

Journeyx

Release: Greenwich

Version: 12.2.0

Accessing New Features

This guide includes descriptions of new features in Journeyx and Journeyx PX version 12.2.0 (“Greenwich”) and is intended for existing Journeyx customers who are upgrading to the Greenwich release from Journeyx 12.1.x. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

The Greenwich 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](#).

Team Assignments Feature for Journeyx PX

The Greenwich release includes a major new feature for managing assignments in Journeyx PX through the addition of **team assignments**. The Teams feature allows you to create groups of users with shared characteristics for making preliminary "team assignments" to scheduled tasks before you have determined the individual(s) who will do the work. Team assignments are a great way to block off future resource capacity in a general way based on the types of resources you will need to work a particular task some time in the future.

Teams Management is located under **Manage>>Resources>>Manage teams**. After you have created a team or teams, you will then have access to assign the team(s) to tasks using the same screens/imports you use to make individual assignments. The teams include a name, description, list of users/members and groups*. The team members can be filtered based on required skills, location, function or any other user custom field information you choose. NOTE: User custom fields must be select lists or multi-select lists to be included in the user search criteria for Teams.

*The Journeyx group field for teams is used to determine access for other team managers. Under **Settings>>Manage fields and roles>>Customize system roles** you will see two new default roles, and the related collection of abilities, for managing teams. The *Teams Admin (Super)* role and ability give the account holder the ability to manage all teams in the system and choose any users in the system to be members of those teams. The Teams Manager role and add, modify, delete abilities give the account holder the ability to manage teams that are in the account holder’s groups. So, the group field on team management is used to limit team managers’ access to only the groups they manage.

When creating scheduled tasks and making assignments under **Manage>>Projects>>Manage**

scheduled projects, you will see your teams as assignable options along with individual users. When creating scheduled tasks, you have an option to choose which type of team assignment you want to allow that task (the setting can also be inherited from the summary task/parent project). The setting is labeled “Allow users to begin work on their Team assignments” and includes the options inherit, no and yes.

- The system will default to inherit from the “root” project, and the root project is set to no.
- If you stick with the default no inherited from the top level project, users with group access to the task will be able to start work on it and assign it to themselves when they log time. These are also referred to as “agile” or “self” assignments.
- If you change the setting to yes, no one on the team can log work against the task until the project manager changes the assignment from a team assignment to individual assignments. Hours/actual work cannot be logged against a team assignment.

In both the scheduled task assignment wizard and under **Manage>>Resources>>View resource availability**, you will see team availability and assignment - along with your existing individual assignment information. Team availability reporting is based on the aggregated availability of the members of that team. Then when it is time to do the work, project managers can convert the team assignment into individual assignment(s) or members of the team can "grab" the work and assign it to themselves depending upon the scheduled task setting discussed in the previous paragraph.

New search filters for showing the relationship between team and individual resource capacity are available on both task assignment and resource availability screens. You can choose to show only team assignments, only individual assignments, or both when making assignments or reviewing availability. You can also show how team is impacted by both team assignments and assignments to individuals on the team. On the flip side, you can see how future team assignments might impact an individual or individuals on that team. By default, the full team assignment is shown in a team member’s workload graph if you show team assignments in user workload. However, you can also turn on the option to divide the team assignment(s) evenly amongst the team members to view individual capacity that includes team assignments. These search filters provide you with the tools to view total future resource capacity without the need to make individual assignments.

Other teams/team assignment features:

- When teams are shown in the user interface, there is an associated link to quick report with a list of team members that pops up in a smaller window. By default, the user custom field Team Skills is shown in this report. If you would like to show different user information, you can go to **Settings>>System settings>>Assignment and resource settings** to change the information shown in the report.
- If team assignments are set to be “agile”/allowed for self-assignment, the team assignment will appear on the team members’ **My Assignments** screens during the period is scheduled to start/end.

- Team assignments are included under **Analyze>>Run report** in assignment reports and in the assignment feed for **Journeyx Reportlink**.
- A system report and standard import are available for teams.

For more information about team assignments and/or Journeyx PX, please contact your Journeyx account manager.

New Reporting Formats and Charts

The Greenwich release includes a new report format and chart type for more options to present your data in the ways that you need.

New Report Format - Grid Format

For time, expense and custom reports under **Analyze>>Run report** there is a new report option that allows you to organize your time/expense/custom data by user sheets in the report output. You can use this format by going to the “Report Output Options” while modifying a report. At that bottom of the list is the new option “Display output in grid format”. Turning this option on disables other options that do not apply. When you run the report, it will show time/expense/custom data grouped by user sheet for each period included in the report. It will also show report footer information (e.g., user email address, signature line) at the bottom of each sheet.

The option to display sheets in grid format in standard reports is intended to replace other methods for printing and/or saving user sheets. For example, printing the actual time entry screen from the browser will no longer be optimized. The standard reporting option for grid format is the preferred method for displayed sheets for printing and/or saving for future auditing.

New Chart Type – Multi-value Chart

When you modify most reports under **Analyze>>Run report**, you will see a new chart type under “Chart Options”. The new multi-value chart allows you to compare numeric fields or aggregate them using the bars of the chart. The chart can show bar graph data vertically or horizontally. It includes 2 display options for comparing numeric fields: side-by-side or overlapped. When using the overlapped option, you can hover to see the other bars when they are less than the primary bar. There are also 2 display options for aggregating numeric fields: waterfall and stacked.

You must have at least 2 numeric fields displayed in a report to compare or aggregate them in this chart. The order in which the bars appear in the chart is based on the order in which the fields appear in the report from left to right, so you can change the order in the chart by changing the order of the fields in the report. A common use case for comparing data is reporting on project actual work compared to project estimated work. A common use case for aggregating data is reporting on total project budget when the project budget is broken into components like labor cost and direct expenses.

Miscellaneous New Features

- Printable and “save to PDF” report options – Viewing standard reports in printable format and printing from the browser has been improved to remove white space and make the printable version cleaner/easier to print.
- Notifications – Performance of notifications has been improved and Journyx administrators no longer receive notifications that do not apply directly to them (e.g., approval notifications for other approvers).
- Approval plans and Org Chart Manager – If you are using Org Chart Manager, other users in the Journyx system will be blocked from creating approval plans manually in the user interface to avoid negating your Org Chart Manager configuration.

You can view the complete [change list for the Greenwich release here](#). If you would like additional training on the Greenwich release or would like your site assessed for optimization, please reach out to your account manager to discuss options we have available.