

## Journeyx

Release: Vision

Version: 12.7.0

### Accessing New Features

This guide includes descriptions of new features in Journeyx and Journeyx PX version 12.7.0 (“Vision”) and is intended for existing Journeyx customers who are upgrading to the Vision release from Journeyx 12.6.x. If you are upgrading from an earlier version, you will also need the guides for earlier versions.

**The Vision 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](#).

---

### Company Leave Calendar for All Employees

The Vision release includes a new default role and role ability for universal access to a company leave calendar. The new view shows all approved leave for everyone in the Journeyx system. The information does not contain any entry details or potentially sensitive information contained in the leave requests. It simply shows who has approved leave and for how much time each day.

If you typically assign your users to multiple roles to give them access to areas of the Journeyx system, you can go to **Manage**→**User accounts**→**Manage users** and add the “Company Leave Calendar” role to existing roles for any users who you want to give access. You can also run a user import to make the changes if there are too many users to update easily in the web interface.

If you have built custom roles that allow you to assign only one role per user, you can change the definitions of your custom roles to add the ability “Access-Company Leave Calendar”. To change your custom role definitions, go to **Settings**→**Manage fields and roles**→**Customize system roles** and select the roles you want to edit. Then add the “Access-Company Leave Calendar” ability to the existing ability list for those roles. Anyone assigned to the updated role will gain access to the company leave calendar.

Those with the role/ability to view the company leave calendar can navigate to it under **Time**→**Request time off** menu or the **Analyze**→**Leave calendar** menu. Navigation is also available in the **Sitemap**.

### My Favorites (f/k/a My Projects) for All Entry Columns

The Vision release has taken the historically popular “My Projects” list and applied it to all the other entry columns on entry screens. The feature was been renamed “My Favorites” in 12.7 because it no longer applies exclusively to the project select list.

My favorites is managed under **Profile and settings**→**My favorites**. Any users who track time, expense, equipment or other custom entries can use this feature to manage long select lists on their entry screens. In versions prior to 12.7, there were two options under **Profile and settings** (the round avatar with your

initials in the upper right corner of every screen): **My projects and My access**. Those two options have been combined into a single **My favorites** option. Under My favorites, you can see all of the items you have access to in each entry select list, and you can use that list to choose your favorites to show at the top when choosing selections on your entry screens. **My favorites** indicates the favorites you've selected with star icons at the top of the search results. You also have new options to filter and search for specific items when choosing your favorites.

As was the case for **My projects**, **My favorites** also includes a numeric visual indicator on the entry screens. Next to each column name there is a number that indicates how many items are in your favorites list for that column. If the number is 0, you have no favorites selected. You can also click on these numbers to select or edit your favorites for the selected column.

**My favorites** now appear at the top of all search results when you search for a selection in any given column. Consistent with the set up interface, they also appear with star icons next to them for easy identification.

## Standard Report Improvements for Information and Layout Defaults

Standard reports accessed under **Analyze→Run report** include two new improvements in the Vision release. The first improvement is the inclusion of additional fields for reporting "Accrual" reports. Accrual reports now include an option to display fields related to the accrual balance configuration. For each accrual, you can show the hard limit and warning settings. This information appears in the summary line for each user/accrual combination. This information can be helpful for validating your accrual balance configuration.

The second improvement gives you more control over the view and layout of individual reports at run time. In an earlier version of Journyx 12, we added the general option to expand and collapse report details when viewing reports. However, the default at run time for any given report would depend on your setting for the last report you viewed. In version 12.7, you can now set a default for each individual report so that some reports can default to a summary (collapsed) view, and others can default to a detailed (expanded) view. One thing to note, if you manually change the default (e.g., expand a collapsed report) and leave it that way, the report settings will be updated to the way you last viewed that individual report.

## New Notes View in Summary of Sheet/Project Approvals

If you are a sheet/period or project approver, you can now go to **Manage→Approvals** and add the "Entry Notes" field as an option for your approval search results. In the upper right corner of the search results, there is a gear icon\* that allows you to add/remove fields from the results. You can search for "note" and select the "Entry Notes" field to add to your view.

After you have added the Entry Notes field, you will see a link on each line of the search results with the number of entry notes for a given sheet or project entry. If your processes include required review of sheets/project approvals that include notes, you can sort on this field to pull all sheets with notes to the top of the search results. This makes it easy to then pull up the sheet details and review all sheets with notes quickly. The notes link is also clickable without opening the individual sheets, and it shows a

summary of the notes associated with the sheet/project approval.

\*If you are a manager and do not see the gear icon, you may have to ask your company's Journyx Administrator to add the field for you or give you access to add the field on your own.

## Automatic Sheet Processing (ASP) Incorporated in Journyx Core Product

Automatic Sheet Processing is a powerful automation tool for populating, approving and finalizing time and expense data for period close out and transfer to other systems and sources. It is also a useful tool for cleaning up old, incomplete sheets and approvals to de-clutter your screens and improve performance.

Prior to 12.7, the "Automatic Sheet Processing" tool was a Professional Services option under the **Tools** menu. Now, it is available as an optional, additional-cost module in the Journyx core product. It requires a special license key for access, and Journyx Professional Services will assist with assessment and configuration.

While a lot of information was cleaned up and standardized, the features and options are mostly unchanged from the previous Professional Services tool offering. However, support for automating project approvals was added with this release. The original tool only provided automation for sheets approvals, but there are options to do both now.

NOTE: If your company already has the ASP tool, you will receive a license key update so that you can continue to access it. The new menu location is **Manage**→**Entry for others**→**Auto sheet processing** and Journyx Support can assist with how to grant access to those who will be running it. Your current settings will be migrated to 12.7.

If you are interested in learning more about what ASP can do and/or you're not quite sure if it would be useful to you, the Director of Product will be holding a customer working group in mid-December to review common use cases and solicit feedback on planned future improvements. Please feel free to contact [meredith@journyx.com](mailto:meredith@journyx.com) if you would like to receive an invitation to the ASP customer working group.

## Miscellaneous Features

- **Additional column tracking available in Journyx Mobile** - In Journyx version 12.4 additional tracking column options were added for time, expense and custom entry. At that time Journyx Mobile did not allow users and approvers to use/view those additional columns. Journyx Mobile 12.6, available in the App Store and Google Play, now includes support for entering and viewing additional columns.

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