Journyx App for iPhone v2.0

Journyx App User Manual

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Overview

Introduction

The Journyx app for mobile time entry on iOS allows you to connect to your Journyx site and manage your timesheets. Version 2.0 of the Journyx app includes options for simple time entry. Journyx will continue to improve and expand the app to include more time entry features, expense entry and approvals. If you have a specific feature request for the Journyx app, please add it to the Journyx UserVoice site: journyx.uservoice.com

System Requirements

1. The Journyx app for mobile time entry on iOS connects to your Journyx site. Your Journyx site must be upgraded **to version 8.7m5 or higher** in order to test the mobile app. Contact support@journyx.com for access to the 8.7m5 upgrade. Version 9.1 or higher is required in order to access the new project search and punch time entry features included in version 2.0 of the mobile app.

2. If you host your own site, you may also have to **"turn on" the jxAPI** if you haven't done so already. Any administrator in your Journyx system can do this. An administrator can login to the Journyx system, go to mysitename.com/jtcgi/jxapipref.pyc and enable the jxAPI if it hasn't been enabled before. In some Windows environments, you may get an error trying to enable the jxAPI via browser. If it doesn't work in the browser, you can enable the jxAPI using the command line by going to the bin directory, entering the command below and clicking return:

   ```
   python ..\wtlib\make_jxapi_wsdl.pyc
   ```

3. Your Journyx site must be **available to your mobile phone 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 on VPN access for the mobile app when you don't have access to your internal resources. You can configure VPN access on the iPhone by going to Settings→Network.

4. Your login account must also include a **time entry ability** in order to use the Journyx app. Provided you have access to the Time or My Assignments menu in Journyx, you will be able to use the app for time entry.

Installation and Setup

Installation of the Journyx app for iOS works like any other iPhone app. Simply locate the app in the App Store on your phone and install it. Search for the keyword "journyx" to locate it quickly. The app is free.

The first time you click on the Journyx app image, you will be directed to the Settings screen. You will enter your Journyx connection and login information on this screen. You will not be able to use the app time entry features until you have completed the Username, Password and Domain settings successfully.

 If your Domain (a/k/a site URL or web address) starts with "http://", you will enter your domain as follows: http://mysitename.com. If your site starts with "https://", you will simply enter mysitename.com.

The "Start in My Timesheet" setting allows you to set the My Timesheet screen as your home page for future use of the app. If you want to go straight to My Timesheet when you open the Journyx app, turn this setting on.

After you have successfully entered your Journyx site connection information, click on Save. 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 time entry information, it may take several seconds. When loading is complete, it should redirect you to the Home screen.

Project Search Setup

In version 2.0 (and higher) of the mobile app you can access the project search feature while creating or editing time entries provided your Journyx server version is 9.1 (or higher). Project search is automatically available to all mobile app users provided they are running the required app and server versions. In addition to project search access, you also have the option to limit project selection to search only.

In the iOS version of the Journyx app, you can set a maximum number of projects to revert to search only by going to the device's general Settings and selecting Journyx. Under Settings, you can manage the login information you entered in the Journyx app, as well as set the maximum number of projects to show in the time entry select list. If you have access to hundreds of projects on your timesheet and it is slow to load in the mobile app, you can use this setting to improve load times by limiting project selection to search only.

Punch In/Out Time Setup

In version 2.0 (and higher) of the mobile app Journyx Administrators can give individual users access to track in and out times using the mobile app provided your Journyx server version is 9.1 (or higher). These in and out times are populated in the "allocation" type time entry screens. 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. You can read more about allocation entry screens under Configuration→Entry Screens→Time Entry Screens while logged into the Journyx system via browser. 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 the mobile app, 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 track in and out times in the mobile app. Users with the "Punch" value will only be able to track in and out times. They will no longer have access to the "My Timesheet" and "Time by Project" screens for detailed time entry. Users with "Punch or Grid" will have the option to track in and out times, as well as enter detailed time via "My Timesheet" and "Time by Project" screens.

Using App Features

Unless your Journyx Administrator has limited your access to tracking in and out times only, the Journyx app for iOS provides you with two methods for entering and managing your time: My Timesheet and Time by Project. If your Journyx Administrator has provided you with access, you may also have the ability to track in and out times in the app using the "Punch" button.

The My Timesheet view looks similar to a grid time entry screen and shows a list of days in the current period as your starting point to enter or edit your time. Time by Project starts with project selection for the project you are working on. The Punch button tracks in and out times based on the time on your device clock when you click the button.

Using My Timesheet

When you click on the My Timesheet option, you will see a screen with a list of days for the current period. If you have time entered for any of those days, your existing entries will be summarized under each date.

You have the following options on this screen:
- **Create new time entries** – click on "New Entry" under the selected date
- **Edit existing time entries** – click on the existing entry summary (includes project name, activity name and hours)
- **Navigate to a past or future timesheet** – double arrow icons at the foot of the screen
- **Navigate to any timesheet period** – arrow in box icon displays date selection
- **Return to the current timesheet** – folder with arrow down icon
- **Submit the timesheet you are viewing** – Submit button at top of screen

If you need to create a new entry, you will be directed to a blank entry screen where you can add all of your time entry details. You can then click on each field to add the required information.
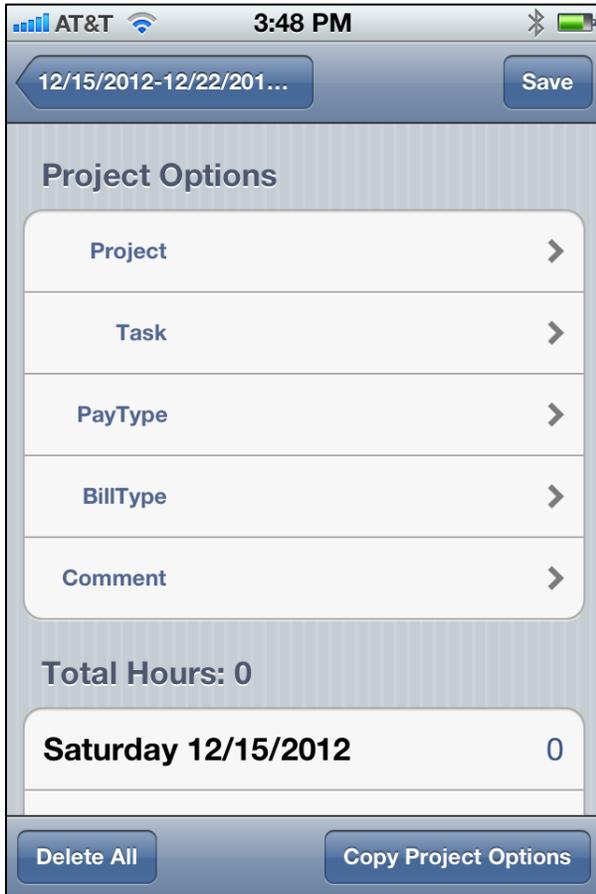
The fields that require selection provide a scrolling wheel for choosing your time entry values. As is the case in your browser-based timesheet, the project selections and dependencies for other time entry fields are specific to your account and what you are able to see. The project field also includes the ability to search for specific projects based on name or description in mobile app version 2.0 (or higher).

 If your project names or other field value names are long, it may be difficult to tell them apart in the select list when your phone is vertical. The iOS app does include support for re-orienting this select list by turning your phone on its side, and it will show more of the value names when turned horizontally.
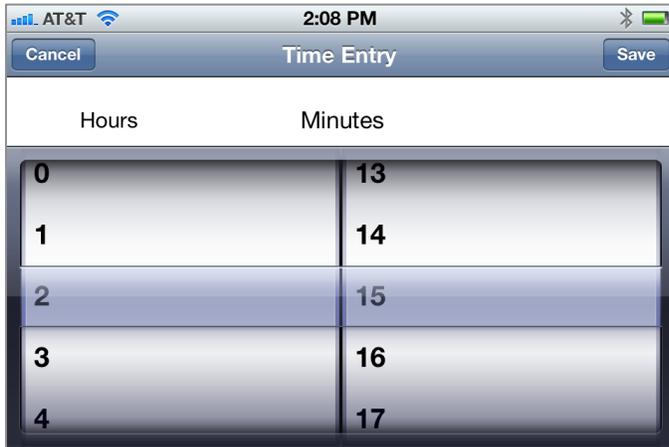
Rotate to the side view.
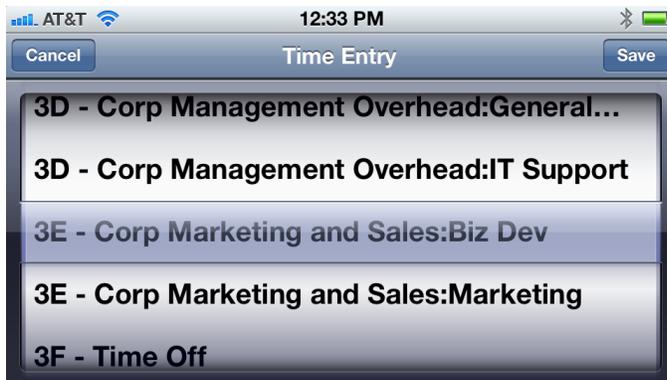
After you select your project or other field values in the selection list, click the Save button in the upper right corner to return to the new entry and complete the information. The Save option on the selection list screens do not save the final entry – only the individual selection for the new entry.

In addition to selecting a value for each of your time entry selections, you must enter the number of hours (and minutes if desired) for the new entry. You can enter hours for any day in the period. Like the other selection fields, there is a scrolling wheel for selecting both hours and minutes.

After you have entered your selections, hours and a comment (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 you can use the date range button in the upper left corner to return to your timesheet where the new entry will now appear.

The process for editing existing entries is the same as creation of a new entry except that you must click on the existing entry itself 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 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.

If you need to reuse your time entries from a previous timesheet, you can navigate to the prior timesheet, click on the entry, and click on the Copy Project Options button in the lower right corner of the entry. It will prompt you to enter a date for copying the entry. Then you can start entering time against the copied entry in the current period.

Using Time by Project

The Time by Project screen shows your timesheet project list in alphabetical order with an option to the right of the list to jump to specific number or letter areas in the list.   Like other views in the app, you can rotate this to a horizontal orientation on your phone in order to view more of the project names.
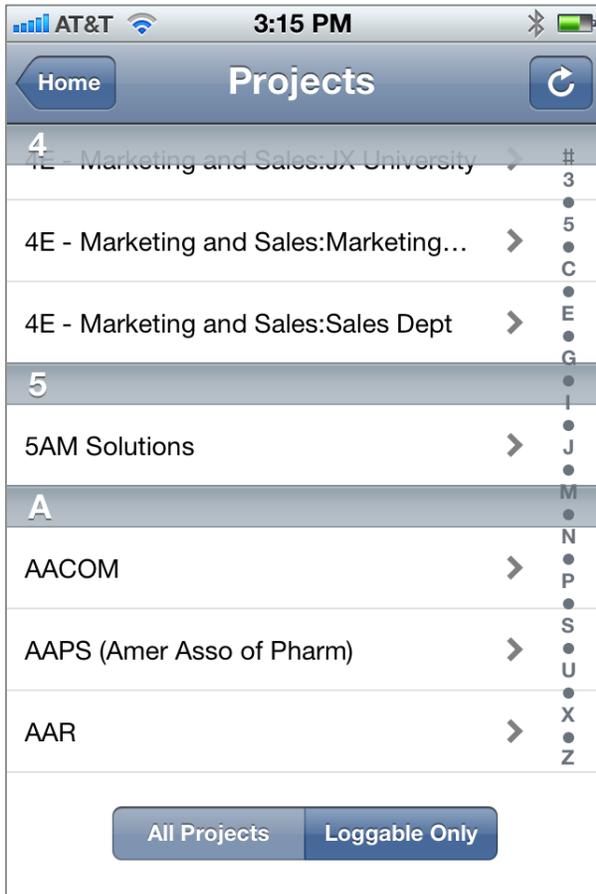
This view starts with the project for which you want to enter time. Then it moves on to the date selection for the entry. The project selection is shown at the top of the date selection screen.
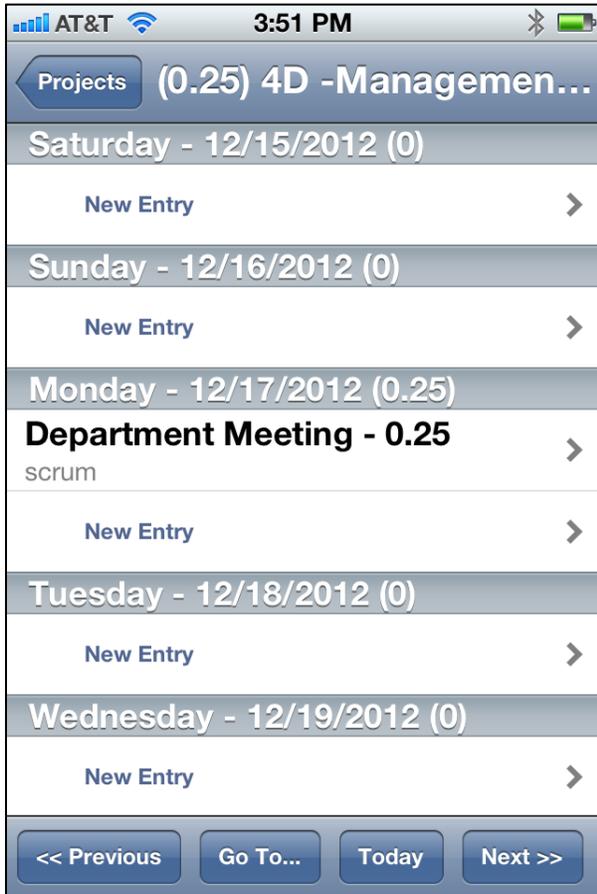
After you have selected a project and date, the process is the same as creation of a new entry on the My Timesheet screen. The project is prefilled with your original selection, and you can click on the remaining fields to make selections, enter hours and add a comment (optional).

After you have entered all of the information for your new project time entry, click on the Save button in the upper right corner to save the entry. The app will confirm that the new entry was saved. You can then use the button(s) in the upper left corner to return to entering more time for the selected project or select a new project for time entry.

Using Punch to Track In and Out Times

If your Journyx Administrator has given you access to track in and out times in the mobile app, you will see a "Punch In" button on your home screen. When you click on the button, 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 recent activity.

General Usability Notes

If you open the Journyx app while you are also logged into your browser-based timesheet, you will be logged off automatically in the browser. The same thing happens in reverse when you log into your browser-based timesheet while running the app. Regardless of where you enter new time, all entries will show up in both views immediately.