

## Journeyx

Release: Pathway

Version: 12.6.0

### Accessing New Features

This guide includes descriptions of new features in Journeyx and Journeyx PX version 12.6.0 (“Pathway”) and is intended for existing Journeyx customers who are upgrading to the Pathway release from Journeyx 12.5.x. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

**The Pathway 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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### User Management Screen Updates for Journeyx

The Pathway release includes more user interface updates to make more screens consistent with the style/technology of Journeyx 12. In this latest version the user management screens have been updated to be consistent with other updated management screens in v12, and they include improvements to the workflow for creating and managing users that dramatically improve the user experience and system access security.

User management is located under **Manage→User accounts→Manage users**. This screen now has the latest in search filter options, including remembering your last search. 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.

\*This should be a valuable feature for those of you who don’t use expense and/or custom entry in Journeyx. Using the new field customization feature on the main user management screen, you can remove all of the unused information for expense and custom entry that is currently shown in the default user search results. You can then add back user information that is more useful for your organization. Don’t forget that you can also control the fields displayed in search results for projects, accruals, entry columns and approval queues as well.

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 users 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, roles) to make batch modifications to your selected users.

On the user create/modify screens you'll notice that the fields have been reorganized based on the subject matter they cover. Of particular note is the change to fields for managing passwords. The password set/reset is now in its own popup screen where it will let you know if you've met your Journyx password security requirements as you create passwords. For those of you who use single sign-on for Journyx access, this password field would only apply to accounts that will need to bypass SSO to access Journyx. On-screen messaging is now available to assist with proper password management based on your Journyx password settings.

In order to support more robust password management for user, Journyx has added some new password security options under **Settings→System settings→Security**. We encourage you to review the default values for the new settings and make sure they are a good fit for your password security processes. The following is a list of new password security options with explanation:

- *When a new user is created, their default password for first sign-in is the same as their username. If this is off, there is no default password and the user can't sign in until a password is set. (Recommended: OFF)* – As the setting text indicates, we recommend that you leave this setting turned off in production environments. This setting is primarily for secure testing.
- *Required password strength (general complexity)* – This is a new setting that was previously used to measure the strength of user passwords as they entered them, but it could not be enforced. Now you can use this option to enforce password complexity and block new passwords that don't meet your security threshold. **The default threshold for this setting starts at Medium. We encourage administrators/system testers to try out various password changes to determine what level of security is right for your organization.**

NOTE: The new password settings will be set to default values based on Journyx minimum security recommendations and best practices. If you notice a change to your password process after creating a new user in v12.6.0, please contact Journyx Support for assistance with your password settings and process.

## Resource Requisition Management Screen & Workflow Updates for Journyx PX

The Pathway release includes even more user interface updates to make more screens consistent with the style/technology of Journyx 12. In this latest version the resource requisition screens in Journyx PX have been updated to be consistent with other updated management screens in v12. The updates also include improvements to the workflow for splitting requisitions amongst several managers and control over notifications for a more robust process.

Resource requisition management is located under **Manage→Resources→Manage requisitions**. This screen now has the latest in search filter options, including remembering your last search. 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.

Prior to the Pathway release, you could only create a requisition for a single resource manager. Now you

can split a single requisition amongst as many resource managers as you choose. When you select more than one resource manager and click the Save button, a dialog box will pop up that allows you to split the scheduled hours/work associated with the requisition across the list of selected managers in any amounts you like. Visual cues ensure that you assign the same total hours as the original requisition.

In the Pathway release you also have more control over notifications and content of the notifications triggered by actions take on requisitions. You can turn on notifications and customize the notification content by going to **Settings**→**System settings**→**Resource requisitions**.

## Request Leave on Behalf of Others & Leave Duration Limits

If you are assigned to a role where you can manage leave for others (e.g. view/approve leave requests), you can now go to **Analyze**→**Leave calendar**→**All leave requests** to request leave on behalf of those you manage provided your Journyx administrator has turned on this option.

Administrators can turn on the option to request leave for others by going to **Settings**→**System settings**→**Leave requests**. The setting “Allow managers to create leave requests for employees” adds a section to the foot of the leave request management screen for those who have access to approve and manage leave for others. After selecting a user on this screen, managers will then see the leave request create options that the selected user would also see, and they can create the request on behalf of the user.

In addition to the option to create requests for others, there are two new options for managing the duration of leave requests created by users and managers. Under **Settings**→**System settings**→**Leave requests** you can set the maximum number of days to warn users about a long leave request by turning on this setting: “Warn users if they try to create a leave request longer than a certain number of days”. Just below this setting you can also set a maximum number of days before blocking creation of a request by turning on this setting: “Prevent users from creating a leave request longer than a certain number of days”.

## Payroll Rules Engine (PRE) Incorporated in Journyx Core Product

If you are an Administrator of the Journyx system, or you are assigned to a role with the new Payroll Export- Admin ability, you can now go to **Analyze**→**Exports**→**Payroll data** to set up your payroll rules for processing and export. The “PRE” was previously a separate add-on delivered by Journyx Professional Services. In v12.6.0, it is now incorporated into the core Journyx product. As a result, it no longer appears under the **Tools** menu where other Professional Services add-ons are typically found.

While a lot of information was cleaned up and standardized, the features and options are mostly unchanged. Error handling was improved, and there is a new option to ignore pay groups that aren’t set up/configured correctly so that you can run the payroll export for the groups that are ready. There is also another new role ability, Payroll Export – User, that allows someone with a role that includes the ability to run the payroll export. However, it will not allow them to change the payroll rule configuration.

## New Full Sheet View Option in Manager Sheet/Project Approvals

If you are a sheet/period or project approver, you can now go to **Manage→Approvals** to see a third options for viewing sheets. Prior to v12.6.0, your two sheet view options were “Comments” (a project summary view) and “Days” (time totals shown by project and day). Now approvers can choose a third view, Full Sheet, as their default view\* for approvals. This new view loads the detailed grid view (including in/out times, notes, attachments, PRE summary, other custom information) in the approver sheet view window. While the link to the Full Sheet is still available, this new view will replace the need to click through to the full sheet in most cases.

You cannot set the default view for your approvers. Journyx recommends that you alert your organization’s approvers that this new sheet view option is available.

## Miscellaneous Features

- **Ability to search using custom text fields:** Prior to v12.6.0, the only custom text fields available to include in management screen searches were fields set up as selection list fields. Basic/static text fields were not an option for management searches. With the updates to the user management screen, static text fields are now available for inclusion on management screens under **Settings→Manage fields and roles→Manage search filters**.
- **Layout fix for approval system reports for multiple levels of approval:** Prior to v12.6.0, the approval system report available under **Analyze→Exports→System reports** did not list multiple approvers in a plan on distinct lines. Now each approver has a dedicated line for the approval plan information based on the level assigned.
- **New chart options to control how much data is shown:** Prior to v12.6.0, all charts in Journyx were set to show a certain threshold of data points before the remaining data was summarized into an Other category. Now you can decide how much data you want to show in a single chart, and you can also view large data sets in a paginated format for more control over how you view your visual data.
- **Load time/search time improvements for project and other management screens:** The Pathway release includes continued load time and performance improvements for handling large data sets on the new, redesigned management screens.
- **New calendar availability graphs on PX resource availability:** In 12.6.0, the old style calendar availability graphs on **Manage→Resources→Resource availability** have been replaced with the new, easier-to-read calendar graphs that are also available on the assignment managements screens.
- **Actual hours field added back to PX assignment management:** In 12.6.0, the Actual Hours field for unassigned and existing assignments was added to the new assignment management screens.

A number of bugs were also fixed in the Pathway release, and you can view the complete [change list for the Pathway release here](#). If you would like additional training on the Pathway release or would like your site assessed for optimization, please contact your account manager to discuss options we have available.