WBI 7 Online Help - Client Use

USER MANUAL

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1. AyaNova WBI Features 5
1.1 Welcome to AyaNova WBI 6
1.2 Customer Service Request grid 7
1.3 Customer Service Request menu options 8
1.4 Filtering & Sorting 10
1.5 Example of filtering to show only Open requests 13
1.6 Requesting Service 15
1.7 Viewing Existing Service Requests 18
1.8 Editing Existing Service Requests 19
1.9 Viewing and Printing Service Work Orders 20
1.10 Viewing all open and Closed workorders or just open workorders 23
1.11 Viewing WikiPage of a service workorder 25
Index 0

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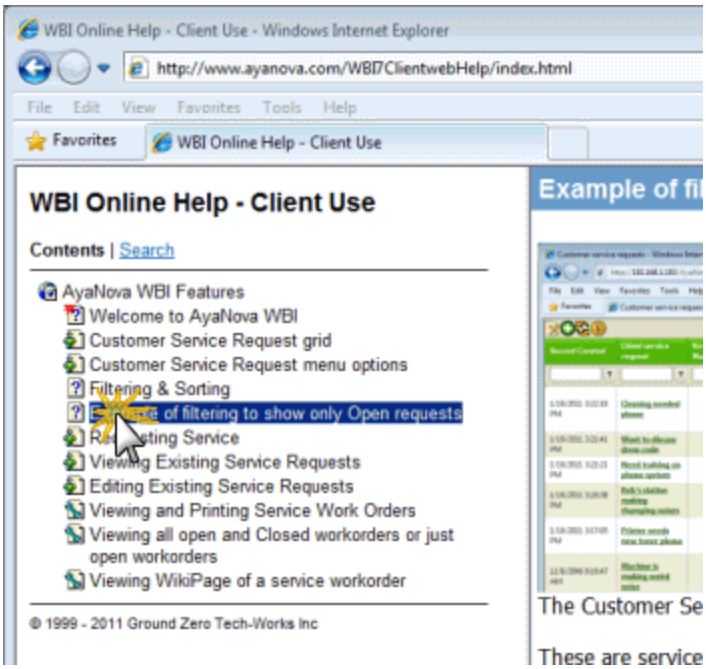
AyaNova WBI Features

1 AyaNova WBI Features

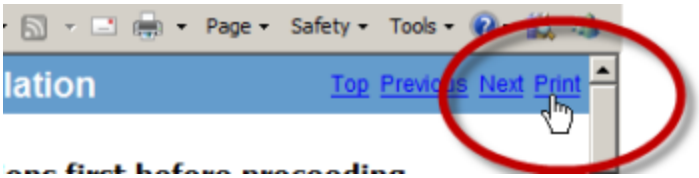
1.1 Welcome to AyaNova WBI

This Help documentation provides information on how to request service from your service company, view your existing workorders, and print workorders

- Click on AyaNova WBI Features on the list to the left to expand the list of feature information just like it is shown in the screenshot below.



- To print topics, select the Print menu option in the upper right hand corner of the topic



- Please contact your service company administrator if you have additional questions on how to request service and view your data.

- If you encounter an issue, click on the Compatibility View in Internet Explorer to see if that fixes.

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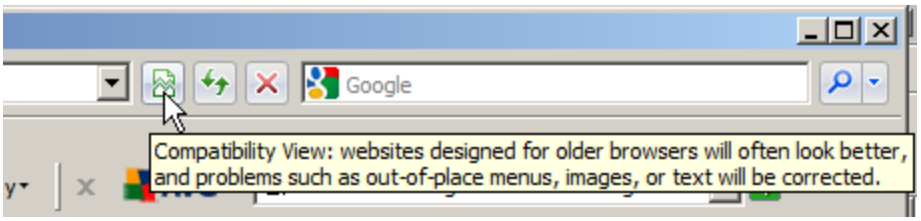
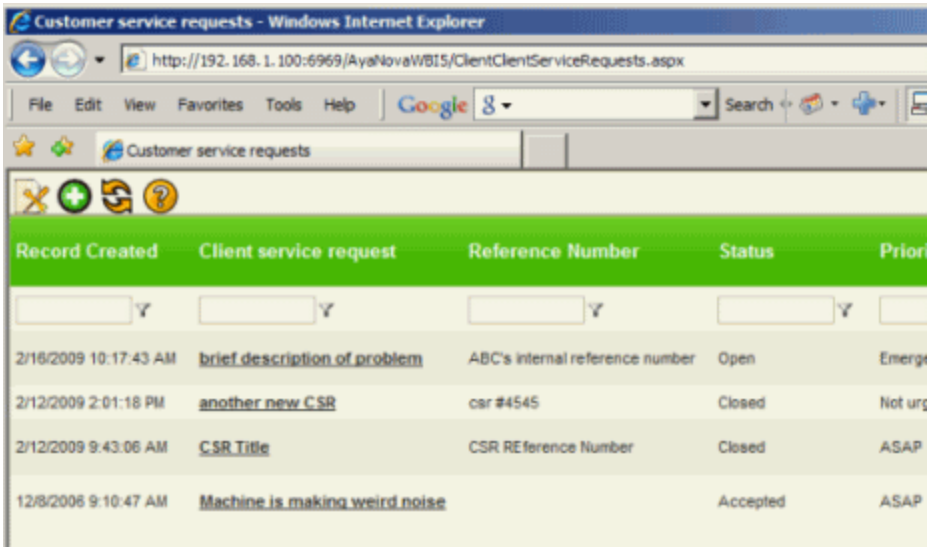


1.2 Customer Service Request grid

The Customer Service Requests grid

- When you first log into WBI via the URL provided from your service company, you will see a grid that **lists all service requests** you have made so far sorted in descending order by the date the service request was created.



- If you want to sort by a different column, and/or filter to show only service requests that meet a certain criteria, refer to Filtering & Sorting for details on how to filter this Service Request grid and/or the Workorders Grid

Columns of the Customer Service Request grid

- **Record Created** - when you created the service request
- **Client service request** - the text you entered in the Title field when requesting service
- **Reference Number** - the text you entered in the Reference Number field when requesting service
- **Status** - the status of the service request
  - Open means that this is a new request that you have made that has not

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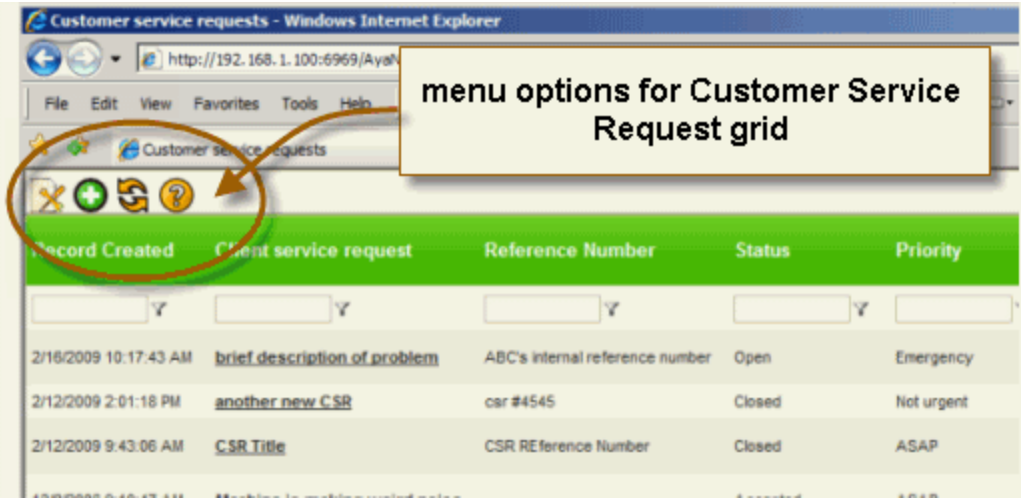
been accepted by your service company
- Accepted means that your request has been accepted and a service workorder has been created (see Workorder column)
- Rejected means that your request has been rejected. Contact your service company for details.
- Closed means that the service workorder created from this service request has now been closed (see the Workorder column)

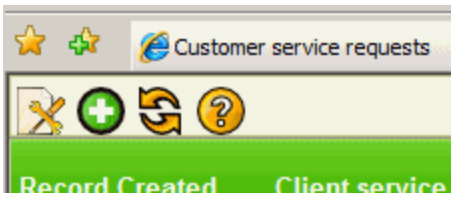
- **Priority** - the priority (Emergency, Not Urgent, ASAP) that you selected in your service request
- **Record Created By** - the initials of your AyaNova username you logged into WBI via
- **Client** - your company name
- **Serial Number** - the specific unit you selected that needed service in your service request
- **Workorder** - the workorder created for your service request

1.3 Customer Service Request menu options



Customer Service Requests grid menu

- At the top of this grid is a menu bar.



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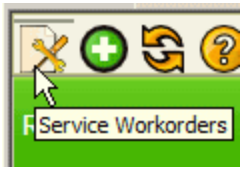
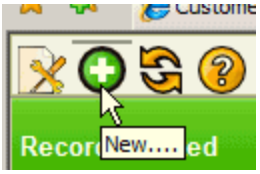
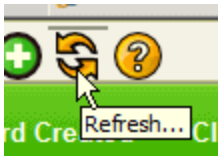
- The **Service Workorders** menu option will move you to the Workorders Grid so that you can view your existing service workorders via grid.



- The **New...** menu option is used to create to a new service request from your service company.



- Click on the **Refresh** menu option to refresh the grid every time you create a new service request or edit an existing so that the grid shows the latest information.



- The **Help** menu option is used to access this Online Help file

- The **Filter Selection** menu option will **only** appear if you are logged in as a Head Office - someone that is requesting and viewing service requests for a number of other clients so you can select to view the customer service requests for the specific client.

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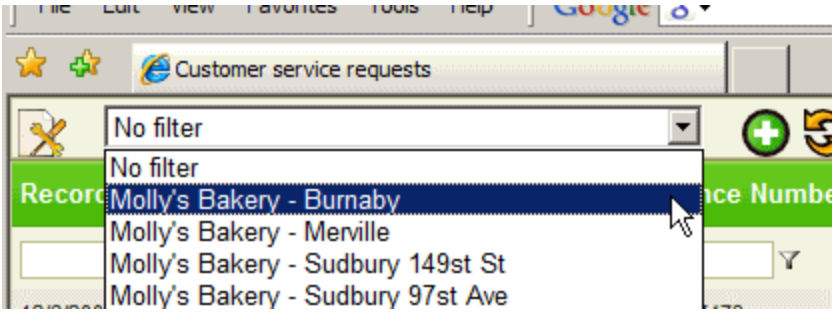


Select the client you wish to view service requests for, as well as the client you wish to create a service request for.

You can also confirm which specific client you are viewing CSR's for by the client name listed in the Client column.

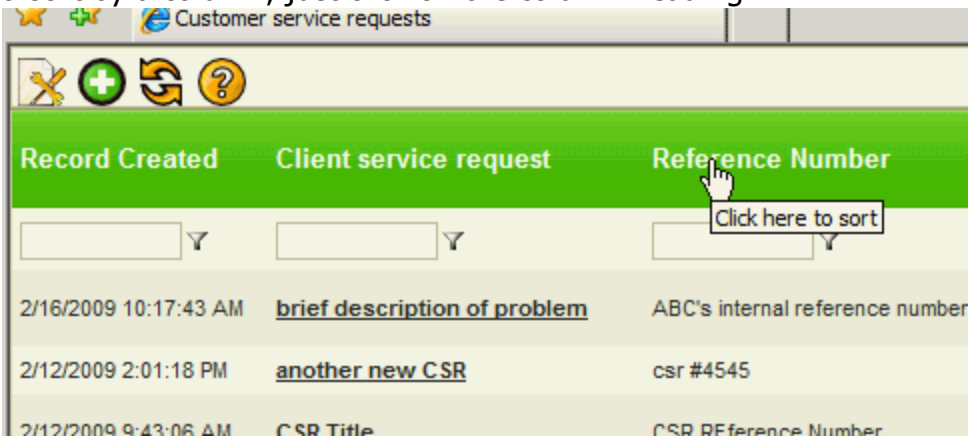
1.4 Filtering & Sorting

Whether viewing the Customer Service Requests grid or the Service Workorders grid, you might want to sort by a specific column, or filter to only show specific records that match a certain criteria so that you can find what you are looking for.

Sorting the grid
Filtering the grid
Example of searching for a specific word to filter by

Sorting the grid:

- To sort by a column, just click on the column heading.



- The Customer Service Requests grid when logged in as a client defaults to sorting by the date the service request was created in a descending order (last request made will be listed at the top).

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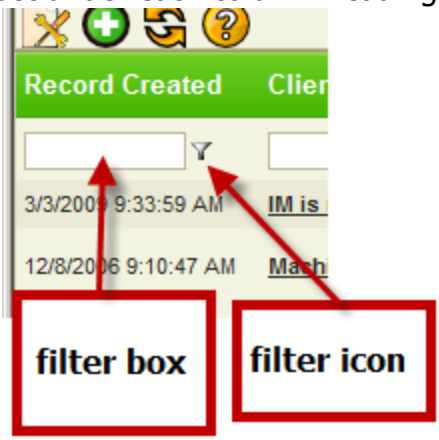
- NOTE: If logged in as a Head Office, the Client Service Request grid will be first sorted by the client column, and then sorted by the Record Created column. Select a specific client from the drop down selection to see service requests for that specific client.

- The Service Workorders grid defaults to sorting by the workorder number in a descending order (last workorder created will be listed at the top), but as above, just click on the column heading you do want to sort by.

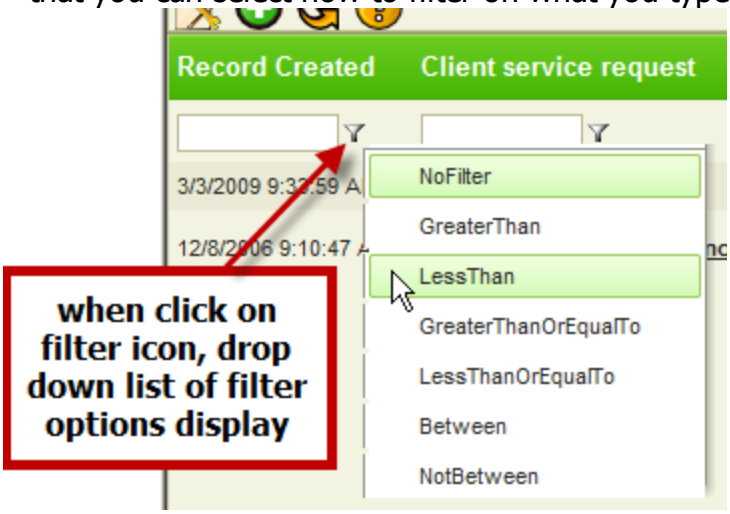
Filtering the grid:

- **NOTE**: Filtering is case sensitive

- Just under each column heading is a **filter box** and **filter icon**



- The **filter box** is where you type in, and the **filter icon** is what you click on so that you can select how to filter on what you typed in



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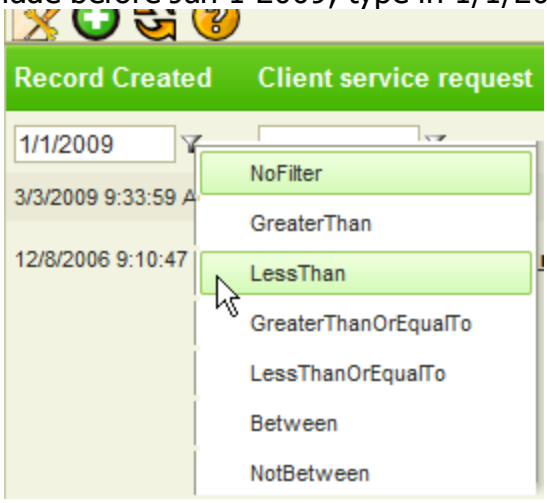
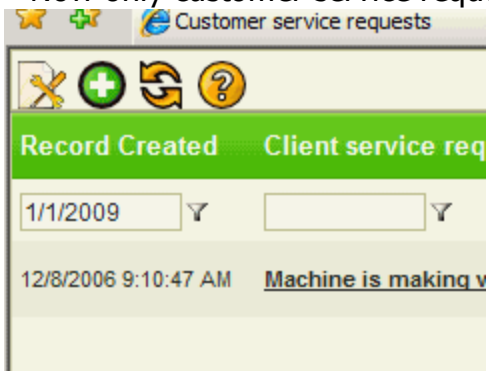
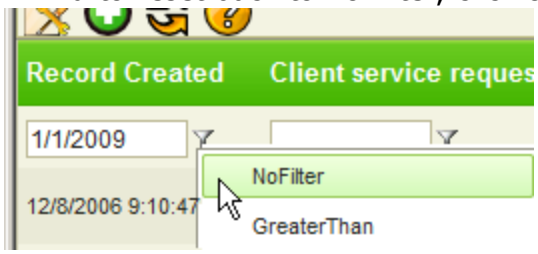
- For example, if you wanted to filter to only show customer service requests made before Jan 1 2009, type in 1/1/2009 and select LessThan



- Now only customer service requests made before that date will show



- And to reset back to no filter, click on the filter icon and select **No Filter**



Example of searching for a specific word to filter by

If you are looking for a service request where the text CSR was entered - you would enter the text CSR and select ***Contains*** and all records that have the text CSR in it will be listed

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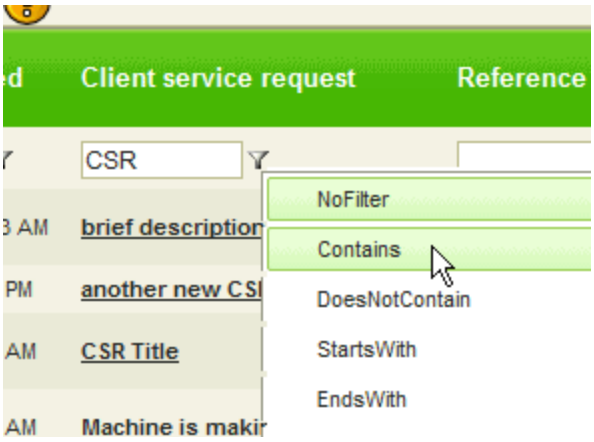
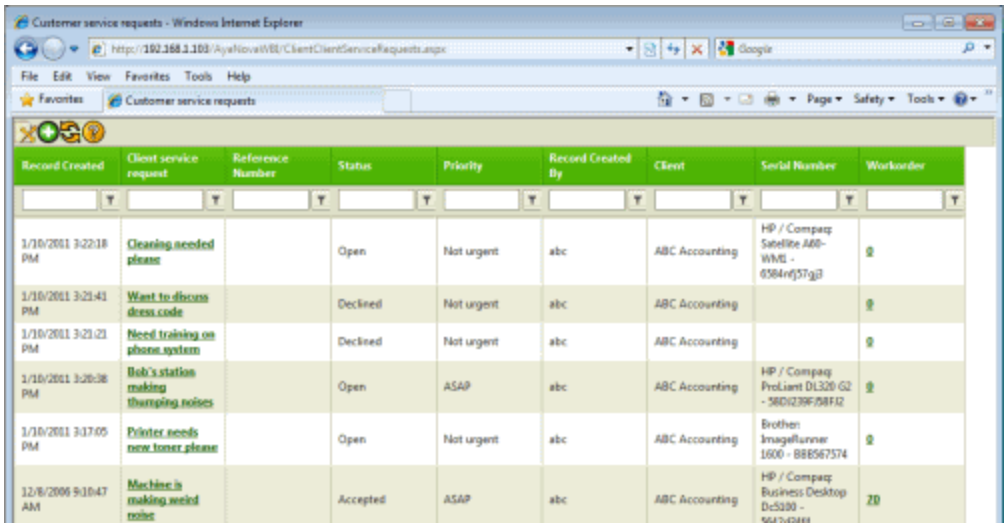


1.5 Example of filtering to show only Open requests



The Customer Service Request grid will display all service requests made by you.

These are service requests that have a **Status** of Open, or Accepted, or Rejected.

This tutorial will walk you through how to use filtering to quickly view only service

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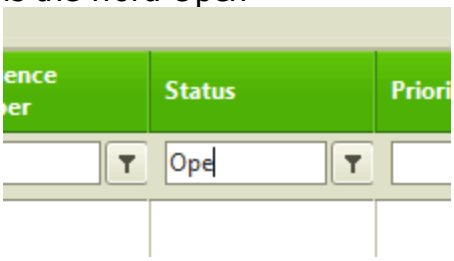
requests that are Open

1. Let's say you have a lot of service requests, and you only want to quickly see those that are Open and have not yet been Accepted or Rejected

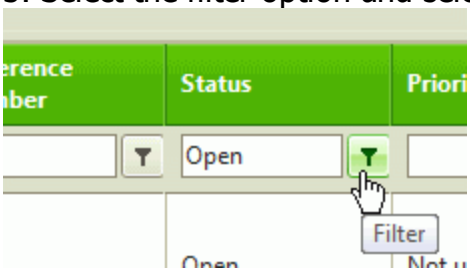
Easy - just filter on the Status column

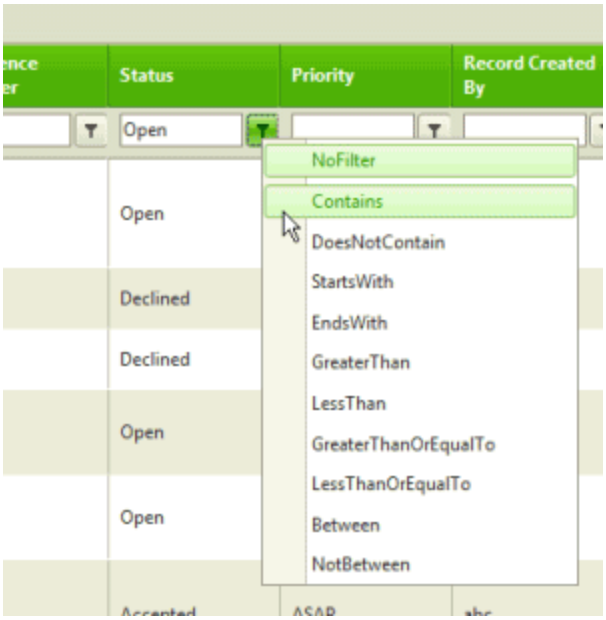
You can filter on any column, but this tutorial will walk you through how to do so on the Status column.

2. In the Status column, just type in the word you want to filter by - in this case it is the word Open



3. Select the filter option and select **Contains**





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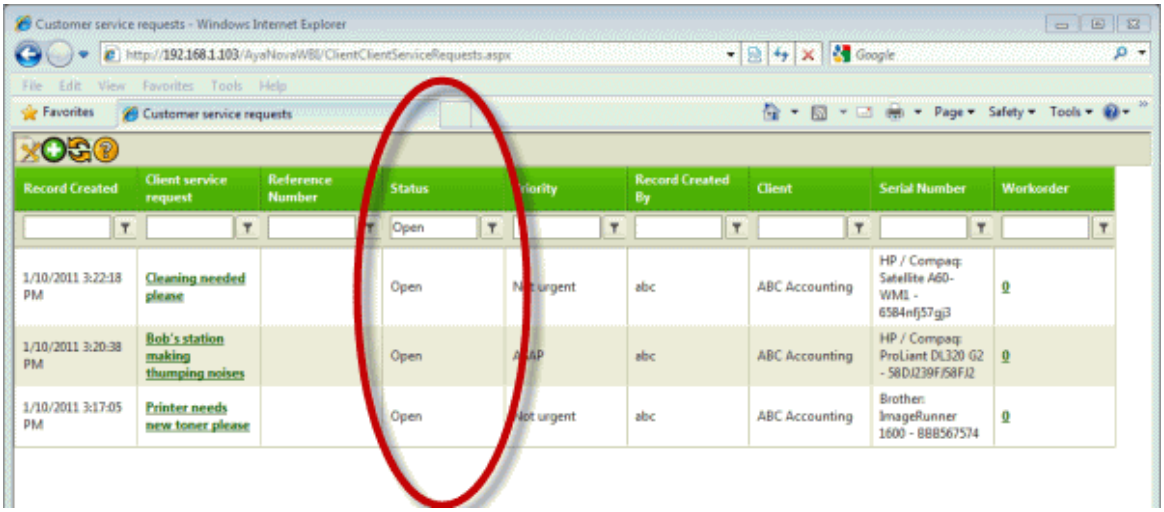
4. Now only service requests that have the status of Open will display



5. You can filter on any of the columns - try it out!

1.6 Requesting Service

Below is an example of how to request service using AyaNova WBI.

Note that these screenshots are examples only, as your service company may have customized the field labels to be used for other purposes:

1. Use your mouse to click on the **New...** menu option in the Customer Service Requests grid

2. A new screen appears - the service request entry screen

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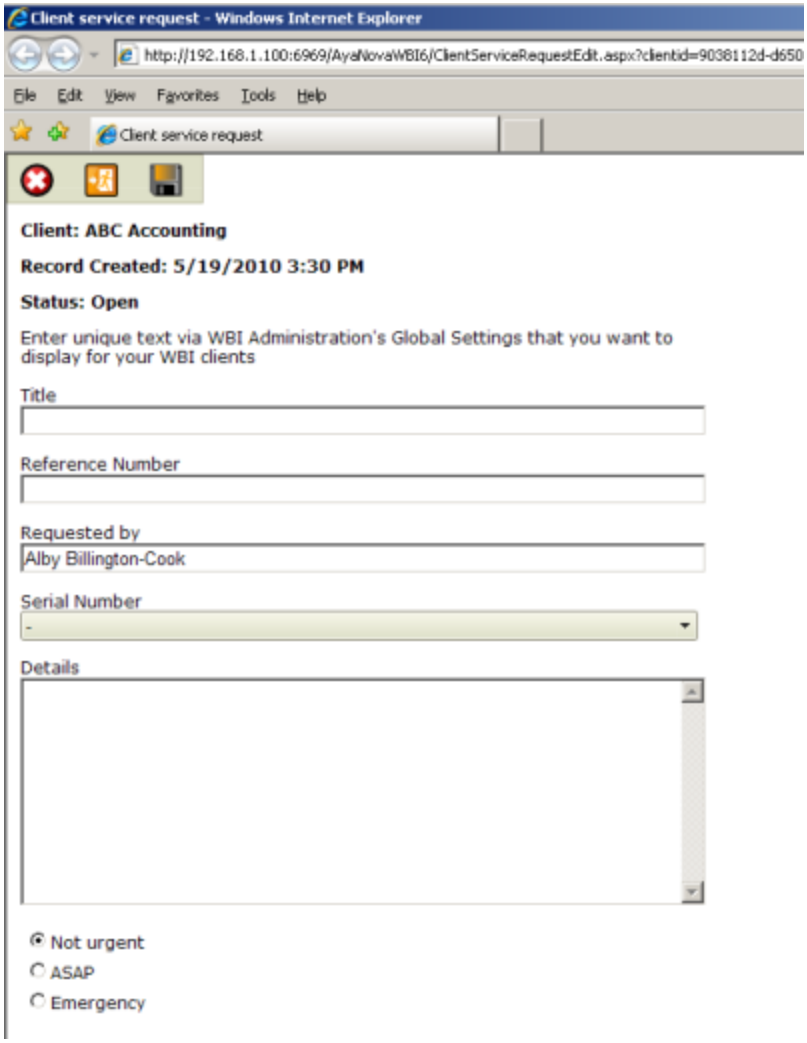

3. At the top is the menu bar:

Delete - select to delete the customer service request if you no longer want it

Exit - select to exit the customer service request entry screen without saving

Save & Exit - select when you are ready to save and exit returning you to the previous grid

4. The customer service request entry screen identifies who the workorder is being create for (your company), the date you have created, and the present status in regards to whether your service company has seen it yet and accepted to

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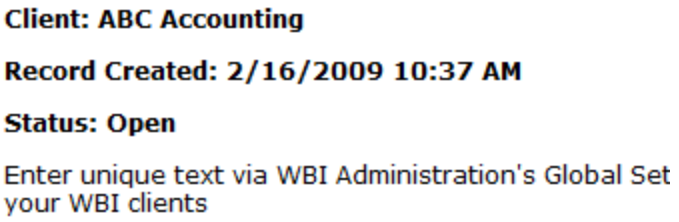
a service workorder. The text just under Status: will of course be different for you as it is specified by your service company, and this is just an example screenshot



5. In the **Title** field, enter a brief summary of the service you require.

This field is limited to entry of 255 characters, as all you want to enter here is a simple identification of what it is that needs to be done.

6. In the **Reference Number** field, if you use internal reference numbers for placing service requests, enter it here

7. The **Requested By** field will be pre-populated with your first and last name that your service company has set up for your WBI Client login username.

You can edit this however you want. This lets your service company know exactly who to contact about the service that needs to be performed.

8. If your service company has already documented a list of equipment you own that may need to be serviced, select the equipment by its **Serial Number** if applicable.

- You can not enter new serial numbers for this list. If your equipment is not listed for selection, enter its serial number, model, etc in the Details field below it.

9. In the **Details** field, entered detailed information on the service that needs to be performed.

- It is suggested to be as detailed as possible - thus making sure that when your service company comes to provide the service, they already know what has been happening, and what needs to be serviced.

10. As a suggestion to your service company, identify whether this service request is **Not Urgent**, **ASAP** (as soon as possible) or is an **Emergency**.

11. When you have completed entering all the information, click the menu option Save & Exit at the top

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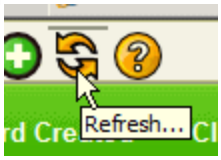
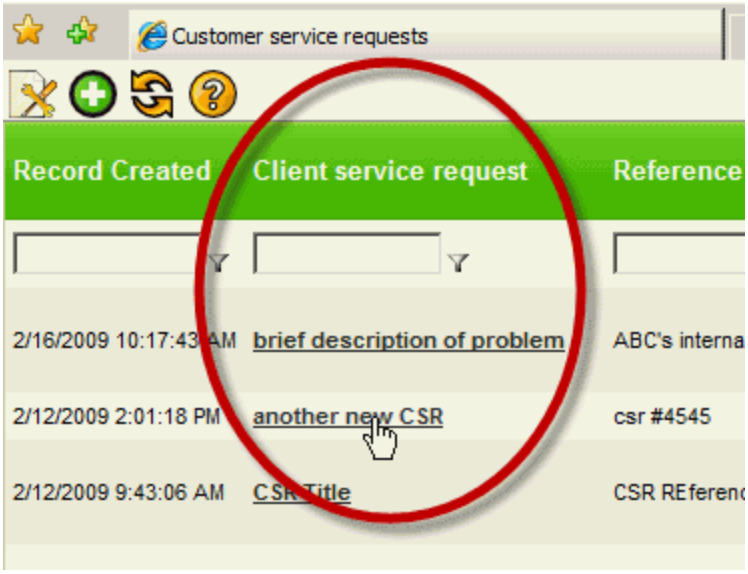
12. This will return you to the Service Request grid - click the **Refresh** menu option at the top to refresh the grid so that you can now see this new service request.



1.7 Viewing Existing Service Requests

Below is an example of how to view existing service requests you have made using AyaNova WBI:

1. To view an existing service request, click on the text under the column **Client Service Request**



2. This will open the service request so that you can view all of it, including text entered in **Details**.

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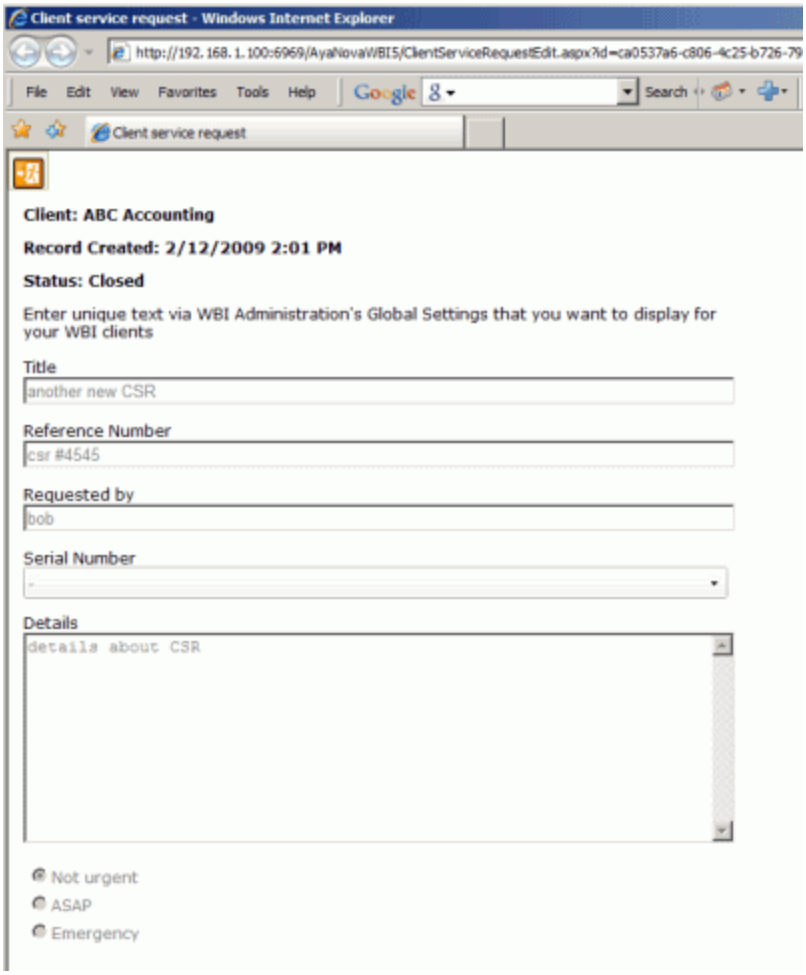

1.8 Editing Existing Service Requests

If a service request has not yet been accepted, you can edit it further - for example, you may want to add additional details on the service you need.

Or if a service request has been declined, you can delete it or add additional information.

Below is an example of how to editing existing service requests you have made using AyaNova WBI:

1. Open the existing service request that has a status of Open, click on the text under the column **Client Service Request**

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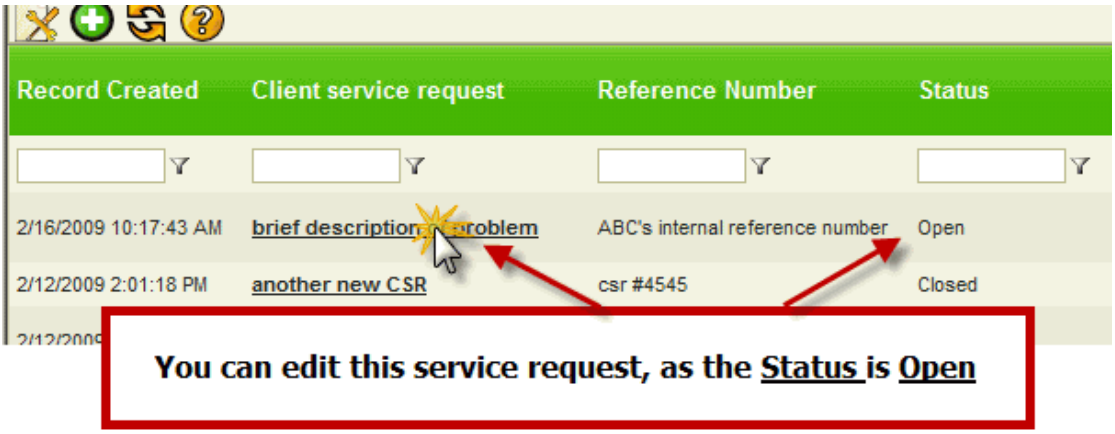

2. This will open the service request so that you can view all of it, including text entered in Details.

3. Only service requests that have a status of Open can be further edited.

1.9 Viewing and Printing Service Work Orders

The **Service Workorders grid** lists workorders that have been created for you.

You can filter and sort to find the specific workorder you want to view.

And select the workorder number to open that workorder in a report format that you can print if desired

1. If you are presently viewing the Customer Service Requests grid, click the Service Workorders menu option

2. This displays your Service Workorders to date, sorted in descending order by the newest workorder number listed first.

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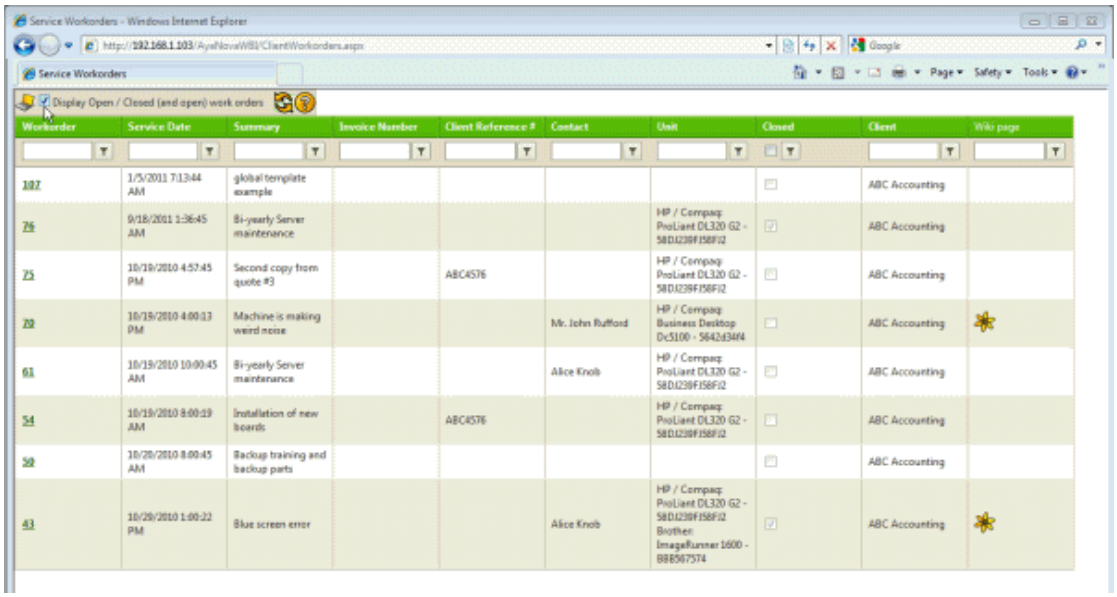
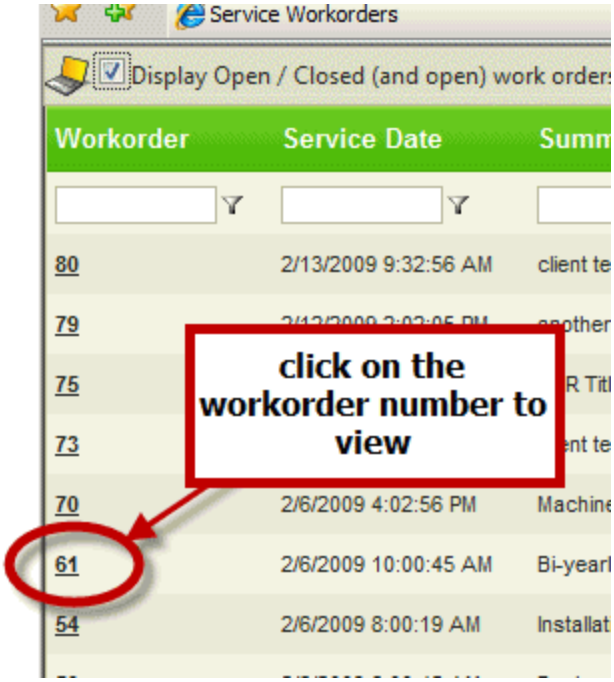


- Note that if you are logged in as a Head Office, the Filter Selection menu option will also display where you can select to view service workorders for each of your clients. By default, it will show the workorders for the first client in the list even though it says No Filter.

3. To view details of a service workorder, click on the **Workorder** number



4. This will open the Workorder in a printable format.

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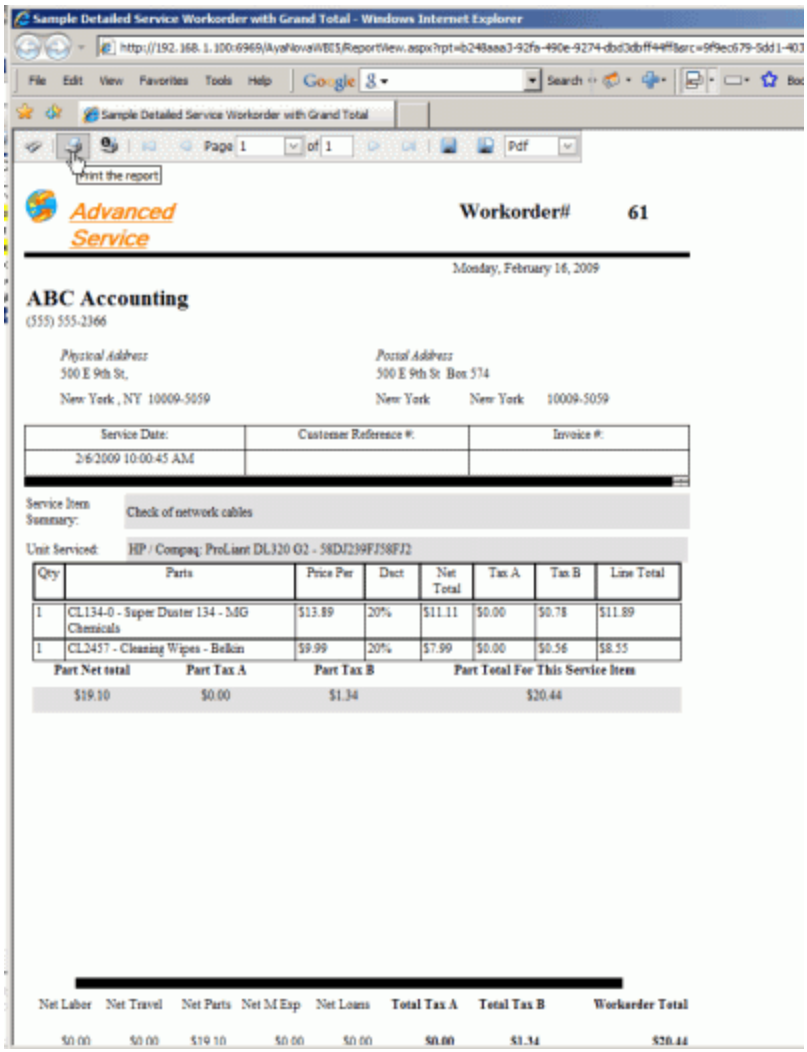
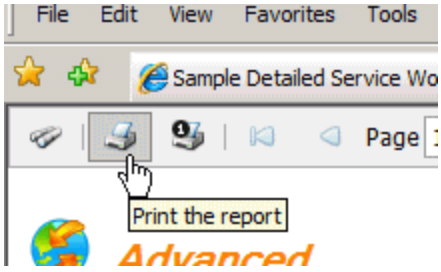


5. To print select the **Print the Report** menu option, or select the **Print current page** menu option



6. Exit out of the report web page when you want to return to the Service Workorders grid

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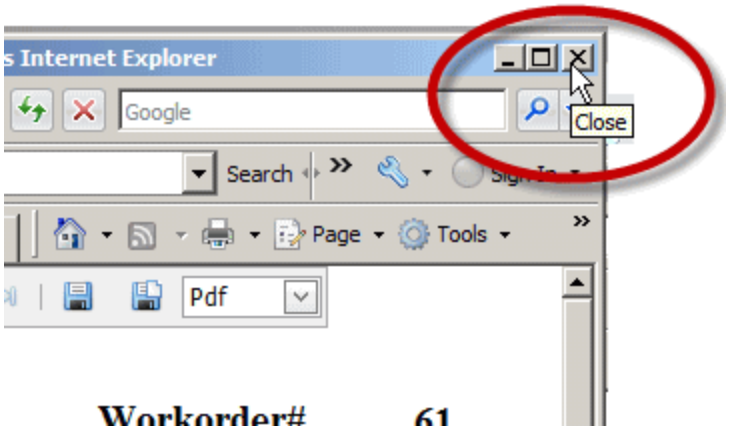
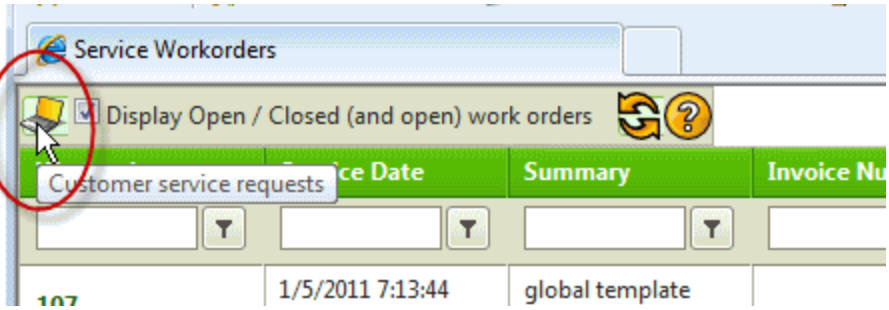


7. To return to the Service Requests grid, select the **Customer Service Requests** menu option



1.10 Viewing all open and Closed workorders or just open workorders

The **Service Workorders grid** lists workorders that have been created for you.

You can filter and sort to find the specific workorder you want to view.

You can also use the quick menu option to view only service workorders that are open (not yet Closed) or you can view all workorders both open and Closed.

By default only workorders that are open display (as shown by no checkmark in the Closed column).

1. Use your mouse to place a checkmark in the menu option Display Open / Closed (and open) workorders

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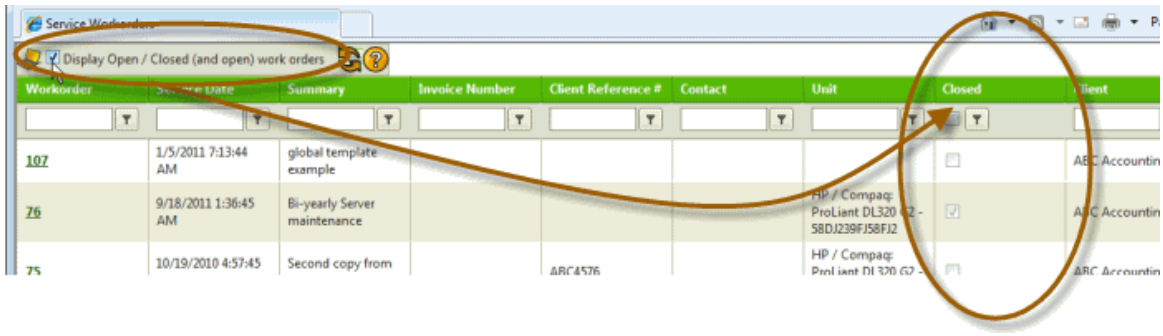
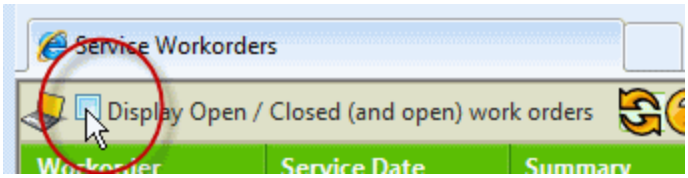
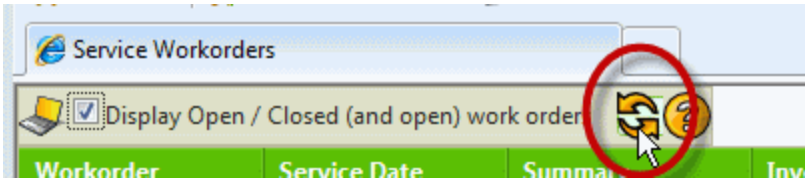
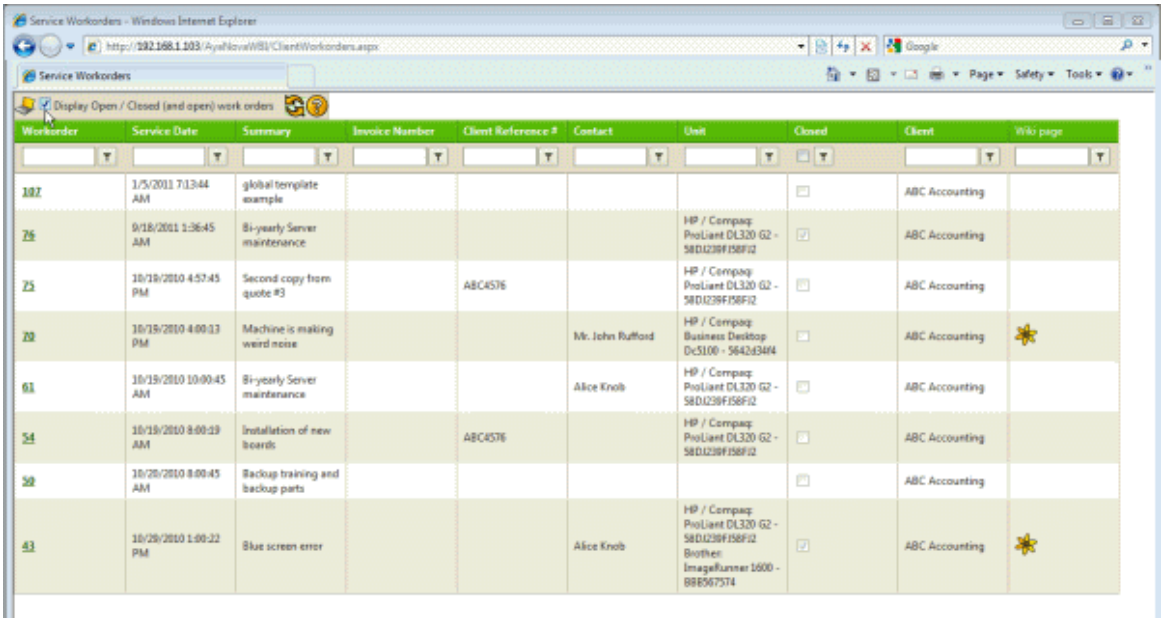


2. Click on the Refresh menu option (so that the page refreshes to show you all workorders now)





3. All workorders, both open and Closed, will now display



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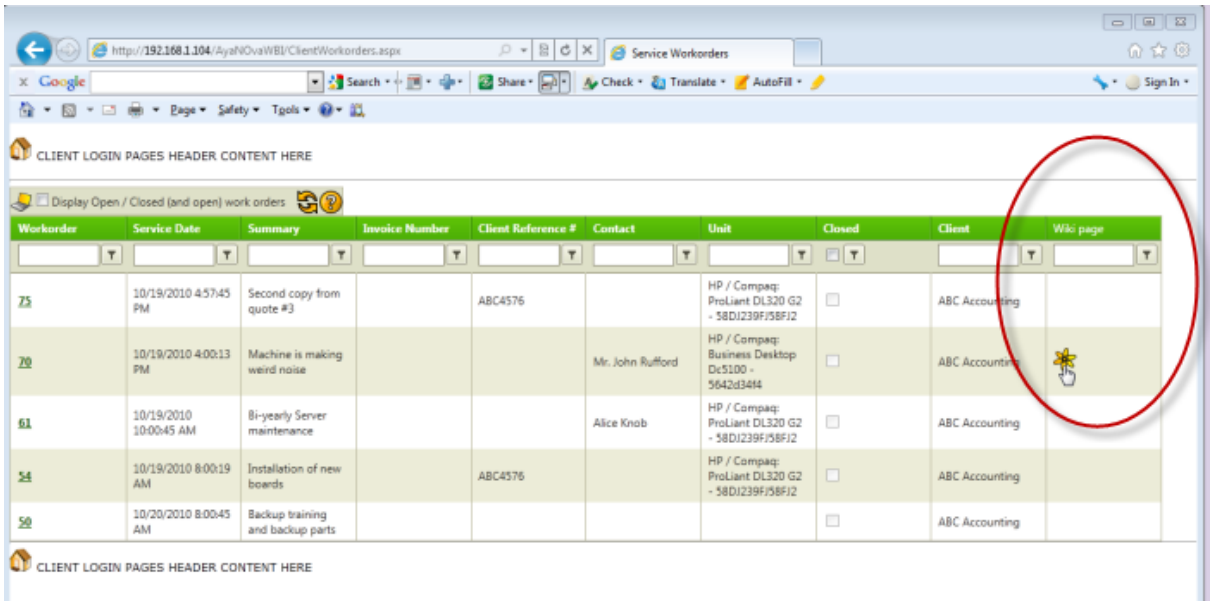
1.11 Viewing WikiPage of a service workorder

The Service Workorders grid lists all workorders that have been created for you.

If there is a WikiPage associated with a service workorder, use your mouse to click on the Wiki image



The wiki page will now show in a new webpage

When done viewing, just close that web page.

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