



Journyx Mobile 12 for iOS

Journyx Mobile User Manual

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Overview

Introduction

Journyx Mobile allows you to use your mobile phone or device to fill out your timesheets and reimbursable expenses and submit them for approval when you don't have access to a computer. The app also provides manager access to time and expense approvals. Journyx Mobile requires you to have an existing Journyx account. You can get started with the app by connecting to your Journyx site using the standard way you login when using a browser.

System Requirements

1. The Journyx app connects to your Journyx site. Your Journyx site must be running versions **11.2.2, 11.5.2, 12.0.1 or later**. If Journyx hosts your site in the cloud, your site already includes the necessary updates for mobile app compatibility.
2. You must have access to a **Wi-Fi** or **cellular** network to use the app.
3. Your Journyx site must be **available to your mobile device like any other web page**. If your site is only accessible when you are connected to an internal network, you may need to work with your IT Department for VPN access for the mobile app when you don't have access to your internal resources.
4. Your site must have **SSL encryption**. If your site URL does not begin with "https", contact your Journyx company administrator to have SSL encryption added to your site.
5. **Azure and Okta single-sign-on** are supported in the app. Other methods for single-sign-on may be supported and require additional testing.
6. Your login account must include either **time entry, expense/custom entry, or you must be a designated approver in an approval plan** in order to access Journyx via the mobile app. "Super approvers" who have access to all approvals via Administrator rights cannot use the mobile app.
7. The minimum version for **iOS is 11**.


Installation and Setup

Installation of the Journyx Mobile app works like any other mobile app. Simply locate the app in the App Store from your device and install it. Search for the keywords “Journyx Mobile” to locate it quickly. The app is free.

NOTE FOR IPADS: While Journyx Mobile for iOS is not optimized for the iPad, it will run on the iPad without issue. When you search for Journyx Mobile in the App Store on an iPad, you will need to change the search options from “iPad only” to “iPhone only” in order to find and install the Journyx Mobile app.

After you install and open the app, you will be directed to a screen to enter your Journyx site information. In the Journyx Mobile Server field you enter the website address of the Journyx site you log your time in.

- If you are in the Journyx cloud (e.g., **mysite.apps.journyx.com**), you can simply enter **mysite** (where you replace mysite with the name of your company's site) and click Next.
- If your company hosts its own site and you go to a URL like this, <https://mysite.company.com>, your Journyx Server will be **mysite.company.com**.

 You do not need to enter the “https://” from your Journyx Server address. You will simply enter “mysite” for the Journyx cloud or “mysite.com” where mysite is replaced with the address for your own server. If your server address includes a port number (e.g., mysite.com:8080), you will enter the port number along with the address.

When you click Next, you will either see the screen for entering a username and password, or you will be routed through your single-sign-on process. Your username and password are the same as those you use in the browser (or to login to Microsoft/Office 365 and Okta for single-sign-on).

Single-sign-on takes you directly into the app. If you are not using single-sign-on and enter your username and password, click the Login button to start using the app.

When you login, you will be prompted to choose a home screen. You can change your selection later under Profile. Activity is generally a good starting point for time and expense entry. Dashboard includes sheets awaiting your approval if you are an approving manager.

Journyx Mobile Features

You can access all of the features available in Journyx Mobile using the menu at the foot of every screen. You may not see all of the options mentioned below. Your Journyx account settings determine what you have permission to do in the app. The following is a *quick start guide* for each menu option:

- **Dashboard**
 - This screen provides a summary of your time entry for the current period.
 - If you are an approving manager, it will also show any sheets for approval in your queue.
 - You can click on the approval queue to view individual user's sheets
- **Activity**
 - This screen shows you a summary, with access to details, of your daily time entries.
 - If you have access to expenses or custom, you can switch to the summary view for those.
 - Activity starts on the current day. You can click on other days to view the entries for those days.
 - You can scroll right on the date bar to view previous weeks. You can use the calendar icon in the upper right corner to return to the current date.
 - You can click on existing entries to edit them.
 - You can click on View Details below the list of your daily entries to see more information about those entries, edit them, and delete them.
 - The icons in the upper right corner give you access to submit your completed timesheets and expenses/custom sheets for approval.
- **Plus Sign**
 - The plus sign in the middle of the footer menu gives you the option to add new time, expenses and/or custom entries.
 - It defaults to creating an entry for the type and day that you are viewing in Activity.
 - If you want to add an entry for a different day, select the day you want.
 - When you click on the first select field (usually called the Project field), you will see your favorite "memorized" entries at the top, along with recently used entries, if you have any. Below your favorites and recents is your list of projects for selection.
 - You will only have to make selections if you have more than one option in the list.
 - You can enter time in decimal or HH:MM format.
 - You can attach a new or existing photo to a time, expense and/or custom entry.
 - You can add a note to a time, expense and/or custom entry.
- **Notifications**
 - This screen has notifications tied to your sheets that have not been submitted.
 - If you click on submission notifications, you will be directed to the screen where you can submit your outstanding sheets.
 - This screen will also show manager notices for sheets awaiting approval.
 - More types of notifications will be available soon.
- **Profile**
 - This screen contains various settings for the mobile app.
 - Your profile comes from our Journyx account.
 - You can change your home screen.
 - You can access the mobile app help center.

Time Entry

You use the Activity and Create Entry screens to enter and manage your time in the app. Activity shows you information on what you have already entered - summarized by day and week. The plus sign allows you to create new entries that will appear in your activity after you save them. As is true for browser entry, you can edit open and rejected sheets. You can only view the existing time for submitted and approved sheets.

Below is a list of the things you can do for time entry in the app and how to do them:

- **Create new time entries** – The plus sign in the menu at the foot of each screen is used to create a new entry. It will default to the day you were last viewing in Activity. If you need to enter time for a different day, pick the day to get started. After selecting the day, click on the first select list field to choose the entry details.
 - If you have created memorized entries in Journyx, you will see these in your favorites at the top. You can pick a favorite, or you pick a selection from the lists below favorites.
 - You may also choose from recent entries to quickly create a new entry.
 - If you do not want to use a favorite or recent entry, you can jump to the field list or search for a selection from the field list. The three dots at the top allow you to jump from favorites, to recents, to the field list itself quickly.
 - The time entry wizard will walk you through the remaining selections as needed.
 - After your selections have been made, enter the time amount in either decimal or HH:MM format.
 - If desired, you can enter a comment, attach a picture or add an entry note before saving the new entry.
 - After the new entry is saved, you can view and edit it on the daily view of the Activity screen.
- **Edit existing time entries** – You can edit an existing entry by going to the day of the corresponding entry on the Activity screen and clicking on the entry you want to edit. This will take you to the create entry screen where you can change the selected values, amount, attachments and/or notes and click save when finished.
- **View entries for other days/weeks** – The Activity screen will default to the current week. To view previous weeks, scroll right on the date bar. To return to the current day, scroll left or click on the calendar icon in the upper right corner. To view entries for a specific day, click on the day in the date bar. The selected day will appear in blue. *If you are assigned to an allocation time entry screen with a punch clock for tracking in/out times in Journyx, you will also be able to punch in/out on the Activity screen for the current day.*
- **Attach pictures from your phone** – When creating or editing an entry, you have the option to add a picture with the entry. When you click on the camera icon associated with the entry, you will be given the option to either take a picture with your device camera or select a picture already saved on your device.
- **Submit completed timesheets** – When you are ready to submit a completed timesheet, click on the clock icon in the upper right corner. The submission screen will show your recent open timesheets that are eligible for submission. Pick the date of the sheet at the top by clicking or scrolling left. Review the sheet and click Submit. If there are any errors that block submission, the app will show you what they are. You can then go back to the Activity screen to correct your entries and resubmit the sheet with corrections.

NOTE: If you are assigned to a time entry screen in Journyx that requires you to enter in/out times manually, you will need to continue entering these times using a browser. While you can enter your hours in the app, you cannot enter in/out times in the app. Support for in/out time entry will be available in a future release.

Expense/Custom Entry

You use the Activity and Create Entry screens to enter and manage your expenses and/or custom entries in the app. Activity shows you information on what you have already entered - summarized by day and week. The plus sign allows you to create new entries that will appear in your activity after you save them. As is true for browser entry, you can edit open and rejected sheets. You can only view the existing expenses/custom entries for submitted and approved sheets.

Below is a list of the things you can do for expense entry in the app and how to do them:

- **Create new expense/custom entries** – The plus sign in the menu at the foot of each screen is used to create a new entry. It will default to the day you were last viewing in Activity. Click on Expense to switch to expense entry create. If you need to enter expenses for a different day, pick the day to get started. After selecting the day, click on the first select list field to choose the entry details.
 - If you have created memorized entries in Journyx, you will see these in your favorites at the top. You can pick a favorite, or you pick a selection from the lists below favorites.
 - You may also choose from recent entries to quickly create a new entry.
 - If you do not want to use a favorite or recent entry, you can jump to the field list or search for a selection from the field list. The three dots at the top allow you to jump from favorites, to recents, to the field list itself quickly.
 - The expense/custom entry wizard will walk you through the remaining selections as needed.
 - After your selections have been made, enter the amount in decimal format.
 - If desired, you can enter a comment, attach a picture or add an entry note before saving the new entry.
 - After the new entry is saved, you can view and edit it on the daily view of the Activity screen.
- **Edit existing expense/custom entries** – You can edit an existing entry by going to the day of the corresponding entry on the Activity screen and clicking on the entry you want to edit. This will take you to the create entry screen where you can change the selected values, amount, attachments and/or notes and click save when finished.
- **View entries for other days/weeks** – The Activity screen will default to the current week. To view previous weeks, scroll right on the date bar. To return to the current day, scroll left or click on the calendar icon in the upper right corner. To view entries for a specific day, click on the day in the date bar. The selected day will appear in blue.
- **Attach pictures from your phone** – When creating or editing an entry, you have the option to add a picture with the entry. When you click on the camera icon associated with the entry, you will be given the option to either take a picture with your device camera or select a picture already saved on your device.
- **Submit completed expenses/customer entries** – When you are ready to submit completed expenses, click on the dollar sign icon in the upper right corner. The submission screen will show your recent open sheets that are eligible for submission. Pick the date of the sheet at the top by clicking or scrolling left. Review the sheet and click Submit. If there are any errors that block submission, the app will show you what they are. You can then go back to the Activity screen to correct your entries and resubmit the sheet with corrections.

Managing Sheets Awaiting Approval

If you are a manager in the Journyx system and are a designated approver of others' time and/or expenses/custom entries, you can view and approve sheets awaiting your approval in the app. You must be a designated approver in a sheet approval plan. Journyx Administrators and "super approvers" who have access to all approvals in the system cannot use the app to approve sheets at this time.

If user have submitted sheets that are awaiting your approval, they will appear in a quick list on the Dashboard screen. On this screen you can see summary information for the first few sheets in your queue. Then you can click on View All to see a list of all sheets awaiting approval. If you approve both time, expenses and/or custom sheets, you will see separate lists for each type of approval on the Dashboard.

After clicking View All to see the full list of sheets awaiting approval, you will start on a more detailed view of the first sheet (by user and period) in your list. You can review the summary. You can also click on specific days to look at the individual entries in more detail. If the entries have attachments or notes, you will see the thumbnails for those attachments and notes. A larger view for attachments will be available in a future release. You can click on the notes thumbnail to read the text of the note.

After reviewing a sheet, you can approve or reject it. If you reject a sheet, the app will prompt for a reason for rejection of the sheet. At any time you can also switch to another sheet for review by clicking or scrolling left/right through the names at the top.