

Journyx & Journyx PX 11.0.0

Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX 11.0.0 and is intended for existing Journyx customers who are upgrading to version 11.0.0 from version 10.1. 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.

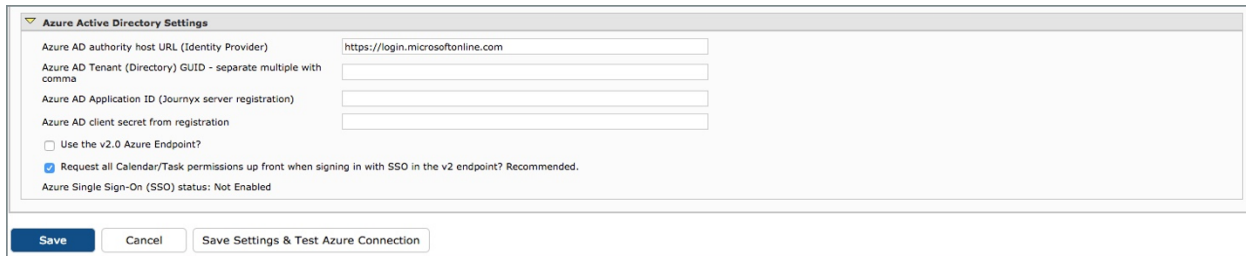
Suggestions for Exchange Calendar and Tasks on Time Entry

Suggested Entries allow you to load entry suggestions on your timesheet based on data in other applications that you use to do your work throughout the day. Data such as Microsoft Exchange/Office 365 calendar events or tasks can be loaded into the suggested entries of your timesheet for editing and saving as time entries. Suggestions will include project/activity/etc. selections based on the descriptions in the data. However, after accepting the suggestions you can edit these selections, and the system will learn to make more accurate selections in the future based on your changes. NOTE: Suggested Entries are only supported on grid-based timesheets. They are not supported on line item timesheets where the date of the entry is chosen from a select list.

If you want your users to be able to load calendar events and tasks from Exchange/Office 365, you will need to set up your Microsoft Azure authentication first. You will need to work with your staff in IT who administer your Exchange Online/Office 365 service with Microsoft. Your IT staff will need to gather some information from your Office portal and register your Journyx site URL in order to connect Journyx with Exchange calendar and tasks.

You can enter your Azure credentials in your Journyx system by going to Configuration → Security Settings → Azure Active Directory Settings. If you click on the Help menu for this page, there are detailed instructions for setting up your connection to Azure.

Azure Authentication Settings



The screenshot shows the "Azure Active Directory Settings" configuration window. It contains the following fields and options:

- Azure AD authority host URL (Identity Provider):
- Azure AD Tenant (Directory) GUID - separate multiple with comma:
- Azure AD Application ID (Journyx server registration):
- Azure AD client secret from registration:
- Use the v2.0 Azure Endpoint?
- Request all Calendar/Task permissions up front when signing in with SSO in the v2 endpoint? Recommended.
- Azure Single Sign-On (SSO) status: Not Enabled

At the bottom, there are three buttons: "Save", "Cancel", and "Save Settings & Test Azure Connection".

After you have set up and successfully tested your connection with Azure, you can grant users access to Suggested Entries by turning on the section for their timesheets. Access is based on the time entry screen that is assigned to each user. You can turn on suggestions for specific time entry screens by going to Configuration → Entry Screens → Time Entry Screens. You can edit a time entry screen by clicking on the name. There are options on the right side of the time entry edit screen that allow you to turn the options on and off. The new option for suggestions is called "Show the Suggestion Entries section".

Configuration → Entry Screens → Time Entry Screens → Modify

Time Entry Screen configuration allows you to customize timesheets for your users.

Copy the settings of screen: Allocation Entry - In/Out Times Load

Name: Standard Time Entry Grid

Grid format

- Display in/out times at the top of the entry screen
 - Manually enter the in/out times
 - Press a button to populate the in/out times
 - Press a button to populate the in/out times and create default time entry

Entry format

Enter time as: hours worked

Enter time with: dropdowns

minute increments for dropdowns

Default time period: weekly

Time entry format: Either

Display days in ascending chronological order

Number of blank entries to display: User Preference

Allow file attachment uploads?

- Do not allow file uploads.
- Allow unlimited file uploads
- Allow uploads; number of attachments allowed per period: 7

Allowed file attachment types: Images and PDF documents only

- Add this screen to all new groups
- Total hours as they are entered
- Show Project descriptions in dropdowns
- Show Project tree in the Project column
- Show memorized entries
- Show the Suggested Entries section
- Allow users to view past periods
- Allow users to view future periods
- Use entry field notes
- Apply Dependencies to hidden columns?
- Use customized names for Entry Columns

Suggested Entries option for time entry screens

After you have turned on suggestions entries for a particular time entry screen, any user with access to that time entry screen and a Microsoft Office 365 login can use them. Users with access to suggestions will see a green button at the foot of their time entry screens where they can connect Journyx to their Office 365 portal account. If the user is already logged in to the Office portal site in another browser tab, the connection will be automatic after the user clicks on the green button. If the user is not logged in to the Office port, clicking the green button will take the user to a login screen for your Office portal.

Project (0)	Activity	Pay Type	Bill Type	Comment
▼ New Entries (1) U...				
🔍 - Select Project	🔍 G&A	🔍 Regular	🔍 Unbillable	default
This account is not yet linked to Microsoft Office 365.				
Link this account to Microsoft Office 365				

Button on time entry to link to Office 365 account for suggestions

Users can also manage their settings for suggestions under Preferences → Entry Screens. They can turn suggestions on and off. They can control the appearance of help content, and they can link or unlink their Office 365 accounts.

Preferences → Entry Screens

Entry screen preferences contain the personal default settings for your timesheets, expense sheets, and custom sheets.

Entry Screen Preferences

On the Leave Management Calendar, limit the displayed requests to those I am authorized to approve

Show a 'Previous Entries' section based on the entries from up to period(s) back (max. 4)

Maximum number of items in selection drop downs:

Default comment for all entry screens:

Number of blank entries available on each screen:

Which Leave Request Create screen do you want to use?

Hide declined requests on leave calendar

Timesheet

Time entry screen: Default time report:

Number of manual in/out rows:

Expense Sheets

Expense entry screen: Default expense report:

Custom Sheets

Custom entry screen: Default custom report:

Suggested Entries

Show Suggested Entries on Entry Screens when available. Includes Exchange Calendar and Tasks.

Show a tutorial dialog for Journyx Suggestions.

Microsoft Office 365 Identity

This account is not yet linked to Microsoft Office 365.

Preferences for managing link to Office 365 account for suggestions

Users have a variety of options for learning how to use suggestions. After a user has turned on suggestions, a popup window with an overview for suggestions will appear on the time entry screen. Included in the window are links to more detailed written help and a demonstration video. The detailed written help documentation can be accessed using the in-product help menu for the time entry screen.

NAME HERE: My Assignments One

Using Suggestions for the first time?

Do the choices under Suggested Entries look kind of weird? That's OK.

The first time you load Suggestions on your timesheet, Journyx won't know what to pick. Unfamiliar Projects, Activities, or other items might appear, but you will teach Journyx to pick the right choices by correcting the Suggestions for a few weeks.

How do you correct Suggestions? Use the ⚙ or ☰ icons in Suggested Entries to accept those that do apply – even if the name is wrong. Then, make corrections as needed in the New Entries area of your timesheet.

So...

- **STEP 1:** Accept your Suggestions with the menus or mark them as Ignored.
- **STEP 2:** Correct the Suggestions you accept and save them to your timesheet.

After you correct your Suggestions for a few weeks, the choices will become more and more relevant.

[Click here to read about how to use all the features for Suggestions.](#)

[Click here to watch a video that shows how to use Suggestions.](#)

If you would like to see a demonstration on how to use suggestions, you can [view a quick demo here](#) or contact your account representative for a full demonstration.

User Interface and Usability Improvements

- Under the Approvals menu, there are new search options that make it easier to control what see in your approval queues. New options include additional sheet filters, user attributes and start/end dates.
- Entry screens did not include column sorting after the user interface redesign for 10.0. 11.0 has restored the column sorting option by clicking on the column name.
- The current day on all entry screens is now set apart with a highlight color for easier entry on screens with a lot of data.
- The hover information for the triangle icon for notes on entry screens now shows the full text of the note. So, there is no need to click through to the notes screen to view the content of the notes.
- Allocation punch clock time entry screens include an option to automatically generate time entries based on a pre-configured default time entry. This feature makes it easy for users who only need to track exceptions. Go to Configuration→Entry Screens→Time Entry Screens to turn on this feature for an allocation punch clock time entry screen.

Reporting Improvements

- 11.0 now includes the ability to set up scheduled reports to be emailed automatically to a designated list of recipients. Go to Reports→Scheduled Reports to add an automatic email distribution list to your scheduled report(s).
- The Accrual report type includes some new fields: user login and all user custom fields.
- Time/expense/custom list reports include some new fields: record ID and record transferred. The record ID field is the database ID of the time/expense/custom record. The record transferred field is the date a record was transferred to 3rd party software using a standard Journyx integration.

Journyx PX Usability Improvements

- On the assignment wizard screens under Management→Scheduled Projects→View Assignment Loads, there is a new option in the Assignment Details section called “Retain task scheduled work amount”. When you select an assignment for editing, you can turn this setting on to put some of the assignment scheduled work back in the unassigned bucket for the task. Prior to the introduction of this setting, reducing an assignment’s scheduled hours for a fully assigned task would also reduce the total hours scheduled for the task. This setting allows you to preserve the original estimate for the task hours while adjusting the individual assignments that make up the task.
- On the assignment wizard screen where you can select users for assignment, there is now an option to edit the assignments for each selected user on one screen. After you have selected several users for assignment, you can click on the “Save Assignments and Modify Allocations” button to view all of your users and assignment values side-by-side on one screen. This option is especially useful if you do not plan to divide the scheduled hours evenly amongst the selected users.
- Assignment custom fields are now supported for the Assignment Import. Go to Configuration→Imports→Assignments and view the Help for This Page menu to see how you can set up your assignment import file to include assignment custom field values.

Technical Upgrades and New Options

- Version 11.0.0 includes an upgrade to Python v3.6.
- Single sign-on through Microsoft Azure is now available. You can review the settings under Configuration→System Settings→Security→Azure Active Directory Settings. Please contact Journyx Support or your account representative if you would like to change your method of SSO or set this up for the first time.
- The Journyx API includes a new method to copy parent project dependencies to child projects.
- Database restore (restoredb) uses multiple CPUs and is MUCH faster.
- Enhanced logging capabilities, including log rotation management, are available under Configuration→System Settings→Logging.

NOTE: Journyx and Journyx PX 11.0.0 are major upgrades. If you host your own local installation of the Journyx software, you will need a new license key when upgrading to v11.0.0.

For more information about Journyx or Journyx PX 11.0.0, please contact your account representative at +1 800-755-9878 or sales@journyx.com.