Part Tot Total		Part Tax A	Part Tax B	Part Total For This Service Item		
\$11.00		\$0.00	\$0.00	\$11.00		


Description of Misc. Charge	Total Cost	Tax A	Tax B	Line Total
Working Fee	\$0.00	\$0.00	\$0.00	\$0.00
Misc. Exp. Tot Total	\$0.00	\$0.00	\$0.00	\$0.00

Net Labor	Net Transp	Net Parts	Net M & M	Net Lease	Total Tax A	Total Tax B	Workorder Total
\$0.00	\$0.00	\$11.00	\$0.00	\$0.00	\$0.00	\$11.00	\$11.00

Client Signature: _____ Date: _____

BY SIGNING BELOW YOU AGREE TO TERMS OF SERVICE PROVIDED

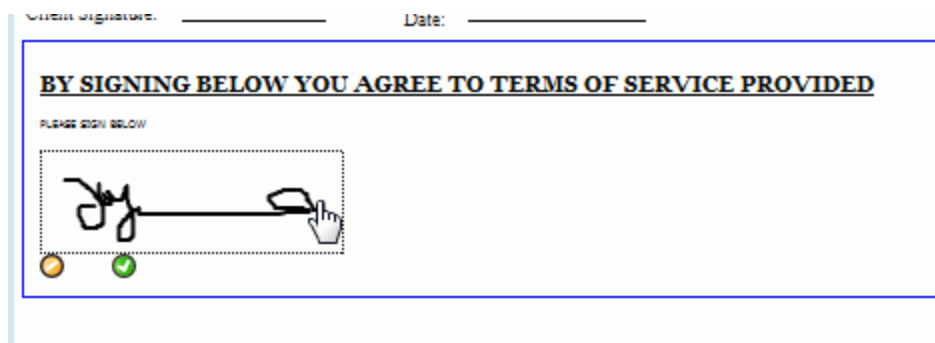
PLS SIGN HERE



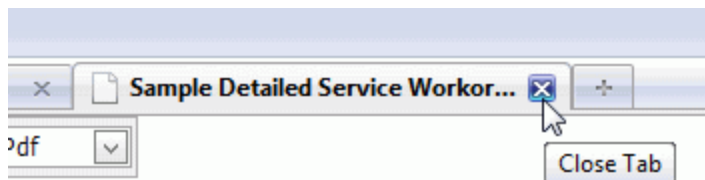
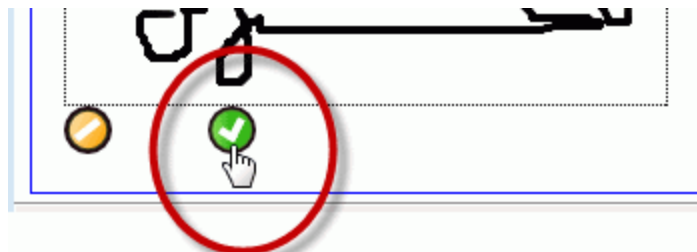
A screenshot of a digital signature form. At the top, it says "BY SIGNING BELOW YOU AGREE TO TERMS OF SERVICE PROVIDED" in bold, underlined text. Below this, it says "PLEASE SIGN BELOW". There is a large dashed rectangular box for the signature. At the bottom left of the box, there are two circular buttons: a yellow one with a pencil icon and a green one with a checkmark icon.

e. Have your client sign. Select OK when completed which will save it.

Note that the saved signature will not show in the field after you click OK, you MUST exit out of the report template and open it again if you wish to see the newly saved signature



A screenshot of the same digital signature form, but now with a handwritten signature "Jey" inside the dashed box. A mouse cursor is pointing at the end of the signature. The yellow and green buttons are still at the bottom left.





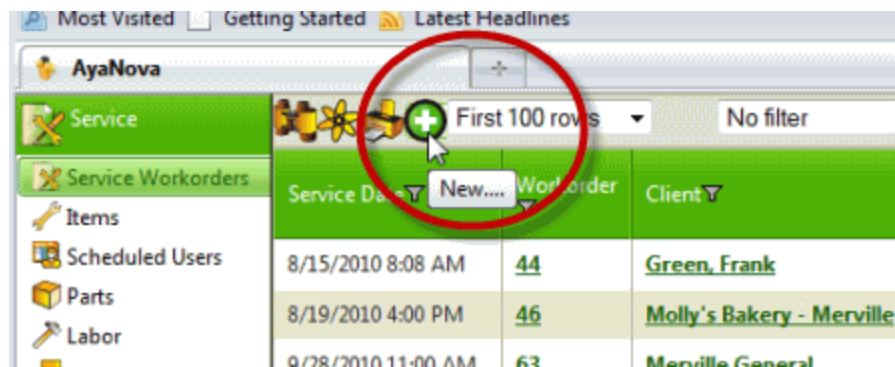
5.15 Service Workorder - client selection

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

Creating a new workorder:

- Just like with the AyaNova program, the client selection first appears when you select the  New... menu option via the Service Workorders grid menu bar.
- But do note that you can **not** create a new client via the WBI client selection screen. If the client is not listed for selection, cancel  , view the Client's grid and create a new client



The screenshot shows a web browser window with the address bar displaying `http://192.168....rkorderNew.aspx`. The browser's navigation bar includes links for "Most Visited", "Getting Started", and "Latest Headlines". The page content features a form with the following elements:






- A "Client" label above a dropdown menu currently showing a hyphen (-). A mouse cursor is hovering over the dropdown arrow.
- A search icon (magnifying glass) to the right of the Client dropdown.
- A "Service template" label above another dropdown menu, also showing a hyphen (-).
- At the bottom of the form, there are three circular icons: a yellow circle with a pencil, a yellow circle with a circular arrow, and a green circle with a checkmark.

5.16 Service Workorder - workorder items

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: *WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost***

Workorder Item:

- Refer to the Help topics Adding New Records in a SubGrid , Editing Existing Records in a SubGrid and Selecting a Workorder Item subgrid for information on  adding a new workorder item,  deleting,  editing,  saving any edits, and  selecting a workorder item.

Workorder Item Sub-Grids:

- Via WBI, the workorder item sub-screens such as Parts, Labor, Tasks etc are accessed by selecting the associated tab. In the screenshot below, the first workorder item record is active (as shown that it is green highlighted) and have clicked on the Labor tab to view labor for this specific workorder item

Client: Molly's Bakery - Merville
207 - 112st Ave
Merville AT 10256-12365
United States
Business: (555) 555-5555
Fax: (555) 555-9999
Scheduleable User Notes:
Sample tech notes.

Summary: Apply memory

Contact: MOL7878

Project: -

Workorder Category: -

Workorder status: -

Invoice Number: -

Service Date: 2/12/2009 9:35 AM

Close by date: 2/19/2009 9:35 AM


Service Completed: ☐

Closed: ☐

Workorder item status	Item Summary	Service Notes	Workorder item Type	Priority	Request Date
Waiting on Parts	Apply memory	-	-	-	-
Scheduled	Check server backup	-	-	-	2/12/2009 4:09:22 PM
Waiting on Customer Approval	Software training	-	-	-	2/12/2009 4:09:56 PM
Scheduled	Power supply failing	-	-	-	2/12/2009 4:10:16 PM

Unit: Scheduled Users: Tasks: Parts: **Labor**: Travel: Expenses: Loans: Outside Service: Custom Fields:

User	Sales tax	Service Rate	Service Start Date Time	Service Stop Date Time	Service Details	Service Rate Quantity
John Galt	Sales & Goods	Silver Service Rate	2/12/2009 4:09:11 PM	12/7/2008 4:09:11 PM	2	0

- If the workorder has multiple workorder items, to be able to view the associated Labor, Parts, etc with a specific workorder item, you must first "select" the workorder item. Refer to the Help topic Selecting a Workorder Item subgrid on using  to select a workorder item.

5.17 Service Workorder - selecting a Workorder Item record

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.









Selecting a Workorder Item subgrid record:

Just like in the main AyaNova program, if you have multiple workorder items in a workorder and you want to view the specific Labor, Parts, Scheduled Users, etc for that specific workorder item - **you need to select it**

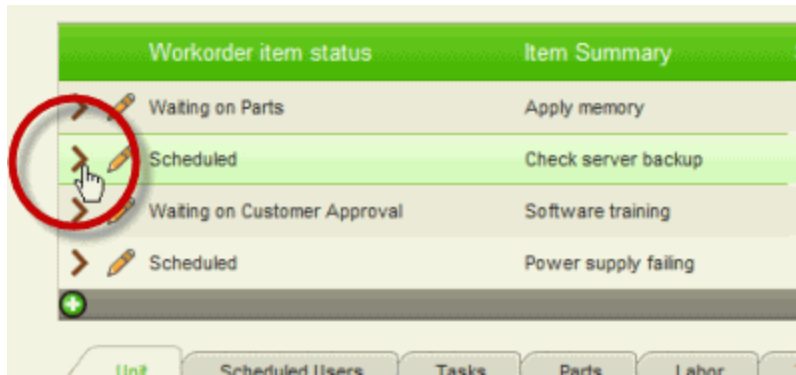
The Select image  is to select a specific sub-grid record so that you can view the associated sub-records.

For example, if you are viewing a workorder that has multiple workorder items, and you want to view the Labor for the second workorder item, you must select that second workorder item - as Labor, Parts, Travel, etc for each workorder item will display only if the specific workorder item is selected.

When you first open a workorder, the first workorder item listed will be selected by default - note the color difference.

Workorder item status		Item Summary
	 Waiting on Parts	Apply memory
	 Scheduled	Check server b
	 Waiting on Customer Approval	Software traini
	 Scheduled	Power supply t

And if you want to view the Labor for a different workorder item, you must select that workorder item first



You **do not** need to select the workorder item record to be able to edit it or delete it. You **only** need to select the workorder item record if you want to view the associated sub-records (i.e. Scheduled Users, Labor, etc) for it.

5.18 Service Workorder - Unit

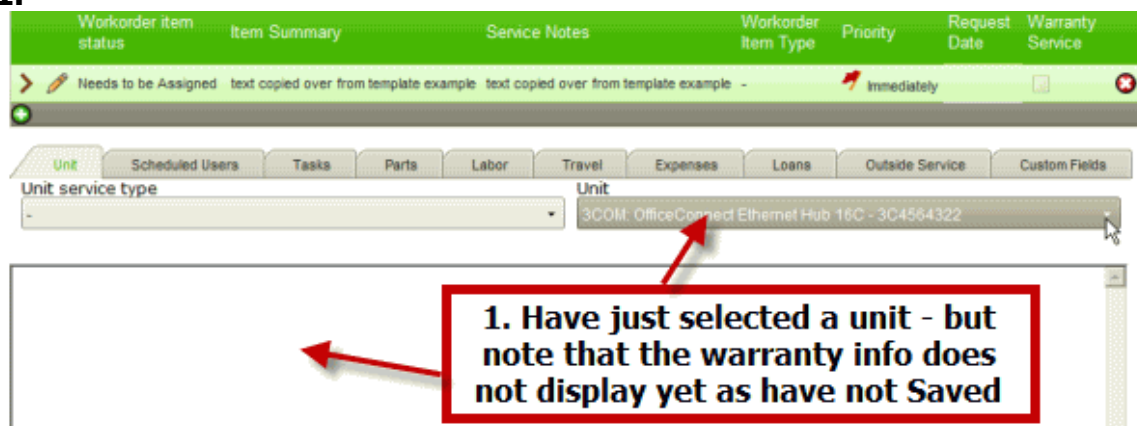
Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

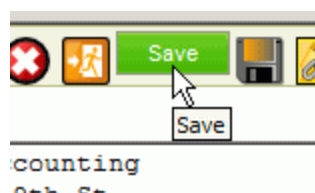
Units tab:

- If you create a second workorder item via WBI, and the first workorder item did have a unit selected, as a time saving feature, WBI will preselect the same unit for you. You can easily deselect this unit if not desired.
- If a unit is selected within a workorder item, and this unit has Unit Metered enabled, a hyperlink will display under the unit selected where you can enter meter readings that will be tied to this workorder when the workorder has been saved.
- To display warranty information on a unit just selected, you **must** select the Save menu option so that data will be retrieved from the AyaNova database and displayed.

1.



2.



3.

The screenshot shows a software interface with a top navigation bar containing tabs: Unit, Scheduled Users, Tasks, Parts, Labor, Travel, Expenses, Loans, Outside Service, and Custom Fields. The 'Unit' tab is active. Below the tabs, there are two dropdown menus: 'Unit service type' and 'Unit'. The 'Unit' dropdown is set to '3COM: OfficeConnect Ethernet Hub 16C - 3C4564322'. Below these, there is a text area displaying warranty information. The text reads: 'Unit is warrantied until Friday, December 31, 9999'. Below this, it says 'Warranty terms:' followed by a dashed line. Under the dashed line, it lists: 'Last closed service date: 2/12/2009 10:01:37 AM', 'Last closed service workorder: 75', and 'Purchased Date: 12/31/2004 4:00 PM'. A red box is drawn around the 'Unit Metered' link and the warranty details. A red arrow points from the 'Unit Metered' link to the red box. Another red arrow points from the text '3. Warranty info now shows as does Unit Metered link if unit is metered' to the red box.

Unit service type

Unit

3COM: OfficeConnect Ethernet Hub 16C - 3C4564322

Unit Metered

Unit is warrantied until Friday, December 31, 9999

Warranty terms:

Last closed service date: 2/12/2009 10:01:37 AM

Last closed service workorder: 75

Purchased Date: 12/31/2004 4:00 PM

3. Warranty info now shows as does Unit Metered link if unit is metered

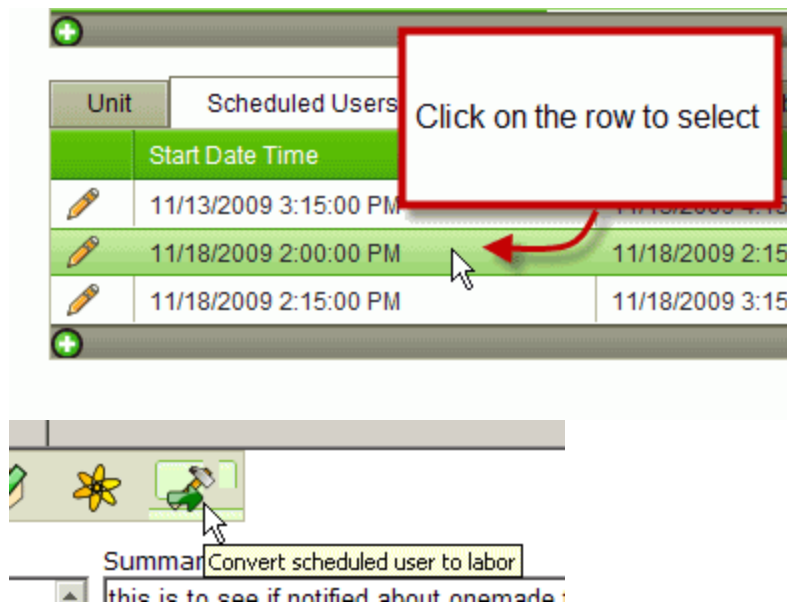
5.19 Service Workorder - Convert scheduled user to labor

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

Scheduled Users tab:

- Just like with the AyaNova program, you need to select the specific Scheduled User record **before** clicking on the menu option Convert Scheduled User To Labor



1. Select the specific Scheduled User record

2. And then click on the Convert Scheduled User to Labor menu option

Unit	Scheduled Users	Tasks	Parts	Labor	Travel	Expenses	Items	Outside Service	Custom Fields
	Start Date Time		Reg Date Time			Estimated quantity	User		Suggested rate
	11/13/2009 3:15:00 PM		11/13/2009 4:15:00 PM			1.00000	Mark Randles		-
	11/18/2009 2:00:00 PM		11/18/2009 2:15:00 PM			0.25	John Galt		Standard - Networking Cabling
	11/18/2009 2:15:00 PM		11/18/2009 3:15:00 PM			1	John Galt		Standard - Onsite Service Rate

5.20 Service Workorder - banked service

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

Travel tab:

- Existing Banked Service balance at the time the workorder was first opened will display under the existing travel records if any.
- If you apply banked service to a travel record, you **MUST** to save and exit out of the workorder, and re-view it to see the new Banked Service balance; or view the Banked Service grid for the client itself.

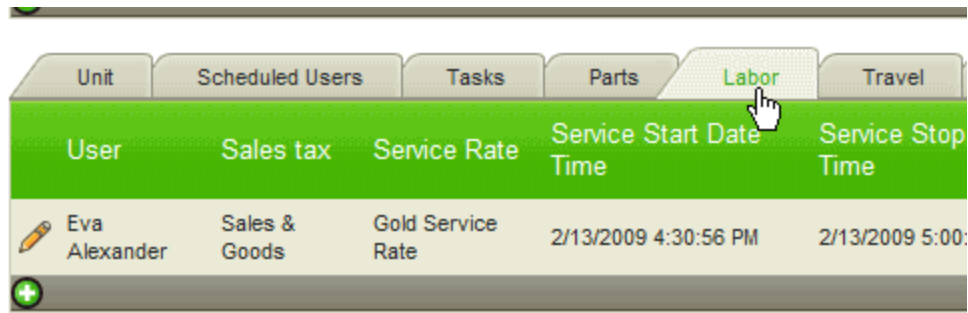
Unit	Scheduled Users	Tasks	Parts	Labor	Travel	Expenses
User	Sales tax	Travel Rate	Start Date	Stop Date	Travel Details	Quan
No records to display.						


Currency balance: \$200.00 Hours balance: -2 Incidents balance: -1

- **NOTE:** If you do not Save the workorder entry screen after applying to banked service, the travel record will still continue to show that it can still be banked, even though the Banked Service record for this client (or unit) will show having been applied from this workorder number. You **MUST** make sure to Save after applying banked service.

Labor tab:

- Existing Banked Service balance at the time the workorder was first opened will display under the existing travel records if any.
- If you apply banked service to a labor record, you will need to save and exit out of the workorder, and re-view it to see the new Banked Service balance; or view the Banked Service grid for the client itself.



Unit	Scheduled Users	Tasks	Parts	Labor	Travel
User	Sales tax	Service Rate	Service Start Date	Service Stop Time	
 Eva Alexander	Sales & Goods	Gold Service Rate	2/13/2009 4:30:56 PM	2/13/2009 5:00:00 PM	

Currency balance: \$200.00 Hours balance: -2 Incidents balance: -1

- **NOTE:** If you do not Save the workorder entry screen after applying to banked service, the labor record will still continue to show that it can still be banked, even though the Banked Service for this client (or unit) will show having been applied from this workorder number. You **MUST** make sure to Save after applying banked service.

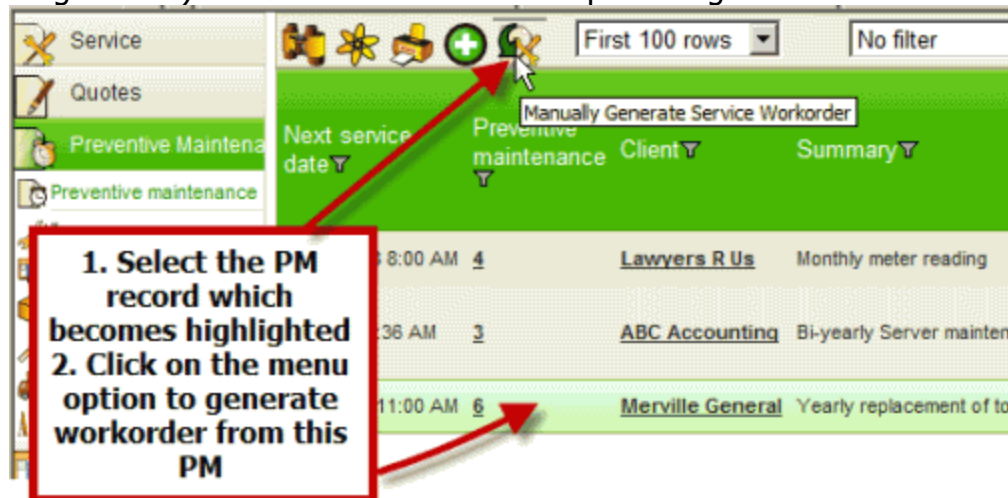
5.21 Manually generating workorder from quote or pm via WBI

Do refer to the AyaNova Help file for AyaNova's features. We **only** list differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

Generating a workorder from a quote or a pm:

- To generate a workorder from a quote, you need to:
 1. first select the quote in the Quotes grid (you will note that the row changes color)
 2. and then second select the menu option to generate a workorder
 3. and then third, save the created service workorder
- Same applies to generating a workorder from a PM, you need to first select the PM record in the Preventive Maintenance grid (you will note that the row changes color) and then select the menu option to generate a workorder



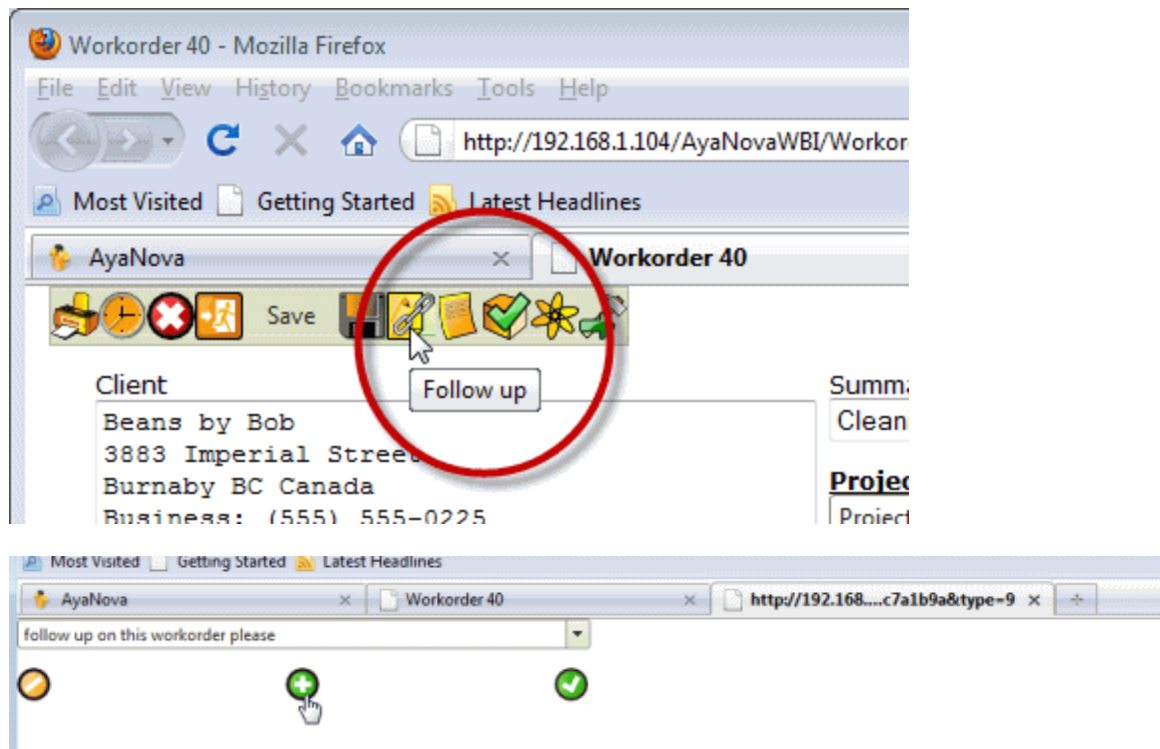
5.22 Follow Ups via WBI

Do refer to the AyaNova Help file for AyaNova's features. We **only** list below differences between the main AyaNova Windows program and WBI

NOTE: WBI will only save edited data **when you tell it to** . This is unavoidable due to the nature of web technology. If you close the browser window in any other way than using the menu buttons without saving, your changes **will be lost**

Follow Up menu option:

- Just like the Follow Up menu option in the AyaNova program, use this menu option to view existing Follow Up items, or create a new Follow Up item.
- **But do note** that once have saved a new Follow Up, the Follow Up selection window will close returning you to the entry screen.
- If you wish to view the follow ups, will need to select the Follow Up menu option again. .

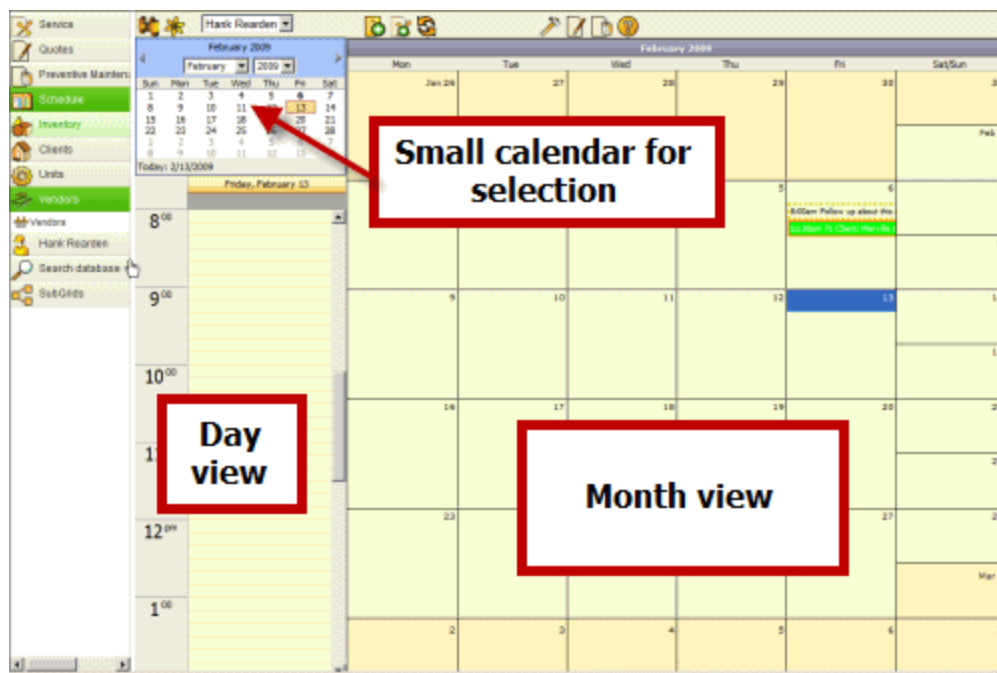


5.23 Schedule Screen via WBI

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

Schedule Screen:



- The Schedule screen displays three viewpoints

1. the small calendar at the upper left hand top for date selection that identifies the single day displaying in the Day view and the month in the Month view
2. the Month view in main view to the right to view your schedule for the month
3. and the Day view of the day selected on either the main month calendar or the small calendar where you can see more details on the specific selected day.

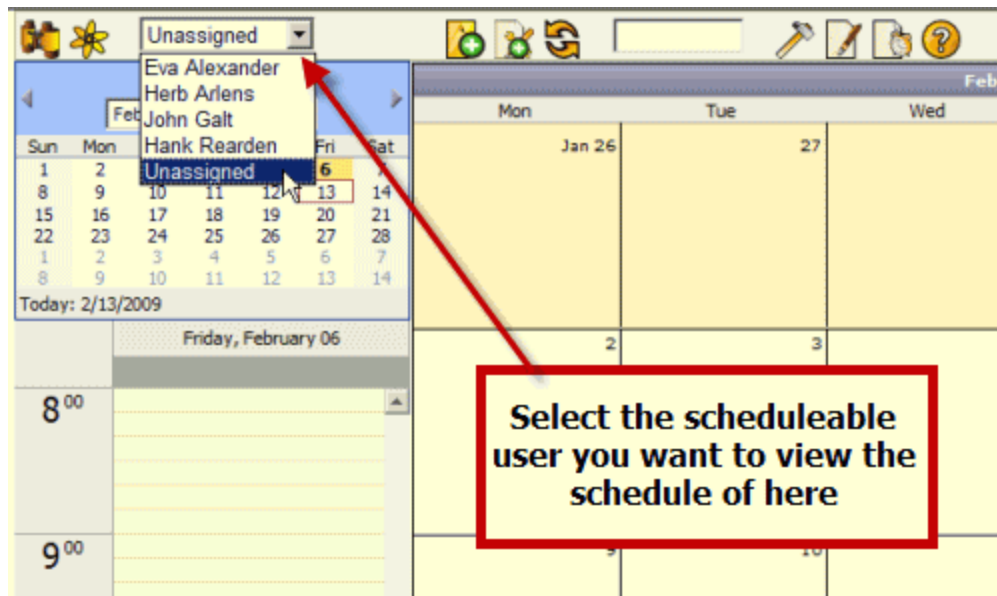
- Multiple days can not be selected at the same time via the WBI small calendar - the day selected in the small calendar displays in the Day view.
- Menu options such as printing, merge view, horizontal time view, etc are not available via the WBI Schedule screen.
- Multiple users schedule can not be viewed at the same time, instead select as per below

5.24 Schedule Screen - Scheduleable Users

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

Scheduleable User selection:



- As WBI's Schedule screen is designed for the on-the-road logged in scheduleable user, WBI shows the schedule for one scheduleable user at a time to minimize what that user on the road has to click to see their schedule. The schedule does not show for multiple scheduleable users at one time.
- If the user logged in is not of type Scheduleable User, the Schedule screen will default to selection of Unassigned.
- Otherwise if the user logged in is a Scheduleable User, the WBI Schedule screen will by default have the username selected. This is a useful feature - when a scheduleable user is on the road, logs in via WBI and checks the Schedule screen, it will default to showing their schedule as soon as they select Schedule.

5.25 Schedule Screen - Schedule Markers & Follow Ups

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

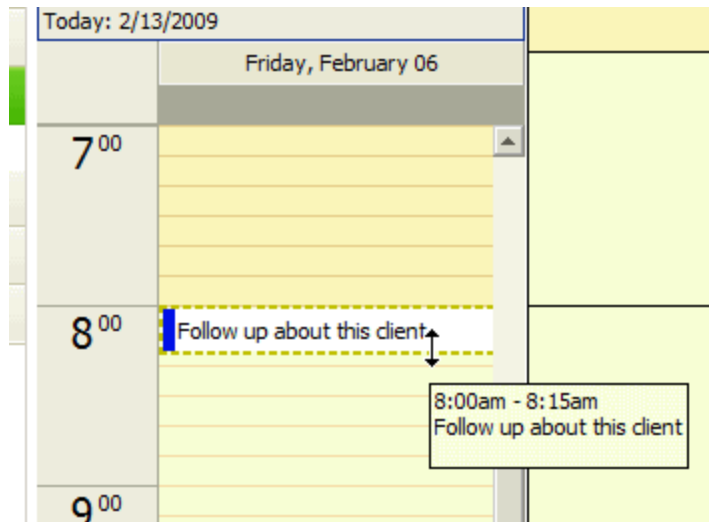
NOTE: As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.

Schedule Markers & Follow Ups:

- A new Schedule Marker defaults to a Source of Global - select the specific schedulable user if required.
- Via WBI you can not pre-select the time range for a new Schedule Marker in the day view section of the graphical Schedule screen.
- A new schedule marker Start time will default to 12:00PM and a stop time of 12:30PM - edit as needed.
- A new schedule marker will default to the date selected on the WBI calendar
- Also see Entering Dates & Times

The screenshot shows a web-based form for creating a schedule marker. At the top, there is a toolbar with icons for undo, redo, delete, and a 'Save' button. The form fields are: 'Source' (a dropdown menu currently showing 'Global'), 'Name' (a text input field), 'Start' (a date and time picker showing '2/6/2009 12:00 PM'), 'Stop' (a date and time picker showing '2/6/2009 12:30 PM'), 'Color' (a color selection dropdown), and 'Notes' (a text area). A mouse cursor is hovering over a clock icon next to the 'Stop' time field, which has triggered a tooltip that reads 'Open the time view popup.'

- A schedule marker displays with a dashed border, the color of the dashes are those selected within the Schedule Marker entry screen



Just as in the main AyaNova program, you can:

- hover your mouse over the schedule marker to popup a display identifying the start and stop time and the name of the schedule marker.
- double-click on an existing schedule marker to open its entry screen and view its Notes and who else is assigned this schedule marker (Source)
- and you can quickly edit the time of an existing schedule marker by hover your mouse over the top or the bottom via the Day View.

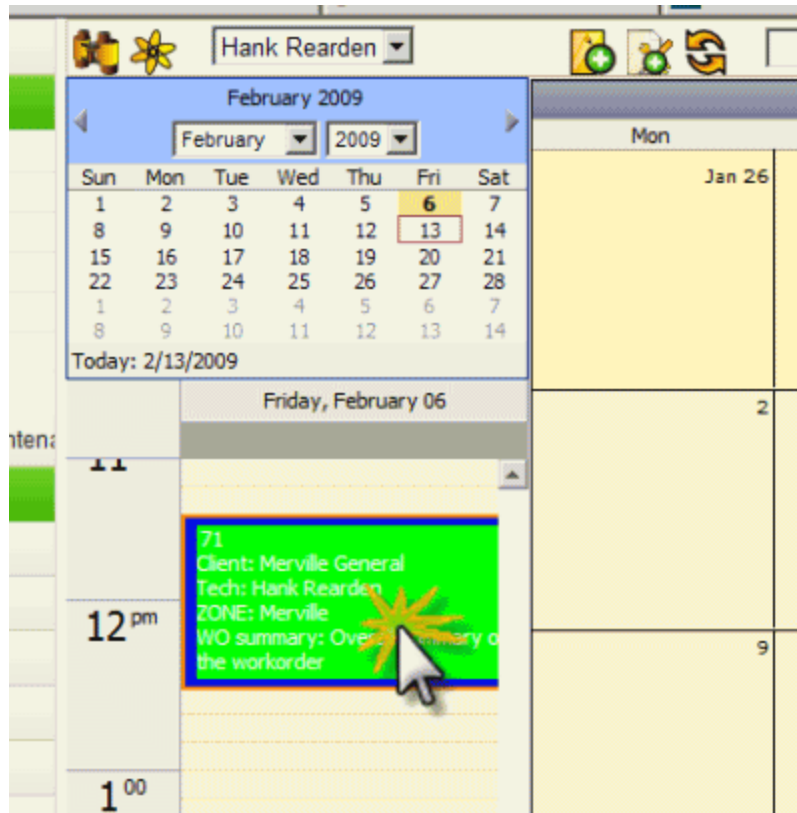
5.26 Schedule Screen - Workorder Items

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program and WBI

NOTE: *As accessing AyaNova data via WBI is via a web program, unless you "tell" the web page to save edits or new entries, the AyaNova database has no way to know that you have added a new record, or edited an existing record unless you "tell" it to Save. It is up to you to make sure that you save any new records added, or any existing record edits.*

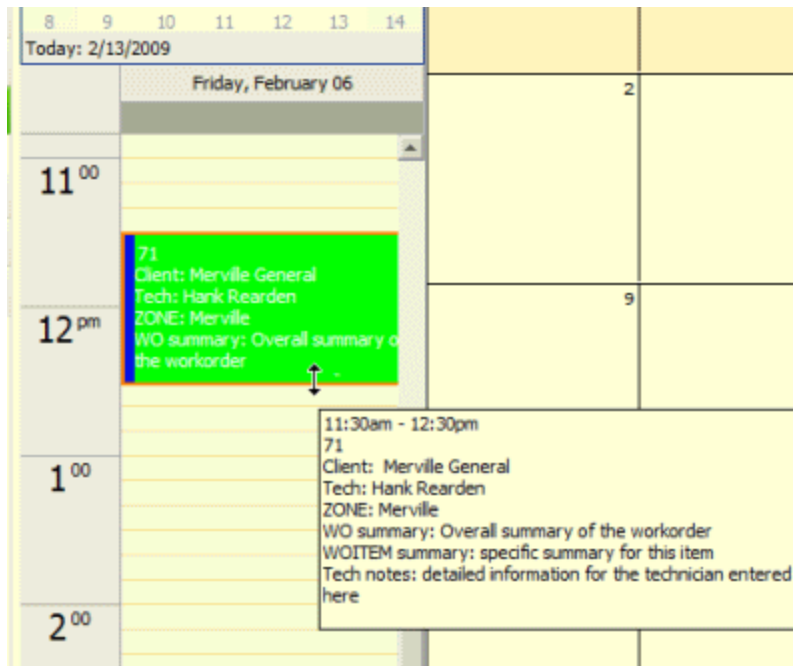
Workorder Item:

- Via WBI you can not pre-select the time range for a New Workorder Item in the day view section of the graphical Schedule screen.
- A new scheduled item's Start time will default to 12:00PM and a stop time of 12:30PM - edit as needed.
- A new scheduled item will default to the date selected on the WBI calendar
- Also see Entering Dates & Times
- To edit an existing workorder item from the Schedule screen, double-click to open it.



- WBI does not include menu options to edit a selected scheduled workorder item.
- WBI does not include menu options to print reports from the Schedule screen.
- As the Schedule shows for one user at a time, and displays both a day view and a month view, the Merged and Separate are not menu options.

A workorder item displays with a solid border, the color of the border is that of the selected Priority for that workorder item. The color of the "inside" is that of the workorder item status selected for this workorder item.



Just as in the main AyaNova program, you can:

- hover your mouse over the workorder item to popup a display based on the Workorder Item Summary Template set in Global Settings by the AyaNova Administrator.
- double-click on a workorder item to bring up the workorder where that workorder item resides. Do note that if there are multiple workorder items in this workorder, the selected workorder item may not be that where this Schedule workorder item is. Check before editing.
- and you can quickly edit the time of an existing workorder item by hover your mouse over the top or the bottom via the Day View.

5.27 What about adding parts via WBI?

Do refer to the AyaNova Help documentation for AyaNova's features. We only list differences between the main AyaNova Windows program and WBI

You are out on the road providing service and using WBI, and determine **need to create a part or add to on hand amounts**. What do you do???

Most companies that utilize service management software (if not all) don't want their techs doing clerical work, they want them billing out hours as much as possible. The whole point of automating service management is to maximize revenue of expensive resources like professional service people.

If your tech determines a need for a part not yet in inventory, at this point many decisions need to be made that are not normally the responsibility of the technician such as:

- What the cost of the part is from the supplier, what the mark up will be, what the price charged to the client will be
- Confirmation from the client they will pay for this part if ordered in
- Part needs to be ordered in via a purchase order from certain supplier
- A decision made if it's to be an inventory item going forward, or just a miscellaneous one time part or expense
- etc

There are not a good use of a technicians time out on the road, and normally the responsibility of an inventory person.

So what do you or your tech do while out on the road:

Scenario 1: Part needed is not an existing part in inventory, so unable to do a part request:

1. They confirmed that the part is not already in inventory by looking up that part via WBI which is a feature.
2. And it is recommended that they send a memo to the person that would be responsible for getting part pricing, availability, etc
3. Perhaps even create a Follow Up from that workorder as a reminder that this workorder requires a specific part etc.

Scenario 2: A non-inventory part is bought while out on the road and want to charge the client for it

Another scenario is that the technician out on the road has an unexpected and unplanned need for an item to fulfill service while on the road and they purchase it themselves from another store and use it in service, and want to charge that to the client:

1. Have the technician enter as a miscellaneous expense in the Expenses subsection of the service workorder.

Scenario 3: An inventory part is bought elsewhere while out on the road and want to charge the client for it

Another scenario is that the technician out on the road buys a part that is normally carried by the service company in inventory, but is presently out of stock of.

1. Have the technician enter as a miscellaneous expense in the Expenses subsection of the service workorder.
2. Back at the office the tech or inventory person makes an adjustment to enter that part into stock, and the misc expense is replaced with a part entry in the workorder.

Scenario 4:

A user of WBI is acting as a remote office or a one man operation and simply wants to do everything remotely.

They can and should in that scenario **run the full AyaNova via a dataportal connection**. There is no reason not to, it's a built in feature of AyaNova and doesn't even involve buying anything extra and in the case of a one man operation there are many good reasons to go this route including notification etc.

5.28 Printing Reports

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program grids and WBI grids:

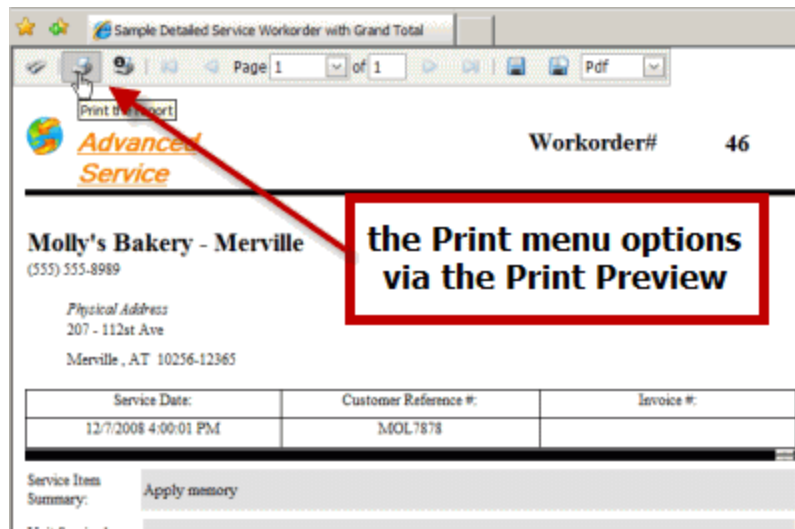
- 1. Customizing or creating new report templates via WBI**
- 2. How to print a report via WBI**
- 3. How to download a report to a file**
- 4. If data and fields do not print or show up with incorrect placement**

Customizing or creating new report templates via WBI:

- Customizing or creating new report templates is not a feature of WBI
- Customize or create new report templates is only via the full AyaNova program itself. Refer to the AyaNova Help section on creating custom reports, and for additional information and sample report templates, to the AyaNova Support Forum section AyaNova Printing & Report Templates

How to print a report via WBI:

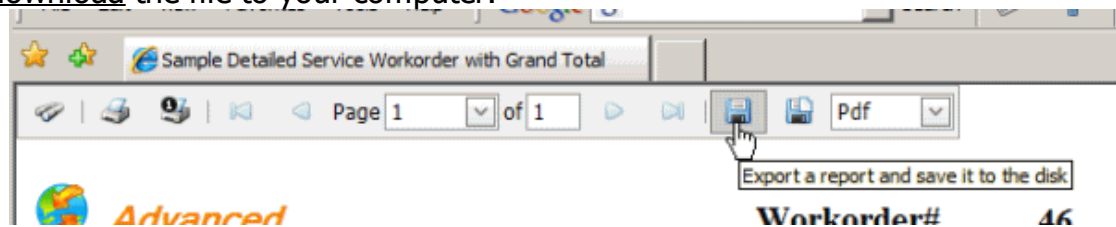
- Just like with the main AyaNova program, to print a report, select the **Print** menu option and then the report template you wish to use and the Print Preview will open in a new window
- The Print Preview via WBI is of course different than via the main AyaNova program as you are using a web browser
- To print this report, use the **Print** or **Print the current page** icon on the web page itself



- Do note that if instead you use your web browsers Print menu option or icon, what will result is a print of that screen itself, **not** the report.
- Do note some web browsers react differently to printing certain images and fields (checkboxes) - for example IE 6 may not print out your images you have placed on report headers, or may not print out check-boxes. You will also want to remove headers, footers and margins from printing that would affect the layout of your report. Refer to this helpful web page which provides information on editing for IE and FireFox
<http://www.worldstart.com/tips/tips.php/642>

How to download a report to a file

- Just as with the main AyaNova program, from the Print Preview you can select a file format to save the report to. Of course, being a web application, you download the file to your computer.



- **NOTE:** If printing from a grid, it is recommended to save the report to a file (PDF, MS Word, etc) so that page breaks occur correctly in your report. For example, if printing the Sample Dispatching Report from the Service Workorders grid for a number of different workorders, if you print directly the Print Preview, page breaks may not occur. Whereas if you first save the report to PDF, correct page breaks will occur in the document for when you print.

If data and fields do not print or show up with incorrect placement:

- If you have fields that do not display on your report when printed via WBI or saved to PDF, Excel, Word etc, this is because fields in the report template are overlapping.

You will need to do the following via the AyaNova program

1. Edit the report template
2. Set **ShowHTMLWarning** to **True** - this now will have any fields that overlap show an exclamation mark.
3. Edit sizes and overlappings as needed
4. Set **ShowHTMLWarning** back to **False**
5. Save report template
6. Now print again via web browser to see if now addressed.

5.29 If have changed Use Inventory via Global Settings

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program grids and WBI grids:

If you have changed the Use Inventory setting via Global Settings in the AyaNova program, you **will need to** restart the web site before the new Global Setting will take effect via WBI.

For example:

1. Use Inventory was previously set to True but you want to disable inventory
2. Via the main AyaNova program, set Use Inventory to False via Global Settings in AyaNova, saved and have exited
3. Restart the site by either of the following methods:
 - a. reboot the IIS server and log in and open IIS and confirm site is running
 - b. or edit existing comment section of web.config file in the AyaNovaWBI folder and save (as saving a change to the web.config causes the site to recycle itself).
 - c. or stop and start the application pool used by the WBI site.
4. Now log back in via WBI and confirm Purchase Orders, etc are no longer visible

5.30 Features In AyaNova Not Available via WBI

Do refer to the AyaNova Help file for AyaNova's features. We only list below differences between the main AyaNova Windows program grids and WBI grids:

The WBI functionality is intended to support the needs of out of office technicians and clients to request service.

We have made every effort to ensure that AyaNova WBI is as easy to use and similar as possible, however due to the nature of web applications and technology there are some differences that are inevitable and out of our control. If a *completed* form in WBI does not operate exactly as it does in AyaNova for Windows or is missing certain features or they operate differently this is a result of what is possible with the current state of the art technology we are working with.

The following are features that are available in the latest full AyaNova Windows program that are not presently available in WBI - these are not listed in any particular order.

If you have a specific need for one or more of these features, we may already have it on our AyaNova Support Forum's Wish List section; if not, do contact us with your suggestion, ensuring to provide one or more examples of how and why it would be used and useful.

- Due to the nature of a web application, when you make changes in an entry screen, then save and return to the grid, you **will need to select the Refresh menu** option as WBI does not know to automatically check for new data unless you tell it to by selecting the Refresh menu option.
- For this same reason, WBI does not automatically determine the difference between Start Date/Time and Stop Date/Time when creating a new labor record in a service workorder
- For this same reason, WBI will not advise you there is an existing of the same if you enter in a new client name, or new part number, or new unit serial number.
- Drop down fields in AyaNova use a "get more" button rather than automatically listing all potential selections - this way only the existing selected data displays in the specific field when you load an entry screen, which speeds up loading of that entry screen. And if the user wishes to select something for a drop down field they would use the "get more" button as outlined in Selecting via a Combo Drop Down Box

- Customizing or creating new report templates is not available via WBI
- Creation, editing, deletion of Filter Drop List views - create saved filter lists via the full AyaNova program so the saved list selections are available when logged in via WBI.
- Sorting, pinning, filtering of grids and sub-grids and setting what columns in a grid shows - the layout of columns (sort order, pinned, viewable columns selection) are those used by the WBI user when last logged into the main AyaNova program.
- Schedule screen is for viewing for one schedulable user - therefore Schedulable User Groups creation and editing is not be available.
- Creation of parts is not available via WBI
- Part Inventory grid, Purchase Order entry screen, Purchase Order Receipts entry screen and Part Adjustments entry screen are not accessible via WBI. If you wish to view the On Hand amount in a particular warehouse for a part while remote from your office, open that part's entry screen via WBI to view a read-only display of what is On Hand, etc
- Administration navigation pane features of the AyaNova program are not available via WBI. All administrative functions should be performed from the main AyaNova program. In keeping with this, Rates, Tax Codes, Contracts, Vendors, Parts, Purchase Orders, Purchase Order Receipts, and Part Adjustments are created via the main AyaNova program only. Do note that you can view the text of what is set for Parts, Rates and Contracts
- Some workorder entry menu items are not available such as Copy Workorder Item to Workorder and Move Workorder Item to Workorder menu option
- Creation of new Task Groups and Tasks are not a feature of WBI.
- Popups of notifications for the user are not a feature of WBI.
- Subscribing to notifications and viewing the Notifications Subscription Log (last 7 days) is not a feature of WBI. Note that your subscriptions set up via the desktop AyaNova program will continue to be implemented, as are saved within your AyaNova database even if you are not able to view via WBI.