Journyx & Journyx PX 10.0

Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX 10.0 and is intended for existing Journyx customers who are upgrading to version 10.0 from version 9.5x. If you are upgrading from an earlier version, you will also need the guides for earlier versions (PX customers upgrading from versions earlier than v9.5 MUST review the 9.5 upgrade guide for critical changes). If you have additional questions about a feature, please contact your account representative or email Journyx Support at support@journyx.com.

User Interface Changes on Time, Expense and Custom Entry Screens

Entry screens are available under the Time, Expense and/or Custom menus for end users tracking their data in the Journyx system. In order to make the data entry process faster and more efficient, Journyx has redesigned the entry screens to be more streamlined and require less clicking to view and enter information. The example below shows a new time entry screen. The same design and changes apply to the expense and custom (f/k/a mileage) entry screens as well.

Below the time entry screen examples from 10.0 and 9.5 is a list that itemizes the changes from 9.5 to 10.0. This list can help end users to review the changes and find the features they use most frequently in the new interface.

New time entry screen in v10.0.

Former time entry screen in v9.5.

1. Sitemap – Moved from upper right corner to Help menu.
2. Calendar Navigation – Moved from upper right corner to gray status bar below navigation menu.
3. My Projects – Moved from right side of grid to number in parentheses next to Project field label.
4. Accruals – Moved from right side of grid to left side of gray status bar.
5. View Time Report – The button below the grid is now a View Report link in the upper right corner above the grid.
6. Switching to Day View – Clicking on the date range in the gray status bar now toggles from period to day view and back.
7. Leave Requests – Available in Leave menu only.
8. Select List and Comment Field Width – Drag to resize is now available.
9. Allocated Time – Collapsible section for in/out times if the user is required to track them.
10. Edit Current Entry – Edit icon on left side replaced with direct click on any field to edit.
11. Create New Entry – New entry fields look like existing entries, but clicking on them allows entry.
12. M Icon – Memorized entry icon to right to right of each entry changed from an "M" to a star.
13. Note Icon – Yellow note icon next to each entry amount replaced with gray/yellow triangle in cell. Gray indicates no notes or attachments. Yellow indicates one/both. Hovering shows counts of each.
14. Attachments – The attachment button information and link above the grid have been moved into the yellow triangle next to an entry amount. The triangle allows the user to add notes and/or attachments. Hovering shows counts of each.
15. Warnings and Messages – Green and red text messages related to actions taken now appear in green and red rows below the gray status bar and can be closed after viewing.

Related Feature – Custom Color Changes:

As a result of the redesign of entry screens, some changes to the custom color options were required system-wide. When you upgrade to 10.0, your color scheme will be switch to the default color scheme shown in the 10.0 entry screen shot above. You can review your color choices here: Configuration→System Settings→Branding Settings. If you want to return to something similar to the colors you chose in a previous release, these colors may require some minor adjustment for proper

contrast and visibility in the new interface (e.g., menu text will always be white). If you would like assistance adjusting your color scheme, please contact Journyx Support.

Related Feature – Entry Screen Custom Header/Footer:

As a result of the redesign of entry screens, some changes to the custom color options were required system-wide. If you have a custom header displayed on an entry screen, it will now appear in the gray area above the grid and below the date navigation. You may want to review your custom header information to see if you still need it. Your custom footer information will appear below the grid and Save button. You can make changes to your custom header and footer information or remove them entirely under Configuration→Entry Screens.

NOTE: Due to the upgraded technology in interface improvements, the Disconnected User feature is not supported in Journyx/PX v10.0. For more information on the alternatives to Disconnected User, please contact your Journyx account representative.

New Profitability Report and Other Reporting Improvements

Journyx and Journyx PX v10.0 include a new standard report type called a Profitability Report. It allows you to choose cost and billing rate sources to calculate and analyze your financials on a project-by-project basis. You can create this new report type under Reports→Standard Reports. It includes options to pull active projects by their start/end dates, filter by custom field values and change field display names in the report. It also allows you to drill down to the time and expense record details that make the financial totals.

Sample Profitability Report with Record Details Shown

The features for custom field filtering and renaming fields in specific reports have also been carried over to the time, expense and custom line item reports.

In the Report Actions menu in the upper left corner of each report, there is a new option to export the report to Excel. If you are on a Windows platform, you can export directly to Excel. If you are using a browser other than Internet Explorer, clicking on the Export to Excel option will create a file that you can open in Excel.

For line item time, expense and custom reports you can now include attachments/receipts/pictures in the body of the reports. For each line item with an attachment, there is a link to view the attachment. You can also show all attachments at the foot of the report for printing. Because PDF attachments can have multiple pages, PDF attachments must be printed separately. A button for printing the PDF attachments is included in the reports. Look for the "Attachments" option in the Fields to Display.

New Leave Request and Holiday Time Features

Journyx and Journyx PX 10.0 includes a variety of additions to leave request handling. In addition to the basic leave request creation screen that users have access to in older version, there is a new advanced screen that allows users to create multiple leave requests at once. For users who use leave requests to indicate work schedules where days on and off vary by week, this new advanced screen makes it easier to create a list of days off quickly.

Advanced View for Creating Leave Requests

Both the basic and advanced views for leave requests also include a new field called "Note to Approver". This field is for making notes specific to the leave request without including those notes in entry itself (e.g., in the time entry Comment). The approver can then review the note field when reviewing pending leave requests. The Note to Approver field can be renamed under Configuration→System Settings→Entry Sheets.

Prior to version 10.0, a leave request could not be edited after it was created. If a user needed to make a change, he would have to delete the existing request a create a new one with the correction. In 10.0, both users and managers have the option to edit leave requests if you provide them with access to do so. You can set editing options for leave requests under Configuration→System Settings→Leave Requests. The defaults will be set to allow users and managers to edit leave requests while they're pending, but you can turn off edit access to allow editing for requests in other states as well.

Along with the options to determine when leave requests can be edited, you can also turn on email notifications that let users and/or managers know when a leave request has been edited. The email notifications are also located under Configuration→System Settings→Leave Requests.

Prior to version 10.0, neither leave requests nor holidays would load on a day with time already entered for that day. In the event you have users who enter leave or holidays for partial days and also need to

enter their anticipated work time before they have actually worked it, you can turn on the option to load leave and holidays for day with time already entered. You can turn this setting on under Configuration→System Settings→Entry Sheets.

In version 9.5, we added the ability to determine which projects should be available for the different types of entry screens. So, a project could be available for leave requests but not regular time entry as an example. In 10.0, you can also determine project availability for holiday entries and you can remove access to holiday projects from time entry so that no one can manually enter holidays. Under this scenario, users would only get holiday entries from what is auto-loaded based on their assigned holiday schedule. You can go to Management→Projects or Management→Scheduled Projects and click on a project name to set the availability for each type of entry.

New Assignment Notification (PX Only)

Journyx PX 10.0 includes a new notification that allows you to turn off new assignment notifications if a user creates an assignment for herself. In version 9.5, users with simple group access to a scheduled project (no existing assignment) could create assignments for themselves by logging time against the projects. The new notification under Configuration→System Settings→Resource Management allows you to turn off new assignment notices if users don't want emails for assignments they create for themselves. There is a separate notification that will continue to send email notices if someone else creates assignments for them.