Journyx Timesheet 7.1 – Accessing New Features

This guide includes descriptions of new features in Journyx Timesheet 7.1 and is intended for existing Journyx customers who are upgrading to version 7.1 from version 7.0. If you are upgrading from an earlier version, you will also need the guide for version 7.0 to review all the new features in the 7.x series. If you have additional questions about a feature, please contact your account representative, email the Journyx Support Department at support@journyx.com, or sign up to participate in a New Features Review class by sending email to training@journyx.com.

Timesheet 7.1 development efforts were focused on usability – from implementing small improvements to the user interface to increasing consistency for similar functions from feature to feature. New features include:

- **Project Hierarchy Navigation Options**
  - Arrows for one level/all levels
    - Go to Management→Projects→Project Management
    - Note that blue arrow icons appear next to the yellow arrow icons for projects with more than one level of descendants below them. The yellow arrows are used to view the next level of descendants below a selected project. The blue arrows are used to view all descendants/levels below a selected project
  - Tree sort by column
    - Go to Management→Projects→Project Management
    - Click on the Tree column header. The search results which are sorted alphabetically by project name by default are re-sorted and displayed in order of hierarchical location.
  - Project parent selection/modification
    - Go to Management→Projects→Project Management
    - Click on the Create button. Note that you can select any parent project for the new project on the Project creation screen. The parent selection will also be preserved when you click on the Save and New button – allowing you to create multiple descendants quickly under a single project.
    - Go back to Management→Projects→Project Management
    - Click on an existing project name. Note that you can change the parent on the project's modification screen.

- **Project Approval Plan System Report**
  - Go to Reports→System Reports
  - A new system report, Project Approval Plans, allows you to view the configuration of your project approvals in the same way Time/Expense/Mileage Approval Plans system reports show the settings for your other types of approval plans .

- **Copying Multiple Reports in a Single Step**
  - Go to Reports→Standard Reports
  - Select multiple reports and click Copy to User. Note that you can copy a set of reports to another user. It is only possible to rename the copied report from the Report Copying screen when a single report is selected.

- **Current Values of Custom Fields in Rate Reports**
  - Go to Reports→Rate Reports
  - Click on the Create button.
  - Look under "Report Output Options" at "Custom fields to display". Note that all custom fields are displayed sorted by type regardless of whether they're enabled for historical

tracking or not. This allows you to report on current values of custom fields that are not enabled for historical tracking.

- **Declined Requests Set Apart in Leave Request Calendar**
  - Go to Management→Leave Requests→Leave Request Calendar.
  - If there are declined leave requests for the month, the total amount of requested hours is displayed in the monthly view and the declined hours are shown below the total. You can click through to the daily view and view a status column where submitted/declined is displayed for each request.

- **Approvers Included in Notification List for Leave Requests**
  - Logged in as a user who is assigned to a Time Approval Plan, go to Management→Leave Requests→Request Time Off.
  - In the list for notifying other users of a new leave request, the user's approvers should appear as options (provided the approvers have valid email addresses in the system).

- **Leave Request Link on Time Entry under Additional Options**
  - Go to the Time tab. Note that the Additional Options table below the entry grid includes a link to Leave Requests if the user's role includes this ability.

- **New Default Login Screen Logic Favors Approval/Entry Compliance**
  - If a user has the "Approver-Regular" ability and has any submitted sheets awaiting approval in his queue, he will be directed to the Approvals tab after login
  - If a user does not have the approver ability or does not have submitted sheets awaiting approval, he will be directed to Time Entry (or Expense Entry or Mileage Entry depending on what he has access to) next.
  - If a user does not have approvals and does not have access to any entry screens, he will be directed to the same default screen for his specific roles that was used in previous versions.