

# Journyx & Journyx PX 11.1.0

## Accessing New Features

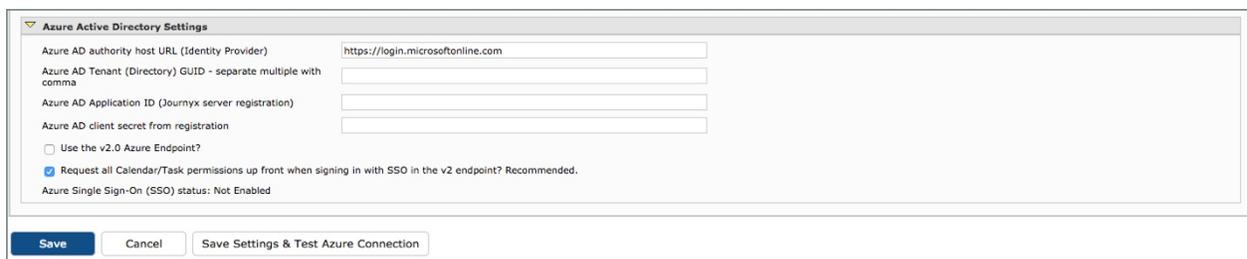
This guide includes descriptions of new features in Journyx and Journyx PX 11.1.0 and is intended for existing Journyx customers who are upgrading to version 11.1.0 from version 11. If you are upgrading from an earlier version, you will also need the guides for earlier versions. If you have additional questions about a feature, please contact your account representative or email Journyx Support at [support@journyx.com](mailto:support@journyx.com).

## Suggestions for Exchange Calendar and Tasks on Time Entry

Suggestions allow you to load entry suggestions on your timesheet based on data in other applications that you use to do your work throughout the day. Data such as Microsoft Exchange/Office 365 calendar events or tasks can be loaded as suggestions on your timesheet for editing and saving as time entries. Suggestions will include project/activity/etc. selections based on the descriptions in the data. At first the suggested selections may not be that accurate, but the system will learn to make more accurate selections in the future based on your changes. NOTE: Suggestions are only supported on grid-based timesheets. They are not supported on line item timesheets where the date of the entry is chosen from a select list.

If you want your users to be able to load calendar events and tasks from Exchange/Office 365, you will need to set up your Microsoft Azure authentication first. You will need to work with your staff in IT who administer your Exchange Online/Office 365 service with Microsoft. Your IT staff will need to gather some information from your Office portal and register your Journyx site URL in order to connect Journyx with Exchange calendar and tasks.

You can enter your Azure credentials in your Journyx system by going to Configuration → Security Settings → Azure Active Directory Settings. If you click on the Help menu for this page, there are detailed instructions for setting up your connection to Azure.



### Azure Authentication Settings

After you have set up and successfully tested your connection with Azure, you can grant users access to Suggested Entries by turning on the section for their timesheets. Access is based on the time entry screen that is assigned to each user. You can turn on suggestions for specific time entry screens by going to Configuration → Entry Screens → Time Entry Screens. You can edit a time entry screen by clicking on the name. There are options on the right side of the time entry edit screen that allow you to turn the options on and off. The new option for suggestions is called “Use Suggested Entries from calendar”.

Configuration → Entry Screens → Time Entry Screens → Modify

Time Entry Screen configuration allows you to customize timesheets for your users.

Copy the settings of screen: Allocation Entry - In/Out Times Load

Name: Standard Time Entry Grid

Grid format

- Display in/out times at the top of the entry screen
- Manually enter the in/out times
- Press a button to populate the in/out times
- Press a button to populate the in/out times and create default time entry

Entry format

Enter time as: hours worked

Enter time with: dropdowns

5 minute increments for dropdowns

Default time period: weekly

Time entry format: Either

Clock format: 12 hour (am/pm)

Display days in ascending chronological order

Number of blank entries to display: User Preference

Allow file attachment uploads?

- Do not allow file uploads.
- Allow unlimited file uploads
- Allow uploads; number of attachments allowed per period: 7

Allowed file attachment types: Images and PDF documents only

- Add this screen to all new groups
- Total hours as they are entered
- Show Project descriptions in dropdowns
- Show Project tree in the Project column
- Show memorized entries
- Use Suggested Entries from calendar
- Allow users to view past periods
- Allow users to view future periods
- Use entry field notes
- Apply Dependencies to hidden columns?
- Use customized names for Entry Columns

### Suggested Entries option for time entry screens

After you have turned on suggestions for a particular time entry screen, any user with access to that time entry screen and a Microsoft Office 365 login can use them. Users with access to suggestions will see a green area at the foot of their time entry screens where they can connect Journyx to their Office 365 portal account. If the user is already logged in to the Office portal site in another browser tab, the connection will be automatic after the user clicks on the “Link this account...” button. If the user is not logged in to the Office portal, clicking the button will take the user to a login screen for your Office portal.

Project (0)	Activity	Pay Type	Bill Type	Comment
▼ New Entries (1) U...				
- Select Project	G&A	Regular	Unbillable	default
This account is not yet linked to Microsoft Office 365.				
Link this account to Microsoft Office 365				

### Button on time entry to link to Office 365 account for suggestions

Users can also manage their settings for suggestions under Preferences → Entry Screens. They can turn suggestions on and off and control whether or not they load automatically. They can control the appearance of help content, and they can link or unlink their Office 365 accounts.

Preferences → Entry Screens ↓

Entry screen preferences contain the personal default settings for your timesheets, expense sheets, and custom sheets.

**Entry Screen Preferences**

On the Leave Management Calendar, limit the displayed requests to those I am authorized to approve

Show a 'Previous Entries' section based on the entries from up to  period(s) back (max. 4)

Maximum number of items in selection drop downs:

Number of blank entries available on each screen:

Hide declined requests on leave calendar

**Suggested Entries**

Show Suggested Entries on Entry Screens when available. Includes Exchange Calendar and Tasks.

Automatically load Suggested Entries as New Entries when available.

Show a tutorial dialog for Journyx Suggestions.

**Microsoft Office 365 Identity**

This account is not yet linked to Microsoft Office 365.

### *Preferences for managing link to Office 365 account for suggestions*

Users have a variety of options for learning how to use suggestions. After a user has turned on suggestions, a popup window with an overview for suggestions will appear on the time entry screen. Included in the window are links to more detailed written help and a demonstration video. The detailed written help documentation can be accessed using the in-product help menu for the time entry screen.

If you would like to see a demonstration on how to use suggestions, you can [view a quick demo here](#) or contact your account representative for a full demonstration.

## Other New Features & Improvements

- Under Management → Users → Timekeeping, you can do crew-based entry for multiple users at once – entering work and holiday/leave time for an entire group in a single step.
- Under Configuration → Policies → Manage Rules and Policies, there are a number of new options to improve the flexibility and power of rate rules.
  - There is a new screen for setting up Rate Codes. These codes can be used in place of hourly rates when applying rules to specific time entries. These codes provide added security in the event you don't want to store your hourly rate data in Journyx, or they can also provide a way to match up rate data with other systems.
  - There is a new option to filter on a subset of the records to which a rule is applied and treat them differently. This option is available when you are creating or editing a rate rule.
  - There is a new option to use in/out times from line item or punch time entry screens when applying rules. (This option is not supported for Allocation Time Entry screens.)
  - To turn on the “filter by subset” or “use in/out times” features above, go to Configuration → System Settings → Server and Email → Rules and Policies Settings.
  - **NOTE:** We highly recommend that you work with the Journyx Professional Services team if you want to set up and use these new rate rule options.
- Under Configuration → System Settings → Project Settings, there are new options to set the default project availability for specific entry screens. These defaults will be used when creating new projects un the user interface or via imports.
- When Journyx PX creates automatic assignments based on an unassigned user who logs time against a scheduled task, it will now split the scheduled work amongst the users as more users log time and are assigned. Prior to 11.1.0, the first user to log time was assigned all of the scheduled work for the task, and subsequent users were assigned 0 hours.

For more information about Journyx or Journyx PX 11.1.0, please contact your account representative at +1 800-755-9878 or [sales@journyx.com](mailto:sales@journyx.com).