Update 2025-03-01 (4.59.3, new features)

Updated to version 4.59.3[1].

New Features

Periodic Approval of Journal Entries

With this version, we are introducing periodic approval of journal entries. This function allows companies to review and approve their employees' time tracking journals in a structured and regular manner.

Configuration

This function can be enabled and configured accordingly on request. The following settings can be adjusted:

- The period for which employees can submit entries for approval retroactively.
- The groups for which approval is enabled.
- The sequence of approval steps, e.g., to involve additional persons in the approval workflow or to notify them of the approval.

In addition, you can specify the groups for which monthly approval is enabled.

Automatic Reminder

An automated process notifies employees if the previous month has not yet been submitted for approval. The period within which employees must complete the approval before they receive a reminder can be configured individually per client. However, this setting applies uniformly to the entire client.

User View

After the function is enabled, an additional field appears in the employee's journal that shows the current status of the month. The possible statuses are:

- The month has not yet been sent for approval.
- The month has already been submitted for approval.
- The month has been approved.
- The month cannot be sent for approval.

If a month cannot be sent for approval and an error message appears (see the next screenshot), the journal of the previous month must first be approved before the approval period. This is because journals always check whether the previous month has already been approved. This check also applies to the first month after the approval function is enabled.

To resolve this, the missing permission must be entered in the correction client. To do so, the corresponding permissions must be enabled when the function is set up.

The permission must be set on the last day of the respective month. Example: The period is set to two months, and it is currently March. This means that January and February can be approved. For this to work, the permission must be set manually on December 31.

Once all permissions and settings are correct, you will see the status for January and can enter missing data or submit the journal for approval.

Prerequisites for submitting the journal for approval:

- **No unexcused absences**: Every day must contain either bookings or full-day absences.

- **No irregularities in the time tracking system**: Errors such as "Absent without excuse," open bookings, or bookings clocked out by the system must be resolved.
- **No open change requests**: Time corrections, absence requests, and permission requests must be completed, regardless of whether they were approved, rejected, or canceled.
- **Previous journal is approved**: The previous month must already be approved.
- **Period is closed and within the permitted periods**:
  - The journal can only be approved once the month has ended (e.g., February can only be approved in March).
  - Months that are too far in the past can no longer be submitted for approval.
- **Journal history has been approved**: All previous months within the relevant period must already be approved.
  Example: If retroactive approval is allowed for two months, January must be approved before February can be submitted.

By clicking the "badge," you can view the status of all prerequisites.

Once all conditions are met, the blue "Submit" button is displayed, and the journal can be sent for approval.

After clicking "Submit," a small window with additional information appears, in which you must confirm once more that the journal is to be sent.

Once the journal has been submitted, the status of the badge changes to "Submitted."

The supervisor receives a task in which the month can be approved or rejected. In the case of a rejection, the supervisor can add a comment. The employee can then add the missing data and submit the month for approval again.

Once the month is approved, the status of the badge changes to "Approved" and the next month can be submitted for approval.

After a month has been submitted, no further changes can be made, for example through requests.

Import Connectors

Import connectors can now be configured so that data can be imported from files on S/FTP servers.

Multiple VAT Rates in Receipts

On request, the system can be configured so that multiple VAT rates can be entered at the same time in receipts.

Improvements in the HR Messaging System

- Administrators can now see which recipients have read or rejected a message.
- For a better overview, the status display of messages has been revised: "Read on" has been renamed to "Confirmed/Rejected on."
- In the re-entry form, the names of the additional mandatory groups are now displayed as placeholders.

Optimizations in the User Interface

- The group list now contains a new column "Group type," which provides a better overview of the type of group (e.g., organization groups or loose groups).
- Minor improvements to the user interface increase clarity and readability. These include a slightly adjusted color palette and the removal of unnecessary borders.
- The mobile view has also been optimized: Layout, spacing, and colors have been adjusted to improve readability and user guidance.
  - Absence reasons are now displayed in colored badges.
  - The menu cards in dynamic mode have been revised for a more consistent presentation.

Performance Optimizations

- The calendar now loads faster.
- The loading time of person information has been optimized to improve performance when opening a person profile.

1. https://extranet.workflow.at/daisy/webdesk-manual/2455-dsy/g1/11128-dsy.html