Journyx & Journyx PX 10.1

Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX 10.1 and is intended for existing Journyx customers who are upgrading to version 10.1 from version 10.0x. If you are upgrading from an earlier version, you will also need the guides for earlier versions. If you have additional questions about a feature, please contact your account representative or email Journyx Support at support@journyx.com.

Accrual Balance Changes & New Leave Reporting

Accrual balance handling in Journyx and Journyx PX has been updated in v10.1 to allow for new features and leave time reporting. You can view the new accrual balance options under Management→ Users→ Accruals. Click on a user to view existing accruals or set up new ones.

New Accrual Set Up Interface

Accrual Name: The old accrual interface did not include the accrual name field or the ability to name each type of balance. This is a new field in v10.1. Employees can see this name associated with their balances on the time entry screen, and the name field can also be used accrual reporting.

Accrual Pay Types: Accruals in versions prior to v10.1 were associated with a selection from the Pay Type field. This field may be renamed in your Journyx site. In v10.1, accruals are still associated with Pay Types. However, there is a new option to select more than one Pay Type for a single accrual balance if needed.

Hard Limit: This field includes options that are similar to what was called a "hard" accrual in previous versions of Journyx. This field is optional and should be enabled when you want to block users from entering too much time against the Pay Type(s) that is associated with the accrual. The hard limit enforces a minimum balance that can be a positive or negative number. It can also be zero. For example, a user cannot enter time against the accrual Pay Type that takes the balance below zero when the hard limit is set to zero.

Warning Threshold: This field includes options that are similar to what was called a "soft" accrual in previous versions of Journyx. This field is optional and should be enabled when you want to warn users when they reach or exceed a minimum balance for the Pay Type(s) that is associated with the accrual. The warning threshold minimum balance can be a positive or negative number. It can also be zero. Warnings do not block users from entering more time against the accrual Pay Type. Warnings can be used in conjunction with hard limits (e.g., warn with 2 hours remaining, block with 0 hours remaining), or warnings can be used on their own.

Hide: In previous versions of Journyx hidden accruals were a separate type of accrual and were always treated liked hard accruals. This field is optional and should be enabled when you want to track an accrual balance against a Pay Type, but you do not want the assigned users to see these accrual balances in the accrual information on their time entry screens. NOTE: "Hidden" balances may still be displayed to users in some circumstances. For example, the user will see the remaining amount in the hidden balance when creating a Leave Request that violates a hidden balance.

Hours Remaining: This field has not changed from previous versions of Journyx; although, changes made to the hours after the accrual is created are tracked in the system. This field is required and should be set to the amount of the beginning/current balance of the accrual. This field can also be modified when users earn or lose accrued hours. The hours remaining can be a positive or negative number. It can also be zero. NOTE: If you are using the Accrual Calculator tool, this field may be updated automatically based on the rules and tiers you set up for accrual calculations and adjustments.

Many of the changes to accrual balance management outlined above were designed to provide reporting details for leave time and the resulting balance changes. Under Reports→Standard Reports you can now create a new Accrual report type. This new report can be customized, saved, scheduled, exported to Excel, or run in Journyx Reportlink.

Accrual Report

<< *Thursday, September 1, 2016 through Friday, September 30, 2016* >>

Full Name	Accrual Name	Carry Over	Hours Earned	Hours Used	Hours Lost	End Balance	Pending	Net Balance	Current Balance
Elizabeth N. Mason	Sick Hourly	0.00	3.00	0.00	0.00	3.00	0.00	3.00	3.00
Elizabeth N. Mason	Vacation Hourly	0.00	158.25	0.00	0.00	158.25	0.00	158.25	158.25
Subtotal Elizabeth N. Mason		*0.00*	*161.25*	*0.00*	*0.00*	*161.25*	*0.00*	*161.25*	*161.25*
Gregg Schneider	Sick Hourly	0.00	16.00	0.00	0.00	16.00	0.00	16.00	16.00
Gregg Schneider	Vacation Hourly	0.00	179.75	-16.00	0.00	163.75	16.00	147.75	163.75

	Date & Time	Event Category	Balance Change	Balance Before	Balance After	User	Notes
	09/29/2016	Leave Request	-8.00			Gregg Schneider	Pending Leave Request: -
	09/30/2016	Leave Request	-8.00			Gregg Schneider	Pending Leave Request: -
	09/01/2016 13:43:54 CDT	Created by Sync	179.75	0.00	179.75	QB Sync	Accrual was created in the Accountlink sync. Balance was changed from 0.00 to 179.75, a change of 179.75 hours. Applicable Pay Types changed from (None) to *Vacation Hourly*. Enforce minimum balance flag turned on. Minimum balance is 0.0.
	09/06/2016 14:25:07 CDT	Hours Taken	-8.00	179.75	171.75	Timekeeper	Deducted hours from accrual. Pay Type: *Vacation Hourly*.
	09/06/2016 14:25:07 CDT	Hours Taken	-8.00	171.75	163.75	Timekeeper	Deducted hours from accrual. Pay Type: *Vacation Hourly*.

| *Subtotal Gregg Schneider* | | *0.00* | *195.75* | *-16.00* | *0.00* | *179.75* | *16.00* | *163.75* | *179.75* |
| **Grand Total** | | **0.00** | **357.00** | **-16.00** | **0.00** | **341.00** | **16.00** | **325.00** | **341.00** |

Accrual Report with Details

The new Accrual report includes options to report on user accrual balances, including carry over amounts from the previous period, leave time taken, leave time that is scheduled to be taken, and the resulting balances. It also includes an option to click on any accrual and show a more detailed report that lists the events that resulted in balance changes. NOTE: Any accruals created in a version of Journyx prior to v10.1 will not include a detailed history before the upgrade to v10.1.

Miscellaneous New Features and Options

- Journyx 10.1 includes minor adjustments to the new entry user interface introduced in v10.0:
  - Date/amount area on entry screens can be resized to fit longer periods (e.g., monthly timesheets).
  - Weekend days are shaded in a different color on entry screens.
  - Entry screens include a reset button that returns all columns to the original size.

- The credit card upload feature for expense entry previously supported only QIF files. In v10.1, we added support for more modern OFX and QFX file formats.
- The Org Chart Manager feature was only available for time approval creation in versions prior to v10.1. Under Configuration→System Settings→Security→Data Management Settings, you can now use OCM for automatic creation of expense and custom approval plans. The expense and custom options use the same user custom fields to generate the approvals. Therefore, you cannot use org charts that differ by approval type.
- In v10.0, financial "actuals" fields such as Actual Cost and Actual Revenue were only included in the summary portion of the Profitability report. They were not displayed and broken down in the detailed section of the report. In v10.1, "actual" financial fields are included in both the summary and detailed views of the report. No additional configuration is required. If an "actual" field is included in the report fields to be displayed, it will appear in both the summary and detailed views.
- The Leave Request create screen now includes a confirmation before submission. Prior to v10.1, it was possible to accidentally submit a leave request by clicking on the enter/return button on your keyboard. The submission warning allows users to cancel submissions if the requests are not complete.
- For period/sheet approvers who are also project approvers, it is now possible to complete both sheet and project approvals at the same time on the sheet approval screen. For example, a time approver can go to Approvals→Time and approve a user's timesheet. If the approver is also a designated project approver for project time on that timesheet, the project approval will be completed at the same time. Notices on the time approval screen will show that project approval(s) occurred as well, and the project time will no longer appear in the project approval queue.
- Under Management→Users→Timekeeping, Journyx 10.1 includes new options for viewing sheet status in the timekeeping search results. Timekeepers can use search filters to limit the sheets displayed in search results to those in specific states. The links to the sheets displayed in the search results are also color-coded to indicate the sheet state. Hovering over the link provides sheet state information in text.
- Prior to v10.1, all time, expense and custom records imported into the system using the standard import tools were imported in a "committed" state. Because the records were committed, they could not be edited after import. Version 10.1 includes a new option to import time, expense or custom records while leaving them open for editing. You can view the new file format option in the Help menu under Configuration→Imports→X Record Import.
- Under Configuration→System Settings→Security→Login Behavior, there is a new option to determine whether login names should be case sensitive or not. In previous versions, login names were required to be case sensitive.
- Under Management→Users, you can now include more than one email address per user for system notifications. The email addresses should be separated by commas.
- Under Management→Scheduled Projects→Assignments, the Assignment Name field is open for editing and can be changed (e.g., when a project name has changed, but the old project name is preserved in the assignment name). (PX only)
- Under Configuration→Imports→Assignment Import, import of assignment custom fields has been add to the standard assignment import tool. (PX only)

NOTE: Journyx and Journyx PX 10.1 are major upgrades. If you host your own local installation of the Journyx software, you will need a new license key when upgrading to v10.1.

For more information about Journyx or Journyx PX 10.1, please contact your account representative at +1 800-755-9878 or sales@journyx.com.