

**Table of Contents**

Overview ..... 2

    Functionality..... 2

        Job Approval Types ..... 3

        Planning..... 5

Setup ..... 6

    Job Management Setup Processing ..... 7

    Job Approval Groups ..... 8

    Employee..... 9

    Job Type ..... 10

    User Group Security ..... 11

Job Approval Process ..... 12

    Job Approval Sign-Off Considerations ..... 17

## **Overview**

This document will cover the *Job Approvals* functionality. The use of this functionality requires entries in SedonaSetup which will be detailed in this reference document. This document is divided into three areas; an explanation of the functionality, the *Setup* required prior to activating and using Job Approvals, and the *Process* of how to use this feature.

## **Functionality**

The Job Approval process was designed to add a layer of control to the Job process which requires that one or multiples Users must approve the job prior to the job being released to your installation department. You may set up a job type to first require the Sales Manager to approve the job, then the Accounting Manager may approve the commissions, and lastly the Operations Manager will approve the job for processing.

The Job Approval process is driven by the setup in several SedonaSetup tables. A flag located on the Setup Processing for Job Management form, Approval Processing turns on or off the ability to use Job Approvals. This flag must be selected to activate the Job Approval functionality.

The Job Approvals setup table will require you to setup at least one Approval Group code. Job Approval Groups are a list of the groups you require to approve a job. These group codes may be labeled with a department name or a user's job title.

Each Job Approval Group is linked to a default approval level. You may have as many approval levels as needed. These approval levels determine a level of authority. For example a Level 3 has the highest level of authority where Level 1 has the lowest level of authority. A Job Approval group with a higher level may approve a job for a group with a lesser approval level.

Once the Job Approval Groups codes have been created, you will link each employee who will participate in Job Approvals to their Approval Group code. This linking is done on the Employee record in SedonaSetup. An Employee may be linked to only one Approval Group. Only employees assigned to a Job Approval Group will be able to approve jobs.

Once Job Approval Groups have been set up, you are able to select these on the Job Approvals tab on the Job Type setup record. The approval level assigned to the job approval group in the Job Approval Group setup table will be the default value on the job type, however this may be overridden by the User.

Each Job Type may be assigned a list of groups which must approve the job. When a new job is created which is set up to use job approvals, the application will not let you process the job completely until the approvals have been signed-off. You do not have to set up approvals on all your job types.

When the Job Approvals feature is activated, the menu option, Job Approvals, is displayed within the Job Management module. When selected, the Job Approvals option opens a list of all jobs awaiting approval. If the user logged into the application has been linked to a job approval group on their employee record, a list of jobs will be displayed to approve. For users that are not linked to a job approval group on their employee record yet have the Job Approval user group security option granted, the job approval list will be empty. Jobs may be approved from the Job Approval list or the user with job approval permissions may approve within the job record from the Job Approval button located on the Job toolbar.

### **Job Approval Types**

There are three types of Job Approvals with a few possible setup combinations. The approval type is selected for each Job Approval Group on the Approvals form of the Job Type setup.

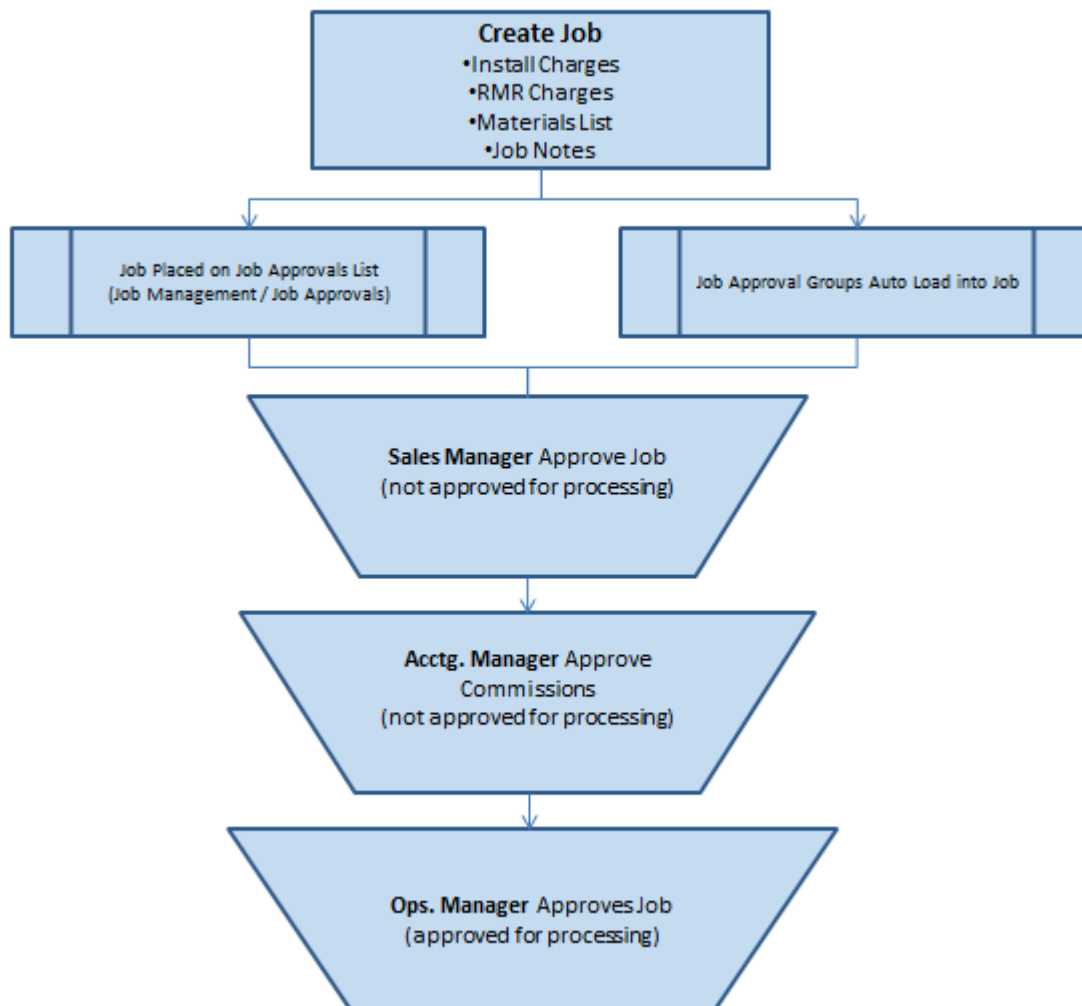
- Approve the job but *not* approve the job for processing
- Approve the job *and* approve the job for processing
- Approve the job, approve the commissions but *not* approve the job for processing
- Approve the job, approve the commissions *and* approve the job for processing

A User may approve a job for processing without having the commission approval completed. If a job has not been approved for processing, a User will not be able to order parts, schedule appointments, enter commissions, or enter the job costing estimate. Once a User approves a job for processing the remaining toolbars and buttons will be displayed on the job record. Until the job is approved for processing the User may only perform the following functions:

- Work Order Information
- Job System Information
- Install Charges
- Recurring Charges
- Materials List
- Custom Field Information
- Job Notes
- View Job Log

**Sample Job Approval Process Flow**

The flow chart provided below is a very simple example of how you may design your Job Approval process. You may have more or fewer Job Approval Groups associated with a Job Type.



## **Planning**

Before working on the setup tables for Job Approvals, first determine which Users or types of Users will have permission to approve a job. Then determine whether one or many of the Job Approval Groups will be allowed to approve other approvals that have not been signed off on a job.

A User with a higher approval level may approve all approval groups equal to or less than their approval level. This will help you to determine the approval level assigned to the Job Approval Groups on the Job Type.

Determine which Job Types will require the approval process. You may not want to use Job Approvals for small jobs with either a small revenue amount or that will be completed in a very short period of time. Large jobs with high revenue and expenses would most likely go through the Job Approval process.



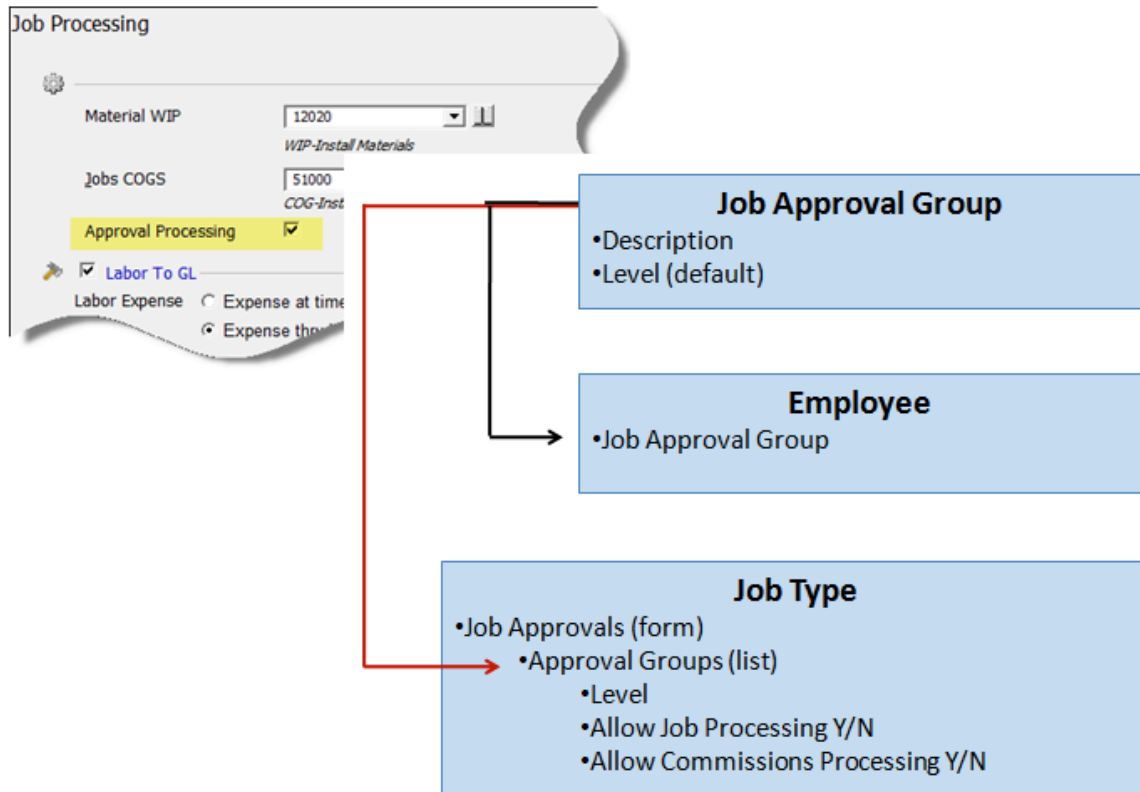
**Until a job is approved for processing, the job task list is not available on the job toolbar. You may want to consider changing the default job status on the first job task to Awaiting Approvals so that when a user looks at the job queue, they will clearly see the job has not yet be approved for processing.**



**If you set up Job Approvals for Job Types where there are jobs already in process, these jobs will not be affected. Only new jobs created after the Job Approvals list is created for the Job Type will use the Job Approvals.**

## Setup

Flags, fields and setup tables in SedonaSetup allow the use of the Job Approval functionality. All setups must be completed prior to using this feature.



**Job Management Setup Processing**

A flag setting located on the Setup Processing form for Job Management enables the use of Job Approvals. This flag labeled *Approval Processing* must be selected and saved to activate the Job Approval process.

The screenshot displays the 'Job Processing' configuration window. It includes several sections for setting up accounts and flags:

- Material WIP:** Set to 12020 (WIP-Install Materials).
- Jobs COGS:** Set to 51000 (COG-Installation Material).
- Approval Processing:** A checkbox that is checked and highlighted in yellow.
- Labor To GL:** A checked checkbox with radio button options for 'Expense at time of entry' (unselected) and 'Expense thru WIP' (selected).
- Commissions To GL:** A checked checkbox with radio button options for 'Expense at time of entry' (unselected) and 'Expense thru WIP' (selected).
- Labor Expense Type:** Set to 51010 (COG-Installation Labor).
- Commission Expense Type:** Set to 60125 (Commissions).
- Labor Deferred:** Set to 23020 (Payroll Clearing Account).
- Commission Deferred:** Set to 23020 (Payroll Clearing Account).
- Labor WIP:** Set to 12030 (WIP-Install Labor).
- Commission WIP:** Set to 12040 (WIP-Install Commissions).
- Overhead:** Unchecked checkbox with empty fields for Overhead Debit and Overhead Credit.
- Restrict Sales Month:** Unchecked checkbox with a dropdown for Current Sales Month set to September/2003.

An 'Apply' button is located at the bottom right of the form.

### Job Approval Groups

A setup table is available in SedonaSetup within the JM (Job Management) group of tables labeled *Job Approval Groups*. Once you have defined your job approval process, create one record for each need job approval group.

Note: You may setup some of your job types to use just one or multiple job approval groups. The list of job type approval groups do not have to be the same for each job type. For example one job type may only require the approval of the operations manager while another job type may require the approval of a Sales Manager, Accounting Manager and the Operations Manager.

For each Job Approval Group, you will enter a *Description* and a default approval *Level*. This approval level may be overridden when setting up your list of job approval groups on the job type.

The screenshot shows the 'Approval Group' configuration window. It features a table listing approval groups and an edit form below it.

Description	Approval Level	Inactive
Accounting Mgr	3	N
Branch Manager	1	N
Branch Sales Manager	1	N
Operations	4	N

Below the table, there is a checkbox labeled 'Include Inactive' which is currently unchecked.

The 'Approval Group Edit' section contains two input fields: 'Description' with the value 'Branch Manager' and 'Level' with the value '1'. There is also an 'Inactive' checkbox which is unchecked.

At the bottom right of the window, there are three buttons: 'Apply', 'New', and 'Delete'.



**Employee**

The field labeled *Job Approval Group* located on the Employee setup form is used to link an Employee to a Job Approval Group. An employee may be assigned to only one Job Approval Group. Only the Users linked to Employee records that have a Job Approval Group link will be able to sign-off on the Job Approval Group assigned to them.

The screenshot displays the 'Employee Edit' interface. At the top, there is a header 'Employee Edit' with a user icon and an 'Inactive' checkbox. Below this, the 'Employee Code' is 'Wanda White'. A navigation bar includes 'General Information', 'Payroll', and 'Commission Setup', along with creation and update dates. The main form area contains several fields: 'User Code' (wwhite), 'Type' (MG), 'Assigned To' (Accounting), 'Supervisor & Credit Request Handoff', 'First Name' (Wanda), 'Last Name' (White), 'Middle Initial', 'Date of Hire', 'Termination', and 'Job Approval Group' (Accounting Mgr). The 'Job Approval Group' field is highlighted in yellow. At the bottom, there are three buttons: 'Apply', 'New', and 'Delete'.

**Job Type**

A new setup for labeled Approvals has been added to the Job Type setup. On this new form you will create a list of all the required job approval groups that must sign-off on the job. After selecting a Job Approval Group from the drop-down list, the approval level will default to the value entered in the Job Approval Group setup table. The user may override the approval level. There are two selections boxes on this form; Allow Job Processing and Allow Commissions. Select the boxes that apply for this Job Approval Group. If the options *Allow Job Processing* and *Allow Commissions* are not selected, the user will just be signing-off on the job but not allowing the job to be processed.

**Job Type Setup**  Inactive

Job Type  Description

Detail | Job Tasks | Costing | Items | Accounts | Commission Types | **Approvals**

Approval Group	Allow Job	Allow Commissions	Seq\Approval ...
Accounting Mgr	N	Y	1
Branch Manager	Y	N	1
Branch Sales Manager	N	N	1

Group   Job Processing

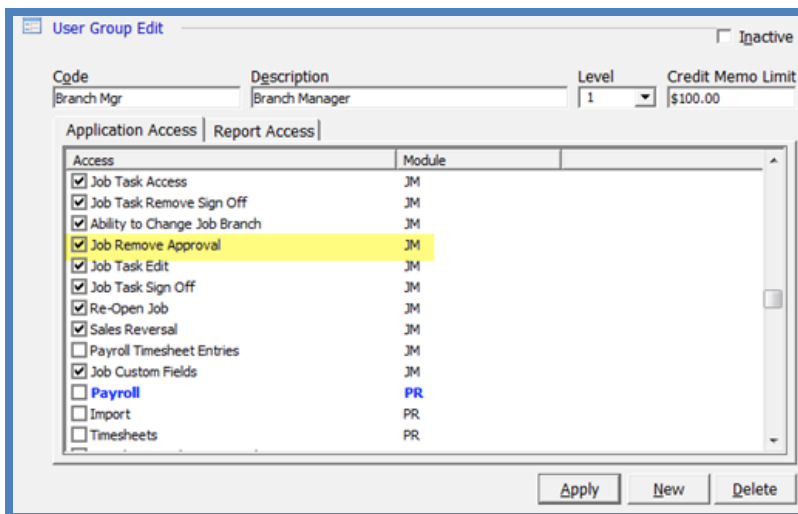
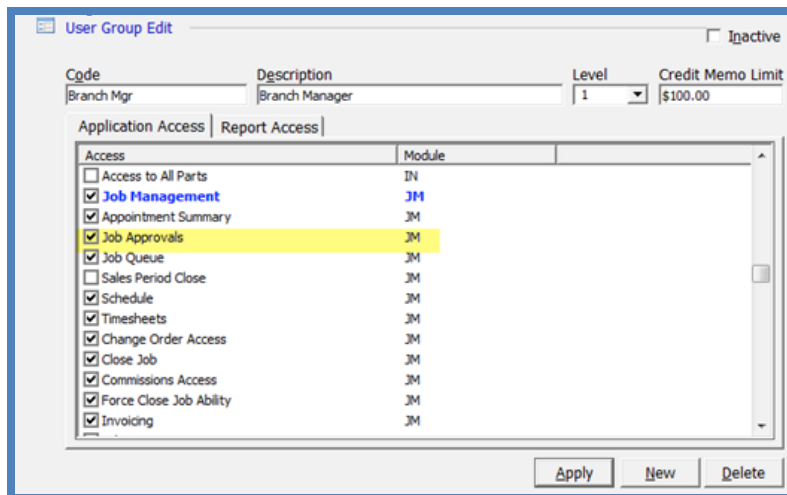
Level   Commission Processing

**User Group Security**

Two new options have been added to the Application Access list for User Groups.

The first option is *Job Approvals*; this option must be selected if you want the user to be able to see the Job Approvals menu option within the Job Management module on the main application tree. If a user is not granted this new permission and the Employee record is associated with a Job Approval Group, they will be able to sign-off on the job approval within the job record but will not have access to the Job Approval Listing.

The second option is *Job Remove Approval*. If the user group is granted this permission, they will be allowed to remove a job approval sign-off that is not flagged to *Allow Job Processing* or *Allow Commissions* as long as the job has not yet been signed off for processing by another user.



**Job Approval Process**

All setups described in the Setup section of this document must be completed before you may begin using the Job Approval process. The sample Job Approval Process provided in this section is considered very simple; each company may design their job approval processing as to align with their own internal company policies and procedures.

In this example Job Approval process, the job type selected is setup in the following manner:

- Branch Sales Manger must approve the job. The Branch Sales Manager does not have the permission to Allow the Job for Processing or to Allow Commissions.
- The Accounting Manger must approve the job. The Accounting Manager has permission to Allow Commissions.
- The Branch Manager must approve the job. The Branch Manager has permission to Allow Job Processing.

**Create The Job** – Enter information on the following forms:

- Work Order
- Job System
- Install Charges
- Recurring Charges
- Job Notes
- Custom Field Information

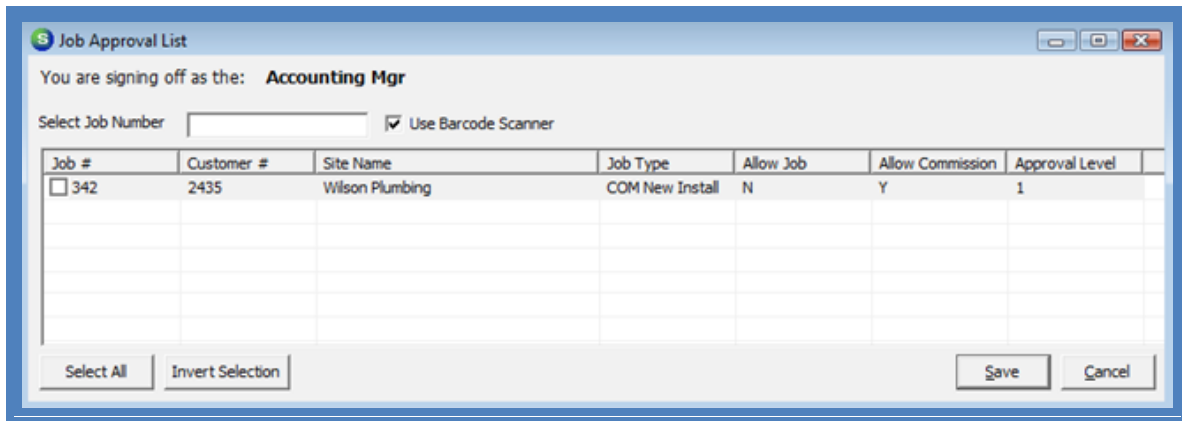
Job	Customer	2435	Site
Job Number 342	Wilson Plumbing		Wilson Plumbing
Job Type COM New Install	100 Portage		100 Portage
Job Status Awaiting Job Approvals	Winnipeg, MB R3P 0X7		Winnipeg, MB R3P 0X7
System 10 (0 Used)	Canada		Canada

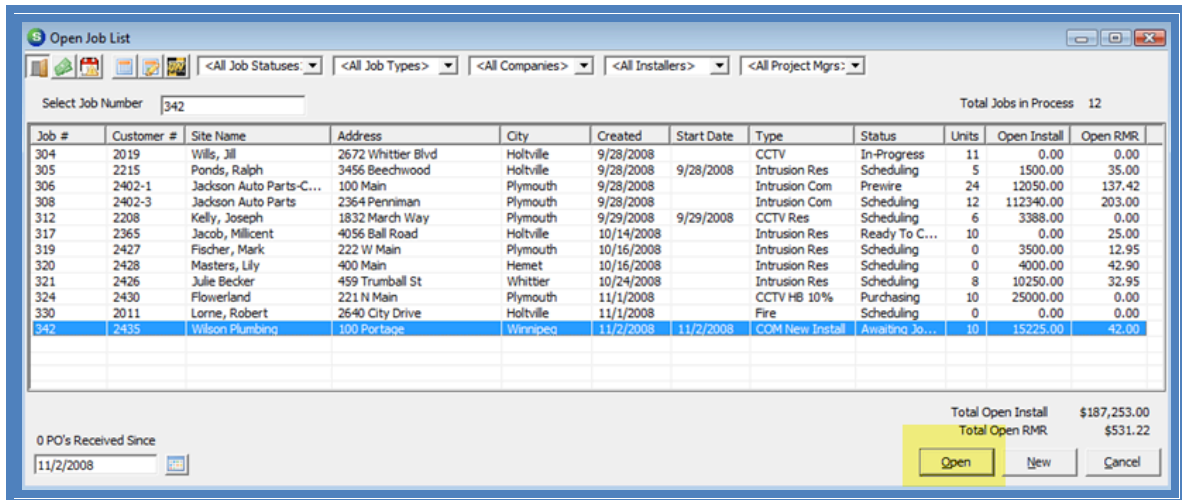
Sales Summary			
<b>Installs</b>			
Item Code	Description	Quantity	Amount
Com - Contacts Add	Commercial - Additional Contacts	1	100.00
Com - Keypads Add	Commercial - Additional Keypads	1	125.00
Com Burg Install	Commercial Burglar System Installation	1	15000.00
<b>Total</b>			<b>\$15,225.00</b>
<b>Parts</b>			
Part Code	Description	Quantity	Amount
5800MICRA	5800MICRA 3/4 in Wireless Contact	3	0.00
5808LST	5808LST Wireless Smoke Detector	20	0.00
5839	5839 Wireless Keypad	4	0.00
5853	5853 Wireless Glass Break Detector	20	0.00
998PI	998PI Motion Detectors	10	0.00
AS-ODCS9A	OverHead Door Contact	1	0.00
V32FB	V32FB Fire/Burg Panel	1	0.00
<b>Total</b>			<b>\$0.00</b>
<b>Total Non Recurring</b>			<b>\$15,225.00</b>
<b>Total Non Recurring Billed</b>			<b>\$0.00</b>
<b>Total Credits</b>			<b>\$0.00</b>
<b>Balance to Bill</b>			<b>\$15,225.00</b>
<b>Recurring</b>			
Item Code	Description	Monthly Amt	
Com - Monitoring -MB	Commercial - Monitoring Manitoba	22.00	
Com - Super Open/Close	Commercial - Supervised Open/Close	10.00	
Com - Sys Activity Report	Weekly E-Reports	10.00	
<b>Total Recurring</b>			<b>\$42.00</b>
<b>Total Recurring Billed</b>			<b>\$0.00</b>

**First Approval** – The Branch Sales Manager will open the Job Approval List to see which jobs require approval. The approval may be performed from the Job Approval List by selecting the checkbox to the left of the job and pressing the save button. Most likely the user will want to review the information on the job prior to signing-off on the approval. Once the job is open the approval may be signed off within the job.

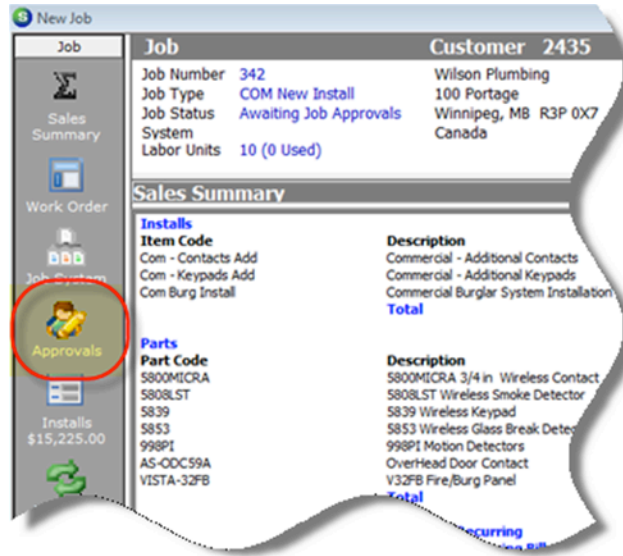
1. Open the Job Approval List: Job Management / Job Approvals. Make note of the job number or job numbers that need to be approved.



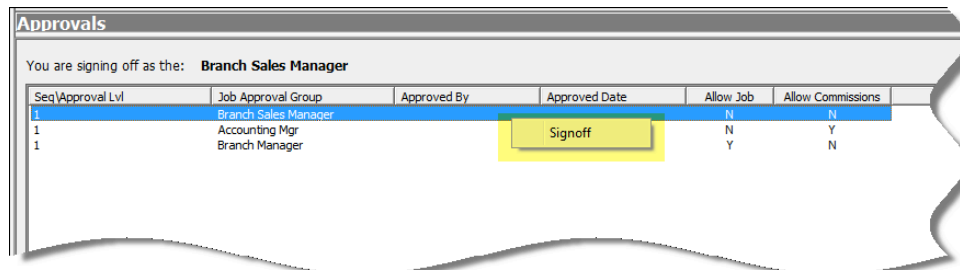
2. Open the Job: Job Management / Job Queue. Highlight the job number and press the Open button located at the lower right of the Job List or you may double-click on the job line to open the job record.



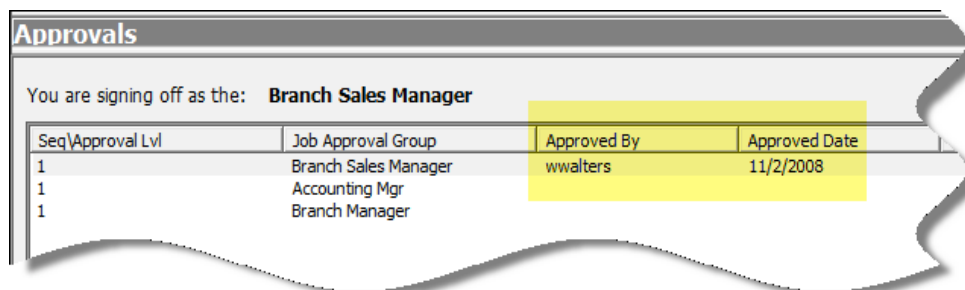
3. Select the *Approvals* button on the Job Toolbar.



4. The *Approvals* form will be displayed. Highlight the proper Job Approval Group line, right-click and select sign-off.



5. Once the user has selected the Signoff option, the Approved By will fill in with the name of the user logged into the application. The Approved date will display the date when the sign-off was performed.



**Second Approval** – The Accounting Manager will open the Job Approval List to see which jobs require approval. The approval may be performed from the Job Approval List by selecting the checkbox to the left of the job and pressing the save button. Most likely the user will want to review the information on the job prior to signing-off on the approval. Once the job is open the approval may be signed off within the job.

Follow steps 1 through 5 under the *First Approval* section.

Approvals

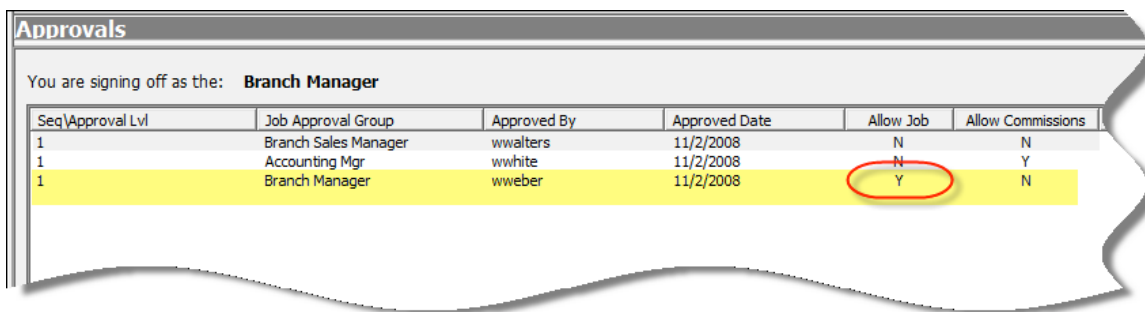
You are signing off as the: **Accounting Mgr**

Seq	Approval Lvl	Job Approval Group	Approved By	Approved Date	Allow Job	Allow Commissions
1		Branch Sales Manager	wwalters	11/2/2008	N	N
1		Accounting Mgr	wwhite	11/2/2008	N	Y
1		Branch Manager			Y	N

**Third Approval** – The Branch Manager will open the Job Approval List to see which jobs require approval. The approval may be performed from the Job Approval List by selecting the checkbox to the left of the job and pressing the save button. Most likely the user will want to review the information on the job prior to signing-off on the approval.

Follow steps 1 through 5 under the *First Approval* section.

Since the Branch Manager was setup to Allow Job Processing, once this approval has been completed, the job record will be populated with the remaining toolbars and option buttons. The job is now ready for scheduling, ordering parts and other normal job processing functions.



The screenshot shows a window titled "Approvals" with a sub-header "You are signing off as the: **Branch Manager**". Below this is a table with the following data:

Seq	Approval Lvl	Job Approval Group	Approved By	Approved Date	Allow Job	Allow Commissions
1		Branch Sales Manager	wwalters	11/2/2008	N	N
1		Accounting Mgr	wwhite	11/2/2008	N	Y
1		Branch Manager	wweber	11/2/2008	Y	N



**Job Approval Sign-Off Considerations**

If you assign the same Approval Level to each Job Approval Group on the Job Type setup, then each user will only be permitted to approve the group to which they are assigned on their employee record. If any Approval Level is set to a higher number than the other Job Approval Groups on the job type, then a user who has a higher approval level will be able to sign-off on all job approval groups that have not yet been signed-off.

For example, the Accounting Manager sees the job in the Job Approval List prior to the Branch Manager or Branch Sales Manager. If the Accounting Manager signs-off on his/her approval group, all other approval groups with a lower approval level will automatically be approved. The Approved By will show the user code of the Accounting Manager preceded by two asterisks on the approval group lines where the application performed an auto-signoff.

Job Type: COM New Install | Description: Commerical Burg New Install

Detail | Job Tasks | Costing | Items | Accounts | Commission Types | Approvals

Approval Group	Allow Job	Allow Commissions	Seq\Approval ...
Accounting Mgr	N	Y	2
Branch Manager	Y	N	1
Branch Sales Manager	N	N	1

**Approvals**

You are signing off as the: **Accounting Mgr**

Seq\Approval Lvl	Job Approval Group	Approved By	Approved Date	Allow Job	Allow Commissions
1	Branch Sales Manager	**wwhite	11/2/2008	N	N
1	Branch Manager	**wwhite	11/2/2008	Y	N
2	Accounting Mgr	wwhite	11/2/2008	N	Y