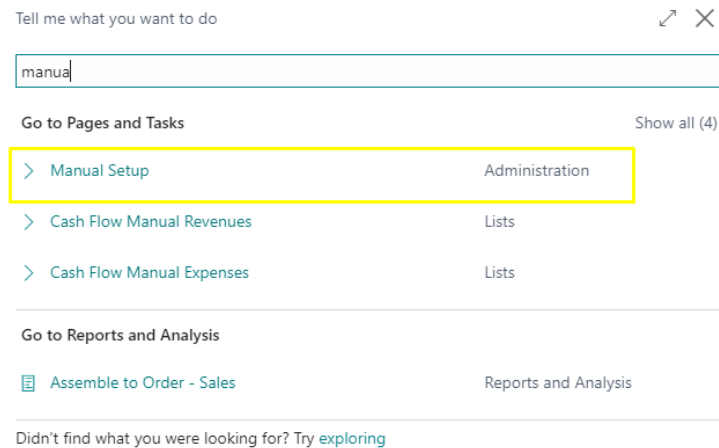


Advania Job Management

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

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

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 ...

Default Job Posting G...

Numbering

Job Nos. ... Job WIP Nos. ...

- 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 ✓ Saved

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 ✓ Saved

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
→ ÍTREKAD	Ítrekunarbók verka		VRB-ÍTR	<input checked="" type="checkbox"/>	VERKKBK		
→ VERK	Verkbók	VRB-ALM		<input type="checkbox"/>	VERKKBK		

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

← 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

Work Template - Jobs | Work Date: 30.6.2021

Search + New Edit List Delete Open in Excel

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.

← 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 Calendar | Work Date: 30.6.2021 ✓ Saved

Search Edit List **Create period** Open in Excel

Date Weekday Holiday Comment

(There is nothing to show in this view)

Create Jobs Calendar

Filters

From Date 1.1.2021 To Date 31.12.2021

Holidays

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Advanced >

Schedule... OK Cancel

Jobs Calendar | Work Date: 30.6.2021 ✓ Saved

Search Edit List Create period Open in Excel

Date	Weekday	Holiday	Comment
→ 1.1.2021	Friday	<input type="checkbox"/>	
2.1.2021	Saturday	<input checked="" type="checkbox"/>	
3.1.2021	Sunday	<input checked="" type="checkbox"/>	
4.1.2021	Monday	<input type="checkbox"/>	
5.1.2021	Tuesday	<input type="checkbox"/>	
6.1.2021	Wednesday	<input type="checkbox"/>	
7.1.2021	Thursday	<input type="checkbox"/>	
8.1.2021	Friday	<input type="checkbox"/>	
9.1.2021			
10.1.2021			
11.1.2021			
12.1.2021			
13.1.2021			
14.1.2021			
15.1.2021			

Period from 01.01.21 to 31.12.21 created.

OK

f. Resource 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

←

✎

+

🗑

✓ Saved

🔖

📄

↗

Resources Setup

Numbering

Resource Nos.

FORDI

▼

Copy Job Desc. to Led... ☒

Default res. posting g... ..

PJÓNUSTA

▼

Time Sheet Nos.

Ep

▼

Def Res. Unit of Meas... ..

KLST

▼

Time Sheet First Week... ..

Monday

▼

Confirm Res. Modifica... ..

☒

Time Sheet by Job Ap... ..

Never

▼

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.

Tell me what you want to do

↗

✕

create job journal

Go to Pages and Tasks

>

Create Job Journal and Resource

Administration

←

✎

+

🗑

✓ Saved

🔖

📄

↗

Create Job Journal and Resource

New

Process

✓ Create

⋮

ID Number/SSN

5902697199

Name

Advania

Address

Gudrunartun 10

Post Code

101

▼

City

Reykjavik

E-Mail

advania@advania.is

Work template

WT100

▼

User ID

ADVANIA

...

Dimension

...

Job Journal Name

ADVANIA

Create as Customer

☒

Create as Vendor

☒

Create as Employee



☒

📘

User Advania created.

OK




6. 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  

user setup

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"/>




7. 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  

assign re


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 >

-



+



[Process](#)
[Report](#)
[Resource](#)
[Navigate](#)
[Prices & Discounts](#)
[Planning](#)
[Actions](#)
[Related](#)
[Reports](#)
[Fewer options](#)

 Resource Capacity

 Resource Availability

No.	5902697199
----------	------------

...

Use Time Sheet

Name Advania

Time Sheet Owner User ID

Resource Capacity

◀ Previous Set ◀ Previous Column ▶ Next Column ▶ Next Set More options

Matrix Options

View by Day

View as Net Change

Resource Capacity Matrix | Manage More options

[illegible]

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 Journal

Lists

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

Qty. total

Overtime

Current Period

Res. Capacity

Qty. total

Overtime

Chargeable of used qty.

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

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 the Job Journal interface with the 'Process' tab selected. The 'Confirm Registration' button is highlighted in the top toolbar. Below the toolbar, a table displays job journal entries. A dialog box is open, asking 'Post the 1 entries in range?' with 'Yes' and 'No' buttons.

→	☑	⋮	30.6.2021	Wed		10000	JOB00010	100	KLST
<div><div>?</div><div>Post the 1 entries in range?</div><div><div>Yes</div><div>No</div></div></div>									

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 Job Journal interface with the 'Process' tab selected. The 'Registered' field is highlighted in the top toolbar. Below the toolbar, a table displays job journal entries. The 'Registered' field is highlighted in the first row.

→	☑	⋮	30.6.2021	Wed	Job Request No.	Cust. No.	Job No.
						10000	JOB00010

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 Job Journal interface with the 'Process' tab selected. The 'Remove Registered' button is highlighted in the top toolbar. Below the toolbar, a table displays job journal entries. The 'Remove Registered' button is highlighted in the first row.

→	☐	⋮	30.6.2021	Wed	10000	JOB00010	100	KLST
<div><div>×</div><div>Remove Registered (Marked/Highlighted)</div></div>								

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

Name ↑	Description	Resource Capacity	Total Qty.	Total Used Qty.	Chargeable Qty.	%	Other Expenses
ADVANIA	Advania	2.080,00	4,00	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
<p>? Remove the mark Registered of 1 entries?</p> <p>Yes No</p>								

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

Qty. Report Job Journal

Name ↑	Description	Resource Capacity	Chargeable Qty.
ADVANIA	Advania	2.080,00	4,00

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...

Send to...

Print

Preview & Close

Cancel

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
```

UnPosted transactions						Totals	
30.06.21	10800010	100	SQL			4	4
						Totals	4
							4
						4,00	
						4,00	4
						0,00	0
						0,00	0
Total Chargeable (%)						0,00	0

Totals for all

Total Hours	4,00		Planning	Contract	Both
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

Send to...

Print

Preview & Close

Cancel

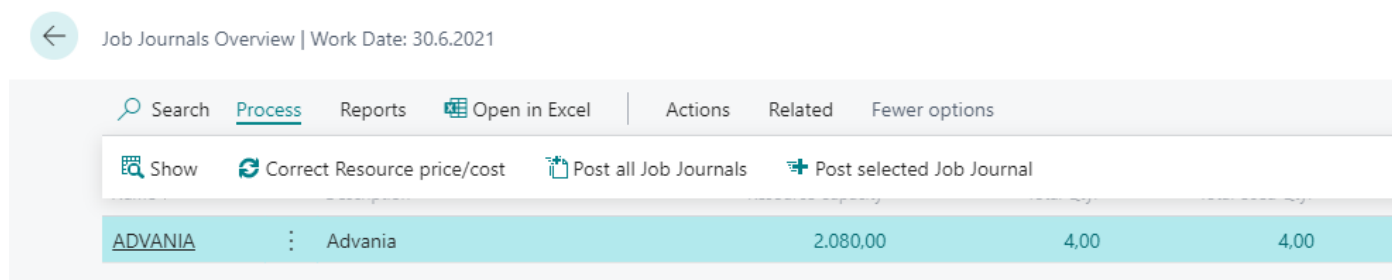
Job Journal

Advania 5902697199

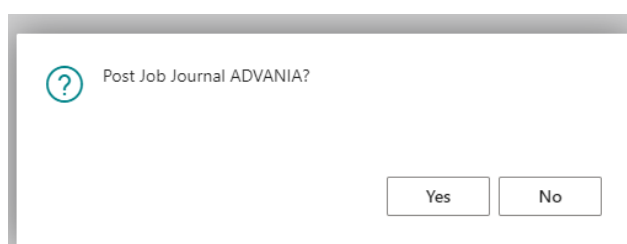
23. August 2021
Page 1
ADVANIA

Posting Date	Customer Name	Job No.	No Job	Task Line	Quantity	Work Description
30.6.2021	Adatum Corporation	JOB00010	No 100	Programming	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.



The 'Post Job Journals' window allows filtering job journals. It includes a 'Filter: Job Journal Batch' section with dropdowns for 'Journal Template Name' (VERK) and 'Name' (ADVANIA), and a '+ Filter...' button. Below this is a 'Filter totals by:' section with a 'Date filter' dropdown set to '30.06.2021' and another '+ Filter...' button. An 'Advanced >' section is at the bottom, and 'OK' and 'Cancel' buttons are at the bottom right.

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 Docket
- 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	JO800010	1010	KLST	6	6	Work work

JO800010 - Endurgerð móttökusvæðis | 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	JO800010	1010		Resource	0402815929	Heiðar Örn Stefánsson	Work work	KLST	3
2.12.2021	Usage			J00250	JO800010	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 contr. 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 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 ☒

- 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**