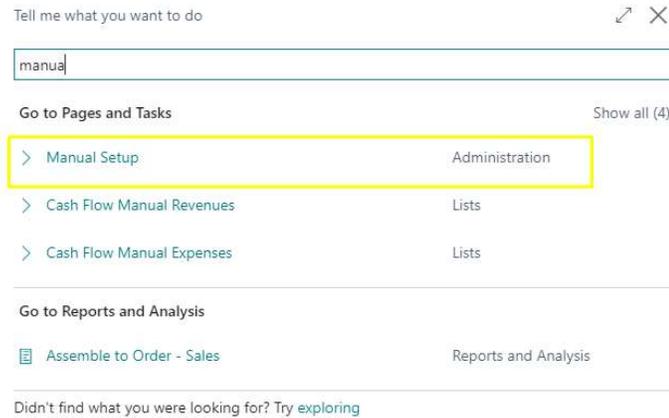


Advania Job Management

User Setup

1. Basic setup for *Advania IS Job Management* extension is available on Manual Setup page. On Home Page search for Manual Setup page.



Picture 1 Search Manual Setup Page

2. *Advania –Job Management* setup is available under General category

Manual Setup | Work Date: 30.6.2021 ✓ Saved 🔖 📄 ↗

🔍 Search 📄 Open in Excel | More options 🔍 ☰

Short Title	Extension Name	Description	Category	Keywords
Advania - Bank Account S...	Advania Banking Services	Set up and define verify bank a...	Finance	Banki,IOBS,I
Advania - Claim Payment ...	Advania Banking Services	Define the posting setup and i...	Sales	Banki, Kröfu
Advania - Icelandic Reports	Advania IS Reports	Icelandic Reports	General	Fjárhagur,V
→ Advania - Job Management	Advania Job Management	Job Management	General	Job Manage
Advania - Purchase Addons	Advania Purchase Addons	Set up and define Purchase Ad...	Purchasing	Innkaup, Vi
General journal templates	Base Application	Set up templates for the journa...	Finance	Færslubók,
PayPal Payments Standard	PayPal Payments Standard	Set up and enable the PayPal P...	Service	Fjárhagur,P
Cost accounting setup	Base Application	Set up general ledger transfers ...	Finance	Kostnaður, I

3. Advania – Job Management Setup needs to be filled with user preferred setup:

ADV Jobs Setup

Version Info Resources Setup... Job Setup... Job Posting Groups... Job Journal Templates... Job WIP Methods... Work-Hour Templates... ADV Jobs Calendar... Job Indexes... Actions Fewer options

General

Enable Confirm Job Modification
 Confirm Cust. Modification

Jobs

Base Job Journal Template: VERK
 Display corr. lines on inv.
 Lookup on Job Task in Job Jnl. Print Job Docketlet Autom.
 YV Work Type: YV Exclude Driving from disc.
 First day in period: 23D Only update price before post.
 Smallest allwd qty. in JobJnl. 0.50 Only post confirmed qty.
 Smallest allwd used qty in JJ 0.25 Show Customer balance on jobs
 Sales Invoice Report 206 ... Check Jobs when blocking Customer: None
 Sales Cr.Memo Report 207 ... Send Work Report With Electronic Invoice

Defaults

Default Job status: Order Def. Gen.Bus.Posting Gr. vend: INNANLANDS
 Def. Gen.Bus.Posting Gr. Cust: INNANLANDS Default Vendor Posting Group: INNANLANDS
 Default Customer Posting Group: INNANLANDS Default work type:

Job Requests

Job Requests in use Job Request Report: 10014361 ...
 Archived Job Req. in use Archived Job Request Report: 10014383 ...
 Job Request Nos.: JOBREQUEST Synch. Job Request lines with Job Planning Lines

Two values need to be created for the Job Management setup, of „YV Work type“ and „Job Request Nos.“

YV Work Type: YV Excl

First day in period:

Smallest allwd qty. in JobJnl.:

Code ↑	Description	Unit of Measure Code
→ YV	Yfirvinna	KLST

Job Request Nos.: JOBREQUEST

Select - No. Series List | 🔍 + New 🗑 Edit List ...

Code ↑	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Def... Nos.	M N
→ JOBREQUEST	Verkbeiðni	JRQ-000001	JRQ-999999	–	–	☑	
J-PL	Verðlisti fyrir verk	J00001	J99999	–	–	☑	
LÁNARD	Lánardrottinn	V00010	V99990	–	–	☑	

4. After **ADV Job Setup** page has been filled out and enabled you will need to setup these additional setups:
- Job Setup:

ADV Jobs Setup

Version Info Resources Setup... Job Setup... Job Posting Groups... Job Journal Templates... Job WIP Methods... Work-Hour Templates... ADV jobs Calendar... Job Indexes...

General

Jobs Setup

General Show more

Automatic Update Jo...

Apply Usage Link by ...

Allow Budget/Billable ...

Default WIP Method ...

Default WIP Posting ... Per Job

Default Job Posting G...

Numbering

Job Nos. ... VERK

Job WIP Nos. ... VÍV VERKS

- Job Posting Groups, select the right keys for each field and activate Time Register

ADV Jobs Setup

Version Info Resources Setup... Job Setup... Job Posting Groups... Job Journal Templates... Job WIP Methods... Work-Hour Templates... ADV jobs Calendar... Job Indexes...

General

Job Posting Groups | Work Date: 30.6.2021

Search + New Edit List Delete Open in Excel

Code ↑	WIP Invoiced Sales Account	Job Sales Applied Account	Job Sales Adjustment Account	Recognized Costs Account	Recognized Sales Account	Index Correction	Time Regi...
→ SETJA UPP	2212	6190	6191	7620	6620		<input checked="" type="checkbox"/>

- Job Journal Templates

ADV Jobs Setup

Version Info Resources Setup... Job Setup... Job Posting Groups... Job Journal Templates... Job WIP Methods... Work-Hour Templates... ADV jobs Calendar... Job Indexes...

General

Job Journal Templates | Work Date: 30.6.2021

Search + New Edit List Delete Open in Excel More options

Name ↑	Description	No. Series	Posting No. Series	Rec...	Source Code	Reason Code	In Bz N
→ VERK	Verkbók	VRB-ALM	VRB-ÍTR	<input checked="" type="checkbox"/>	VERKKB		

d. Work-Hour Templates, create the work force work-hour template.

Code	Description	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total per Week
WT100	100% work time	8	8	8	8	8	0	0	40
WT50	50% work time	4	4	4	4	4	0	0	20

e. ADV Job Calendar, create the year/moth work period.

f. Resource Setup.

5. Creating Job Journal and Resource, on this page you can create Job journal and Resource for a selected employ. You can also at the same time create him as a Customer, Vendor and Employ. To finalize the creation, go to Process and select create.



- Finalize the user setup – in the page **User Setup** you can select what access/permission each employ has.

Tell me what you want to do ↗ ✕

Go to Pages and Tasks Show all (4)

[> User Setup](#) Administration

← User Setup | Work Date: 30.6.2021 ✓ Saved 📄 🔍

🔍 Search + New 📄 Edit List 🗑 Delete 📄 Open in Excel 🔍 ☰

User ID ↑	Allow Posting From	Allow Posting To	Regi... Time	Salespers./Pu... Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Time Sheet Ad...	E-Mail	Resource No.	Has Job Jour...	Job Journal Name	Can crea... Job	Can close Job	Can cha... Ma...
→ ADVANIA			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		5902697199	<input checked="" type="checkbox"/>	ADVANIA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Assign Capacity to resource, After the setup is done you go and run the “Assign Capacity to Res.” To assign Capacity to resource for selected time period (this is usually done for a month at a time).

Tell me what you want to do ↗ ✕

Go to Reports and Analysis

[📄 Assign Capacity to Res.](#) Reports and Analysis

Assign Capacity to Res. 📄 ↗ ✕

Printer (Handled by the browser) ▾

Filters

From Date 1.1.2021 📅

To Date 31.12.2021 📅

Filter: Resource

× No. 5902697199 ▾

× Type ▾

× Work Template WT100 ▾

[+ Filter...](#)

Filter totals by:

[+ Filter...](#)

Advanced >

Advania Job Management General Info

1. There are three ways to register time in the Job journal, **ADV User Job Journal**, **Job Journal** or **Time Sheet**. Here we will go over the time registration for **ADV User Job Journal**.

User Manual

ADV User Job Journal

1. Go to User Job Journal, and create a new entry by selecting New.

Tell me what you want to do ↗ ✕

user job

Go to Pages and Tasks

> User Job JournalLists🔖

Job Journal - 5902697199 Advania | Work Date: 30.6.2021 🏠 🗨️ ↗

🔍 Search + New 🔧 Edit List 🗑️ Delete 🔄 Process 📊 Reports 📄 Open in Excel ⋮ More options 🔼 ⋮ 🔍

Regi...	Posting Date	Weekday	Job Request No.	Cust. No.	Job No.	Job Task No.	Unit of Measure Code	Used Qty.		
(There is nothing to show in this view)										

Line Information

Cust.	-
Job	-
Job Task	-

Job Journal Line

Current Date	
Res. Capacity	0.00
Qty. total	0.00
Overtime	0.00
Current Period	-
Res. Capacity	0.00
Qty. total	0.00
Overtime	0.00
Chargeable of used qty.	0 %

2. Register the value to the job journal. To complete registration on a job journal you will need to add value to these fields: *“Posting Date”, “Cust. No.”, “Job No.”, “Job Task No.”, “Used Qty” and “Work Description”.*

Job Journal - 5902697199 Advania | Work Date: 30.6.2021

🔍 Search + New 🔧 Edit List 🗑️ Delete 🔄 Process 📊 Reports 📄 Open in Excel ⋮ More options

Regi...	Posting Date	Weekday	Job Request No.	Cust. No.	Job No.	Job Task No.	Unit of Measure Code	Used Qty.	Quantity	Work Description
→	30.6.2021	Wed		10000	JOB00010	100	KLST	4	4	SQL

3. When the job journal is ready, user need to Confirm the registration by going to **Process** and **Confirm Registration**.

Job Journal - 5902697199 Advania | Work Date: 30.6.2021

The screenshot shows a software interface for job journals. At the top, there is a navigation bar with options: Search, + New, Edit List, Delete, Process, Reports, Open in Excel, and More options. Below this is a secondary bar with 'Error Information', 'Confirm Registration' (highlighted in yellow), and 'Remove Registered (Marked/Highlighted)'. A table below contains columns for 'Regi...', 'Posting Date', 'Weekday', 'Job Request No.', 'Cust. No.', and 'Job No.'. A single row is visible with values: 30.6.2021, Wed, 10000, JOB00010, 100, KLST. A dialog box is overlaid on the table, containing a question mark icon and the text 'Post the 1 entries in range?'. At the bottom of the dialog are two buttons: 'Yes' and 'No'.

4. After the job Journal has been confirmed the line will get a mark in the field Registered.

Job Journal - 5902697199 Advania | Work Date: 30.6.2021

The screenshot shows the same software interface as above. The 'Process' button is now selected in the top navigation bar. In the secondary bar, 'Remove Registered (Marked/Highlighted)' is highlighted in yellow. The table below shows the same row as before, but the 'Regi...' column now has a checked checkbox highlighted in yellow.

5. To change a value in a confirmed (registered) Job journal, you will need to select the job journal and go to **Process** and select **Remove Registered**.

The screenshot shows the software interface with a back arrow icon on the left. The top navigation bar has 'Process' selected. The secondary bar has 'Remove Registered (Marked/Highlighted)' highlighted in yellow. The table below shows the same row as before, but the 'Regi...' column now has an unchecked checkbox.

6. Job Journal **Confirmation** and **Remove Registered** is also available on the Page **Job Journal Overview**, by selecting and open the Job journal you want to confirm registration and selecting **Process** and **Confirm Registration/Remove Registered** and confirm the changes.

Tell me what you want to do

job journal over

Go to Pages and Tasks

> Job Journals Overview Lists

Job Journals Overview | Work Date: 30.6.2021

Search Process Reports Open in Excel More options

Show Correct Resource price/cost Post all Job Journals Post selected Job Journal

ADVANIA	Advania	2.080,00	4,00
---------	---------	----------	------

Edit - Job Journal - 5902697199 Advania

Search + New Edit List Delete Process Reports Open in Excel More options

Error Information Confirm Registration Remove Registered (Marked/Highlighted)

30.6.2021	Wed	10000	JOB00010	100	KLST
-----------	-----	-------	----------	-----	------

? Remove the mark Registered of 1 entries?

Yes No

7. Job journal Overview. To transfer the Job journal to its Job after confirmation, you will need to go to the page Job Journal Overview, there you will get a list of all job journals.

Tell me what you want to do

Joub journal over

Go to Pages and Tasks

> Job Journals Overview Lists

Job Journals Overview | Work Date: 30.6.2021

Search Process Reports Open in Excel More options

Name ↑	Description	Resource Capacity	Total Qty.	Total Used Qty.	Chargeable Qty.	%	Other Expenses
ADVANIA	Advania	2.080,00	4,00	4,00	-	-	

Job Journal Totals

Total Hours	4,00
Chargeable Hrs.	0,00
Chargeable %	0,00

8. You can print 2 reports from the Job Journal overview page, Qty Report and Job Journal.

CRONUS IS | Posted Documents Setup

Job Journals Overview: Custom filtered Search Process Reports Open in Excel

Name ↑	Description	Resource Capacity	Charg
ADVANIA	Advania	2.080,00	

Qty. Report
Job Journal

Qty. Report (Employee hours posted and unposted):

Employee hours □ ↗ ✕

Printer (Handled by the browser) ▾

Filters

New page per Resource

Filter: Resource

× No. 5902697199 ▾

+ Filter...

Filter totals by:

× Date Filter

+ Filter...

Filter: Job Ledger Entry

× Posting Date

× Job No. ▾

+ Filter...

Resource
CRONUS IS

23.8.2021 13:39
Page 1
ADVANIA

No. : 5902697199

5902697199 Advania

Posted transactions

UnPosted transactions

30.06.21 JOB00010 100 SQL

Totals	
4	4
Totals	4 4

4,00					
4,00	4	0	0	0	0
0,00	0	0	0	0	0
Total Chargeable (%)	0,00				

Totals for all

Total Hours	4,00				
Total daytime	4,00 Daytime	4,00	0,00	0,00	0,00
Total overtime	0,00 Overtime	0,00	0,00	0,00	0,00
Total Chargeable (%)	0,00				

Job Journal (list of job journals):

Job Journal □ ↗ ✕

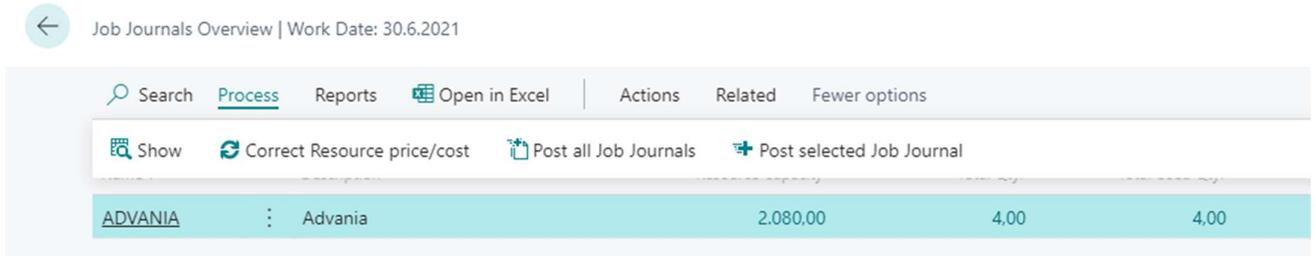
Printer (Handled by the browser) ▾

Show Another Cost

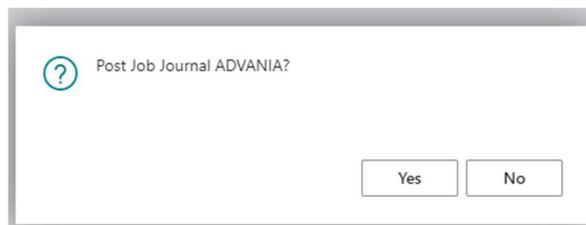
Advanced >

Job Journal		23. August 2021			
Advania 5902697199		Page 1			
		ADVANIA			
Posting Date	Customer Name	Job No.	No Job Task Line	Quantity	Work Description
30.6.2021	Adatum Corporation	JOB00010	No 100	4	SQL
Hours in contract lines: 0 hours 0% invoiced				Total	4

9. In the page Job Journal Overview you can do the following actions, Correct Resource Price/Cost , Post all Job Journals and Post selected job journal.



10. When posting Job Journal using **Post selected job journal**, you will get a confirmation window for selected job journal. Then you will get a option window where you can filter on the date that you want to post. After you post the job journal will transfer to transaction on the Job it belongs to, where you can then work with those transactions using standard functions.



Post Job Journals

Filter: Job Journal Batch

× Journal Template Name VERK

× Name ADVANIA

+ Filter...

Filter totals by:

× Date filter 30.06.2021

+ Filter...

Advanced >

OK Cancel

More than one Customer on a Job

1. You can have more than one customer per Job / job Task. To set it up you go to the Job card page of the job you want to add customer, select Related then Job and click on Job Buyers.

Job Card | Work Date: 12.4.2021

JOB00010 · Endurgerð móttökusvæðis

Process Report Prices & Discounts WIP Navigate Job Print/Send Actions **Related** Reports Fe

Job WIP Prices Planning History

Job Planning Lines
 Dimensions
 Statistics
 Sales Invoices/Credit Memos
 Comments
 Online Map
 Job Requests
Job Buyers
 Job Docklet
 Attachments

JOB00010 Phone No.
 Endurgerð móttökusvæðis Mobile Phone No.
 30000 Email
 CT000006 Search Description
 School of Fine Art Person Responsible
 Tindaseli 10 Invoicing
 Invoice by Job Task
 FL Blocked
 US-FL 37125 Last Date Modified
 Miami Job Buyers Exist

2. After you click Job Buyers you will open the Job Buyers, and there you can add Customers to selected Job Tasks and the percent they will pay for selected job task.

Job Buyers | Work Date: 12.4.2021

✓ Saved

Search + New Edit List Delete Open in Excel

Job No.

Job Task No. ↑	Customer	Customer Name	Ratio %
→ 1010	30000	School of Fine Art	50,00
1010	20000	Trey Research	50,00
1020	30000	School of Fine Art	100,00

- Now when you post Job Journal line on selected jobs/Job Task it will be split to new lines where the quantity will reflect the ratio % on the Job Buyer page for selected Job.

Job Journal - 0402815929 Heiðar Örn Stefánsson | Work Date: 12.4.2021

Regi...	Posting Date	Weekday	Job Task Description	Line Type	Job Request No.	Cust. No.	Job No.	Job Task No.	Unit of Measure Code	Used Qty.	Quantity	Work Description
	2.12.2021	Thu	Ráðgjöf			30000	JOB00010	1010	KLST		6	Work work

JOB00010 - Endurgerð móttökuvæðis | Work Date: 12.4.2021

Posting Date	Entry Type	Transaction Type	Line Type	Document No.	Job No.	Job Task No.	Job Request No.	Type	No.	Description	Work description	Unit of Measure Code	Quantity
2.12.2021	Usage			J00250	JOB00010	1010		Resource	0402815929	Heiðar Örn Stefánsson	Work work	KLST	3
2.12.2021	Usage			J00250	JOB00010	1010		Resource	0402815929	Heiðar Örn Stefánsson	Work work	KLST	3

Send Job Report with Electronic Invoice

- If you are using Electronic Invoice, then you can add the Job Report as an attachment. To do that you go to the ADV Jobs Setup Page and activate the field "Send Work Report with Electronic Invoice".

ADV Jobs Setup

Version Info Resources Setup... Job Setup... Job Posting Groups... Job Journal Templates... Job WIP Methods... Work-Hour Templates... ADV jobs Calendar... Job Indexes...

General

Enable Confirm Job Modification
 You must disable the service before you can make changes. Confirm Cust. Modification

Jobs

Base Job Journal Template VERK Display corr. lines on inv.
 Lookup on Job Task in Job Jnl. Print Job Docket Autom.
 YV Work Type YV Exclude Driving from disc.
 First day in period 23D Only update price before post
 Smallest allowed qty. in JobJnl. 0.50 Only post confirmed qty
 Smallest allowed used qty in JJ 0.25 Show Customer balance on jobs
 Sales Invoice Report 206 Check Jobs when blocking Customer None
 Sales Cr.Memo Report 207 Send Work Report With Electronic Invoice

- After you have activated the field, the Job Report will be added as an attachment for each invoice that has value in the Job No. field, and as a standard function will be sent with the electronic Invoice.

Posted Sales Invoice | Work Date: 12.4.2021

103220 · Heiðar Örn Stefánsson

Process **Invoice** Correct Print/Send Navigate | Actions Related Fewer options

Statistics Dimensions Change Payment Service Find entries... Comments Approvals **Attachments**