Allocation Tool / Timesheet Custom Budget Tool

Work in Progress

Journyx recently released a new tool which is called 'Allocation Tool' or 'Timesheet Custom Budget Tool'. This tool displays the allocated time per project, per user directly on the user time entry screen.

Currently about 10 companies are using the tool which started as customized software for one particular company, but soon grew into something where more companies were interested in.

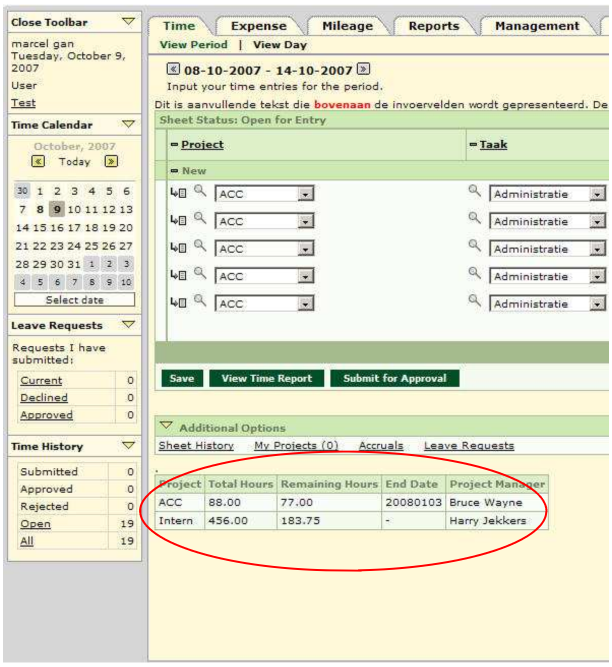
Since it is intensively used, people come up with all kinds of additional functionality to add to the tool. Journyx judges every request (does it makes sense, is the requested functionality not already possible in Journyx Timesheet, can it be done without spending huge amounts of money etc.?), and estimates the amount of time involved for building the new request. If the customer is willing to pay for the work, the new request is added to the tool. Every request can be turned 'on' or 'off' like most of the functionality in Journyx Timesheet so every customer can decide for themselves if they want to use it or not.

The development department of Journyx estimates several months before all the new requested functions are added to the tool, after which it will be sold as a regular additional module.

However, some current existing functionality would already be a welcome feature in your current Journyx Timesheet environment. That's why Journyx wants to make the tool already available for you.

Current functionality

In this screenshot you can see that a new table has been added to the time entry screen (everything else on the time entry screen remains unchanged).



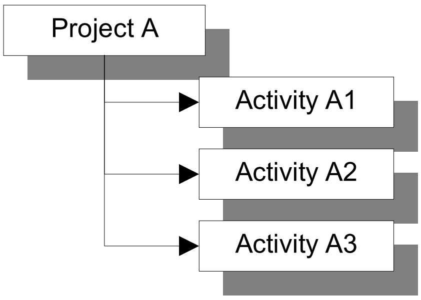
The new table shows that for project 'ACC' 88 hours were allocated to this user and 456 hours to project 'Intern'. In this example the user has already written time on both projects which results in a remaining number of hours of 77 for project 'ACC' and 183,75 hours for project 'Intern'.

This may help in project management if the user is instructed to contact the project manager when the remaining time is less than the amount of time the user needs to finish his (or her) activities for a particular project.

Besides the display of the budget (in hours) and the remaining hours, any project custom field can also be displayed. In this example the end date of the project and the name of the project manager are displayed.

Difference with Accruals?

It's already possible within Journyx Timesheet to show remaining hours on the time entry screen. You can set a specific number of hours per 'Pay Type' (this column may be named different in your Timesheet environment. The default names for the columns on the time entry screen are: 'Project', 'Task', 'Pay Type', 'Bill Type' and 'Comment').



Let's say you have a project 'Project A' with 3 activities 'Activity A1, A2 and A3'. Total allocated time for a specific user for this project is 100 hours.

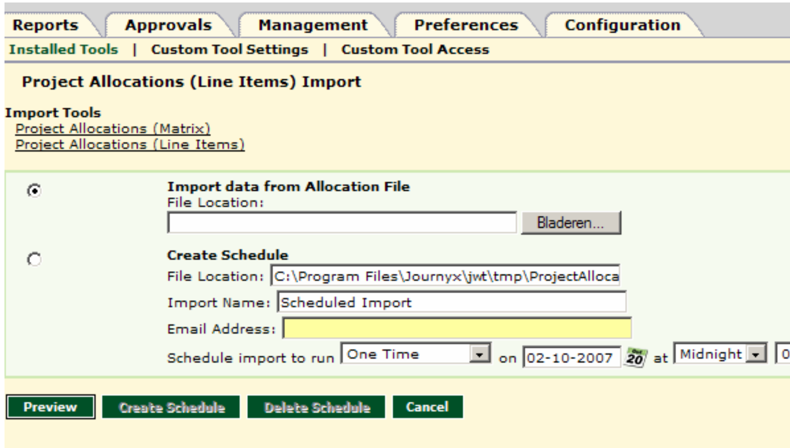
With accruals you would set the available amount of hours for this user and this project per activity (for example Activity A1: 15 hours, Activity A2: 35 hours and Activity A3: 50 hours).

With the new tool you would set the available amount of hours on project level, for example: Project A: 100 hours.

An accrual can be set either as 'hard' (when it reaches 0, no time can be written by the user on this particular 'Pay Type') or soft (user gets a warning but it still able to write time on the Pay Type). In the new tool there is no warning or a 'hard' setting so people can always write time on the project even though there is no remaining time (the number will run into negative numbers).

Data through Imports

The allocation data which is shown on the time entry screen, can not be typed directly into Journyx Timesheet. Data needs to be imported through the import functions of Journyx Timesheet.
This screenprint shows that you need to specify where the import file is located and that the actual import can be scheduled, just put the file in a certain place and Journyx Timesheet will take care



of the rest.

The import file needs to be a text (tab-delimited) file in the following format:

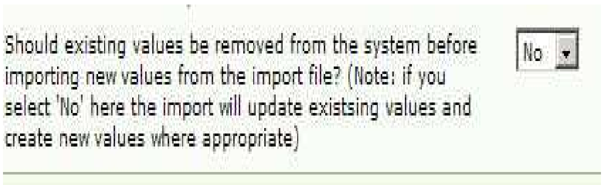
User	Project	Budget
"Doe, John"	"Project X"	234
"Doe, John"	"Project Y"	34
"Doe, John"	"Project Z"	112

The 1st column contains the full name of the user between quotes, the 2nd column contains the project code and the final column contains the allocated hours.

Project hours that are entered by the users in Journyx Timesheet in previous periods (before the import), are deducted from the budget, so you need to specify in the import file the total amount of hours that is budgeted (and not what is currently remaining).

Import settings

Besides the scheduling option there is currently the following option:



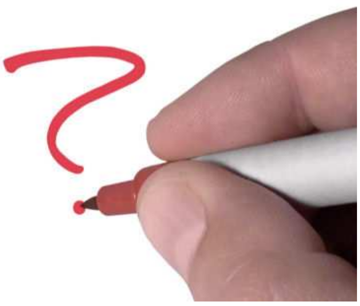
This gives you the option to ‘erase’ the current allocation contents in Journyx Timesheet , before the new data is imported (change the value to Yes).

If the default “No” is chosen then existing records will be updated and new records will be added. Records that are in Journyx Timesheet but not present in the import file, remain unchanged.

Note: The only way to get rid of ‘old’ allocation records (for example for projects that are already finished), is to run the import function with the option “Yes” and make sure that these records are not in the import file. This will be changed in the final version.

What will be next or what functionality will the final product have?

That’s a difficult question to answer at this moment. Since more and more companies are starting to use the tool, more and more good ideas are brought forward. The Journyx development department then makes a functional analyses of what is desired and calculates how much work is involved. Development of the idea will start after the customer orders the new functionality. If more customers want this functionality then the costs will be lower per customer.



Ideas for which an functional analyses has been made:

- **Additional Assignment Fields**
  Currently the tool only has one field that applies to the assignment itself: the budgeted number of hours. With this enhancement you will be able to add an unlimited number of additional fields at the assignment level. You will be able to specify whether the fields are text, numbers, or dates. All fields will be available to be imported in the Assignment Import Tool. All fields will be available to be displayed on the assignment table on the bottom of the time entry screen.

- **Display ‘Estimated Hours’ Field**
  Currently the tool only displays project custom fields. Estimated Hours is a project primary field, and is connected to Timesheet reports in a special way. With this enhancement you will be able to display any project primary field on the assignment table on the bottom of the time entry screen.

- **User-Editable Fields on the Entry Screen**
  Currently the tool only displays fields in view-only mode on the assignment table on the bottom of the entry screen.

  With this enhancement you will be able to specify any of the assignment-scoped fields to be editable on the assignment table on the bottom of the entry screen. Note that this does not apply to project primary fields or project custom fields.

  Fields that are editable on the entry screen will be saved each time that the time entry screen is saved, using the existing [Save] and [Submit] buttons. This means that the fields will not be editable while viewing a submitted or approved sheet, because those buttons are not present.

- **Field Mapping on Imports**
  Currently the tool’s import feature requires that the field names in the import file exactly match the field names in the Timesheet database. It requires that the user is identified by their Timesheet Full Name. It also requires that the project is identified by its Timesheet Project Name.

  With this enhancement you will be able to specify a different user field to identify the user, such as a custom field called “Resource ID”. You will also be able to specify a different project field to identify the project, such as the existing project custom field called "MS Project ID". You will also be able to specify that a field called "EtC" in the import file is populated into a field called "Remaining Hours" in the Timesheet assignment table.

- **Expose the Assignment Table to the JxAPI**
  Currently the tool's assignment table is not represented in the Timesheet API. Other tables, like project primary and custom fields, are already accessible via the JxAPI.

- **Modify Projectlink to Populate the Assignment Table**
  Currently Projectlink does not have the ability to import data to or read data from the assignments.
  With this enhancement, Projectlink would be able to create assignments and populate all of the additional assignment-scoped fields. Projectlink would also be able to read the user's remaining hours (user-editable) field.

Besides the above mentioned ideas there are also several reporting wishes that are investigated by Journyx.

Don't hesitate to contact us when you have ideas of your own!

How to proceed?

Several possibilities, contact us if:

1. You are interested but need more information. We will be happy to schedule an on-line demo for your or answer any question by phone or through e-mail.
2. You want the current functionality as soon as possible. Contact us and we will start the procedure to get you the new tool with the current functionality as soon as possible.
3. You want the tool enhanced with some new functionality (either the ones mentioned in this document or ideas of your own).
4. You are certainly interested in this new tool but want to know more about the future developments. You want to be informed whenever Journyx has developed more functionality or whenever the list with the upcoming functionality has changed.

Pricing

The current tool costs $800 (or €572 at the exchange rate 1 euro is 1,4 dollar). If you want the standard (current) tool with some new enhancements then contact us so we can calculate the price for you. The developments of an enhancement is planned as soon as a customer agrees to fund it. Enhancements that are of general interest get discounted, and big enhancements get the base tool for free.

If you already know that you want the tool then buy the tool for $3.000 (€2.143). This will get you the tool and all the developed enhancements between the base version and the final version.

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