

## Journeyx

Release: Endeavor

Version: 12.1.0

### Accessing New Features

This guide includes descriptions of new features in Journeyx and Journeyx PX version 12.1.0 (“Endeavor”) and is intended for existing Journeyx customers who are upgrading to the Endeavor release from Journeyx 12. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

**The Endeavor release is only available for cloud customers right now.** If you have additional questions about a feature, please contact your account representative or email [Journeyx Support](#).

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### New Features for Reporting

The Endeavor release includes a variety of new features to make Journeyx reporting easier and more powerful. From new report formatting and run-time settings to API key options to make 3<sup>rd</sup> party reporting connections more secure.

#### New Web Report Format

Prior to the Endeavor release, the default report format provided in **Analyze→Run report** was referred to as “HTML” format. This format has been replaced by the “web” format. The new web format includes pagination of report results, drill down into the details of sub-totals and search of the details in the report. This new format defaults to showing subtotal rows in summary. However, there is an expand/collapse all button in the upper right corner of this report type that allows you to see all details with the click of a button. Likewise, you have the option to select how many rows of data to show on the first page of the report. If you select “All”, the pagination will no longer be displayed because it will show all results on page 1.

The “web (printable)” format provides report output that looks like the discontinued “HTML” format. If there is a use case where the new web format is not ideal, the web (printable) format will provide the same layout as the discontinued “HTML” format.

**NOTE:** Under **Analyze→Schedule report**, you can email report output to others. While the web (printable) format can be sent as an attachment to the email, web format can only be sent as link. The link to the report will require the recipient to login to Journeyx to view it. Like any scheduled report that is emailed to others, the recipients will see the same (static) data that you see. It will not be filtered for the recipient’s roles and access. If you want to limit the data by roles and access, copy the report template to the recipients instead. Then the recipients can

run/schedule the report with the applicable data.

### **New Quick Access and Temporary Reset of Report Filters**

When you run a web format report under **Analyze→Run report**, there is a new calendar icon option next to the report dates at the top. This calendar icon gives you quick access to change dates or column filters in the report you are viewing. You can use this quick access to save changes to the report, rather than go to the full report modification screen and make/save changes there. However, it is the option to make temporary changes to dates and/or filters and rerun the report without saving changes that is new to this release.

If you make changes to dates or filters using the quick access and simply run the report without saving changes, you will see the changes in the report output after you click on Run. If you move back and forth through the date ranges of the report, the temporary changes will be maintained. However, the report will revert to its original settings after you leave the report output and come back to run the report later. These “run-time” settings allow you to see report data in different ways on demand without changing your underlying report templates.

**NOTE:** If a user is assigned to a role that is not allowed to modify reports, the run-time settings will not be available.

### **New API Key Security Options**

A broad-based option to generate and use API keys for third party connections to the Journeyx API was introduced in Journeyx 11.x. The Endeavor release includes new options for generating and managing API keys more securely.

Under **Settings→System settings→Security settings**, you can do more than just turn on the option to allow all users to generate API keys. In addition to turning on the option, you can also set the maximum number of days before an API key will expire. 180 days is the maximum number of days that can be selected, but you can also set the default to less than 180 days. If you have a use case that requires expiration after more than 180 days, please contact Journeyx Support.

Under **Settings→Manager fields and roles→Customize system roles**, there are also 2 new abilities and default roles for API key management. One role/ability allows you to use API keys when connecting with third party software. The other role/ability allows you to generate new API keys for use in third party systems. If you have users who have generated API keys in previous versions, those users will be assigned to the API Key Generate role when you upgrade to 12.1. You can always remove the role from the user after you upgrade. Otherwise, no users will get either of the API key roles/abilities unless you decide to assign them.

When a user has been assigned a role or ability to generate API keys, the user can do so under **My settings** under the user’s initials in the upper right corner. Users with the ability to generate API keys can also choose to make them even more secure by opting to make them “read-only”.

In this instance, the user can use the API key to pull data like reporting data from Journyx into a third party reporting tool, but the API key will not allow data to be written back to Journyx. Journyx recommends using the read-only option when data will not be passed bi-directionally. The user can also see other API key management details (e.g., when an existing key will expire) in this area.

## More Options to Choose Settings for Manager Approvals

Journyx 12 included a major update to the manager approval interface and experience. The Endeavor release includes new features to give managers more control over how to organize the information when reviewing users' timesheets.

On **Manager** → **Approvals** → **Approve sheets**, managers can now set the default number of search results for the approval queue and Journyx will retain the last setting. In Journyx 12, this queue would always default to 10 results. Now managers can set the number to what they prefer, and it will be retained. This retention of the last setting also applies to other new card-based parts of the user interface (e.g., web report output). Eventually all screens with search results will provide this option to choose and retain the default number of results to show.

When viewing individual sheets under **Approve sheets**, there are 2 new options that can be customized and retained for future use:

- The first is a check box to select the time format. The manager sheet view defaults to HH:MM format, but managers can click the check box for decimal format above the sheet grid. After the box is checked, the setting will be maintained unless the manager changes it later.
- The second is a selection list that determines what level of detail the manager sees for time entry data. While manual drill down from project to other details is still available, managers can also set a default level of detail to show. The default right now is to

summarize everything at the project level. However, managers can choose to show project + activity, project + activity + pay type, etc. Like the other settings, this setting will be retained from sheet to sheet or session to session unless the manager changes it later.

## New Options for Managing Time Entry Screen Suggestions

In the Endeavor release users can set up keyword- and phrase-based rules to automatically ignore suggested events on time entry by going to **My settings** under the user's initials in the upper right corner. If a user has turned on suggestions for Exchange calendar or some other third party source, the user can now control what events get hidden automatically. For example, the user may always include a specific phrase for vacation or a personal appointment, and the user can then create rules to block those events from being suggested for time entry. The events that are automatically hidden by these rules are still accessible under the list of "hidden suggestions"

(e.g., in the case where something is hidden but shouldn't be), but the user will not have to manually review and hide these if the rules hide them automatically.

### New Area for Reviewing System Notifications

Under the bell icon in the upper right corner, users can now review all system notifications that were previously shown as red numbers in the navigation menus. There are no longer red numeric notices in the menus for submitted sheets or leave requests. These have all been moved to the new bell icon. In addition to providing the same type of notice, you also have the options to review and dismiss the notices. Clicking on a notice takes you to the screen where you can review the data. Eventually, this area will incorporate email-based and other types of notices in a future release.

NOTE: You and your users may get one or two notices with big numbers (e.g., You have 125 approved sheets.) right after you upgrade. This is expected behavior, and you can simply clear those notices by clicking on the X next to the notice and continue using Journyx.

### Miscellaneous New Features

Previous versions of Journyx PX required administrators to choose at the system level whether to allow single or multiple user assignments per scheduled project. Single assignment (1 users can only be assigned to a scheduled task 1 time) was the default. Some customers opted for the multi-assignment mode where 1 user could be assigned to the same task more than once (e.g., for different date ranges).

In the Endeavor release, administrators can now choose single versus multi-assignment mode on a task-by-task basis. When you create a new scheduled project, you can pick your assignment mode and carry it down to all tasks under that project, or you can pick different modes for each task. The change to this behavior supports the use case where some projects are assigned for the entire duration, while others are planned on more of a recurring basis (e.g., monthly work allocations per user).

NOTE: After you have started making assignments to a task, you cannot change the assignment mode. Certain automation applies to each assignment mode type, and it requires "migration" to change from one type to the other after assignments are in use. If you run into a problem where an assignment mode change is needed after assignments are created, contact Journyx Support. In some scenarios we may be able to override the standard interface option and make the change.

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