Journyx

Release: Momentum
Version: 12.4.0

Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX version 12.4.0 ("Momentum") and is intended for existing Journyx customers who are upgrading to the Momentum release from Journyx 12.3.x. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

The Momentum release 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](#).

Project/Scheduled Project and Entry Column Management Screen Updates

The Momentum release includes more user interface updates to make more screens consistent with the style/technology of Journyx 12. Management screens for accruals, sheet and project approvals have been given a face lift in earlier releases of Journyx 12. In the Momentum release similar UI updates are included for project management, scheduled project management and entry column management.

Project Management is located under **Manage➔Projects*➔Manage projects**. If you have Journyx PX, you will also see updates under **Manage➔Projects*➔Manage scheduled projects.** These screens now have the latest in search filter options, including remembering your last search. The arrows that control the expand/collapse options for the project hierarchy now leave you where you were in the project list after expansion versus the previous screen refresh that always took you back to the top of the screen.

Entry Column Management is located under **Manage➔Entry column data**. These screens now have the latest in search filter options, including remembering your last search. There is also a new option to view multiple types of entry fields/columns on one management screen. You can filter by type or select a single type from the sub-menu to do the same. When you modify a particular entry column value, you will also see a new option to set/manage column dependencies. Prior to 12.4, column dependencies could only be managed via import files. This new screen allows you to set up or modify column dependencies in the user interface. NOTE: If you have never used column-to-column dependencies, please read the help documentation for this feature first and/or contact Journyx Support for assistance.

All of the updated management screens include the option to customize the fields shown in the search results. The gear icon is available to all administrators in the upper right corner of the search results. If you click on the gear icon, you can manage the fields in the results (add, remove, relabel, reorder). As an administrator, you can also set default fields for other users of the management screen and/or give other users access to customize the fields on their own screens.

All of the updated management screens that previously had batch modification options on the main screen now have that functionality through the Compare and Modify process. To make batch

modifications (e.g., the same change for a list of items), select the items you want to modify and click on the Compare and Modify button. On the next screen, you will see a button at the bottom of the screen labeled Batch Changes. Click on this button, and you will see the different options (e.g., groups, status) to make batch modifications to your selected items.

*This menu label can be renamed by you, so you may see something different if you have renamed the default project area.

Additional Entry Columns

For the life of the Journyx products, entry screens have always been limited to the project column, 3 other select list columns and one open text column. While Journyx recommends as best practice to keep entry screen tracking as simple as possible for your end users, we understand that sometimes there is a compelling need to track "just one more thing". So, under **Settings→System setting→Entry sheets** we have added a section where you can activate additional fields for entry screens. These new fields are not available until you turn them on in this section. If you activate a field, you can then rename it and include it on entry screen configurations for tracking on entry screens.

For each type of entry screen (time, expense or custom), you have 3 new select list fields and 2 new text fields. If you choose to activate a new field, you will need to go to **Manage→Entry column data** and populate the new field with values. Then you can go to **Settings→Customize entry screens** to create new screens that include the added field. Journyx recommends that you create new entry screens for added fields, rather than add them to existing screens that did not include them in the past.

NOTE: Journyx recommends that you test adding new fields on a test site. There is no way to populate all of your historical records with the new field data, so we recommend you review how the historical data looks in reports, etc. when adding a new field for tracking future data.

There are several areas where additional entry columns are not supported yet. These include: Journyx Mobile, record imports, record management, punch conversions, punch screens and Projectlink/Accountlink. If you have an immediate need for additional entry column support in one of these areas, please let your Journyx Account Manager know.

Accrual and Compensation Calculator Relocated

While this feature may not seem amazing to you, Journyx Support and IT are absolutely thrilled that they no longer have to install and support something separate to give you the accrual calculations you need. What was previously a separately installed tool called the Accrual and Compensation Calculator is now standard functionality included in Journyx. As a result, your options for managing accrual calculations have moved to new locations. Accrual and compensation calculator options were previously available under the **Tools** menu. They are now managed under **Settings→Manage rates and rules→Manage accrual calculations**, and **Manage→User accounts→User accruals** for options to run the calculations. All other screens, options and functionality have remained the same. The installation and location are the only things that changed.

Redesigned PX Workload Graphs for Ease of Use

For customers who use Journyx PX, the Momentum release includes the first phase of user experience update to the PX assignment process. This release, along with the next couple of releases to come, will include improvements to make the assignment process easier and faster. If you are interested in seeing the designs we will be using to implement these improvements, please contact your Journyx Account Manager. We would be happy to have your feedback on proposed designs.

For the Momentum release, we focused on the workload graph redesign and general cleanup of the data displayed on assignment screens. The color key at the top of the screens makes it easy to quickly look up what the color blocks on the graphs mean. Assignments are now always listed in chronological order from left to right, and the hover information contains more specific assignment data when you need to view it quickly. There is also a new view for managing very small and/or 0-hour assignments that were previously difficult to see and manage on the main workload graph.

Continuing improvements will focus on reducing the steps to create/edit an assignment, search shortcuts for the resources you manage regularly, more robust resource requisition workflow and better time entry using My Assignments.

API Keys for Others

Previous releases of Journyx have allowed individual users with the proper role ability to create and/or sign in using their own API keys for third party app access to Journyx.   The Momentum release includes a new role ability to manage API keys for other for stricter security. If a Journyx account include the ability to manage API keys for others, a new option will be available under **Manage→User accounts→User API keys.** On this screen an administrator or manager can create API keys for others, view existing keys and delete them if necessary. While your users of API keys will still require the ability to sign in with the keys, you can remove the end user ability to generate their own keys if you wish someone to manage these more centrally. NOTE: API key managers cannot see a user's actual API key. Only the end users can see the actual key content that was generated for them. This is similar to user password where managers of passwords cannot see the actual passwords.

Time-Phase Data in Matrix Reports

Matrix reports include new options to group your data by recurring time periods. Under **Analyze→Run report** you can create or a edit a matrix report and manage these new options under Report Output Options. Z These new options allow you to add a grouping to the report by date. You can add the date grouping in either the columns or the rows. You can group by weeks, months, quarters or years. You can also subtotal by each date grouping.

Miscellaneous Features

Under **Profile and settings→My settings** there is a new area for the Mobile App. There is a new option in the Momentum release to use your time entry screen default values in the mobile app to quickly create new entries. While not everyone has a time entry screen where default values can be used (e.g., your lists default to *select one*), those who can save to the default values can turn on this setting to make mobile time entry faster. Administrators can also turn this setting on for specific users with user imports. Please contact Journyx Support for more information on using the imports to turn this setting on for specific users.

Under **Manage→Approvals→Approve sheets** the individual sheet views now include daily totals. In previous releases they only included totals for the period.

A number of bugs were also fixed the Momentum release, and you can view the complete change list for the Momentum release here. If you would like additional training on the Momentum release or would like your site assessed for optimization, please reach out to your account manager to discuss options we have available.