



## Journyx Mobile v10.1

---

### Journyx Mobile User Manual

Copyright © 2010, Journyx. All Rights Reserved. Journyx®, the Journyx logo, Journyx Timesheet™ Journyx Timesheet™, and the other graphics, logos, and service names are trademarks and service marks of Journyx. All other product names, service names and company names are the property and/or trademarks of their respective owners.

All rights, title and interest in and to the Software, and any Updates or New Releases thereto or derivative works thereof, including without limitation all intellectual property and other industrial and proprietary rights, at all times remain the exclusive property of Journyx or Journyx's licensors. The license granted does not constitute a sale of the Software, or any portion or copy thereof.

Journyx provides this document "as is" and without warranty of any kind, whether express or implied, to the full extent permitted under applicable law, the company specifically disclaims the implied warranties of merchantability, fitness for a particular purpose, title, and infringement. Journyx does not guarantee the accuracy, timeliness, or completeness of any information in this document or the results of your use of this document.

Printed in the U.S.A

# Table of Contents

---

Overview.....	2
Introduction.....	2
System Requirements.....	2
Installation and Setup.....	3
Note for Journyx Administrators: Punch In/Out Time Setup.....	6
Using App Features.....	8
Using Time.....	10
Using Expense and Custom.....	15
Using Punch In/Out.....	15
Using Approvals.....	16
Using Refresh Data.....	18

## Overview

### Introduction

The Journyx Mobile app for mobile time and expense management allows you to connect to your Journyx site and manage your timesheets, expenses and manager approvals. Version 10.1 of the Journyx Mobile app includes options for end users to get their information entered and submitted for approval. It also includes the ability for supervisors and project managers to complete approvals. If you have a specific feature request for the Journyx Mobile app, please add it to the Journyx UserVoice site: [journyx.uservoice.com](http://journyx.uservoice.com)

### System Requirements

1. The Journyx app connects to your Journyx site. Your Journyx site must be running version **10.1m1 or later**. If Journyx hosts your site in the cloud, your site already includes the necessary updates for mobile app compatibility.
2. Your Journyx site must be **available to your mobile device like any other web page**. If your site is only accessible when you are connected to an internal network, you may need to work with your IT Department for VPN access for the mobile app when you don't have access to your internal resources.
3. Your login account must include either **time entry, my assignments, expense entry, custom entry or you must be a designated approver in an approval plan** in order to access Journyx via the mobile app. "Super approvers" who have access to all approvals via Administrator rights cannot use the mobile app.
4. The minimum version for **iOS is 8.x**. The minimum version for **Android is 4.4.2**.

## **Installation and Setup**

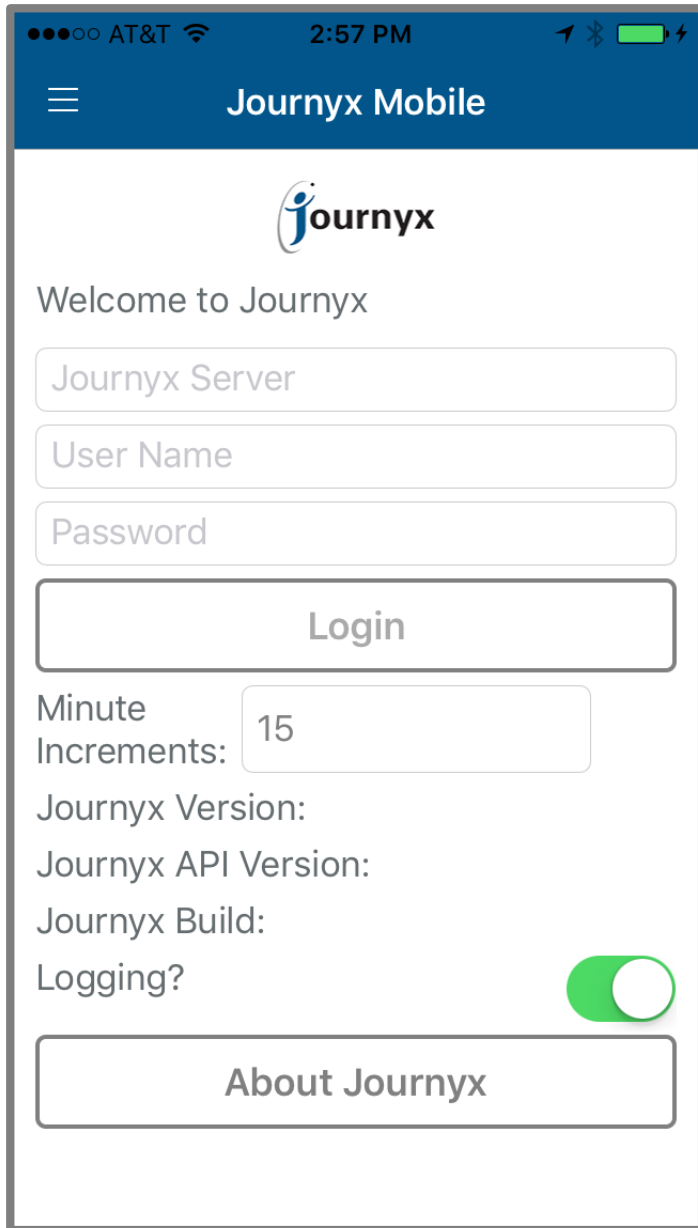
Installation of the Journyx Mobile app works like any other mobile app. Simply locate the app in the App Store or Google Play from your device and install it. Search for the keywords "Journyx Mobile" to locate it quickly. There may be 2 listings: Journyx and Journyx Mobile. The Journyx listing is for an older version still available to customers on older server versions. The Journyx Mobile listing is the current version.


The app is free. While the Journyx Mobile app for iOS is not optimized for the iPad, it will run on the iPad without issue. When you search for the Journyx Mobile app in the App Store on an iPad, you will need to change the search options from "iPad only" to "iPhone only" in order to find and install the Journyx Mobile app.

The first time you click on the Journyx Mobile app image, you will be asked to confirm that you want logging turned on. You do not have to enable logging, but the logging feature allows Journyx to better assist you when you need app support. If you opt to turn it off, you can turn it on later should you require support.

You will also be prompted to verify your minimum minute increment settings. The default is for time entry in 15 minute increments. If you are planning to use any kind of punch in/out feature that calculates your work time for you, Journyx recommends that you change the minimum increment setting to 1 minute. Otherwise, the app will change your punch times to reflect the 15 minute increment.

After you set your logging option and/or adjust your minute increments, you will be directed to the Login and Settings screen. You will enter your Journyx connection and login information on this screen. You will not be able to use the app features until you have filled in the Journyx Server, User Name and Password fields successfully.



 You do not need to enter the "http://" or "https://" from your Journyx Server address. You will simply enter "mysitename.com" where mysitename is replaced with the address for your server. If your server address includes a port number (e.g., mysitename.com:8080), you will enter the port number along with the address.

After you have successfully entered your Journyx site connection information, click on Login. If there are problems with your login information, the app will notify you. Otherwise, it will notify you that it is loading your projects and settings. The first time you load your Journyx information, it may take a couple minutes. When loading is complete, it will redirect you to the Home screen. Journyx recommends that you connect using a reliable network when logging in to the app for the first time.

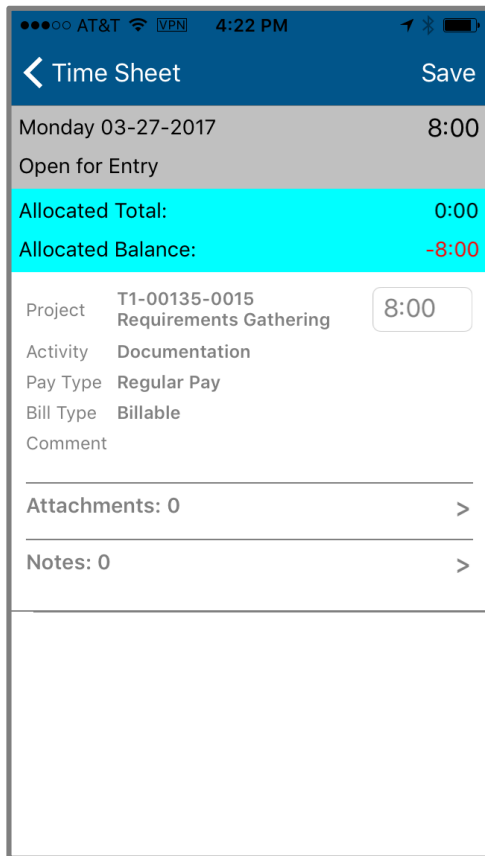


*Journyx Mobile Home Screen*

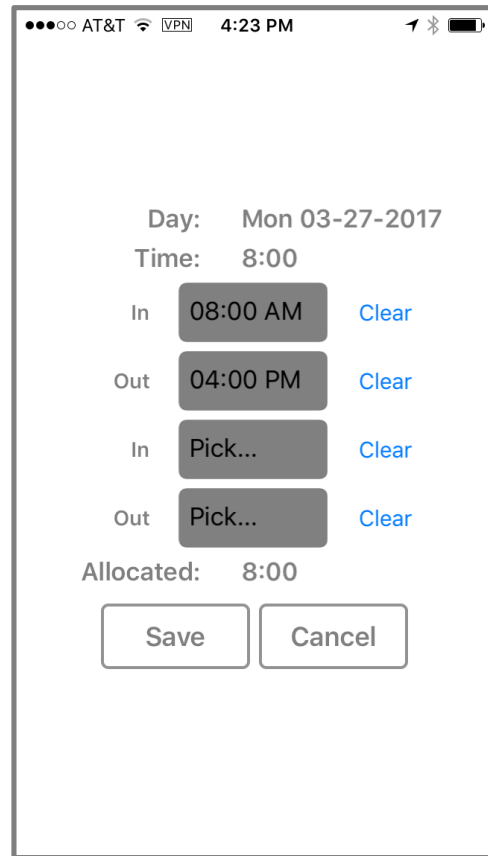
## Note for Journyx Administrators: Allocation Entry and Punch In/Out Time Setup

Journyx Administrators can give individual users access to track in and out times using the mobile app. These in and out times are populated in the "allocation" type time entry screens. They are not supported for "punch" or "line item" entry screens. You can read more about allocation entry screens under Configuration→Entry Screens→Time Entry Screens while logged into the Journyx system via browser.

If a user is assigned to an allocation time entry screen that allows the user to manually enter his/her in/out times, no configuration for the app is required. Journyx Mobile will automatically show these users a blue allocation balance area that they can click on to enter in/out times.



*Journyx Mobile Day View - Allocation*



*Journyx Mobile - Manual Allocation Time*

If a user is assigned to an allocation time entry screen that requires the user to click on a button to log an in or out time, you will need to set a field in Journyx to determine what this user can do in Journyx Mobile. There are 2 configuration requirements for giving users access to track in and out times in the mobile app: 1. The user must be assigned to an "allocation" type time entry screen in the Journyx system that requires punching a clock to create/in/out times. 2. The user must have the "Mobile UI Type" custom field set to either "Punch" or "Punch or Grid".

In order to give users access to the punch button for in and out time tracking in Journyx Mobile, a Journyx Administrator must first go to Configuration→Custom Fields and set up a User Custom Field by the name of "Mobile UI Type". This field must be a select list, and it must contain the following values: "Grid", "Punch" and "Punch or Grid". Users with the "Grid" value will not have the option to create in and out times with a punch button in the app. Users with the "Punch" value will only be able to track in and out times with the punch button. They will no longer have access to the "Time" screen for detailed time entry. Users with "Punch or Grid" will have the option to create in and out times with the punch button, as well as enter detailed time via the "Time" screen. The "Punch" and "Punch or Grid" options are only applicable to/support for users assigned to allocation time entry screens that require a punch clock to create in/out times.



## Using App Features

The Journyx Mobile Home screen (see screen shot on page 5) provides access to the most frequently used features of the app. All options available in the app are available on the Menu screen that can be accessed by clicking on the “hamburger” icon in the upper left corner of the Home screen. You may not see all of the options available in the screen shots of the Home screen and Menu screen. Your Journyx Administrator determines what you have permission to do in Journyx Mobile.

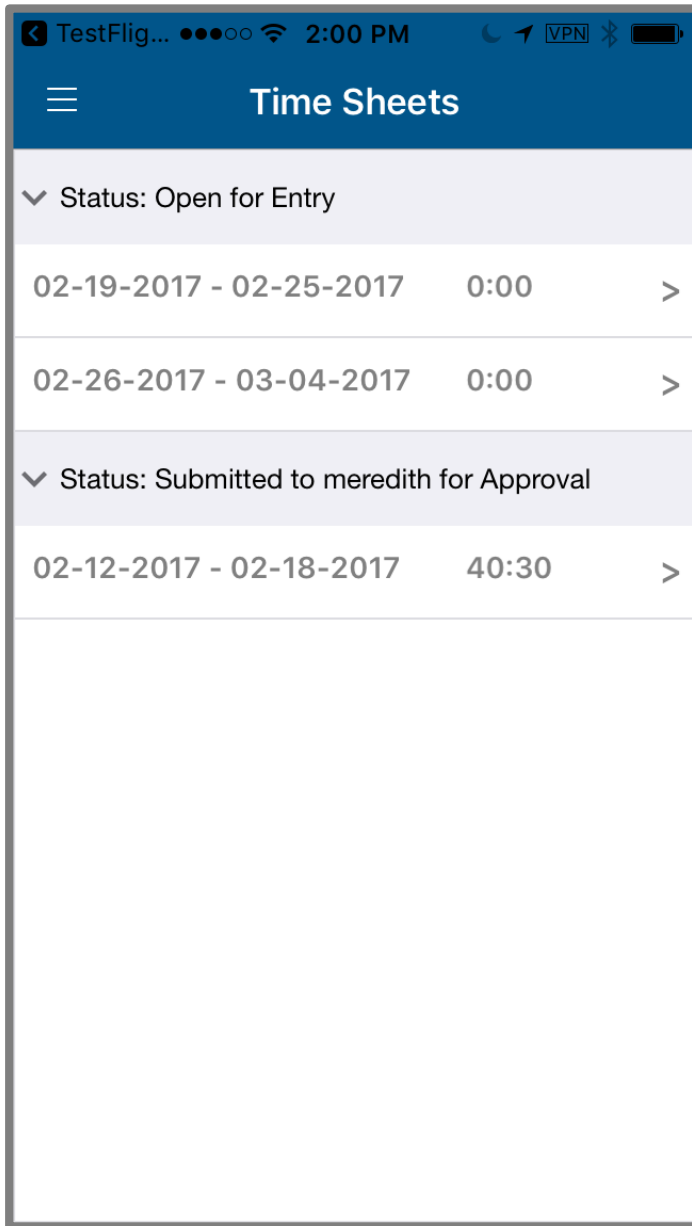


*Journyx Mobile Menu Screen*

- The **Time** option allows you to track time and shows a list of days in the current period as your starting point.
- The **Expense** and **Custom** options show similar information for the respective entry type.
- If your administrator has given you access to punch in and out, the **Punch** option tracks in and out times based on the time on your device clock when you click the In/Out buttons.
- If you are a designated approver in the Journyx system, the **Approvals** options will appear on the Home screen and the Menu screen if there is anything awaiting approval in your queues. The Approvals screens allow you to review the data that has been submitted and approve or reject it.
- The **Refresh Data** option allows you to pull new data from the server (e.g., new projects added to your list) and sync up mobile data when you've been entering information in offline mode.
- The **Settings** option allows you to change your login information and settings.

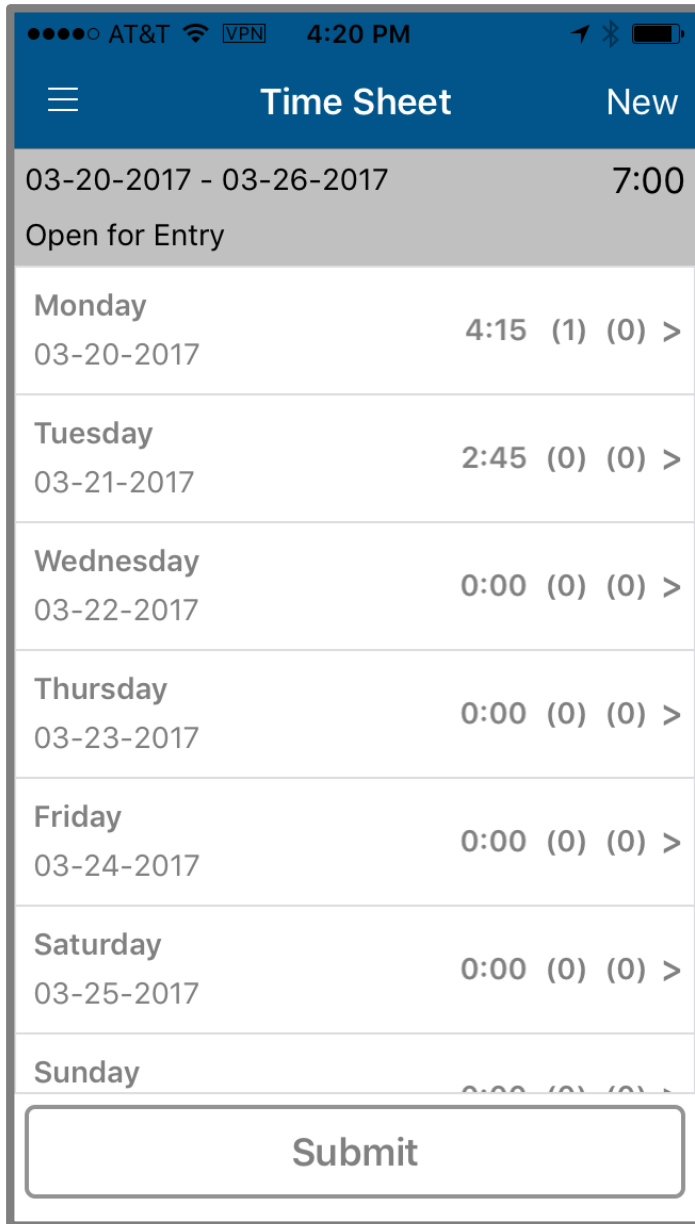
## Using Time

When you click on the Time button, you will see a list of time sheets for different periods organized by sheet status. As is true for browser entry, you can edit open and rejected sheets. You can only view submitted and approved sheets.



*Journyx App Time Sheet List*

After you click on a specific timesheet, you will see a screen with a list of days for the current period. If you have time entered for any of those days, the amount of your existing entries will be summarized under each day. The numbers in parentheses show any notes or attachments associated with the entries.



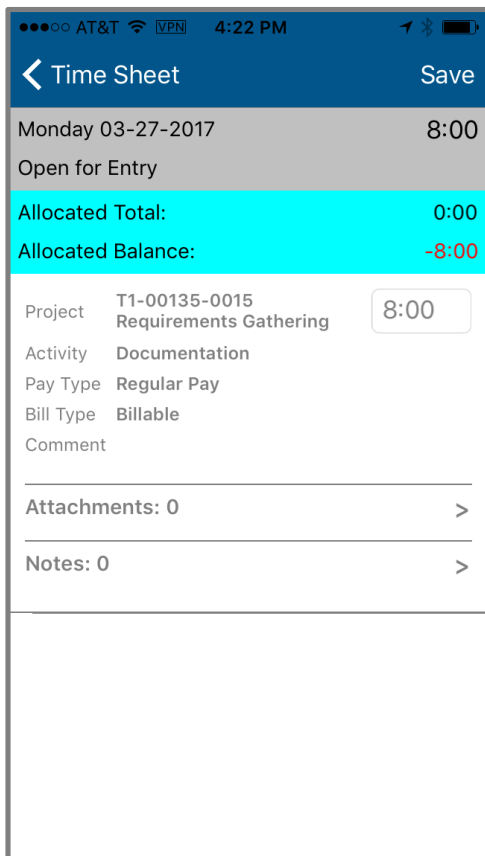
*Journyx App Time Entry Screen*

You have the following options on this screen:

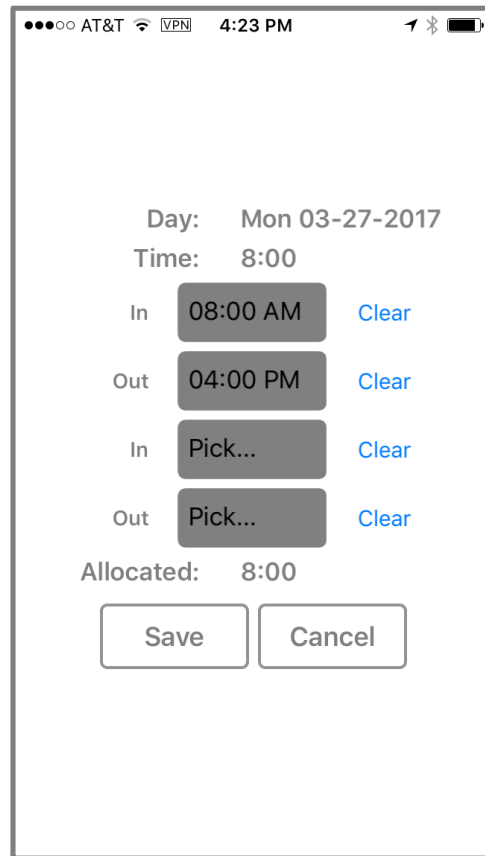
- **Create new time entries** – Click on any day with 0:00 total hours to create a new entry, or click on the New link in the upper right corner to add time to a day that already has entries.
- **Edit existing time entries** – Click on the day to edit an existing entry. If you want to change amount, you can do it from the “day view”. If you want to change your selections or add time for other days in the period, click on the entry to make additional changes in the “row view”.
- **Use memorized entries** – If you have created memorized entries in the browser, you will see these entries for selection when creating new time entries. Click on the “Memorized” button at the top of the new entry screen to access all of your memorized entries for use in the mobile app.

- **Attach pictures from your phone** – click on the Attachments link when creating or editing an entry to attach a picture from your device
- **Add notes to specific entries** -
- **Submit the timesheet you are viewing** – the Submit link at top of screen is available if the timesheet is open and subject to approvals
- **Menu** – the icon in the upper left corner allows you to navigate to other screens or return to the Home screen

If you are assigned to an allocation time entry screen where you enter your in and out times in addition to project hours, your time entry screen will look a little different. It will include color-coded allocation balance totals on the main time entry screen, and it will include a blue area in the “day view” that you can click on to add/edit your in/out times for each day.



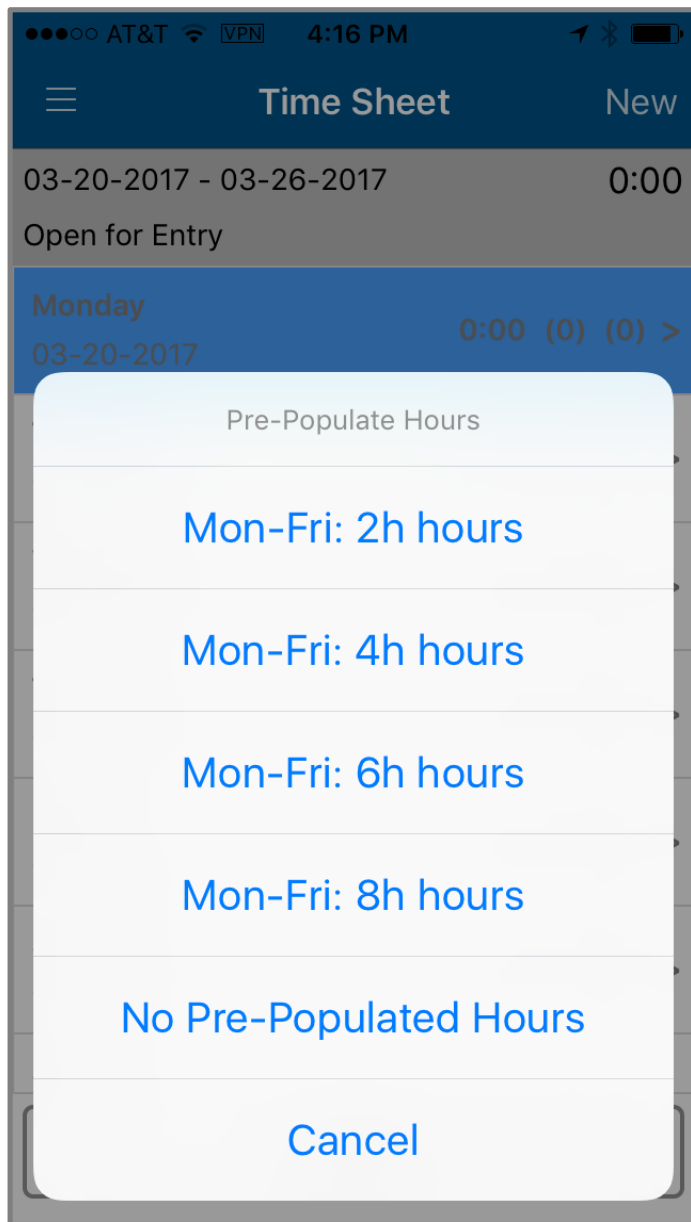
*Journyx Mobile Day View - Allocation*



*Journyx Mobile - Manual Allocation Time*

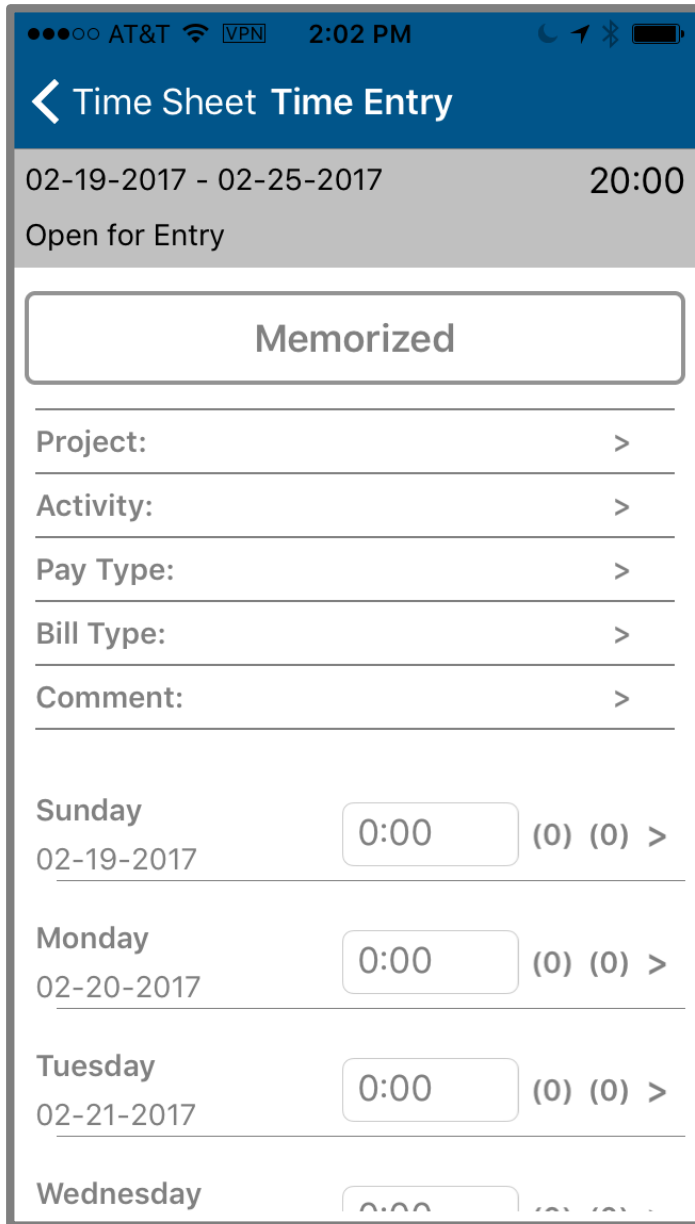
You can create a new entry on all types of time entry screens by clicking on a 0:00 hour day or the New button in the upper right corner. Clicking in these areas will take you to a screen where you can add all of your new time entry details.

When you click to create a new entry, you will see an option to pre-populate hours for the new entry for the week. If you are entering time for only 1 day or a few days, you should skip this option by clicking on “No Pre-Populated Hours”. If you need to enter time for the whole week and worked on only a few things, adding pre-populated hours for all week days can speed up your time entry.



*Journyx Mobile New Entry – Pre-Populated Hours Option*

After you have selected your pre-populated hours option, you will see the new entry screen. You can then click on each field to add the required information. If you have Memorized Entries set up in the Journyx system, you can also click on the Memorized button to select one of these entries for faster time entry creation.



*Journyx App New Time Entry Screen*

The fields that require selection provide a list of available options for choosing your time entry values. As is the case in your browser-based timesheet, the project selections and dependencies for other time entry fields are specific to your account and what you are able to see. All of the selection fields also include the ability to search for specific values based on name.

After you select your project and other field values in the selection lists, click the amount field for the day on which you want to enter time. You can enter time for several days at once on this screen. After selecting values for your time entry and clicking on a specific day, you will enter the number of hours for the new entry.

You also have the option to include Notes or Attachments with each entry. After you enter the amount of hours for a day, you can click on the zeros in parentheses next to the amount. Clicking here will show a screen with the option to add a Note or Attachment.

If you click to add a Note, click the New button in the upper right corner to add a new note. When you are finished adding your Note, click on Save and return to the new entry screen. More than one note can be added to an individual entry. Notes can also be added to existing entries.

If you click to add an Attachment, click the New button in the upper right corner to add a new attachment. You will be given the option to pull a photo from your device Gallery or use your device camera to take a new photo to attach. After you have selected the photo, click save and return to the new entry screen. More than one note can be added to an individual entry. Notes can also be added to existing entries.

After you have entered your selections, hours for any days and notes/attachments (optional), click on the Save button in the upper right corner to save the new entry to your timesheet. The app will confirm that entry has been saved and return you to the current timesheet view.

The process for editing existing entries is the same as creation of a new entry except that you must click on the day and the existing entry in that day to make changes to the hours, dates and/or selections. You can also use existing entries to add hours for the same work on another day (e.g., clicking on an entry for "Support" on Monday will also allow you to add more hours to the same project for other days in the period).

The Submit button at the foot of the screen allows you to submit your timesheet for approval if your timesheet is subject to period or project approval plans. As is the case with your browser-based timesheet, you will not be able to edit a timesheet that has been submitted and/or approved. However, you can view submitted and/or approved timesheets in the app.

## **Using Expense and Custom**

The process for adding and editing expense and custom entries is the same as the time entry process. The only difference is that the amounts are entered in decimal format rather than HH:MM for time. You can enter mileage on My Expenses if your system is set up for it. Both expense and custom entry also include the notes and attachments features.

## **Using Punch In/Out**

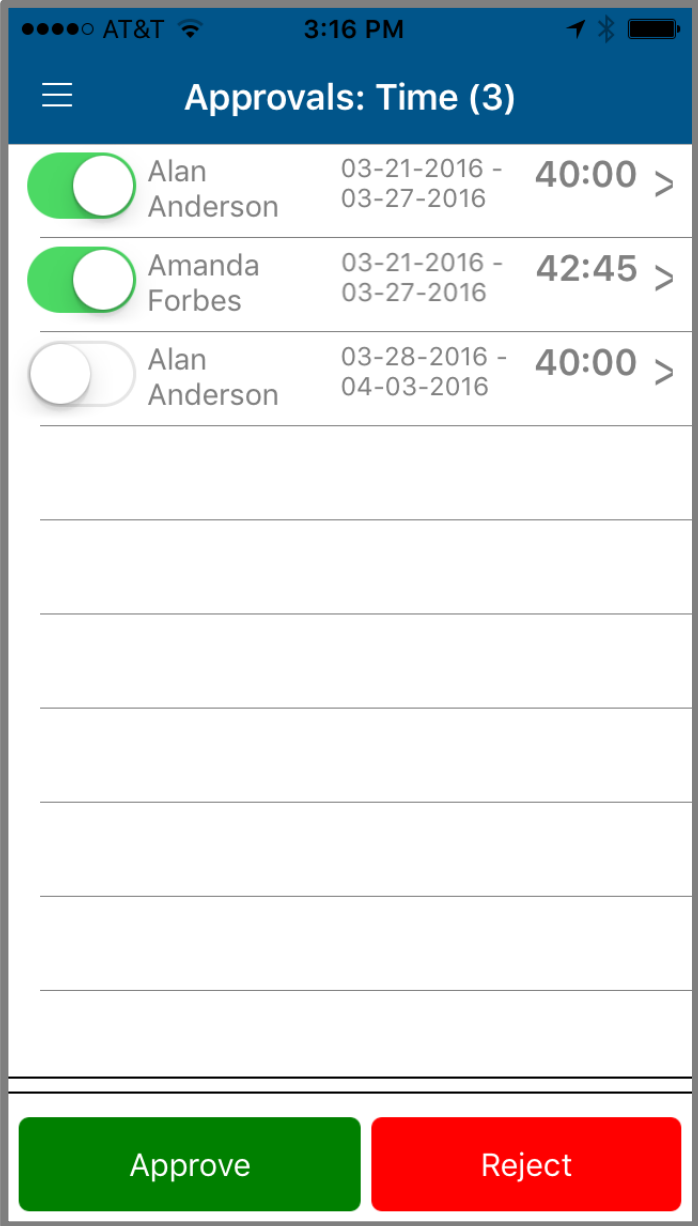
If you have access to track punch times in the mobile app, the Punch button will take you to a screen where you can punch in and out. When you click on the Punch In link, it logs an "in" time based on your device clock time and changes to the "Punch Out" option. When you click on "Punch Out", it logs the "out" time and switches back to the "Punch In" option. These in and out times are populated in your allocation time entry screen and can be viewed in the browser. The punch button also includes information on your punch activity for the current day. In the current version of the Journyx mobile app, you can only access and enter punch information for the current day. The Punch feature is only supported for allocation time entry screens that require users to use a clock to punch in and out.



### Using Approvals

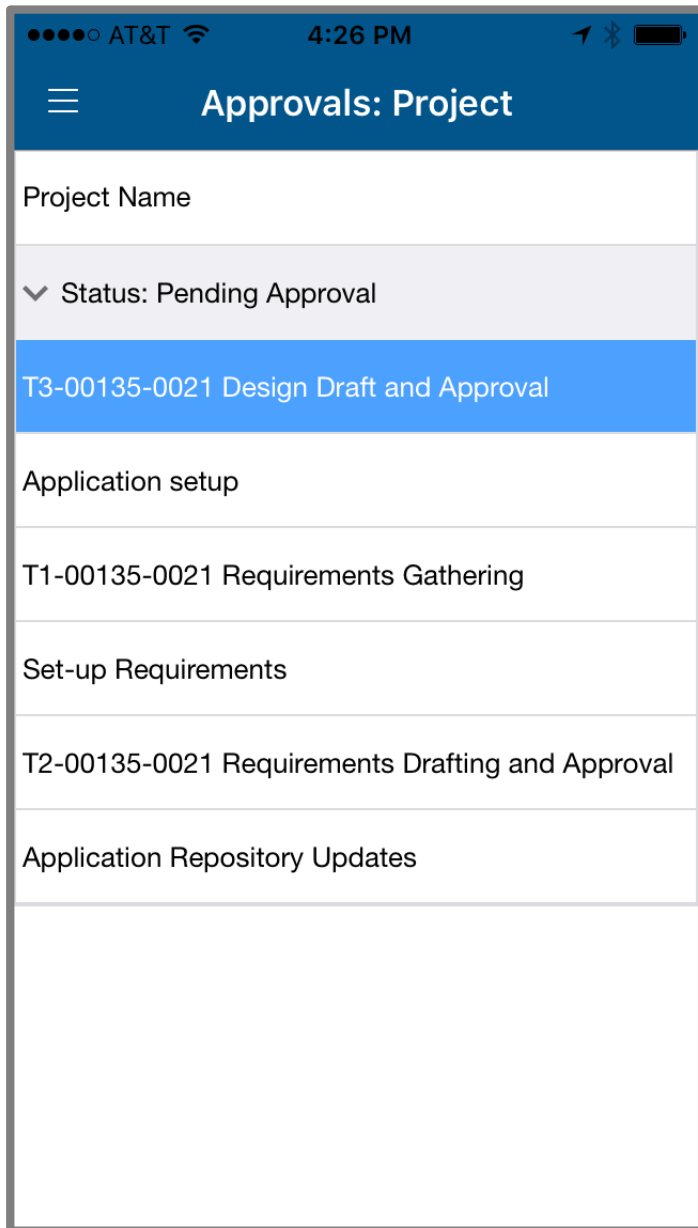
If you are a manager in the Journyx system and are set up to either approve user sheets or time/expense by project, you can access the information awaiting your approval in the Journyx mobile app. You must be a designated approver in an approval plan. The Approvals menu items (Approval for Time, Expense, Custom and Projects) will only appear on the Home screen and Menu screen if you have something awaiting your approval.

After you click on one of the Approval options, you will see a list of what is in your queue for approval. For the sheet-based approvals (Time, Expense and Custom), you will see a list of approvals by user and period. You can use the slider buttons to select sheets and approve or reject from this summary screen, or you can click on a sheet to view the details.



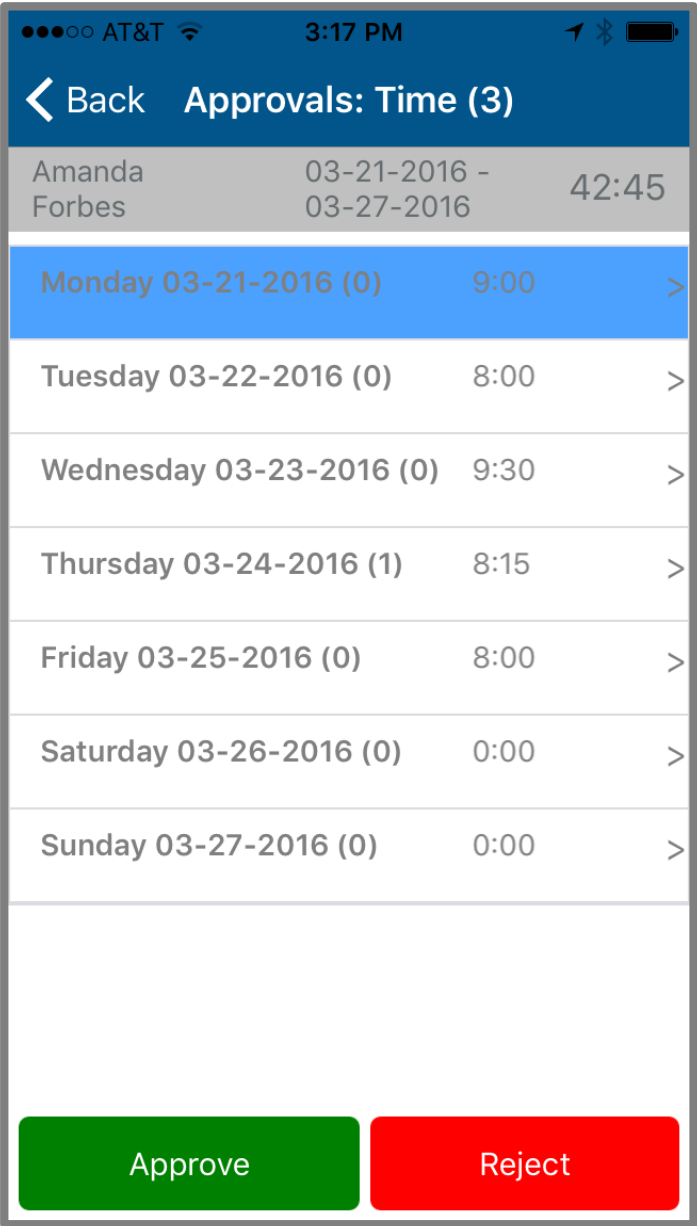
Journyx App Time Approval Summary Screen

For project approvals, you will see a list of the projects that have approvals. After clicking on a project, you will see a list of approvals by user, period and type.



*Journyx App Project Approval Summary Screen*

For all types of approvals you can drill down into the details of the entries to view selections, amounts, attachments, etc.



*Journyx App Week Details Screen*

**Using Refresh Data**

Any data that you add via the mobile app will automatically be synced with the Journyx server provided you are connected to a network when you add it. It is possible to use the mobile app when a network connection is not available. If you add data while offline, it will be synced with the Journyx server as soon as you save new data when a network connection becomes available. The primary reason to run Refresh Data is to sync data

entered while offline or pull new information from the server. For example, you might need to sync with the server because you entered some time recently in the browser. You might also need to sync with the server to get access to new projects that have been assigned to you. You can also refresh your data to update your approval queues. Running Refresh Data periodically (e.g., weekly) will ensure that you have access to your current projects when entering time and expenses in the mobile app.