Journyx 12

Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX 12.0.0 ("Journyx 12") and is intended for existing Journyx customers who are upgrading to Journyx 12 from version 11.5x. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

Journyx 12 is only available for cloud customers right now. If you have additional questions about a feature, please contact your account representative or email Journyx Support.

User Interface/Experience Changes: General Changes

Journyx 12 represents a major overhaul of the user interface and experience. While elements of the interface design have changed, it also includes improvements to workflow and efficiency for 3 key areas (a/k/a "hero flows"): visual reporting for the new dashboard, manager approvals and time entry. This section will cover the general design and small changes. Other sections of this guide will be devoted to the 3 key hero flows.

Login Screen
The login screen includes an area where you can plug in your company logo. If you have a custom logo for your site, it will appear where the Journyx logo is on the login screen. This is the only place a custom logo will appear. *Color customization of Journyx screens is no longer available in Journyx 12.*

New Profile Section
What was under the **Preferences** menu prior to Journyx 12 is now under your **Profile,** along with other information and features. Your profile is in the upper right corner of the site header and displays your name and initials. The profile menu that includes all the previous user preferences is under your name and initials.

The profile screen simply provides information about your account in Journyx 12, but we will be expanding this area to allow users to customize avatars and other opt-in notifications and settings.

If you have a custom link set up that shows in your site header, the link will now appear in the profile section.

New Help Section

What was under the Help menu prior to Journyx 12 is now under the question mark icon in the upper right corner of the header. The help area includes product documentation, access to the user community and knowledgebase, an option for a custom email link to contact your company administrator, as well as legal and general information about Journyx.

Sitemap and Navigation Menu Updates

Most of the changes to the Sitemap and menu navigation involved simplifying and consolidating the top level of menus. For example, the top-level menu for Leave was moved under the top-level Time menu. If you are using Journyx PX, the My Assignments screen was also moved under the top-level menu Time. The former top-level menu Approvals was moved under the top-level menu Manage. As mentioned in the previous two sections, Preferences and Help were moved to new locations outside of the main menu structure.

A number of the menu items have text changes. At the top level, **Management** has been changed to **Manage**, **Reports** has been changed to **Analyze** and **Configuration** has been changed to **Settings**. It is worth noting that **Timekeeping** moved from the old Users menu. It is now under Manage→Entry for others and is called "**User/crew sheets**". Most of the rest of the text changes should be self-explanatory.

All menus and submenus are viewable by hovering over the menu above it. So, you can hover to see all menu options and then click on the option that will take you there.

Miscellaneous

Many of the screens have been redesigned to use the "card' interface. The information on these screens appears in what looks like a white card with a title. Any card can be expanded or collapsed by clicking on the title. So, you can free up screen space for viewing other data by collapsing a card when you don't need it. The system will remember your last setting (provided you are using the same browser). Most of the search areas are in cards now, and you can collapse them when you are not using them.

User Experience Changes and New Features: Visual Reports and Dashboard

Journyx 12 includes a new screen referred to as the "manager dashboard". Anyone can use it to set up a dashboard, provided the user has the Access-Dashboard ability in his/her assigned role. You can adjust your custom roles to add the access ability under **Settings→Manage fields and roles→Customize system roles**. NOTE: If you use Journyx PX, your project managers may already have access to the dashboard. In this case, the old dashboard will be replaced with the new and improved one in Journyx 12.

Setting Up a Dashboard

After you have given users access to the dashboard via their Journyx roles, they can access the screen under the top-level **Analyze** menu. The dashboard will be blank initially, and users can click on the **Dashboard Settings** link in the upper right corner of the screen to start adding reports and approvals to their dashboards.

If the users are also sheet approvers, they can add a Pending Approvals card to their dashboards. This card will give them quick access to their pending sheet approvals, and they can review and approve sheets from their dashboard.

The real purpose of the dashboard is to show users the data they need to see and understand quickly to make decisions. Adding Report Type cards allows them to add custom visual reports to see exactly what they need for quick and easy consumption. Users can click on **Help** under the question mark icon while on the dashboard to see the documentation for the screen. The help for this screen outlines all of the options for report type cards and what they mean.

Users can experiment by adding cards under dashboard settings, saving those settings and reviewing the output on the dashboard. All cards on the dashboard can be edited or removed under settings. The display order top-to-bottom and left-to-right can also be controlled in settings by dragging and dropping cards into the desired order.

Source Reports for Charts and New Date Options

All of the new charts for visual reports in Journyx 12 use your existing standard reports in the system as the source data to generate the charts. So, you can start building visual reports right away based on the standard reports you already use.

You may want to adjust some of your standard reports to get what you want in your visuals (e.g., a field must be displayed in the source report if you want to select the field to rank/group the data in chart). You can edit these reports by going to the **Analyze→Run report** and clicking on the report name.

There is an additional new setting related to the date options for reports that allows you to choose if the periods in the report will come from the past, current or future dates. Prior to Journyx 12, all standard reports started with the current period and pulled dates from the past. You may want to revisit some of your scheduled reports that may currently contain more data than is required if you only need past periods. Likewise, you can now schedule forward-looking reports without having to enter the dates at runtime.

The source reports also include their own chart options that allow you to display a single chart to include in the output of the text/list report. These charts are independent of the charts on the dashboard that might use the same report as their source. Again, the dashboard section in our reporting help documentation explains the chart options in more detail.

User Experience Changes and New Features: Manager Approvals

Aside from the new option to view an abbreviated approval queue on your dashboard, manager approvals include two big improvements:

1. Managers can navigate from sheet to sheet in the sheet details view without closing the window and returning to the approval queue to view each sheet.
2. Managers who approve more than just timesheets (e.g., expense or some type of custom data) can view all of their pending approvals in one place.

When a manager clicks on the period dates to review a user's sheet, the approval window allows the manager to easily page through the sheets awaiting approval. In addition to the improved process and navigation, the sheet view offers some layout options for a cleaner-looking summary of the data with drill-down when needed. While the new sheet summary layout may not cover all use cases perfectly, we welcome feedback on how we can improve it to suit your needs. In the meantime, the View Full Sheet link on each summary sheet view provides you with access to the old grid entry screen with all details in the view.

The combined approval queue can be accessed under **Manage➔Approvals➔Approve sheets**. You can also get to this screen by clicking on the Advanced Search link on the dashboard Pending Approvals card. All types of sheets are included in this queue if you are a designated approver for those different types of data. However, if you are limited to time approval, the time type filter will be the only one you see. All of the filters have been updated to make it easier to search for the sheets you want to view. You can also reset the filters at any time.

User Experience Changes and New Features: Time Entry

Journyx 12 includes a new, more modern time entry screen. You can set up one of these new time entry screens by going to **Settings➔Customize entry screens➔Time entry screens** and selecting the "summary format" option. This new screen is the start of a process to roll all of the important use cases covered by other time entry screen types into this new screen. In Journyx 12, it covers entries by day summarized by project. Like the new manager approvals sheet view, there is also drill down to more detail on demand. In future releases, we will add project card and in/out time views that will allow users to move from one to another as needed.

If your users have roles that allow them to switch time entry screens under **Profile➔My settings**, you could assign users the new time entry screen and allow them to try it out, while maintaining access to their existing screen. Like the manager approvals summary view, we welcome feedback on your specific needs and use cases to improve the new screen. If you have custom tools for your time entry screens, we can work with you to assess if these tools could be ported to the new time entry screen.

While the new time entry screen lacks a few existing features (e.g., support for entry notes and attachments), it does include some features that the existing entry screens do not. It introduces a new section where users can set defaults for the layout and turn on tools that would be helpful to them. The settings are accessed using the gear icon in the upper right corner of the screen.

Users can choose to turn on a tool that automatically saves the timesheet as changes are made. When combined with the option to automatically load suggestions from third party sources, users can literally make the Journyx system fill out their timesheets for them. Additional tools and options will be added in the future to make smart time tracking a reality.

If you would like additional training on Journyx 12 or would like your site assessed for optimization, please reach out to your account manager to discuss options we have available.