Journyx and Journyx PX 11.5.0

Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX 11.5.0 and is intended for existing Journyx customers who are upgrading to version 11.5.0 from version 11.2.x. 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.
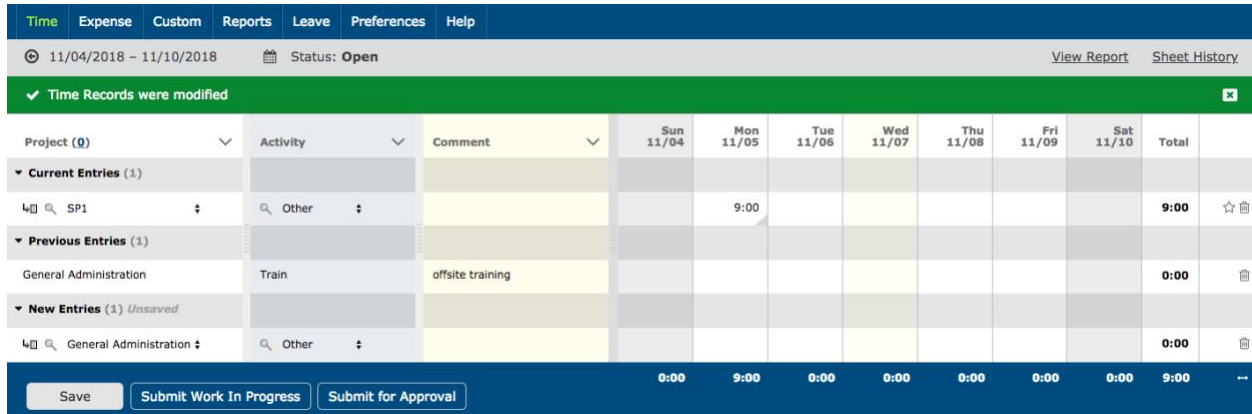
New Interim Approvals for Submitting Work in Progress

Journyx and Journyx PX v11.5.0 include a new type of approval workflow that allows users to submit work in progress on a timesheet before the full timesheet is complete and submitted at the end of a period. We refer to the feature as "interim approvals", and users assigned to timesheets with the interim submission feature can submit work in progress as often as needed during the period.

This feature was designed explicitly to satisfy the use case where users need to submit their time on jobs on a daily basis so that the time can be approved and sent to 3rd party systems for daily billing*. It allows users to submit all time entered through the current day (unless you have it configured to allow submission of future time entries). After submission they can continue to add time to the timesheet – even on days that already have interim submissions.

*The interim approvals feature can also be used to submit a partial timesheet for the use case where a payroll period ends before the end of the timesheet period. However, we understand that some features may need to be added in a future release to support this use case fully (e.g., option to lock down days that are interim submitted, reminder and late notices that are independent of the timesheet period).
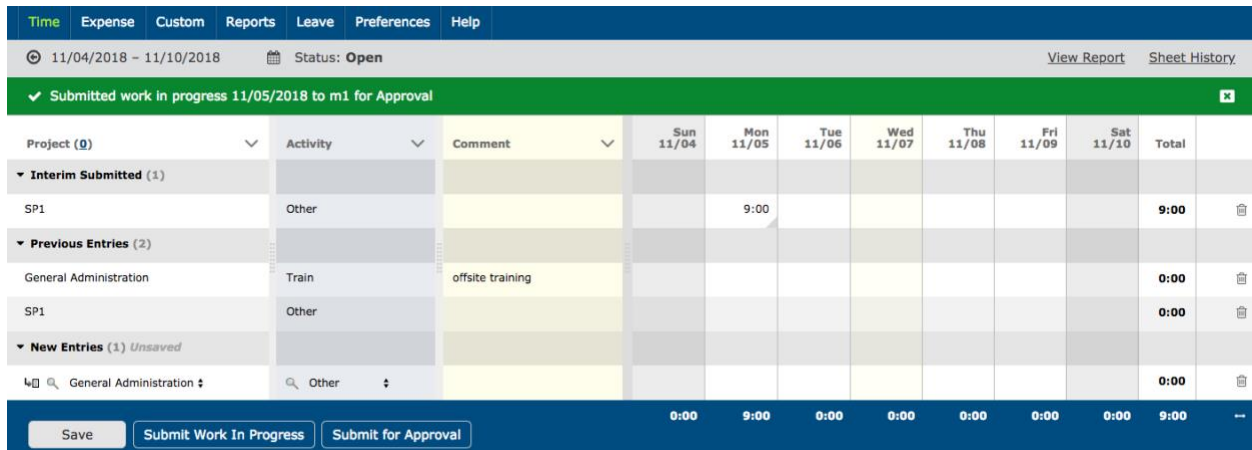
A user with a timesheet that allows interim submission looks like this:

The user has saved time for what she did on Monday. At the end of the day she needs to submit it to her supervisor so that it can be approved and billed to the customer.
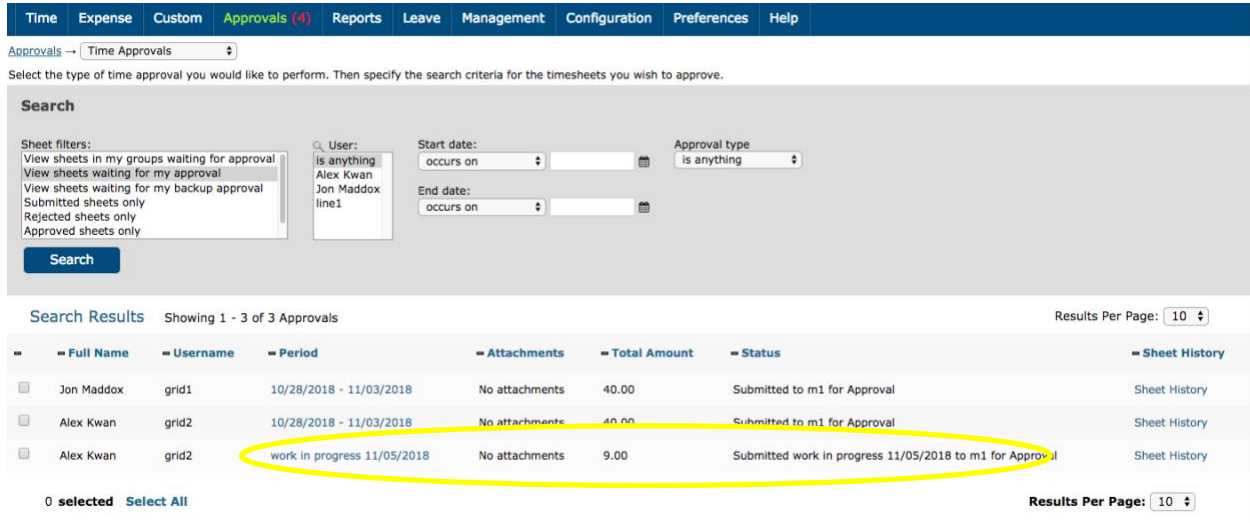
After she submits the work in progress for Monday, her timesheet looks like this:

Note that the time logged on Monday is displayed in a new section labeled "Interim Submitted". While the interim submitted and approved records cannot be edited directly on the row in which they appear on the timesheet, a copy of the entry is automatically added to the "Previous Entries" section so that the user can continue to log time for the same job for the rest of the period.

This is an example of what her supervisor sees in the approval queue after Alex has submitted her work in progress for Monday compared to full sheet submissions already in the queue:
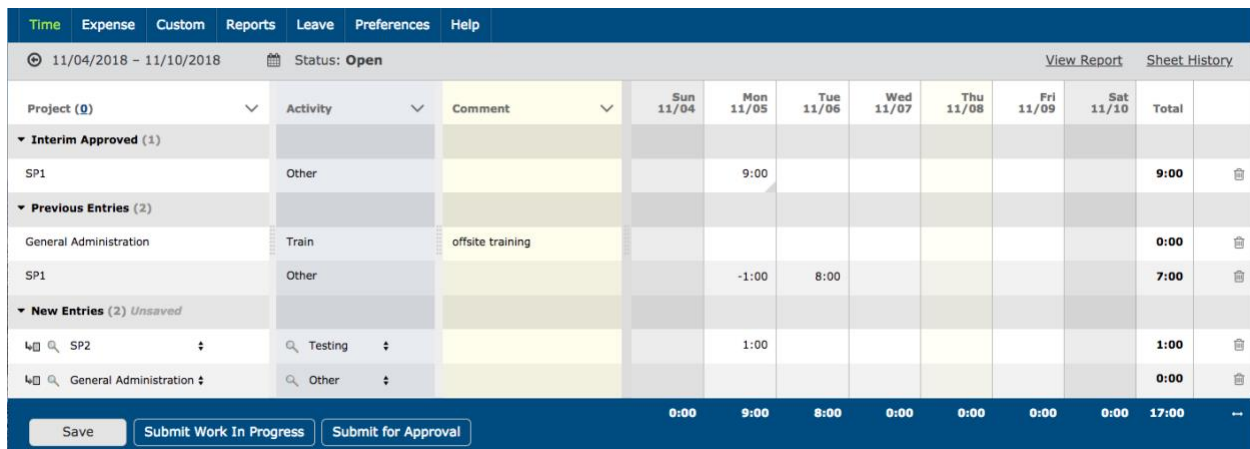
After an interim submission/approval, the user can continue to enter time for the period. It is also possible to add adjustment entries to a day that has already been interim submitted or approved. The user can add time if additional work was required after she submitted on Monday. She can also make corrections to the approved time.

This is an example where the user has entered her time for Tuesday, but she needs to adjust the Monday entry to reallocate 1 hour to a different job:

After entering her time for Tuesday and the corrections for Monday, she can submit her work in progress again:

			Sun 11/04	Mon 11/05	Tue 11/06	Wed 11/07	Thu 11/08	Fri 11/09	Sat 11/10	Total	

Time Expense Custom Reports Leave Preferences Help

⊕ 11/04/2018 – 11/10/2018   🗓 Status: **Open**   View Report   Sheet History

✓ Submitted work in progress 11/05/2018 - 11/06/2018 to m1 for Approval   ☒

Project (0) ⌄	Activity ⌄	Comment ⌄	Sun 11/04	Mon 11/05	Tue 11/06	Wed 11/07	Thu 11/08	Fri 11/09	Sat 11/10	Total	
▾ Interim Submitted (2)											
SP1	Other			-1:00	8:00					7:00	🗑
SP2	Testing			1:00						1:00	🗑
▾ Interim Approved (1)											
SP1	Other			9:00						9:00	🗑
▸ Previous Entries (3)											
▾ New Entries (1) *Unsaved*											
⌸ 🔍 General Administration ↕	🔍 Other ↕									0:00	🗑
			0:00	9:00	8:00	0:00	0:00	0:00	0:00	17:00	→

Save | Submit Work In Progress | Submit for Approval

The approver sees the records that are included in each interim submission when viewing an interim submission for approval:

11/04/2018 – 11/10/2018   Status: **Submitted work in progress**   View Report   Sheet History

✓ Group Supervisor approving Time sheet for Alex Kwan   ☒

✓ Submitted work in progress 11/05/2018 - 11/06/2018 to m1 for Approval   ☒

Approve work in progress Time Entry Sheet For user Alex Kwan: 11/04/2018-11/10/2018

Project ⌄	Activity ⌄	Comment ⌄	Sun 11/04	Mon 11/05	Tue 11/06	Wed 11/07	Thu 11/08	Fri 11/09	Sat 11/10	Total	
▾ Interim Submitted (2)											
SP1	Other			-1:00	8:00					7:00	
SP2	Testing			1:00						1:00	
			0:00	0:00	8:00	0:00	0:00	0:00	0:00	8:00	→

Open | Approve | Reject | User View

If the approver needs to view what has previously been interim submitted in order to approve the current submission, he can click on the View Report link in the upper right corner to see all records and their status for the sheet:

Timekeeper: Group Supervisor
Timesheet for: Alex Kwan

My Timesheet Report

Sunday, November 4, 2018 through Saturday, November 10, 2018

Date	User	Activity	Pay Type	Bill Type	Project	Comment	Record State	Level 1 Approver ID (actual)	Level 2 Approver ID (actual)	Sheet State	Hours
11/05/2018	Alex Kwan	Other	Regular	Billable	SP1	None	Interim Submitted	-	-	Not Yet Submitted	-1.00
11/05/2018	Alex Kwan	Other	Regular	Billable	SP1	None	Interim Approved	-	-	Not Yet Submitted	9.00
11/05/2018	Alex Kwan	Testing	Regular	Billable	SP2	None	Interim Submitted	-	-	Not Yet Submitted	1.00
Subtotal 11/05/2018											*9.00*
11/06/2018	Alex Kwan	Other	Regular	Billable	SP1	None	Interim Submitted	-	-	Not Yet Submitted	8.00
Subtotal 11/06/2018											*8.00*
Grand Total											**17.00**

Signature:_____

The user can continue to submit work in progress until she has completed her timesheet for the period and submits it for full sheet approval. Any outstanding ("unapproved") interim submissions will be canceled when the full sheet is submitted for approval because the full sheet contains all records and overrides any interim submissions.

Other notes about configuration options and interim approval behavior:

- Interim approvals can be turned on or off at the system level. They must be turned on under Configuration→System Settings→Approvals and Auditing in order to grant users access to use them.
- Interim approvals can be set to submit everything through the current date (date of submission) or everything on the sheet regardless of date. The default is set to submit everything on the sheet through the current date (e.g., holidays already loaded for later in the period would not be interim submitted). This behavior is controlled by a system setting in the same area as well.
- Users get access to interim approvals through their assigned time entry screens. Under Configuration→Entry Screens→Time Entry Screens you can opt to show the Submit Work in Progress button on specific screens. Then you can go to Management→ Users→Manage Users to assign individuals to screens that include the interim approval feature.
- Interim approval email notifications are currently tied to the sheet-based email notifications. Notices to the approver of submit and resubmit, as well as notices to the user of rejection and approval, will all apply to interim approval actions if they are enabled for sheet approvals. There is a system setting to turn off all interim approval email notifications if you do not want to use them.
- Interim approvals are not supported in the current version of Journyx Mobile. Support for interim approvals will be added in a future mobile release in Q2 2019. Interim approvals can be accessed in mobile browsers.

Other New Features & Improvements

- New import tools for currency conversions and mileage conversions are available under Configuration→Imports. Sample files and required fields for the imports are included in the Help menu for the respective screens.
- New custom role ability to provide more granular access to Accruals management for those who do and do not need it is available under Configuration→Roles. The default Manager role that comes with Journyx will no longer include Accruals access.
- Improved formatting for printing timesheets from the browser. When we updated the user interface in version 10, it caused some types of time entry screens to lose formatting for printing from the browser. We have restored some formatting for this use case.
- Journyx Suggestions app for the Zapier integration platform is available for version 11.5.0. The first application of this app is a connection for Google Calendar and your timesheet. Initially, it will only be available for beta testing.   We will post a sign up form for the beta program on the customer community at community.journyx.com.   You can also contact Journyx Account Management if you would like to connect your timesheet to Google Calendar.

For more information about the Journyx or Journyx PX 11.5.0, please contact your account representative at +1 800-755-9878 or sales@journyx.com.