

## Journyx Timesheet 7.5 – Accessing New Features

This guide includes descriptions of new features in Journyx Timesheet 7.5 and is intended for existing Journyx customers who are upgrading to version 7.5 from version 7.1. If you are upgrading from an earlier version, you will also need the guides for version 7.0 and 7.1 to review all the new features in the 7.x series. If you have additional questions about a feature, please contact your account representative, email the Journyx Support Department at [support@journyx.com](mailto:support@journyx.com), or sign up for a free New Features Review webinar by sending email to [training@journyx.com](mailto:training@journyx.com).

Timesheet 7.5 development efforts were focused on usability – from implementing small improvements to the user interface to adding greater flexibility and efficiency for daily administrative tasks. The following material includes guidelines for enabling and using new features. For more detailed information, please refer to the Timesheet User Manual or online product help documentation.

### New features in Timesheet 7.5:

- **Time and Expense Entry Screen Usability**
  - **Enhanced search and select**
    - End users go to Preferences→Entry Screens to use the “enhanced interface for popup searches”
    - The new search options, which include “auto-suggest” as you type and navigable search results, are available any place that you see a magnifying glass icon
    - If your value for the maximum number of items in a drop down (also under Preferences→Entry Screens) is in effect on any of the columns on your entry screens, you can simply click in the text box to trigger the enhanced search\*
    - Enhanced search can be enabled/disabled for the entire system by going to Configuration→System Settings→Screen Appearance (“Allow users access to enhanced interface for popup searches. Overrides user preference if unchecked.”)
  - **Automatic generation of current entries based on past period entries**
    - End users go to Preferences→Entry Screens to use the “suggest current entries” based on prior period entries option
    - The end user may choose the number of periods (up to 4) in the past from which current entries will be pulled
    - The current entries behave like temporary Memorized Entries. They do not include the hours and appear in the Memorized Entry section of the entry screens. An entry ceases to be carried forward to the next period when it goes unused in the current period.
    - These “rolling” entries will appear in addition to the user’s existing permanent Memorized Entries. Depending upon end users’ typical usage of the system, they may want to delete some of their permanent Memorized Entries (particularly when the entry is only used for a few periods) in favor of the “rolling” entries that are pulled from the previous period(s).
    - Suggestions for current entries can be enabled/disabled for the entire system by going to Configuration→System Settings→Entry Sheets (“Allow users to automatically generate current entries based on entries from prior periods”)

\*The maximum number of items in a drop down setting allows you to improve entry screen loading performance by switching drop down menus with large selection lists to search only fields.

- **Leave Request Approval Automation**
  - **Option to tie leave request notification to users’ designated time approvers**
    - Go to Configuration→System Settings→Leave Requests

- The “Show only designated time approvers in user leave request notification lists” setting allows you to limit the list of people users can notify of requests for time off to the users’ designated time approvers (NOTE: If this setting is enabled, users must be assigned to Time Approval Plans in order to request time off.)
    - When this setting is enabled, all levels of primary and backup approvers will be displayed in the user’s notification list
  - Option to require approval of leave requests
    - Go to Configuration→System Settings→Leave Requests
    - The “Require approval of leave requests prior to loading them in user timesheets” setting requires manager or approver approval (depending on the setting discussed above) of all requests for time off
    - You can also customize the subject and body text of the emails that notify users a leave request has been approved
  - Option to define how many days previous leave requests are displayed
    - Go to Configuration→System Settings→Leave Requests
    - This setting determines how many days in the past users will see pending, approved and declined leave requests on their main Leave Requests screen. This screen always displays all leave requests for the current day and going forward, but it only shows a limited number of past requests based on this setting.
- **Inactive User Management**
  - Go to Management→Users→User Management
  - Select a user and click on the name/link to modify him
  - Note the presence of new custom fields “Employee Start Date” and “Employee End Date”. The date values (optional) in these fields determine if the user’s status is active or inactive on any given date. If a user is inactive, he will not be able to login to the Timesheet system. These dates also determine on which days the user can enter time/expenses.
  - By default, new users will be assigned a start date for the day they are created. This date can be erased or changed to a future/past start date. Users will not be able to enter time/expenses before their start dates and will not receive notifications for sheets before the start period.
  - The “Employee Start Date” field can be populated by the standard integration for MS Project by renaming fields in both programs to match each other. For Projectlink, a Resource field named “Employee Start Date” can be added to MS Project. If there aren’t matching fields in each program, the “Employee Start Date” field in Timesheet will remain blank for users created via synchronization.
  - The start and end dates can be temporary for users who are deactivated and reactivated over time. To deactivate a user, you can either enter an end date value or select the user(s) and click the “Deactivate” button on the main User Management screen. When you want to reactivate a user, you either blank out the end date and enter a current start date or select the user and click the “Activate” button on the main User Management screen. Using the buttons to change user status automatically fills in the start/end date with current day. No history of start and end dates is maintained. Only the current values are used to control access.
  - Full configuration, including group membership and approval plan assignments, is maintained for inactive users. This means that anyone with the ability to report on the users will still be able to see the users’ records after they have become inactive. However, the inactive users will not have login access to the system and will not receive notifications.
- **Password Reset Automation**
  - Option to give all users access to reset password link on login screens
    - Click on the “reset your password” link on the main login screen

- On the Reset Password screen users can enter their usernames to request a password reset email. The email will contain a link that takes them to a Timesheet password change screen where they can enter and confirm a new password. For added security, the link in the email can be set to expire after a customer-defined number of hours (the “password reset window”).
    - The password reset link can be enabled/disabled for the entire system by going to Configuration→System Settings→Security (“Show a password reset button on login screen”)
    - The password reset email subject and text can be customized on the Configuration→System Settings→Security screen (NOTE: If you remove the <link> tag, users will not be able to automatically reset their passwords.)
    - If you have used the process of simply changing a user’s password to disable account access, you will want to consider changing this practice if using password reset automation. The password reset link will still be accessible for any user account that is set to Active status. Setting a user account to Inactive status will disable the account and block the user from resetting the password.
  - **Option to notify an administrator when password reset fails**
    - Go to Configuration→System Settings→Security
    - For security reasons, the Timesheet system does not alert users to problems with sending reset password emails. However, you can set up an email address where notices of password reset failure can be sent. The email will also include the reason for failure (i.e., invalid username, the user has no email address defined in his profile).
    - In addition to defining an email address for password reset failure notification, you can customize the subject and body text of the email
- **Combining approver late notices into a single email**
  - Go to Configuration→System Settings→Approval Plans
  - The “Compile all backup and approver late notices into a single email” setting allows you to reduce the number of individual late notices approvers receive on any given day by compiling them into a single email that contains an itemized list of each notice
- **Patch log file for tracking changes to the system**
  - Go to the /tmp directory where all Timesheet log files are stored
  - A new pengine.log file will be created for 7.5 installs that will capture all hot fixes, patches and upgrades applied to the installation after upgrade to 7.5