

# Journyx DCAA Toolkit Instructions

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## 1.0 Journyx DCAA Toolkit Overview

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The Journyx DCAA Toolkit helps Journyx Timesheet users meet DCAA compliance standards for labor tracking. Augmenting the existing Journyx Timesheet functionality, the DCAA Toolkit adds four additional tools to satisfy DCAA requirements. These four tools include:

- **Daily Email Reminders** – notifies time users when they have failed to log the required number of hours for the day.
- **Printable Timesheets** – enables the printing of timesheets on individual pages for those who desire physical signatures or hard documentation.
- **Audit Log** – tracks and reports on auditable transactions within the Timesheet database, including who performed which actions and at what times the actions occurred.
- **DCAA Daily Compliance** - reports on users and their compliance history based upon completeness and timeliness of data entry.

These tools can all be found in the Timesheet navigation menu under Tools → Export.

**Note:** To achieve full DCAA compliance, the Journyx Timesheet tool settings must first be appropriately configured. The required configuration is explained in the following section.

## 2.0 Mandatory Settings for DCAA Compliance

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To achieve compliance with the Journyx DCAA Toolkit, administrators must configure the following preferences within the existing Journyx Timesheet tool and user settings:

### 2.1 Time Entry Deadline

To achieve DCAA compliance, administrators must specify a cutoff time for daily time entry. This cutoff time must fall on either the same working day or the following day.

Administrators can set time entry deadlines under Tools → Tool Settings in the section titled *Export - DCAA Daily Compliance*. The cutoff day can be selected from the menu labeled “When are users required to log their time in order to be compliant?” and the cutoff time must be entered in the format “HH:MM xm” in the custom field labeled “What is the cutoff time for compliance?” After updating the settings for both the day and the time, click **Save**.

**Note:** If you ever encounter the error message “Incorrectly formatted cutoff time: missing a colon”, you have not configured this setting correctly.

## 2.2 Audit Log

DCAA compliance requires a full log of all timesheet activity. To enable Audit Logging, navigate to Configuration → System Settings → Logging Settings. Activate the checkbox labeled “Audit log” and click **Save**.

**Note:** The audit log records all transactions within the system, including all transactions that affect time, expense, or mileage records and sheets. Journyx **strongly recommends** setting up a daily log rotation to compress and rename existing log files to avoid any file size limitations. The audit.log file resides in the tmp directory within the directory where Timesheet was installed on your application server.

## 2.3 Audit Level

To achieve DCAA compliance, Journyx Timesheet's audit level must be set to 5. This setting can be found under Configuration → System Settings → Approvals and Auditing. In the section titled *Audit Trail Settings*, there is a drop down menu for "Level of auditing required when users make changes to existing entries". Set this field to “5: Always require correction notes” and click **Save**.

**Note:** Setting the audit level to 5 requires any change to existing time, expense, or mileage records to be entered into the database as a separate correction record, rather than allowing any entered records to be altered directly. Furthermore, such changes require the user to enter a special change note to indicate the reason for the change.

## 2.4 Days for which Compliance Is Not Calculated

The DCAA Daily Compliance Report requires the administrator to configure days on which compliance should not be calculated, such as Saturdays and Sundays.

These settings can be modified under Tools → Tool Settings in the section titled *Export - DCAA Daily Compliance*. From the menu labeled “For which days should compliance not be calculated (probably weekends)?”, highlight the days for which you will not be calculating compliance. Hold down the 'Ctrl' key to select more than one day. After selecting the appropriate days, click **Save**.

## 2.5 Required Hours Per Day

The Daily Email Reminders and the DCAA Daily Compliance Report require administrators to establish a fixed number of expected daily hours for all Timesheet users. This figure is automatically calculated as one fifth of the total work week, such that a 40-hour work week is regarded as five 8-hour days.

This number can be set in one of two ways:

### 2.1.1 Setting Required Hours for Existing Users

To modify existing users' expected hours per week, navigate to Management → Users → Manage Users. To find a user or a group of users, you can use the search section to narrow the results by User Name, Role, Status, Pay Group, Project, Group, and Manager Name. All names that match your criteria will appear under the Search Results heading.

To select one user, click on the user that you wish to modify by selecting the user's name from the column under Search Results labeled "Name". The number of expected hours per week should be set in the custom form field labeled "User Work Hours Per Week:" in the section titled "Custom Fields".

To modify multiple users at the same time, you must activate the check boxes next to the users' names under the column labeled "Name". When all of the desired names are checked, go to the bottom of the page and click **Compare and Modify**. The number of expected hours per week for these users can then be set individually in the custom form fields labeled "User Work Hours Per Week:" under the section titled "Custom Fields".

**Note:** If left unmodified, this field defaults to 40 hours per week, or 8 hours per day.

### 2.1.2 Setting Required Hours for New Users

When adding a new user (Management → User → Create User), the custom form field labeled "User Work Hours Per Week:" can be found in the section titled "Custom Fields".

**Note:** If left unmodified, this field defaults to 40 hours per week, or 8 hours per day.

## 3.0 DCAA Toolkit Tools

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The DCAA Toolkit contains four tools:

### 3.1 Daily Email Reminders

The Daily Email Reminders tool is designed to assist with user compliance in time recording.

When utilized, it tracks all users in the system who are required to record their time (essentially anyone with a "Time" option in their navigation bar) and sends an email reminder before the time entry deadline to those who have yet to submit a completed timesheet. This tool can be used to send out emails manually or scheduled to operate automatically.

#### 3.1.1. Configuring Daily Email Reminders

The Daily Email Reminders tool can be configured under Tools → Export → Daily Email Reminders.

The contents of this email, both subject and body, are configurable. Administrators can use the tags <FullName> to display the user's name, <LoggedTime> to display how many hours the user has logged, and <RequiredTime> to display the required number of total hours for each user. After creating a message, click **Save Email Settings**.

Administrators can send out emails manually or set a schedule for automated delivery:

- To send a manual email to users, select the “Run Now” radio button. Click **Preview** beneath the radio options to see the full list of users this email will reach. Click **Send reminder emails** at the top of the page to send the email.
- To set up a scheduled email reminder, activate the radio button labeled “Create Schedule.” Administrators can choose the frequency, days, and time for each round of emails. We recommend for most companies that the tool be scheduled to operate daily, weekdays only, about an hour before the end of the business day or the established time entry deadline. After configuring the email settings, click **Create Schedule**. The scheduled reminder will then show up as a radio option. To delete an existing schedule, select it and click **Delete Schedule**.

## ***3.2 Printable Timesheets***

This tool renders customized timesheets built around the criteria that you specify. After compiling the reports, you will be presented with an option to print the timesheets for a hard copy of the data.

### **3.2.1 Generating Printable Timesheets**

Printable timesheets can be accessed under Tools → Export → Printable Timesheets. From here, administrators can select the range for the collected timesheets and the users to include.

To declare the range for timesheet collection, enter a start and end date in the same format as the default values or select the dates from the pop-up calendars. Only sheets which contain at least one day in this range will be displayed.

To select the users to include in your range, select one of the options in the drop down menu labeled “Users to include.” These options consist of:

- Include all users I can view – displays all users that you can view.
- Include users I select below – gives you the option to highlight all of the users that you would like to collect data for from a full menu.
- Include users I do not select below – gives you the option to highlight only the users that you would not like to collect data for from a full menu.

- Include users whose sheets are approved by the users I select below – allows you to highlight names from a menu which will generate a report on every user viewable by those highlighted names.

**Note:** To select multiple users, hold down the 'Ctrl' key and click on the names that you would like to include from the drop down menu labeled “Users to include:”.

After selecting your criteria, click **Preview** to view the data. You will then be able to export, save, or email any of the reports individually or choose Print All or Email All at the bottom of the page. **Print All** automatically segments the information to print the data on separate pages.

### **3.3 Audit Log Report**

The audit log tracks and reports on all actions within the Timesheet database, recording both 1) when each action occurred and 2) who performed each action.

#### **3.3.1 Generating the Audit Log Report**

Administrators can access the audit log under Tools → Export → Audit Log. Each Audit Log Report is configurable based upon the following criteria:

##### ***Audit log:***

- Select the file(s) you wish to examine. The file names will depend on your customization.

**Note:** For SaaS users, the file “audit.log” contains the current week's audit log, while the “audit.log.?.gz” files contain the audit logs from the previous weeks.

**Note:** Hold down the 'Ctrl' key to select multiple entries.

##### ***Date limiting options:***

- No date limiting, regardless of specified range – the report will not be impacted by the selected dates.
- Affecting a date in the range – the report will only show data that affects a date within the chosen range.
- Created on a date in the range – the report will only show data created within the chosen date range. **Note:** does not work on sheets.
- Modified on a date in the range – the report will only show data modified within the chosen date range. **Note:** does not work on sheets.

**Note:** To declare the range for timesheet collection, enter a start and end date in the same format as the default values or select the date range from the pop-up calendars. Only sheets which contain at least one day in this range will be displayed.

**Data types to examine:**

- Time Records – the report will include time records.
- Expense Records – the report will include time records.
- Travel Records – the report will include travel records.
- Time Sheets – the report will include time sheets.
- Expense Sheets – the report will include expense sheets.
- Travel Sheets – the report will include travel sheets.

Note: Hold down the 'Ctrl' key to select multiple entries. If you leave this field blank, the report will contain transactions for all of the above types of records.

**User limiting options:**

- No user limiting, regardless of the selection below – the report will not be impacted by the selected users.
- Affecting the selected user(s) – the report will only show data affecting the selected user(s).
- Created by the selected user(s) – the report will only show data created by the selected user(s).
- Modified by the selected user(s) – the report will only show data modified by the selected user(s).
- Created or modified by the selected user(s) – the report will only show data created or modified by the selected user(s).
- Created or modified by someone besides the affected user, regardless of the selected user(s) – the report will show all data created or modified by somebody other than the affected user(s). The affected user is the user whose timesheet gets modified.

**User selection:**

- Include all users I can view – the report will include transactions for all users you can view.
- Include users I select below – the report will include transactions for all users that you highlight.
- Include users I do not select below – the report will include transactions for all users that you do *not* highlight.
- Include users whose sheets are approved by the users I select below – the report will include transactions for all users viewable by the highlighted names.

**Note:** Hold down the 'Ctrl' key to select multiple entries.

**Project selection:**

- No project limiting, regardless of the selection below – the report will include transactions from all projects.
- Affecting the selected project(s) – the report will include transactions from all highlighted projects.

**Note:** Hold down the 'Ctrl' key to select multiple entries.

After configuring your report, press **Preview** to view the result. At the top of the page you will have the options to export, save, or email the information. At the bottom of the report, you will be able to click **Print All** for a hard copy of the report.

### **3.4 DCAA Daily Compliance**

The DCAA Daily Compliance generates a report on users' compliance history based upon completeness and timeliness of reporting.

#### **3.4.1 Generating the DCAA Daily Compliance Report**

Administrators can access the DCAA Daily Compliance Report under Tools → Export → DCAA Daily Compliance.

To declare the range for timesheet collection, enter a start and end date in the same format as the default values or select the dates from the pop-up calendars. All dates within this range will be included in the report.

To select the users to be included in the report, select one of the options in the menu labeled “Users to include.” These options consist of:

- Include all users I can view – displays all users that you can view.
- Include users I select below – gives you the option to highlight all of the users that you would like to collect data for from a full menu.
- Include users I do not select below – gives you the option to highlight only the users that you would not like to collect data for from a full menu.
- Include users whose sheets are approved by the users I select below – allows you to highlight names from a menu which will generate a report on every user viewable by those highlighted names.

**Note:** Hold down the 'Ctrl' key to select multiple entries.

Click **Preview** and you will be presented with the report. You will then have the option to export, save, or email the information. At the bottom of the page, you can click **Print All** for a hard copy of the report.

### 3.4.2 Reading the DCAA Daily Compliance Report

The DCAA Daily Compliance Report generates a list with the following fields:

- Approver Name – the name of the person who approved each timesheet.
- Approver Login – the login ID of the person who approved each timesheet.
- User Name – the name of the person who submitted each timesheet.
- User Login – the login ID of the person who submitted each timesheet.
- Delinquency Score (By Date) – the number in this column represents how many hours late a user was, or is, in submitting his or her *completed* time entry for a given date. The delinquency score is calculated as the difference between the compliance time (when the last change was made to a completed timesheet) and the time entry deadline. If sufficient time data is entered before the cutoff, the delinquency score shows up as 0.
- % Compliance – this figure indicates the percentage of days in the report for which the user was compliant (had a delinquency score of 0).
- Average Delinquency – this figure represents the sum of all delinquency scores averaged over the number of days in the report. An average of 0 signifies perfect compliance.

**Note:** Any number located in the Delinquency Score by Date columns, the % Compliance column, or the Average Delinquency column that is not compliant will be shown in red.

## 4.0 Support Instructions

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Any and all issues with these tools should be reported directly to Journyx's support department via email to [support@journyx.com](mailto:support@journyx.com). In any error report, please include enough information for the Journyx support team to reproduce the error. Generally, that will include a screen shot or the text of the error message, the steps that you took that caused the error, a copy of your debug.log file, and a fresh database backup.

## 5.0 Credits

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These tools and documentation fall under the same license agreement as the core Journyx Timesheet software. Copyright by Journyx, 2011.