

# Journyx & Journyx PX 11.2.0

## Accessing New Features

This guide includes descriptions of new features in Journyx and Journyx PX 11.2.0 and is intended for existing Journyx customers who are upgrading to version 11.2.0 from version 11.1.0. 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).

## User Compliance Report as a Standard Report

The User Compliance Report was located under Approvals→Compliance→User Compliance prior to v11.2.0. It was originally designed as a one-off report and did not include a lot of the options available for report types under Reports→Standard Reports. In this version, the report has been moved to standard reports and is listed as a new report type. It includes all of the relevant options that other standard reports offer, including the option to pick run dates, save multiple versions of the report, and schedule and email the report.

[Reports](#) → [Standard Reports](#) → Modify User Compliance Report (User Compliance Report)

Standard reports provide information about the hours, Expense and Custom logged by users in relation to Projects, Activities, Pay Types , Bill Types, etc.

▶ **General Report Options**

▼ **User Compliance Report Options**

Show which kind of data?

Show which users?

Show only users with active Approval Plans and Time entry capability

Show dates in long format, e.g. Thursday, June 28, 2018 instead of 06/28/2018

▶ **Report Filters**

▶ **Fields to Display**

▶ **Run Report Options**

*Set up screen for user compliance report under standard reports*

## Additional Fields for Inclusion in Matrix Reports

Under Reports → Standard Reports, you can set up matrix type reports. In versions prior to v11.2.0, matrix reports allowed you to display 1 field/data point in the columns and 1 other field/data point in the rows. In this version you can now choose up to 3 fields for columns and 3 for rows.

[Reports](#) → [Standard Reports](#) → Modify Total Hours by Project and User Report (Matrix Time Report)

Standard reports provide information about the hours, Expense and Custom logged by users in relation to Projects, Activities, Pay Types , Bill Types , etc.

▶ **General Report Options**

▶ **Report Filters**

▼ **Report Output Options**

Show percentages

Show subtotals

Column headings (#1): User Custom Fields | Department

Column headings (#2): Time Record Fields | User

Column headings (#3): None | None

Row headings: #1 Project Fields | Project Name

Row headings: #2 Time Record Fields | Activity

Row headings: #3 None | None

Show dates in long format, e.g. Thursday, June 28, 2018 instead of 06/28/2018

Show users's column names from Entry Screen Configuration.

Additional header HTML: Total Hours by Project and User Report

Additional footer HTML: Total Hours by Project and User Report

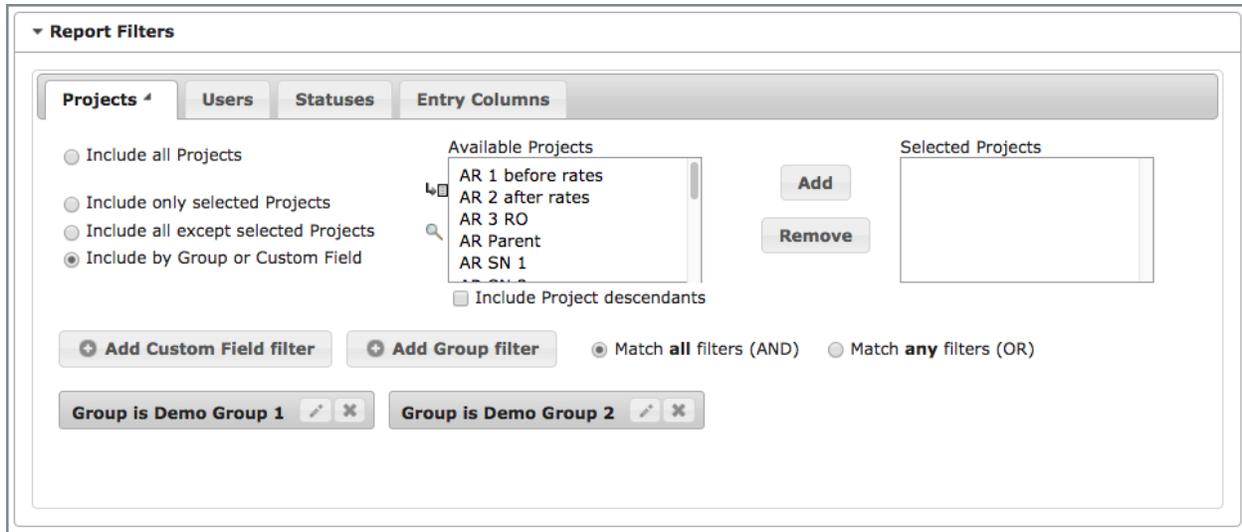
▶ **Run Report Options**

**Save and Run Report** Save Cancel

Set up screen for matrix report under standard reports

## Group Filtering and Date Formats for Standard Reports

Under Reports → Standard Reports you can now set up and save group filters for the various fields available in each report. Prior to v11.2.0, you could search for field values that belonged to a selected group and put those values in the report filters. However, the filters were not dynamic based on changes to the originally selected group. All reports also have a new option to choose between long and short date format for report output.



The screenshot shows the 'Report Filters' configuration for the 'Projects' field. It includes radio buttons for 'Include all Projects', 'Include only selected Projects', 'Include all except selected Projects', and 'Include by Group or Custom Field'. An 'Available Projects' list contains 'AR 1 before rates', 'AR 2 after rates', 'AR 3 RO', 'AR Parent', and 'AR SN 1'. A 'Selected Projects' list is currently empty. There are 'Add' and 'Remove' buttons between the lists. Below the lists are buttons for 'Add Custom Field filter' and 'Add Group filter', along with radio buttons for 'Match all filters (AND)' and 'Match any filters (OR)'. At the bottom, two filter rules are displayed: 'Group is Demo Group 1' and 'Group is Demo Group 2', each with edit and delete icons.

*Group filtering options for report fields under standard reports*

You have the option to set up group filters that show values in any of the groups selected, or you can require that the report only show values that are in all of the groups selected. If you select multiple groups in a single group filter, the any filter will apply. If you set up a group filter for each group, the all filter will apply.

## New Tools for Project-Activity Rate Management

You can access the project-activity rates set up under Management→Project-Activity Rates. Your names for the Project and/or Activity fields may be different. In v11.2.0, there are some new features that make it easier to populate and manage project-activity rates.

The first new feature is a project setting that allows you to populate project-activity rates for a project parent and automatically create those same rates for child projects/tasks underneath the parent. So, once you have created the project-activity rates for the parent, the children/tasks will automatically have the same rates applied. The project setting is available under Management→Projects or Management→Scheduled Projects (for PX) when you create or edit a project. The setting is called “Copy project-activity rates to children”. This setting is also available in project imports and the Journyx API for integrations with 3<sup>rd</sup> party systems.

Name:	<input type="text" value="AR Parent"/>	Status:	<input type="text" value="Reportable Only"/>
Description:	<input type="text"/>	Parent:	<input type="text" value="root"/>
Owner:	<input type="text" value="None"/>	Backup owner:	<input type="text" value="None"/>
	<input type="checkbox"/> Update all descendants with owner changes	Percent complete:	<input type="text" value="0.00"/>
Total estimated hours:	<input type="text" value="0.00"/>	Children:	AR Parent has <a href="#">6 Projects</a> directly under it. Create a <a href="#">new child Project</a>
Availability:	<input checked="" type="checkbox"/> Available for Time Entry <input checked="" type="checkbox"/> Available for Expense Entry <input checked="" type="checkbox"/> Available for Custom Entry <input type="checkbox"/> Available for Leave Requests <input type="checkbox"/> Available for Holidays	Groups:	<input type="text" value="Demo Group 1"/> <input type="text" value="Demo Group 2"/> <input type="text" value="Demo Group 3"/> <input type="checkbox"/> Add this Project to all new Groups
Project-Activity Rates	<input checked="" type="checkbox"/> Copy to children	Created by:	meredith (meredith)

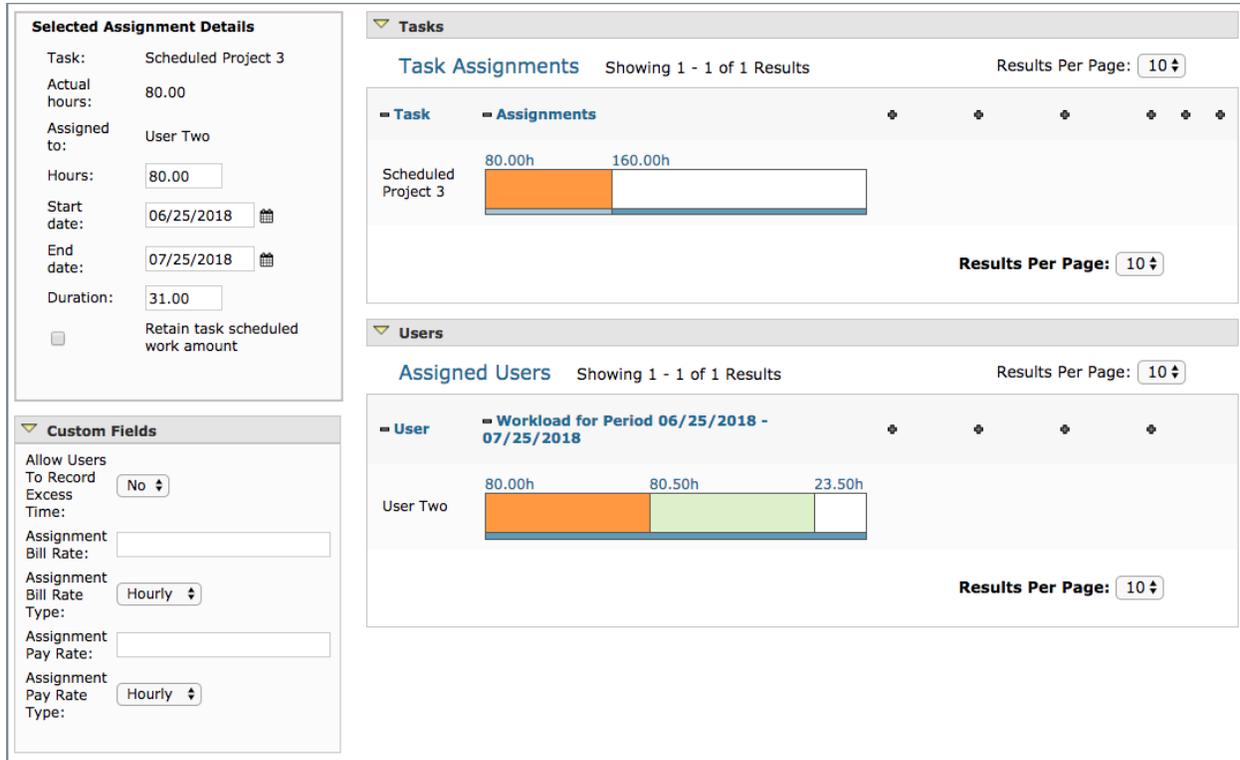
*Project set up screen*

The project parent project-activity rates can be added in Journyx directly, or you can use import and integration tools to populate the rates. If you update the existing project parent rates and the “copy to children” setting is turned on, the rates for the child projects/tasks will automatically be updated as well.

In addition to the ability to copy project parent rates, there is also a new report for reviewing the project-activity rates that you have created. Under Reports→System Reports there is a new project-activity report that lists all of the existing project-activity rates in the system.

## Block Time Entry That Exceeds Assigned Hours (Journyx PX Only)

In Journyx PX v11.2.0, you can now block users from entering time that exceeds their assigned hours for a specific assignment. For each user/task assignment includes a setting that determines whether or not the user can enter time that exceeds the assigned hours for that assignment. Under the custom fields for each assignment, there is an option called “Allow User to Record Excess Time”. If set to no (which is the system default), users can enter time that exceeds the amount of assigned hours (also known as “assignment scheduled work”). If set to yes, users will not be allowed to enter time that exceeds the assigned hours. The user will be notified that excess hours are not allowed, and the notification includes the amount by which the user exceeded the assigned hours.



The screenshot displays the 'Assignment set up screen' with the following details:

- Selected Assignment Details:**
  - Task: Scheduled Project 3
  - Actual hours: 80.00
  - Assigned to: User Two
  - Hours: 80.00
  - Start date: 06/25/2018
  - End date: 07/25/2018
  - Duration: 31.00
  - Retain task scheduled work amount
- Custom Fields:**
  - Allow Users To Record Excess Time: No
  - Assignment Bill Rate: [Empty]
  - Assignment Bill Rate Type: Hourly
  - Assignment Pay Rate: [Empty]
  - Assignment Pay Rate Type: Hourly

On the right side of the screen, there are two summary charts:

- Task Assignments:** Shows 'Scheduled Project 3' with a bar chart indicating 80.00h (orange) and 160.00h (blue).
- Assigned Users:** Shows 'User Two' workload for the period 06/25/2018 - 07/25/2018, with a bar chart indicating 80.00h (orange), 80.50h (green), and 23.50h (white).

*Assignment set up screen with custom field for allowing users to record excess time*

The option to block entry that exceeds planned hours is specific to each assignment. However, you can set a different default for each project and/or task. If you use system defaults, all assignments under a task will be created such that users can exceed the assigned hours. If you want all assignments for a specific project or task to be created with the default to block excess time, you can reset this default under scheduled project settings. All scheduled projects now have a custom field called “Allow Excess Time in Assignments”. If you change this setting to no, all assignments created under the task will default to blocking time entry in excess of assigned hours. Regardless of the default set at the task level, you can manage the setting for each assignment independently under the task.



## Other New Features & Improvements

- Rate reports now include one-click export to Excel
- Sheet submission email notifications to approvers now include the option to differentiate between open sheets and post-approval corrections
- API keys and a prototype Google Calendar integration through [Zapier](#) extend options for timesheet suggestions

For more information about Journyx or Journyx PX 11.2.0, please contact your account representative at +1 800-755-9878 or [sales@journyx.com](mailto:sales@journyx.com).