

Journeyx

Release: *Insight*

Version: 12.3.0

Accessing New Features

This guide includes descriptions of new features in Journeyx and Journeyx PX version 12.3.0 (“Insight”) and is intended for existing Journeyx customers who are upgrading to the Insight release from Journeyx 12.2.x. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

The Insight 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](#).

Accrual & Project Approval Management Screen Updates

The Insight release includes user interface updates to make more screens consistent with the style/technology of Journeyx 12. Management screens for accruals and project approvals have been given a face lift similar to the improvements made to sheet approval management in earlier releases of Journeyx 12.

Accruals Management is located under **Manage→User accounts→User accrual balances**. This particular screen was actually 2 iterations behind the latest UI in the rest of Journeyx, and it was pretty tricky to use. The overhauled screen works like the other version 12 management screens and includes a lot more helpful information related to accrual balances. Even if you use the Accrual Calculator in Journeyx to automate management of your balances, the accruals management screen has some useful tools for auditing the changes to each balance per employee.

Project Approvals Management is located under **Manage→Approvals→Approve project data**. If you use project approvals, you will see the overhauled interface for managing your project approval queue. While the information available in the queue is specific to projects, the functionality of the screen matches sheet approvals. Also, like sheet approvals, you can insert a project approval card on your dashboard under **Analyze→Dashboard**.

New Management Screen Customization (limited to updated screens)

The Insight release includes a new feature for customizing the fields shown in search results on Journeyx management screens. As an administrator, you can access this new feature under **Settings→Manage fields and roles→Manage search results fields**. For the Insight release, only

3 management screens are available for customization: Sheet Approvals, Project Approvals, and Accruals. Many more management screens will be available in the May and November 2021 releases.

This screen field settings feature allows you to choose which fields will be displayed by default for all users of the screen (“global settings”). You can add and remove fields, and you can change the order left to right. You can also control the label that is shown for each field and add tooltip information that the user can see when hovering over the label. All of these options allow you to set up default views for management screens that make sense for what your organization needs to see on those screens.

There is an additional option that allows administrators to give custom control to the end users of these screens (typically some kind of manager). While you as administrator might want to set the default for your company, you might also want to allow your managers to make their own customizations to some or all of these screens. The checkbox option “Allow all users with access to this screen to customize the fields shown” can be turned on or off for each screen. When you turn this on for a specific management screen, users of that screen will see a gear icon at the top of the search results that gives them access to a page similar to this one where they can manage the fields they see.

In all cases, users of these screens will only see fields to display that said users are allowed to see*. This applies to the fields managers would see when they are allowed to customize their own fields to display. It also applies to the default view you set. If you include a field on the default view that a user is not allowed to see, it will not be displayed on that user’s management screen in the search results.

*Field viewability permissions are based on the user’s roles.

New Time Entry Screen for Manual In/Out Times

In the original version of Journeyx 12, we introduced a new time entry screen called the “summary” time entry layout. This new screen was the first in three new views to offer more modern functionality on time entry. The summary or period view shows time rolled up to the project level in grid format. It shows a “summary” view that allows the user to drill down to see more detail.

The second view referred to as the “day” view is focused on capturing in and out times that correspond with the hours worked. While there are a number of different use cases covered by our various legacy screens for tracking in/out times (allocation manual, allocation punch, line item in/out, punch), the new screen is designed to eventually cover all of these cases on one screen based on the configuration options you choose.

For the Insight release, the time entry screen layout formerly known as “summary” under

Settings→Customize entry screens→Time entry screens has been renamed to the “multi-view” layout, and both period and day options are available to users assigned to this type of time entry screen. A user assigned to this type of entry screen will have the option to switch between the period view (summary grid with drill down) and day view (in/out time tracking).

For the Insight release, the new day view only supports what has been previously offered on the allocation screens with manual in/out time entry (enter start of your day, lunch break, end of day and allocate those hours to projects). However, we expect to expand the options on this view to support in/out time tracking with punch clocks and start/stop timers for capturing time related to distinct pieces

for work. The multi-view screens do allow you to decide if in/out time tracking is required. If you decide to require in/out times for a multi-view screen, the user will not be able to submit a timesheet from either period or day view without in/out times to match the daily hour totals (like the current allocation screens).

There are a bunch of cool drag and drop features for managing in/out times for the technologically adventurous, but there are also the equally powerful old-school keyboard shortcuts that allow for maximum efficiency in getting your data entered quickly. We would love some feedback on how best to display in/out time summary data for this view. Right now, you can look at all your in/out times for the period by clicking on Details below the particular day you are viewing.

Speaking of feedback, we would also be happy to help you with user testing for these new screens. They are still a work in progress, and having users try them out with real data doing the normal things they would do is the best way to get quality feedback on how to improve the user experience. While the old screen layout options are not going away just yet, we would like to make the new screens attractive enough to make you want to switch. Please contact Journeyx Support if you would like assistance in designing a new time entry screen test program for your testers/users.

Data Validation Rule Management Relocated

While this feature may not seem amazing to you, Journeyx Support and IT are absolutely thrilled that they no longer have to install and support something separate to give you the data validation rules you need. What was previously a separately installed tool called the Data Validation Tool is now standard functionality included in Journeyx. As a result, your options for managing data validation rules have moved to a new location. Data validation was previously available under the **Tools** menu. It is now managed under **Settings→Manage rates and rules→Manage validation rules**. All other screens, options and functionality have remained the same. The installation and location are the only things that changed.

More Granular Control of PX Agile/Self-assignments

For customers who use Journeyx PX, the Insight release includes more control over the process of Agile or self-assignments. Prior to this release users who were allowed to assign a PX task to themselves could not choose how much of the task work to assign. When they triggered the self-assignment by logging time to the task, ALL of the task work was included in the assignment to that first person to log time. If others logged time to the same task, the remaining work would continually get split as more users worked on the task.

The Insight release allows PX users who can grab work for themselves (either through group access or a team assignment) to choose how much work to include in the new assignment. So, a user could choose to assign only 50% of the task work to his/her assignment and leave the other 50% unassigned and open for others to grab. The process happens through a simple prompt that pops up when a user logs time to a task that (s)he is not already assigned to. There are 2 options: 1. Put all of the task work in the new assignment, or 2. Specify the scheduled hours for the new assignment. The prompt also includes an option to send a message to the project manager related to the new assignment.

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