WennSoft

Signature

Clock 12.5 Setup and Administration Guide

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System Requirements

Compatible Services and Operating Systems

Refer to the Additional Module Requirements section of the Signature System Requirements[1] document to review the servers and the applications that may be installed on each server in a typical environment. We recommend that you perform the appropriate testing prior to any major purchasing decisions.

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at https://www.wennsoft.com/wsportal/product-downloads.

Prerequisites

Prior to installing the Clock Administration, verify the following information.

Signature

- Signature 18.05b07
- Signature 18.04b06
- Signature 18.03b05
- Signature 2018 R3 (18.00b03g310)

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1 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7507956/Signature+System+Requirements

Browser

Clock is supported on modern versions of Edge, Chrome, Safari, and Firefox. (Clock is not supported on Internet Explorer as Microsoft no longer updates Internet Explorer.)

eTimeTrack Web Service

If you are using Signature 18.04b06 or higher, you will need to install/upgrade to eTimeTrack Web Service 2018 R6 (18.04b06).

Transfer Layer Security (TLS)

Client Protocol

- TLS 1.2

Service User Account Local Security Policy Requirements for AccountlinkClock

The service user account needs to have **Log on as a batch job** and **Log on as a service** assigned in Local Security.

- **Log on as a batch job**: This security setting allows a user to be logged on by means of a batch-queue facility and is provided only for compatibility with older versions of Windows.
- **Log on as a service**: This security setting allows a security principal to log on as a service. Services can be configured to run under the Local System, Local Service, or Network Service accounts, which have a built in right to log on as a service. Any service that runs under a separate user account must be assigned the right.

To verify or add:

1. Open Local Security Policy and select **User Rights Assignments**.
2. Complete the following steps for both **Log on as a batch job** and **Log on as a service**.
3. Double-click the policy.
4. In the Properties window, the list of users with this option assigned is displayed.
5. To add the Service Account, select *Add User or Group*.
6. In the Select Users, Computers, Service Accounts, or Groups window, enter the **Object Name** and select *Check Names*.
7. Select *OK*.
8. In the Properties window, the service user account now displays in the list. Select *Apply*.
9. Select *OK*.
10. Complete the steps for the remaining policy.

Install eTimeTrackWebService

TimeTrackWebService is a required installation.

- If you have eTimeTrack installed, you can verify the TimeTrackWebService installation at http://localhost/TimeTrackService/TimeTrackService.asmx.
- If you do not have eTimeTrack installed, you can download eTimeTrack Web Service:

    - Download eTimeTrack Web Service by logging into the **Customer Portal** at https://www.wennsoft.com/wsportal/product-downloads.
    - Navigate to **Product Downloads**.
    - Download **eTimeTrack Web Service**.
    - Unzip the file and install *eTimeTrackWebServicesSetup*.

Verify/Create eTimeTrack Login Credentials

When installing Clock Admin, you will be prompted to enter the eTT$ login credentials. The TimeTrackService and user login is. Verify the eTT$ *SystemDatabaseName* .

Verify/Create eTT$DYNAMICS Login

1. In **Microsoft SQL Server Management Studio**, expand **Security** and then expand **Logins**.
2. Verify that user *eTT$SystemDatabaseName* (example: eTT$DYNAMICS) exists. If you do not see the user, you will need to create the user.
3. To create the user, right-click on **Logins** and select *New Login*.
4. On the **General** tab, Enter the Login name eTT$*SystemDatabaseName*.
5. Select **SQL Server authentication**.
6. Enter and confirm the **password**.
7. If needed, mark/unmark the password options.
8. On the **User Mapping** tab, mark the company database(s) and the system database.
9. Under **Database role membership**, mark **DYNGRP** and **public**
10. Select **OK**.

Verify Employees are TimeTrack Registered Users

All employees that will be using Clock must be set up as Signature TimeTrack Registered Users. See your TimeTrack User Guide for more information. Any new employees set up in Clock must also be a valid registered user in TimeTrack.

To access the TimeTrack Registered Users Setup window:

1. In Microsoft Dynamics GP, select *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Registered Users*.
2. Verify that each employee has the TimeTrack checkbox marked.

Verify Microsoft Dynamics GP Settings/Records

Turning off Require Manager Approval in TimeTrack

If you are not using manager approval when using Signature MobileTech, you must turn off Require Manager Approval in TimeTrack Setup Options.

1. In Microsoft Dynamics GP, select *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options*.
2. Under Miscellaneous Items, clear the **Require Manager Approval** checkbox.
3. Select *Save* and close the TimeTrack Setup Options window.

Verify Activity ID Character Length

The Activity field in Clock is limited to 14 characters. If you have activities set up in Signature that have more than 14 characters, you will need to edit these activity IDs in Signature. (Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Technicians > Activities).

Review Employee Payroll Records (Supervisor Field)

In Dynamics GP, if an employee does not have a supervisor assigned in the Employee Maintenance window, then in Clock the employee will be able to self-approve and *k2admin* will be set as supervisor. To review the employee record in Microsoft Dynamics GP, go to *Cards > Payroll > Employee* .

Existing Clock Users

> **IMPORTANT**
>
> If you are currently using the Accountlink Clock **32-bit version** and will be installing the new **64-bit version** of Accountlink Clock, you will need to note or take a screenshot of any modified schedule task triggers and then delete the existing Clock scheduled tasks.
> 1. **In Windows Task Scheduler** *(Select the Start button and type Task Scheduler. Expand Task Scheduler Library, and then select Clock.)*:
>   - If you have modified the Clock scheduled tasks' triggers, we recommend that you take screenshots of the Edit Trigger window for each of the modified triggers. *(Double-click a task, then choose Triggers. Double-click the trigger to open the Edit Trigger window. Take a screenshot of this window for each of the modified triggers.)*
>   - Delete the existing Clock scheduled tasks. *(Right-click the scheduled task and then select Delete.)*
> 2. Install Clock Administration (page 5)
> 3. Install AccountlinkClock (page 7) - You will need to set up the Accountlink Clock Config file for the new 64-bit version.
> 4. Use Clock Administration (page 11) - You will need to follow the steps to create the scheduled tasks. Use your screenshot or notes to set up the triggers based on how you had them set up previously.

> **IMPORTANT**

> Upgrading to the latest version of AccountlinkClock and/or Signature will not overwrite jx* Views. Reinstalling Clock Administration, however, *does* overwrite jx* views.

Installing Clock Administration

- Install Clock Administration
- Verify .NET Features Installed
- Verify jx* View Counts
- Verify the TimeTrack Service URL

Install Clock Administration

1. Right-click on **Signature Clock Administration xx-x-xx.exe** and select *Run as Administrator*.
2. In the **Clock Administration Setup** window, select *Next*.
3. Accept the **End-User License Agreement** and then select *Next*.
4. In the **Select Installation Folder** window, accept the default location or navigate to the install location, and then select *Next*.
5. In the SQL Database window, enter the following fields:
   a. **SQL Instance**: Enter the server name (or select the ellipsis button to search for a server name).
   b. **System Database**: Enter the system database name. This defaults to DYNAMICS.

   > ⚠ If your database name is different, you will need to update the ClockAdmin.exe.config file in \Program Files (x86)\Signature\Clock\Clock Administration.

   c. **Username**: Displays the SQL user name.
   d. **Password**: Enter the SQL user name password.
6. Select *Next*.
7. In the **Companies and eTimeTrack User** window, select the **Company Database(s)** and validate the eTimeTrack user by entering the **Password**.
8. Select *Next*.
9. Select *Install*.
10. Select *Finish*.

Verify .NET Features Installed

1. Access **Administrative Tools**.
2. Double-click **Internet Information Services (IIS) Manager**.
3. Expand **Sites**.
4. Expand **Default Web Site**.
5. Select **ClockService** and on the far-right pane, select **Browse *:80 (http)**.

6. In the browser window, select ClockService.svc.

localhost - /ClockService/

[To Parent Directory]

```
    5/2/2018  8:57 AM        <dir> bin
12/28/2017  9:09 AM          123 ClockService.svc
    5/2/2018  8:57 AM         3203 Web.config
```

7. Select **ClockService.svc**.
8. The **Service 1 Service** page displays in your browser.
9. If you do not see the Service1 Service page, verify that the following **WCF Services** are installed with .Net Framework. Install the features if not already installed. Open Server Manager > Click Manage > Select Add Roles and Features and navigate to Features. Expand .NET Framework and then expand WCF Services.
   a. HTTP Activation
   b. Named Pipe Activation
   c. TCP Activation
   d. TCP Port Sharing

Verify jx* View Counts

Run the following script against your company's database Microsoft SQL Server Management Studio to obtain a count of employees, activities, cost code labor, cost code expense, pay code labor, pay code expense, and equipment. This will provide an overview of how much data you will be uploading to the Journyx cloud.

> ⚠ Upgrading to the latest version of AccountlinkClock and/or Signature will not overwrite jx* Views. Reinstalling Clock Administration, however, *does* overwrite jx* views.

SELECT
(SELECT COUNT(*) FROM jxEmployee) AS EmployeeCount,
(SELECT COUNT(*) FROM jxJobServiceCall) AS ActivityCount,
(SELECT COUNT(*) FROM jxCostCodeLabor) AS CostCodeLaborCount,
(SELECT COUNT(*) FROM jxCostCodeExpense) AS CostCodeExpenseCount,
(SELECT COUNT(*) FROM jxPayCodeLabor) AS PayCodeLaborCount,
(SELECT COUNT(*) FROM jxPayCodeExpense) AS PayCodeExpenseCount,
(SELECT COUNT(*) FROM jxEquipmentGLAccount) AS EquipmentCount

SELECT [Employee], COUNT([Job Number]) AS JobApptCount FROM jxJobEmployees GROUP BY [Employee]
SELECT [Employee], COUNT([Service Call]) AS ServiceCallApptCount FROM jxServiceCallEmployees GROUP BY [Employee]
SELECT [Project Manager], COUNT([Job Number]) AS JobCount FROM jxJobProjectManagers GROUP BY [Project Manager]

	EmployeeCount	ActivityCount	CostCodeLaborCo...	CostCodeExpenseCo...	PayCodeLaborCo...	PayCodeExpenseCo...	EquipmentCo...
1	9	80	210	200	7	5	139

	Employee	JobApptCount
1	ANDY	1
2	BARB	1
3	BRIAN	1
4	CHARLEY	1
5	CHET	1

	Employee	ServiceCallApptCount
5	BARB	2
6	BART	2
7	BILL	3
8	BRIAN	2
9	CAROL	3
10	CATHY	3
11	CHARLEY	2
12	CHET	2

	Project Manager	JobCount
1	ANDY	5
2	ANNE	8
3	DAN	1

Verify the TimeTrack Service URL

Please verify that the TimeTrack Service URL that is stored in the Clock Service web.config file is pointing to the correct server. To verify this is correct, copy and paste the URL into a browser window and navigate to see if it resolves without error.

<applicationSettings>
<Key2Act.Clock.Services.Properties.Settings>
<setting name="Key2Act_Clock_Services_WebReference_TimeTrackService" serializeAs="String">
<value> **http://{servername}/TimeTrackService/TimeTrackService.asmx** </value>
</setting>
</Key2Act.Clock.Services.Properties.Settings>
</applicationSettings>

Installing AccountlinkClock

Installing Accountlink Clock

1. Double-click **AccountlinkClock.X.XX.XXXX.XXXXX.msi** file.

2. Accept the **Terms of Use** and select *Next*.
3. Unmark **Launch Accountlink Configuration Manager** and select *Finish*. If you forgot to unmark the checkbox, just close the Accountlink Configuration Manager.

Setting up Accountlink Clock Config

1. Select Sync Business OR from the menu bar, select *Config*, and then select *Server Config*.
2. Enter the following GP Login Information:
    - **SQL Server**
      Enter the SQL Server and Instance Name.
    - **Use Integrated Security**
      Mark if you will be using integrated security.
    - **User**
      Enter the SQL Server username.
    - **Password**
      Enter the SQL Server user password.
    - **Save Password?**
      IMPORTANT: Mark to save the password. This password is used when running the Scheduled Tasks.
    - **Database**
      Enter the SQL Database name.
    - Select *Connect* and then select the **Company** name.

    > ⚠ You should see a Connection Successful message.

3. Enter the following Clock Connection Information (Journyx):
    - **Server**
      Enter the Clock server.
    - **User**
      Enter the GP Sync Admin user name.
    - **Password**
      Enter the GP Sync Admin password.
    - **Save Password?**
      IMPORTANT: Mark to save the password. This password is used when running the Scheduled Tasks.
    - Select *Connect* to verify you can connect to the Clock server.

    > ⚠ You should see a jxAPI Connection Successful message. The Session Context and Journyx version displays in the window.

4. Select *Continue* to save the configuration.
5. The Business Data Sync preview window displays.

Update AccountlinkClock.exe.config

The following settings are found in the ***Accountlink.Properties.Setting*** section:

-
-
-

The batch numbering setting is found in the ***AccountlinkGP.Properties.Setting*** section:

- Set up the batch number naming convention

Set Up the "from" Email Notification Information

The email notification settings are initially commented out.

1. With a text editor (Notepad, etc.) open **AccountlinkClock.exe.config** located at C:\Program Files\AccountlinkClock.
2. Navigate to the Accountlink.Properties.Settings section and remove the comment out marks (<!-) and (->) for the Email Notifications. Edit the email values to the appropriate email address(es) for the following:
    - **EmailNotification_FromAddress** - The automated **sent from** email address.
    - **EmailNotification_ToAddress** - The automated **sent to** email address.
    - **EmailNotification_SmtpHost** - Enter the information after the @ sign for the **sent to** email address. Do not edit the information within the curly brackets/braces.
    - **EmailNotification_FromDisplayName** - Optionally, update the display name for the email.

Set Up a Pay Period End Day that is not Saturday

If you use a pay period ending day that is *not* Saturday, you will need to edit the *PayPeriodFirstDate* within the **AccountlinkClock.Properties.Settings** section. The default date is **2012-01-01**, which is a Sunday.

1. With a text editor (Notepad, etc.) open **AccountlinkClock.exe.config** located at C:\Program Files\AccountlinkClock.
2. Navigate to the Accountlink.Properties.Settings section and edit the **PayPeriodFirstDate value** to a date in the past that lands on the pay period *beginning day* to capture all data. For example, if your pay period begins on Friday, then that is the day of the week the date should land on. You will need to clear all open sheets.

Set Up Employee Sign-In Other than Microsoft Dynamics GP Internet Information

If you do not use Microsoft Dynamics GP Internet Information for Employees *(Cards > Payroll > Employee > Address ID Internet Information icon > Internet Information Email Address)*, and you do not want to sign into Clock using GP Employee IDs, you can set up another login method. The default value is Email.

1. With a text editor (Notepad, etc.) open AccountlinkClock.exe.config located at C:\Program Files\AccountlinkClock.
2. Navigate to the Accountlink.Properties.Settings section.
3. Edit the OptionUserName value to one of the following:
    - UserDefined
    - EmailUserName
    - FirstInitialLastName
    - EmployeeID

Set Up the Batch Number Naming Convention

In the **AccountlinkGP.Properties.Settings** section, you can edit the batch naming convention. The default batch naming convention is **2C-{PeriodDateEnd}**.

1. With a text editor (Notepad, etc.) open **AccountlinkClock.exe.config** located at C:\Program Files\AccountlinkClock.
2. Scroll down to the AccountlinkGP.Properties.Settings section and locate "BatchNumberFormat".

3. Edit the batch name as needed.

> ⚠ If you will be using the new Interim Approvals feature, you may want to set up your batch name to display the employee ID and today's date to create a daily batch.
> <setting name="**BatchNumberFormat**" serializeAs="String">
> <value>**{EmployeeID}{Today}**</value>
> </setting>

4. Save the file.

Upgrading AccountlinkClock

When upgrading AccountlinkClock, you will want to make a backup of the existing AccountlinkClock.exe.config file as this file is overwritten by the installer. This file contains the setup for the "from" email notification, pay period end date that is not a Saturday, employee sign-in other than the Microsoft Dynamics GP Internet information, and the batch number naming convention. If this file is overwritten, you will need to set this up again following the steps in <u>Update AccountlinkClock.config.exe</u> (page 8).

Back up Configuration File

1. Open the where your AccountlinkClock is installed. By default, it is installed at c:\Program Files\AccountlinkClock.
2. Right-click AccountlinkClock.exe.cog and select Copy.
3. Paste this file to a safe location where it can be copied back into the folder after installing the new AccountlinkClock version.
4. Launch AccountlinkClock and take a screenshot of the following windows and/or tabs:
    a. Connection Information: Config > Server Config.
    b. Accountlink Options: Config > Options Config. If you've marked any options on any of the tabs, take a screenshot.

Upgrade AccountlinkClock

1. Verify that you are logged into the AccountlinkClock server as the Clock "service" account. This can be found on the Clock Task Scheduler window.

> ⚠ If you do not log in to the AccountlinkClock server as this user, the scheduled tasks may not function properly.

2. Copy the AccountlinkClock.exe.config to a temp folder.
3. Install AccountlinkClock.exe.config over the existing version by double-clicking **AccountlinkClock.X.XX.XXXX.XXXXX.msi** file.
4. Accept the **Terms of Use** and select *Next*.
5. Unmark **Launch Accountlink Configuration Manager** and select *Finish*. If you forgot to unmark the checkbox, just close the Accountlink Configuration Manager.
6. Copy the *AccountlinkClock.exe.config* file from the backup folder to the installation folder overwriting the existing file.
7. After upgrading, launch AccountlinkClock.
8. Select Config > Server Config.

a. Enter the values from your prior connection information.
b. Test each connection.
c. Mark **Save Password** in each section.
d. Select *Continue.*

9. Select Config > Options Config and enter the values from your prior configuration options. Select *OK.*
10. Select Sync > Business Data Sync to run a Sync Business process.

Using Clock Administration

Logging into Clock Administration

1. Select the **Clock Administration** icon to launch the program and display the Login window. (You may need to double-click the icon based on where you are launching the program from.)
2. In the login screen, with your initial login, enter the following information. Subsequent logins will only require the password entered.
    - **SQL Instance**: Enter the server name.
    - **Authentication**: Select the authentication method.
    - **Login**: Displays the SQL user name.
    - **Password**: Enter the SQL user name password.
3. Select *Connect*.

Mapping Activities/Accounts

Use the Activity/Account tab to map the accounts to use for activities in Microsoft Dynamics GP to the activities used in Clock. After you've assigned an account to an activity, it displays in the window below the fields.

VACATION and HOLIDAY activities are required for Clock.

- **VACATION** – Available for Leave Requests.
- **HOLIDAY** – Available for Holidays and Leave Requests

To map Clock activities to Dynamics accounts:

1. Select **Activity/Account** from the menu bar.
2. Select the **Activity** from the list.
3. Select the **Account** from the list.
4. Select *Submit*.
5. Complete the activity/account mapping for each activity within the list.

> ⚠ To update an activity with a different account, repeat steps 1-4. If you need to remove a mapping, select the activity, do not select an account, and then select Submit.

Creating Tasks

Scheduled synchronization tasks need to be imported in the Microsoft Task Scheduler window. These are the four scheduled tasks:

- **Clock – Business Sync:** Synchronizes only changed data. The default trigger is to run every three hours after the initial sync.

- **Clock – Business Sync Full**: Synchronizes users, projects, etc. from Dynamics GP to Journyx. It is recommended to setting this at a minimum of once a week. The default trigger is run every Saturday at 11 pm.
- **Clock – Expense Sync**: Synchronizes expense data from Journyx to Dynamics GP. The default triggers are set to run daily at 6:45 PM and weekly every Monday morning at 5:45 am.
- **Clock – Time Sync**: Synchronizes time data from Journyx to Dynamics GP. The default triggers are set to run daily at 6:30 PM and weekly every Monday morning at 5:30 am. If you are using the Clock Stopwatch feature, the Time In/Out values are included in the TimeTrack batch.

To create tasks

1. Select *Create Tasks*.
2. In the Create Tasks window, mark the scheduled tasks to create.
3. Enter the **Username**.
4. Select *Create Tasks*.
5. The command window will prompt you for the user password for the Username indicated in the Create Tasks window. **Note:** You will be prompted to enter the password for each task created.
6. The tasks are created and displayed in the top scrolling window.

Name	Status	Triggers	Next Run Time	Last Run Time
Clock - Business Sync (TWO)	Ready	At 12:00 AM on 1/1/2018 - After triggered, repeat every 03:00:...	5/9/2018 12:0...	Never
Clock - Business Sync Full (TWO)	Ready	At 11:00 PM every Saturday of every week, starting 1/1/2018	5/12/2018 11:...	5/9/2018 9:35:05 AM
Clock - Expense Sync (TWO)	Ready	Multiple triggers defined	5/9/2018 6:45:...	5/9/2018 9:41:28 AM
Clock - Time Sync (TWO)	Ready	Multiple triggers defined	5/9/2018 6:30:...	5/9/2018 9:41:31 AM

Running and Enabling/Editing Tasks

Running the Full Business Sync Task

Run the Full Business Sync task by right-clicking on the task and then selecting **Run Task**. This may take some time, so we'd recommend running this task overnight. You will be prompted to enter your Accountlink credentials.

ⓘ

Before Running the Full Business Sync Task for the First Time

When you first install AccountLinkClock, it is recommended to run a Full Business Sync from the AccountLinkClock user interface and that you are logged into Windows with the account that will be used to run the AccountLink Scheduled Windows task. This ensures that the account has sufficient account credentials to successfully run a Business Sync.

1. To run a Full Business Sync via the AccountLinkClock user interface, login with the appropriate Microsoft Dynamics GP account information in addition to the Clock Connection account information.
2. Verify the following configuration options are marked by selecting *Config > Options Config* from the menu.
   a. On the **Business Sync Options** tab:
      - **Force update of all records**
      - **Do mass updates when possible for improved efficiency**
      - **Mass update page size**: 5000

      > ⚠ For larger data sets, it is very important to set the Mass update page size to 5000.

   b. On the **Business Sync Data** tab, verify that none of the options are marked.

3. Select *Save*.
4. Verify the **user.config** file was successfully created in the following location: C:\Users\{service-account}\AppData\Local\Journyx\AccountlinkClock.exe_Url_{app-identifier}\{current-version-number}

Enabling/Editing the Expense and Time Sync Tasks

1. In the Journyx Accountlink Dynamics Settings and Connection Confirmation window, enter the following under GP Login Information:
    - **SQL Server** – Enter the SQL server name.
    - **User** - Enter the admin login for Dynamics GP.
    - **Password** - Enter the admin password.
    - **Database** - Enter the database name.
    - **Company** - If the above information is successful, the company name will display in the Company list.
2. Select *Connect*.
3. Enter Journyx Login Information.
    - **Server** - Enter your Clock URL. (https://*your-company-name*.clock.key2act.io)
    - **User** – Enter *gpdamin*.
    - **Password** – Enter *Access01*.
    - **Session Context** - If the above information is correct, the company name will display in the Session Context list.
4. Select *Connect*.

Tasks are initially created with daily and weekly triggers; however, they are disabled by default.

To enable or edit triggers:

1. In Clock Administration, select **Task Scheduler**.
2. Expand **Task Scheduler Library** and select **Clock**.
3. Right-click on the task and select **Properties** (or select the task and then select Properties on the far right).
4. In the **Triggers** tab, select the trigger to edit, and then select *Edit*.
5. In the Edit Trigger window, mark Enabled.
6. Update the frequency and/or time for the task to run.
7. Select *OK*.

Setting Up Interim Approvals for Submitting Work in Progress

Overview

Clock 2.1 includes a new type of approval workflow that allows users to submit work in progress on a timesheet before the full timesheet is complete and submitted at the end of a period. We refer to the feature as "interim approvals", and

users assigned to timesheets with the interim submission feature can submit work in progress as often as needed during the period.

This feature was designed explicitly to satisfy the use case where users need to submit their time on jobs on a daily basis so that the time can be approved and sent to 3rd party systems for daily billing*. It allows users to submit all time entered through the current day (unless you have it configured to allow submission of future time entries). After submission they can continue to add time to the timesheet – even on days that already have interim submissions.

*The interim approvals feature can also be used to submit a partial timesheet for the use case where a payroll period ends before the end of the timesheet period. However, we understand that some features may need to be added in a future release to support this use case fully (e.g., option to lock down days that are interim submitted, reminder and late notices that are independent of the timesheet period).

A user with a timesheet that allows interim submission, which includes the *Submit Work In Progress* button next to the *Save* button, looks like this:

The user has saved time for what she did on Monday. At the end of the day she needs to submit it to her supervisor so that it can be approved and billed to the customer.

After she submits the work in progress for Monday, her timesheet looks like this, which now includes the **Interim Submitted** section above the Previous Entries section:

Note that the time logged on Monday is displayed in a new section labeled **Interim Submitted**. While the interim submitted and approved records cannot be edited directly on the row in which they appear on the timesheet, a copy of the entry is automatically added to the **Previous Entries** section so that the user can continue to log time for the same job for the rest of the period.

This is an example of what her supervisor sees in the approval queue after the user (Cathy Taylor) has submitted her work in progress for Monday compared to full sheet submissions already in the queue:

After an interim submission/approval, the user can continue to enter time for the period. It is also possible to add adjustment entries to a day that has already been interim submitted or approved. The user can add time if additional work was required after she submitted on Monday. She can also make corrections to the approved time.

This is an example where the user has entered her time for Tuesday, but she needs to adjust the Monday entry to reallocate 1 hour to a different job:

| ✔ Moved 7 days back in time. | | | | | | | | | | | | | ☒ |
| ✔ Submitted work in progress 04/29/2019 to CTAY0001 for Approval | | | | | | | | | | | | | ☒ |

Activity (0) ⌄	Cost Code ⌄	Pay Code ⌄	Equipment ⌄	Comment ⌄	Sun 04/28	Mon 04/29	Tue 04/30	Wed 05/01	Thu 05/02	Fri 05/03	Sat 05/04	Total	
▼ Interim Submitted (1)													
JC - 2759 - Aaron Fitz - Primary	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected			7:00						7:00	🗑
▼ Previous Entries (1)													
JC - 2759 - Aaron Fitz - Primary	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected			-1:00	8:00					7:00	🗑
▼ New Entries (2) Unsaved													
⌂ 🔍 JC - 2760 - Aaron Fitz - Primary	🔍 2-10-3-1 (2760 - Installation - 2nd Floo	🔍 HOUR - Hourly Pay Code ⌄	🔍 * None Selected ⌄			1:00						1:00	🗑
⌂ 🔍 * Select one... -	🔍 * None Selected ⌄	🔍 * Select one... ⌄	🔍 * None Selected ⌄									0:00	🗑
					0:00	7:00	8:00	0:00	0:00	0:00	0:00	15:00	↦

Save | Submit Work In Progress | Submit for Approval

After entering her time for Tuesday and the corrections for Monday, she can submit her work in progress again:

| ✔ Submitted work in progress 04/29/2019 - 04/30/2019 to CTAY0001 for Approval | | | | | | | | | | | | | ☒ |

Activity (0) ⌄	Cost Code ⌄	Pay Code ⌄	Equipment ⌄	Comment ⌄	Sun 04/28	Mon 04/29	Tue 04/30	Wed 05/01	Thu 05/02	Fri 05/03	Sat 05/04	Total	
▼ Interim Submitted (2)													
JC - 2759 - Aaron Fitz - Primary	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected			6:00	8:00					14:00	🗑
JC - 2760 - Aaron Fitz - Primary	2-10-3-1 (2760 - Installation - 2nd Floor)	HOUR - Hourly Pay Code	* None Selected			1:00						1:00	🗑
▼ Previous Entries (2)													
JC - 2759 - Aaron Fitz - Primary	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected									0:00	🗑
JC - 2760 - Aaron Fitz - Primary	2-10-3-1 (2760 - Installation - 2nd Floor)	HOUR - Hourly Pay Code	* None Selected									0:00	🗑
▼ New Entries (1) Unsaved													
⌂ 🔍 * Select one... -	🔍 * None Selected ⌄	🔍 * Select one... ⌄	🔍 * None Selected ⌄									0:00	🗑
					0:00	7:00	8:00	0:00	0:00	0:00	0:00	15:00	↦

Save | Submit Work In Progress | Submit for Approval

The approver sees the records that are included in each interim submission when viewing an interim submission for approval:

✔ Cathy Taylor approving Time sheet for Cathy Taylor													☒
✔ Submitted work in progress 04/29/2019 - 04/30/2019 to CTAY0001 for Approval													☒
Approve work in progress Time Entry Sheet For user Cathy Taylor: 04/28/2019-05/04/2019													

Activity ⌄	Cost Code ⌄	Pay Code ⌄	Equipment ⌄	Comment ⌄	Sun 04/28	Mon 04/29	Tue 04/30	Wed 05/01	Thu 05/02	Fri 05/03	Sat 05/04	Total	
▼ Interim Submitted (2)													
JC - 2759 - Aaron Fitz - Primary	1-10-3-1 (2759 - Installation - 1st F	HOUR - Hourly Pay Code	* None Selected			-1:00	8:00					7:00	
JC - 2760 - Aaron Fitz - Primary	2-10-3-1 (2760 - Installation - 2nd	HOUR - Hourly Pay Code	* None Selected			1:00						1:00	
					0:00	0:00	8:00	0:00	0:00	0:00	0:00	8:00	↦

Approve | Reject

If the approver needs to view what has previously been interim submitted in order to approve the current submission, he can click on the View Report link in the upper right corner to see all records and their status for the sheet:

15

My Timesheet Report

Sunday, April 28, 2019 through Saturday, May 4, 2019

Date	User	Cost Code	Pay Code	Equipment	Activity	Comment	Hours
04/29/2019	Cathy Taylor	2-10-3-1 (2760 - Installation - 2nd Floor)	HOUR - Hourly Pay Code	* None Selected	JC - 2760	None	1.00
04/29/2019	Cathy Taylor	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected	JC - 2759	None	-1.00
04/29/2019	Cathy Taylor	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected	JC - 2759	None	7.00
Subtotal 04/29/2019							*7.00*
04/30/2019	Cathy Taylor	1-10-3-1 (2759 - Installation - 1st Floor)	HOUR - Hourly Pay Code	* None Selected	JC - 2759	None	8.00
Subtotal 04/30/2019							*8.00*
Grand Total							**15.00**

Signature:_____

The user can continue to submit work in progress until she has completed her timesheet for the period and submits it for full sheet approval. Any outstanding ("unapproved") interim submissions will be canceled when the full sheet is submitted for approval because the full sheet contains all records and overrides any interim submissions.

Setting up Interim Submissions

Setting up Interim Approvals at the System Level

1. In Clock , go to *Configuration > System Settings > Approvals and Auditing*.
2. Mark **Use interim approvals** to turn this option on.
3. Mark **For interim approvals, only submit to current date** to submit everything through the current date (date of submission) or everything on the sheet regardless of date. The default (unmarked) is set to submit everything on the sheet through the current date (e.g., holidays already loaded for later in the period would not be interim submitted).
4. Select *Save*.

Adding the Submit Work in Progress button to the Time Entry window

1. Go to *Configuration > Entry Screens > Time Entry Screens.*
2. Under Entry Screens, select **Standard Time Entry Grid**.
3. Mark **Allow users to submit work in progress**.
4. Users who have been assigned to the Standard Time Entry Grid will now see the **Submit Work in Progress** button on their time entry screen.

> ⚠ Users are assigned to the Time Entry Screen in the Manage Users window (*Management > Users > Manage Users).*

Setting up the daily batch

See the Signature Clock Setup and Administration guide (*Set up the batch naming convention*) for information on setting up a daily batch that includes the Employee ID and Today's Date.

Other notes about configuration options and interim approval behavior

- Interim approval email notifications are currently tied to the sheet-based email notifications. Notices to the approver of submit and resubmit, as well as notices to the user of rejection and approval, will all apply to interim approval actions if they are enabled for sheet approvals. There is a system setting to turn off all interim approval email notifications if you do not want to use them.
- Interim approvals are not supported in the current version of Clock Mobile. Support for interim approvals will be added in a future mobile release. Interim approvals can be accessed in mobile browsers.

Clock/Journyx Setup Considerations

Additional Clock/Journyx Setup

The following needs to be set up in Clock/Journyx by an administrator:

- Pay groups (Salary vs Hourly).
- Verify if you need to run OCM (Organization Chart Management). This sets up the user to approve time sheets.
- Activity level approval (turn off to start). Go to Configuration > System Settings > Third Party Software. Take Project Approvals into consideration when returning entries to MSP and QuickBooks.
- Holiday Schedule – possibly two schedules based on Salary and Hourly.
- Holidays.
- DVT2 Blocking Rule – Time Entries (required fields). For example, if employees must enter a pay code with time entries.
- Create DVT2 Blocking Rules – Expense (required fields).
- Create DVT2 Basic Rules – Overtime. For example, if an employee has more than 8 hours in a day, overtime needs to be on a different pay code line.
- Other items to consider:
    - Will they be using Time In/Time Out? If so, this will need to be added to the All Employees group.
    - Do they use Work Crews? If yes, only labor entries will be used for the crews.

> ⚠️ **IMPORTANT**
>
> Pay codes must be managed created and assigned to users in Microsoft Dynamics GP. Do not create or assign pay codes or pay code groups in Clock. After you have assigned pay codes to users in Microsoft Dynamics GP, you will need to perform a Full Business Sync for the pay codes to be assigned in Clock.

Entering Travel Expense Transactions

To enter a travel expense transaction in Clock, for Service transactions, select cost code 5; and for Job Cost transactions, select any cost code set up with cost element 5. Enter the mileage in the quantity field for each day.

> ⚠ For Job Cost, if you currently use a different cost element than 5 for travel, you will need to modify the jxCostCodeExpense database view to customize the cost element mapping.
> This line needs to be modified to replace the "5" with the cost element number you are using:
> CASE JC00701.Cost_Element WHEN **5** THEN 'Yes' ELSE 'No' END AS 'Mileage Expense',

Best Practices

For optimal synchronization performance, it is recommended to not run any unnecessary background processes during the scheduled sync time that could impact available system resources.

If you customize the column label for the "Activity" column, you will also need to update the Project Hierarchical Entry field (Settings > System Settings > Entry Sheets (Global Settings)) and the Time Entry Grid label (Settings > System Settings > Custom Entry Screens > Time Entry Screens > Standard Time Entry Grid) with the exact custom name.

Additional Documentation

Journyx Administration Documentation

Journyx documentation is found at https://community.journyx.com/support/solutions/9000114864 under Technical and Installation Documentation.

Clock Release Documentation

- Clock Release documentation is found at Clock Releases[2].

Additional Clock Information

- The Clock Time Entry Comment field data can end up in multiple places. If the comment is 30 characters or less, it will simply go to the Transactions Description field of the Signature TimeTrack transactions. If the Comment field is > 30 characters, the first 30 characters displays in the the TimeTrack Transaction Description field and then the entire comment is appended in the TimeTrack Transaction Note. Also, the individual notes that can be added to each day's time in Clock will also get appended into the TimeTrack Note field.
- The Activity field in Clock is limited to 14 characters. If you have activities set up in Signature that have more than 14 characters, you will need to edit these activity IDs in Signature. (Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Technicians > Activities).

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2 https://wennsoft.atlassian.net/wiki/spaces/CLOCK/pages/8487365/Clock+Releases

Clock Mobile Addendum

Field Name Differences

If you are using the Clock Mobile for WennSoft app and choose to reference the Journyx Mobile documentation, the field names will be different.

The table below displays what each Journyx field corresponds to in Clock Mobile.

Journyx	Clock
Project	Activity
Activity	Cost Code
Pay Type	Pay Code
Bill Type	Equipment
Comment	Comment

> ⚠️ To download the app, go to your device's app store (iOS or Android) and search for the **Clock Mobile for WennSoft** app.

Accountlink Business Sync - Database Views

Name	Physical Object Name	Type	Description
ServiceCallEquipment	jxServiceCallEquipment	View	Comma-separated list of equipment by service call
ServiceCallEmployees	jxServiceCallEmployees	View	A list of assigned employees by service call appointment
PayCodeLabor	jxPayCodeLabor	View	All active non-expense pay codes
PayCodeExpense	jxPayCodeExpense	View	All active expense pay codes

Name	Physical Object Name	Type	Description
JobCostCodes	jxJobCostCodes	View	A list of assigned cost codes by job
Equipment	jxEquipmentGLAccount	View	All open Service Call Equipment
EmployeePayCodeLabor	jxEmployeePayCodeLabor	View	All active employee non-expense pay codes
EmployeePayCodeExpense	jxEmployeePayCodeExpense	View	All active employee expense pay codes
Employee	jxEmployee	View	All active GP employees setup as TT_Active under TimeTrack Registered Users
CostCodeLabor	jxCostCodeLabor	View	All active labor cost codes
CostCodeExpense	jxCostCodeExpense	View	All active expense cost codes
Activities	jxJobServiceCall	View	All active Jobs, open Service Calls OR completed Service Calls within the last 90 days, and Activities

iOS App Location Permissions

Beginning with iOS 15, users are prompted to allow Location access when attaching photos. To prevent this prompt with every session, you can turn off Location Access for the Clock Mobile app.

1. On the iOS device, go to *Settings > Clock Mobile > Locations*.
2. Under ALLOW LOCATION ACCESS, select *Never*.

Updating the jxJobServiceCall View to Only Display Job Name for the Description

To edit what your users see in the Clock Time Entry or Expense Activity drop-down list for the Job Description, you will need to edit the jxJobServiceCall view (Job UNION query only). In the table below, the left column is the standard jxJobServiceCall view with the red bolded text indicating what needs to be removed. The right column's bolded text shows what the modified jxJobServiceCall view should look like to only return JC00102.WS_Job_Name as the Description.

Standard jxJobServiceCall View (Job UNION query only)	Modified jxJobServiceCall View

SELECT
  'JC - ' + RTRIM(JC00102.WS_Job_Number) AS 'Name',
 	
ISNULL(RTRIM(**SV00200.LOCATNNM),**JC00102.WS_Job_Name) AS 'Description',
  'All Jobs, Job Cost Jobs' AS 'Group',
  RTRIM(JC00102.CUSTNMBR) AS 'Customer Number',
  RTRIM(JC00102.Job_Address_Code) AS 'Location Number',
  RTRIM(JC00102.WS_Job_Number) AS 'Job Number',
  '1900-01-01 00:00:00' AS 'Date of Call',
  RTRIM(JC00102.WS_Manager_ID) AS 'Project Manager',
  0 AS 'Account Index',
  'JOB COST' AS 'TrxType',
  RTRIM(JC00102.WS_Job_Number) AS 'GP ID'
 FROM JC00102
 LEFT OUTER JOIN SV00200
  ON SV00200.CUSTNMBR = JC00102.CUSTNMBR
  AND SV00200.ADRSCODE = JC00102.Job_Address_Code
  WHERE JC00102.WS_Inactive = 0
	SELECT
	  'JC - ' + RTRIM(JC00102.WS_Job_Number) AS 'Name',
	  RTRIM(JC00102.WS_Job_Name) AS 'Description',
	  'All Jobs, Job Cost Jobs' AS 'Group',
	  RTRIM(JC00102.CUSTNMBR) AS 'Customer Number',
	  RTRIM(JC00102.Job_Address_Code) AS 'Location Number',
	  RTRIM(JC00102.WS_Job_Number) AS 'Job Number',
	  '1900-01-01 00:00:00' AS 'Date of Call',
	  RTRIM(JC00102.WS_Manager_ID) AS 'Project Manager',
	  0 AS 'Account Index',
	  'JOB COST' AS 'TrxType',
	  RTRIM(JC00102.WS_Job_Number) AS 'GP ID'
	 FROM JC00102
	 LEFT OUTER JOIN SV00200
	  ON SV00200.CUSTNMBR = JC00102.CUSTNMBR
	  AND SV00200.ADRSCODE = JC00102.Job_Address_Code
	  WHERE JC00102.WS_Inactive = 0

Disabling the Sync of Equipment and (E) Equipment Records During Business Sync

You can prevent equipment records from syncing to Clock during the Business Sync (full or incremental) by commenting out the following lines in the AccountlinkClock.exe.config file.

- Subsubcode Equipment line for Time Entry
- ExpenseSource (E) Equipment line for Expense Entry

To disable the equipment records from syncing during the Business Sync:

1. Navigate to C:\Program Files\AccountlinkClock.
2. Edit the **AccountlinkClock.exe.config** file to add the comment out (bold red) characters to the following lines:

```
<setting name="SyncData_Business" serializeAs="Xml">
 <value>
  <ArrayOfString xmlns:xsi=http://www.w3.org/2001/XMLSchema-instance xmlns:xsd=http://www.w3.org/2001/XMLSchema>
    <string>User</string>
    <string>Project</string>
    <string>Code</string>
    <string>Subcode</string>
    <!--<string>Subsubcode</string>--><!-- Equipment -->
```

```
    <string>ExpenseCode</string>
    <!--<string>ExpenseSource</string>--><!-- (E) Equipment -->
    <string>ExpenseCurrency</string>
   </ArrayOfString>
  </value>
 </setting>
```

3. Save the file.

Contact Information

Support

Phone: 262-317-3800
Email: support@wennsoft.com[3]
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for additional information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, the day after Thanksgiving, Christmas Day, and the day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal[4].

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3 mailto:support@wennsoft.com
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