Advania Bakvörður

Setup and instructions

Contents

Advania Bakvörður

1. SETUP

There is a special Role Center for Bakvordur solution called *Advania Bakvordur*.

To setup *Advania Bakvordur* Role Center go to *My Settings*.
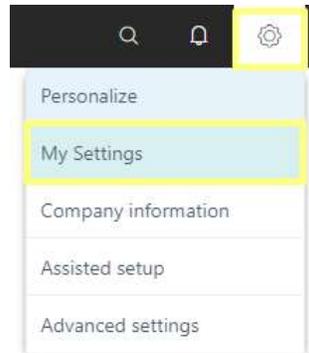
Drill down on Role field, choose *Advania Bakvordur* from *Available Roles* page, and click on *OK* button
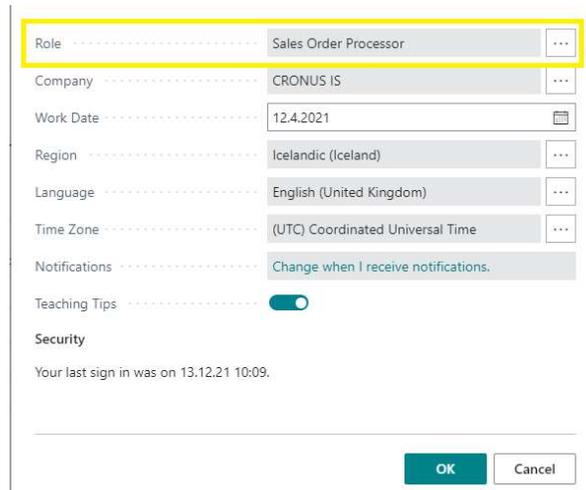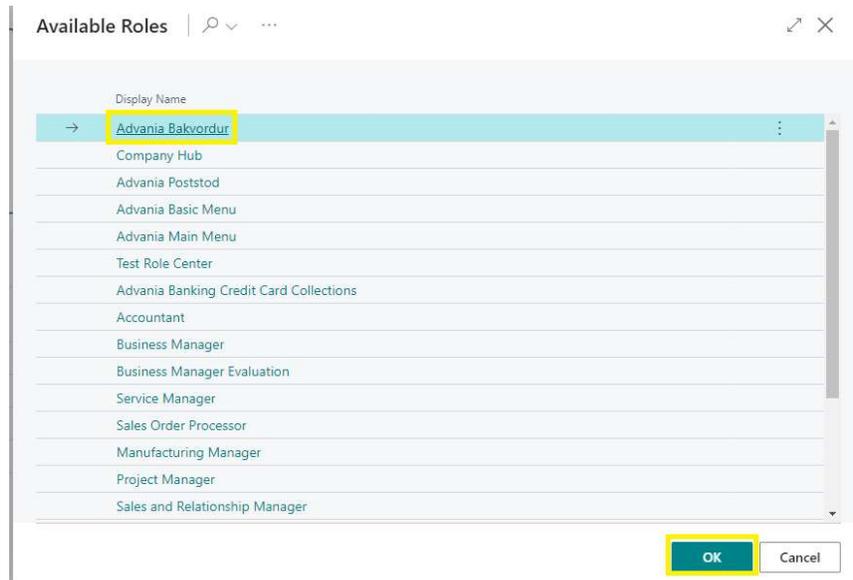
Advania Bakvordur Role Center will open:
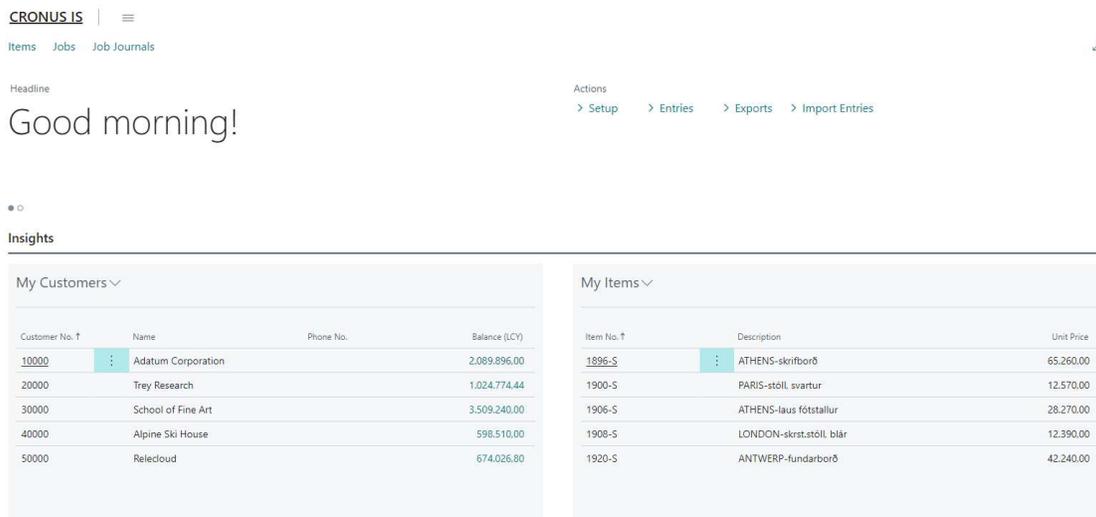
1. *Bakvordur Setup* can be accessed from the role center:
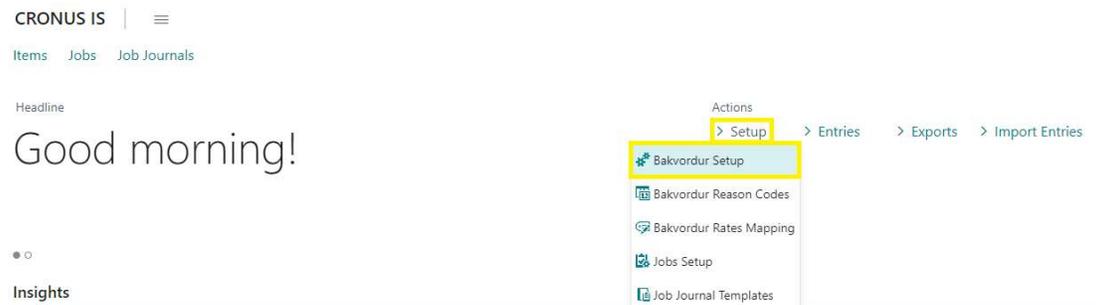
Or from *Service Connections* page:
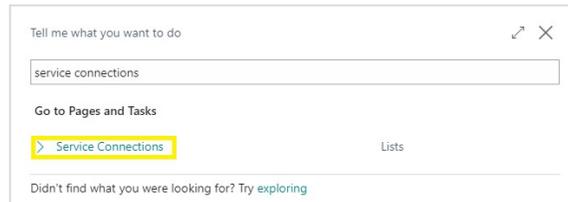
2. On *Service Connections* page click on *Advania – Bakvordur*

3. *Bakvordur Setup* page will open:
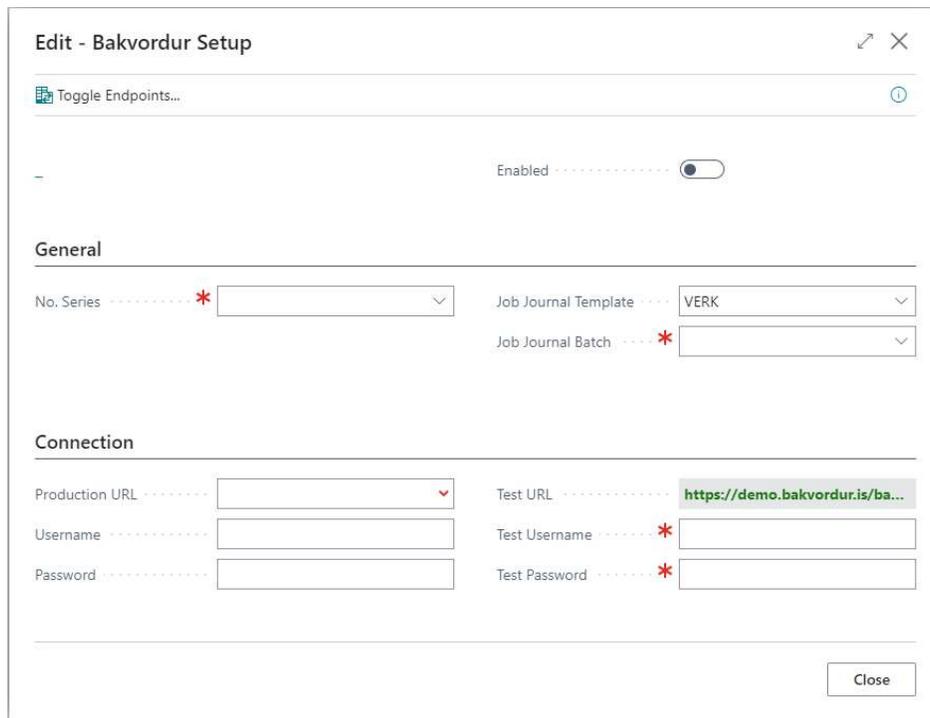
In General tab we can find fields:

- No. Series: No. Series used for creation of Bakvordur Entries
- Job Journal Template: What template to use for job journal
- Job Journal Batch: What batch to use for the template chosen above in the job journal

In Connection tab we can find fields:

- Production URL: base URL for production server
- Username: Username provided from Bakvörður for the production server
- Password: Password provided from Bakvörður for the production server
- Test URL: base URL for the test server
- Test Username: Username provided from Bakvörður for the test server
- Test Password: Password provided from Bakvörður for the test server

To switch between test and production server use *Toggle Endpoints* action, active server will become green
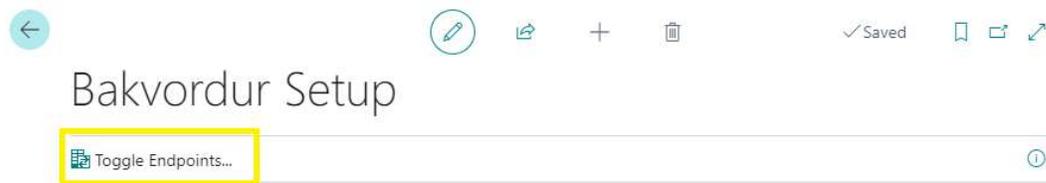
After all fields from Bakvordur Setup page are populated, click Enable field and close the page.

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Reason Codes

To be able to import entries from Bakvordur you must define which reason codes you want, codes can be found on the Bakvordur site. To setup which reason codes to import, *Bakvordur Reason Code* page can be accesed from the role center:
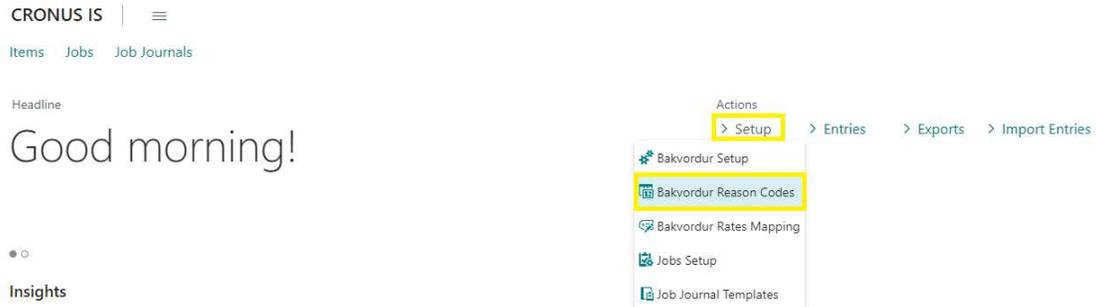
Bakvordur Reason Code page will open

Fields that can be found:

- Code: Code that can be found at Bakvordur site
- Description: Further explanation for the code, optional field
- Import: Specifies whether to import this code

Codes that are not on this page but appear in an entry from Bakvordur will automatically be filled into this page but with the import field set to false.

Rates Mapping

To be able to instert entries from Bakvordur to a job journal you must map the rates from Bakvordur to a work type. *Bakvordur Rates Mapping page can be accessed from the role center:*

CRONUS IS

Items   Jobs   Job Journals

Headline   Actions
Good morning!   > Setup   > Entries   > Exports   > Import Entries

                                                            Bakvordur Setup
                                                            Bakvordur Reason Codes
                                                            Bakvordur Rates Mapping
○ ○   Jobs Setup
Insights   Job Journal Templates

Bakvordur Rates Mapping will open

Bakvordur Rates Mapping   ✓ Saved

🔍 Search   + New   ▣ Edit List   🗑 Delete

Rate ↑	Work Type
DV	DV
YV	YV

Fields that can be found:

- Rate: This is the rate found at Bakvordur site (DV, YV, ST)
- Work Type: The work type that you are mapping the rate to.

2. INSTRUCTIONS

You can both export items (called resources in Bakvörður) and jobs and their job tasks

Items

To export Item to Bakvörður:
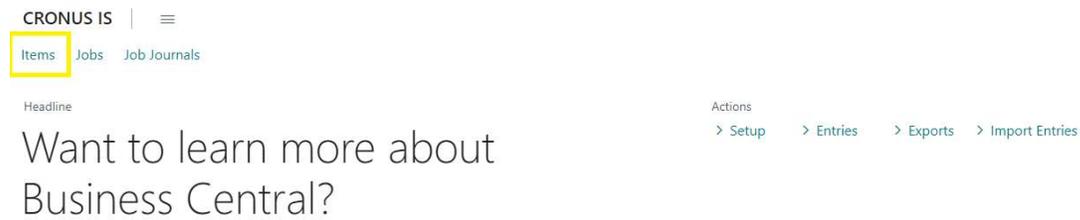
1. Navigate to Items

2. Choose the Item you want to export to Bakvörður

3. Item card page will open, click on the *Export to Bakvordur* Action
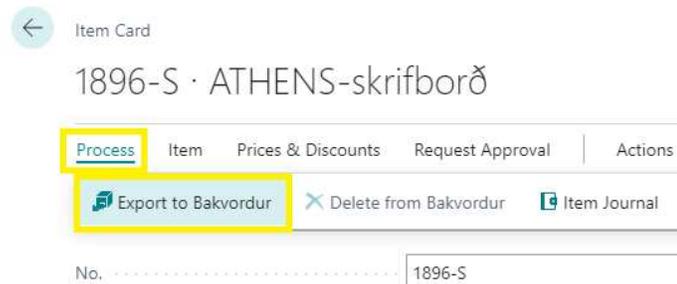
4. Item will be exported to Bakvörður
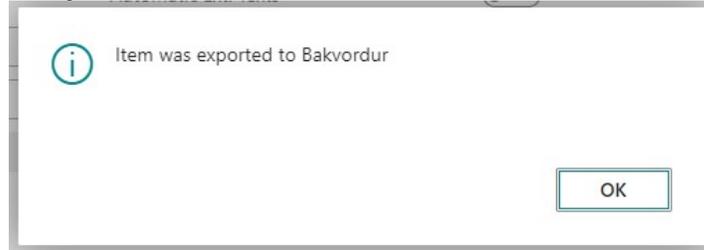
5. Fields that get sent over are:
   o No.
   o Description
   o Base Unit of Measure

Items that are active at Bakvörður can be seen on the item card page and items list page:

To update an item that has already been sent to Bakvörður, click on the *Export to Bakvordur* action again.
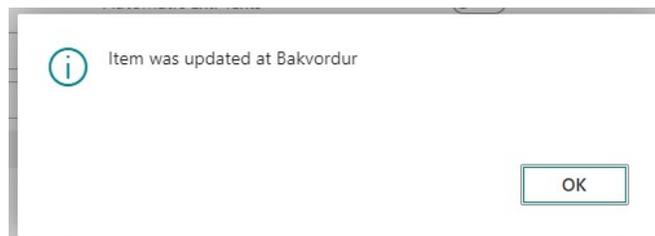
To delete an item from Bakvörður, click on the *Delete from Bakvordur* action
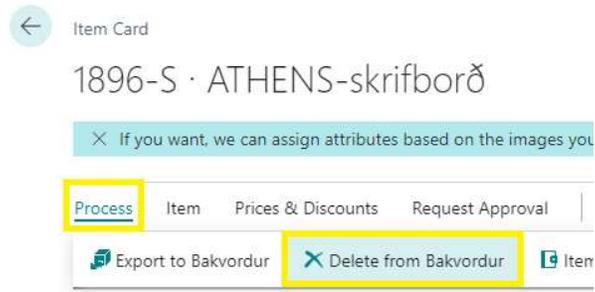
Jobs and job tasks

To add jobs and job tasks to Bakvörður:

1. Navigate to Jobs
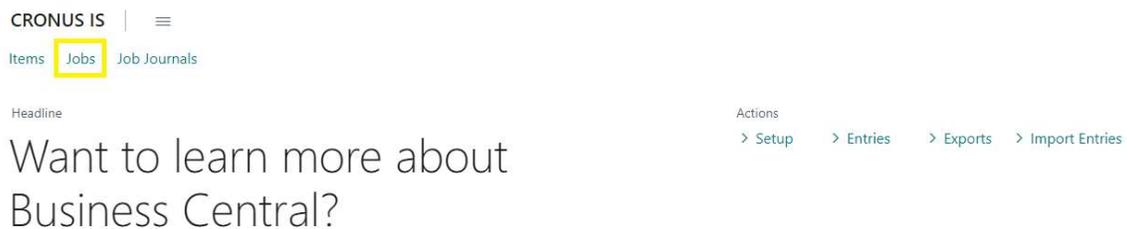
2. Choose the job you want to export to Bakvörður
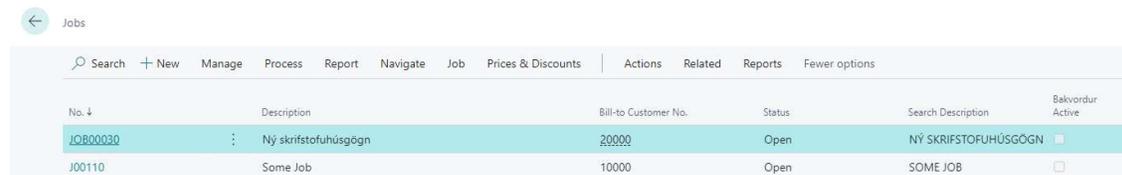
3. Job Card will open, click on the *Export Job to Bakvordur* action
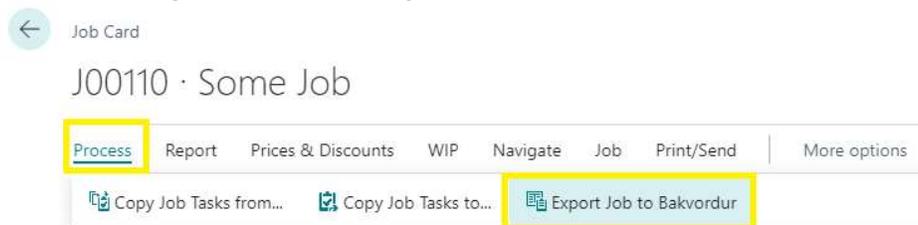
4. The Job along with every job task of type *Posting* will be exported

5. Fields that get sent over:
    o Job
        ▪ No.
        ▪ Description
        ▪ Duration -> Starting Date (optional)
        ▪ Duration -> Ending Date (optional)
        ▪ Person Responsible (optional)
            • SSN must be set on the person and match one at Bakvörður
    o Job Task
        ▪ Job Task No.
        ▪ Description
        ▪ Start Date (optional)
        ▪ End Date (optional)
6. Same as with Items you can see which jobs/job tasks are active at Bakvörður on the Jobs list page and job car page

If you add a job task or change any of the fields sent over, you can click on the *Export Job to Bakvordur* again and it will export every new Job task and update every active job and job task.

Export History

To see history on everything that has been exported, navigate to *Bakvordur Exports* list page
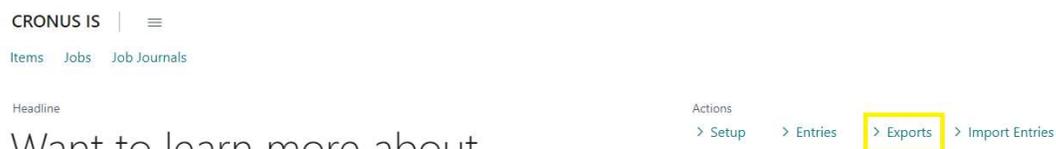
Bakvordur Exports page will open, the *Endpoint* field shows exports to that endpoint. Each line represents an export to Bakvörður. The field Parent No. is only for type *Job Task* and shows the number of the job it belongs to. The *Active* field shows if the type is currently active at Bakvörður.

Bakvordur Exports   ✓ Saved

Endpoint ···   https://demo.bakvordur.is/bakvordur/api   ⌄

Type	No.	Description	Parent No.	Active
→ Item	1001	Tréskrúfur		☑
Job	J00100	BC verk1		☑
Job Task	1000	BC Undirverk1	J00100	☑
Job Task	1010	BC Undirverk2	J00100	☑
Item	1896-S	ATHENS-skrifborð		☐
Job	J00110	Some Job		☑
Job Task	1000	Some Job Task	J00110	☑

Import

Import Entries page can be accessed from the role center:

CRONUS IS   ≡

Items   Jobs   Job Journals

Headline

Good morning!

Actions

> Setup   > Entries   > Exports   > Import Entries

Import Entries page opens.
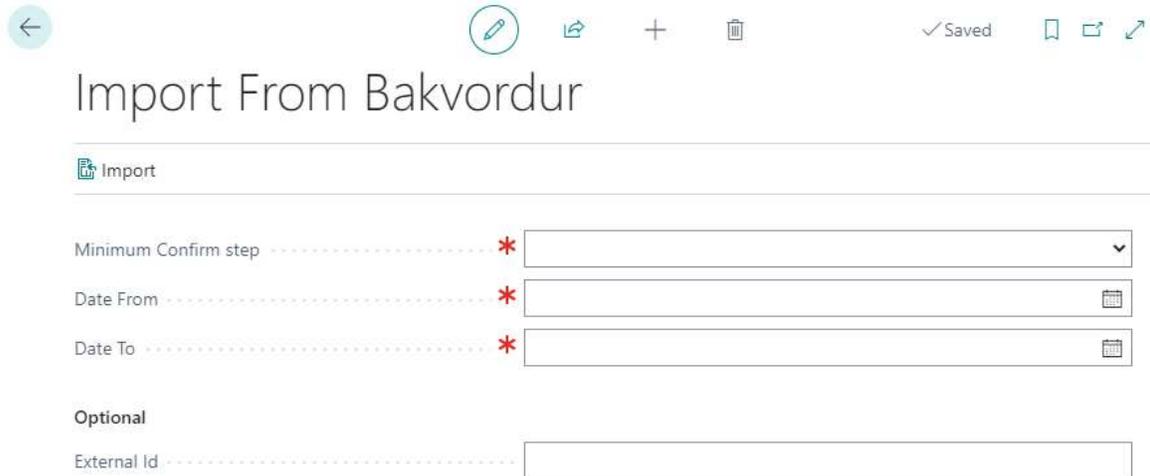
Users can choose what the minimum confirm step at bakvordur should be for imported entries and on what dates. Optional field is to input an Id for a job from the exported page and that will get entries only for that job. Click *Import* so that the system picks up those entries requested.
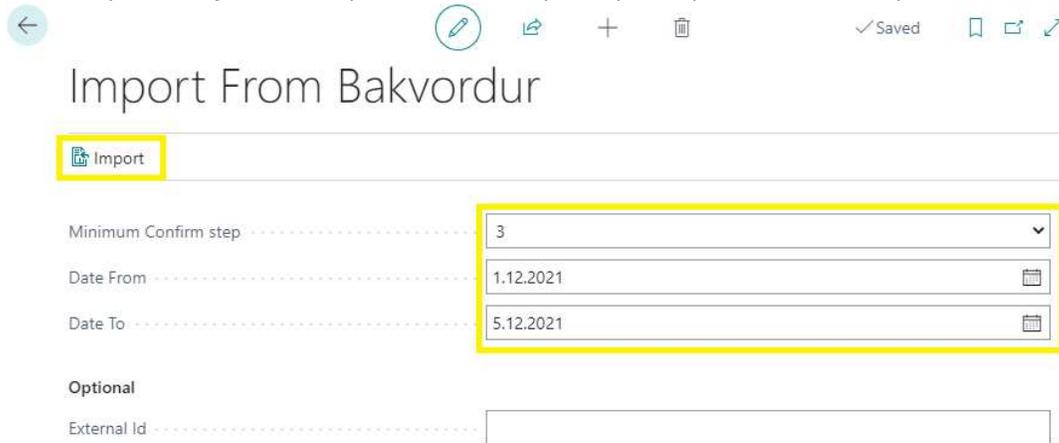
After clicking the action *Import*, a message window will open informing you about the results of the request.
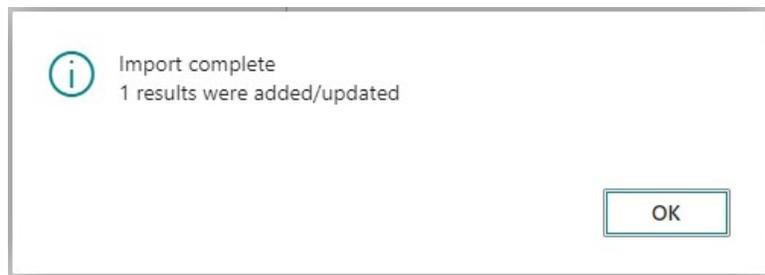
Imported entries can be found in the *History* page. *History* can be accessed under the *Entries* tab in the role center page:

Bakvordur Entries page will open

The fields are:
- Employee: SSN on the employee at Bakvordur, for importing there must be a person with this SSN.
- Job No. and Job Task No.: Shows the number on both the job and the job task
- Hours: Total hours in the entry
- Rates: Every rate that appears in the entry
- Start Time and End Time: Show when the hours were worked
- Items: Shows how many different items were used
- Confirmed: Shows if the entry has been confirmed at Bakvordur, confirmed entries won't be imported again
- Transferred: Shows if every registration in the entry has been transferred to the job journal.
- Error: Shows if there was an error transferring the entry

We now open the Bakvordur Entry.

If we want to confirm the entry at Bakvordur and create job journal lines using the data from the entry, we can achieve that by running *Confirm and transfer entry* action.

When the processing is completed, the user will get a message:
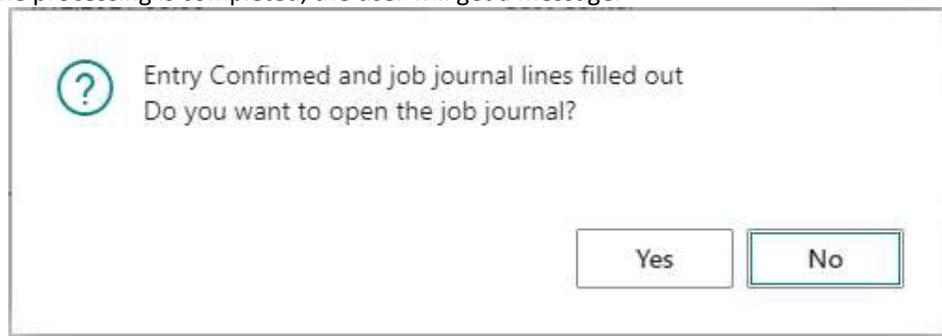
If we review the entry, we can see that it has job journal no. added to the hours tab

And if the job journal line has been posted, we can see that the job ledger entry no. is filled out

To see what entries have not been used to create job journal lines or have posted job journal lines the field transferred will be set to false. These entries can be accessed via *Inbox* page found under *Entries* in the role center. If an entry has been transferred but then one or more job journal line gets deleted the entry will have transferred set to false again and show up in the inbox.

Multiple Bakvordur entries can be confirmed and transferred via *Confirm and transfer entries* action on the Bakvordur Entries page
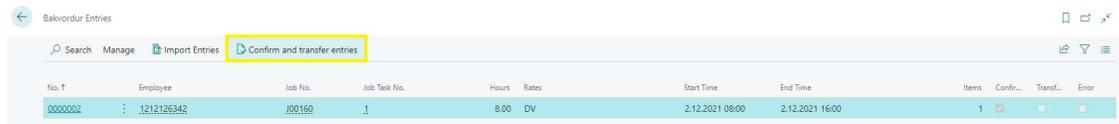
A request page will open. Here we can choose which Nos to create from, set End Time/Date filter or other filters.