



# KeyedIn Projects v7.3 Winter 2020/21 Release

## Release Guide

Version 7.3.0

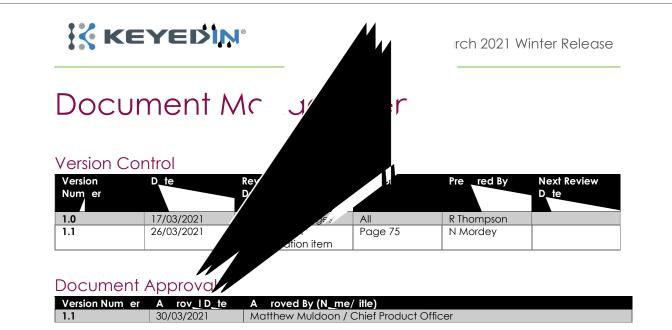
March 2021

## Contents

Document Management4
Version Control
Document Approval4
Document Authorization4
Overview of Changes4
Release Summary
Task Board7
Feature Summary7
Feature Usage
Accessing the Board and switching to/from Gantt8
Board View Basics
Moving a Task using Drag and Drop13
Viewing and Editing Task Details
Adding a New Task15
Viewing Summary Tasks17
Summary View: Viewing and Editing Child Tasks
Task Board - Setup and Configuration23
Enabling the Board view23
Task Board Configuration23
Classification: Public

Setting Up Board Columns	25
Task Highlighting Options	27
Task Display Symbols	27
Displaying Additional Fields	28
Defining the Summary Task Hierarchy	28
Enhancements to Support Task Plans Using Integrations	32
Ability to maintain Multiple Plan Versions by Project	32
Ability to designate a [Task] Custom Field as "Integration"	35
PowerPoint Output	36
Feature Summary	36
Running a PowerPoint report	37
Configuring PowerPoint templates	40
Adding a PowerPoint template to KeyedIn	42
Further Template Configuration	44
Search Screen Inline Menus	51
Linking a PowerPoint template to an action	52
Enhanced Reports via API	53
Feature Summary	53
Enhanced reports via the Report Scheduler	53
Feature Summary	53
Using	53
IFrame Widget	55
Feature Summary	55
Using	55
Pie chart labels displayed as % or value	59
Feature Summary	59
Using	59
Gantt widget ability to set the initial display point	60
Feature Summary	60
Using	60
Administration Screen Changes	62
Summary	62
Changes in Detail	63
"Applications" Configuration Item	75
Feature Summary	75
Classification: Public	2

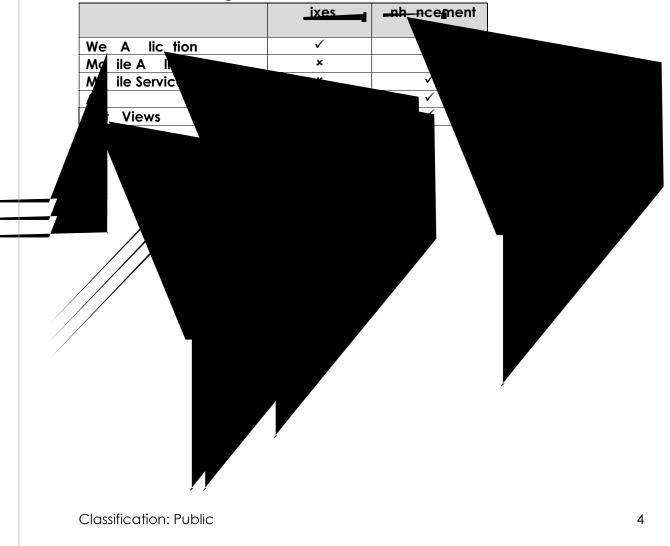
Feature Usage
Product Editions
Other Notable Changes
Ability to restrict Project Creation by Login Group (per Project Type)78
Data View Changes for v7.3
Summary of Additional Features since the last Major Release (v7.2)
7.2.1 (December 2020)
Scheduled Jobs for Project Snapshots80
Scheduled Snapshot Configuration81
Enhancements to the Project Snapshots Search Screen
Protect Custom Fields from Deletion85
Project Type Permissions: New #ANYONE# Token to Capture a Comment on Status Move
Improved Display of Number List Custom Fields on Search Screens
Timesheet Search: Ability to Filter by Resource Type
Ability to View up to 24 Years Finance and Forecast Data90
Finance Tab90
Forecast Tab90
Task Edit Screen: Automatically Clear Constraint Date when Removing Constraint Type
Ability to Update Deliverables on Template Projects within the Deliverables Tab93
Deliverables API
7.2.3 (January 2021) V3 Client API: New Client Template Code Token94
Forecast Collaboration Posts copied on clone94



### **Document Authorization**

Version Num er	A rov_ID_te	A roved By (N_me/ itle)
1.1	30/03/2021	Paul Gleghorn / SVP Technology and Architecture

### Overview of Changes



Winter Relea

## **Release Summary**

KeyedIn Projects v7.3 is the first major release and delivering excitin our market leading Task Planning and Report Founctionality to furth execution and delivery within an agile anvirgement.

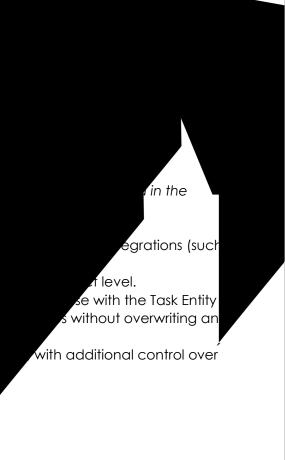
Additionally, a number of supporting changes have been margin help customers with integrations more easily manage Project Task plans, and for continued roll-out of modern API driven technology delivers further usability in provements to various administration entities.

In summary, this release introduces:

- A new Kanban style **sk Bo rd** as an alternative way to visualise and manage the progress **second second borative** agile environment.
- The ability to out ut repowerful automated MI t stakeholders.
- Further additions to the enh
  - Add IFrame widgets v applications (such as F
  - Schedule enhanced rep
  - Access enhanced report
  - Work more easily with the improvements.

\* Ability to schedule enhance subsequent major release (7.

- Various enhancements to support c as JIRA) to better manage Task Plan
  - Ability to control Multiple Plar Version
  - An Integration custom field initially i to allow integrations to update the existing checked out plan.
  - Supporting enhancements to the To Task creation.



**s** to create





## Task Board

### Feature Summary

The Task Board provides an alternative, interact way to view progress of Tasks within an agile environment opperate Task Planning Gantt functionality. ise and manage the Igside our standard

2		k Kanban Demo		ource @ Deliverable	es <b>∆</b> Risks <b>O</b> lss	ars S Dilling at	Ann	ovals v More					C.
	antt Board		and the state of the state	ource of Dearendon		and a number of	- App	Charles Comments					
	🖉 Tasks 🖌 🖌	Check In + Add	Days ~ 2 Refr	esh									O Filter All T
	Not Started	,	Acceptance Cri	iteria Agreed 3	In Development	1,	10	QA	1,10	BA Sign Off	0.0	Complete	10
l	7 F1S1 Task 2     % Complete     Effort     Sprint	0 0 Sprint 1	18 F252 Tas % Complete Effort Sprint	k 1 1 1 Sprint 2	# 11 F152 Task % Complete Effort Sprint	2 50 1 Sprint 1		Gomplete 76 Effort 0 Sprint Sprint 1	<ul><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()</li><li>()&lt;</li></ul>			# 10 F152 Task 1 % Complete Effort Sprint	100 1 Sprint 1
	# 8 F1S1 Task 3 % Complete Effort Sprint	0 0 Sprint 1	# 19 F252 Tas % Complete Effort Sprint	k 2 5 1 Sprint 2								# 14 F2S1 Task 1 % Complete Effort Sprint	100 1 Sprint 2
	23 F351 Task % Complete Effort Sprint	1 0 1 Sprint 3	# 37 Backlog % Complete Effort	- Milestone 1	1							# 15 F251 Task 2 % Complete Effort Sprint	100 1 Sprint 2
	24 F3S1 Task % Complete Effort Sprint	2 0 1 Sorint 3										# 16 F2S1 Task 3 % Complete Effort Sprint	100 1 Sprint 2

The Task Board provides the following key features:

- Tasks are represented as tiles in configurable columns based on the current
   sk ercent com lete for the active Project.
- <u>en Bo</u>ard columns to update percent complete Drð ary of the new column without τo requ Hover d etails such as dates, duration, effort ces, or click through to the standard and the Task View The default on-Summary) Tasks and milestones, but Summary Task levels (subject to specific users can "ro Task configura o visualise and manage progress at a higher level.

## 

v7.3 March 2021 Winter Release

### Feature Usage

This section is aimed at general users of the Task Board and assumes it has been preconfigured by an administrator for appropriate use within your organisation. Administrators should refer to the later section on *Feature Setup* once an understanding of the operation has been established.

### Accessing the Board and switching to/from Gantt

Provided the Board view has been enabled for your Login Profile, the Projects > Tasks tab will now provide options to alternate between Gantt and Board views.

If using multiple plan versions, the Board view is only available when viewing the Published Task Plan version; this is because the Board lanes are based on Task percent complete, which does not apply to draft versions.

Select the **Bo** rd option to view the Board – you will be prompted to save any changes, if ap



rojects					
Product - Task Kanban Demo	1 🛦				C* ~ L <u>at</u> ~
🕷 Home 🔤 Tasks 🗮 Forecasts	🖾 Finance 🛊 Resource 🐵 Deliverables	▲ Risks O Issues \$ Billing d A	pprovals ~ More		
Santt Board					
🖀 Tasks 🗸 📥 Check In 🛉 Add	Days 🗸 🛛 🕄 Refresh				Filter All Tasks ~
Not Started	Acceptance Criteria Agreed 6 /10	In Development 2/10	QA 1/10	BA Sign Off 0 /10	Complete 0
6 F1S1 Task 2     Complete 0     Effort 0     Sprint Sprint 1	Image: State in the image is a state	20         9 F152 Task 1           % Complete         30           Effort         1           Sprint         Sprint 1	SFISITask 1 Complete 76 Effort 0 Sorint 2 Sorint 1		
			0		
TF1S1 Task 3	■ 14 F2S1 Task 2	🗃 10 F152 Task 2			
Effort 0	Effort 1	Effort 1			
1 22 F3S1 Task 1	III 15 F2S1 Task 3				
% Complete 0 Effort 1 Sprint Sprint 3	% Complete 5 Effort 1 Sprint Sprint 2				
	Product - Task Kanban Demo # Hone Tasks Forecass Tasks A Checkin A Add NotStarted E f151 Task 2 # Gongite 0 Effort 0 Sprint Sprint 1 E 27 F151 Task 3 % Complete 0 Effort 0 Sprint 1 E 27 F151 Task 4 % Complete 0 Effort 0 Sprint 1 E 27 F151 Task 1 % Complete 0 Effort 1 E 27 F151 Task 1 % Complete 1 E 1 E 2 F151 Task 2 % Complete 1	Product - Task Kanban Demo 1 ▲         # Hone Tasks       Forecass (2) Finance ◆ Resource ◆ Deliverables         and Courd       Forecass (2) Finance ◆ Resource ◆ Deliverables         Tasks       ▲ Add Days       Ø Refresh         Not Started       ●       Acceptance Criteria Agreed € 190         Ef F151 Task 2       ●       Acceptance Criteria Agreed € 190         Effort       0       ■         Sprint       Sprint 1       ■         B1 7F151 Task 3       ■       ■         W Complete       0       ■         Ffort       0       ■         Sprint       Sprint 1       ■         B1 7F151 Task 3       ■       ■         W Complete       0       ■         Image: Print Sprint 1       ■       ■         Image: Print Sprint 2       ■       ■         Image: Print Sprint 1       ■       ■         Image: Print Sprint 2       ■       ■         Image: Print Sprint 2       ■       ■         Image: Print Sprint 2       ■       ■ <th>Product - Task Kanban Demo 1 ↓         # Hone ■ Tasks       Enrecess GB Prance ↑ Resource ⊕ Deliverables ▲ Roks ● Issues \$ Billing ↓ A         # Hone ■ Tasks       ● Forecass GB Prance ↑ Resource ⊕ Deliverables ▲ Roks ● Issues \$ Billing ↓ A         Matt Deeps       ▲ Add Deys ∨ Ø Refresh         Tasks       ▲ Add Deys ∨ Ø Refresh         Not Started       ●         Acceptance Criteria Agreed       6.10         Im Development       2.10         Im 6 F151 Task 2       Im Complete 0         W Complete 0       Fiffert         Sprint       Sprint         Sprint       Sprint</th> <th>Product - Task Kanban Demo 1 ▲       # Hone Taske Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       # Hone Taske Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Citeria Agreed 0 reports (2) Finance P Resource O Deliverables (2) Finance P Resource O Deliverables (2) Finance P Resource P</th> <th>Product - Task Kanban Demo 1 ☆ # Hone Tasks references 62 Preace P Delverables ☆ Roks 0 Issues \$ Billing @ Approvals ~ More and Const Tasks references Cas Preace Citeria Agreed 6 m B 13 F231 Task 1 % Complete 0 Sprint Sprint 1 F1 4 F231 Task 2 % Complete 0 Sprint Sprint 1 E 14 F231 Task 2 % Complete 0 Sprint Sprint 1 E 15 F153 Task 1 % Complete 5 Sprint Sprint 2 F1 5 F153 Task 1 % Complete 0 Sprint Sprint 2 E 14 F231 Task 3 % Complete 0 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 0 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 0 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 Sprint Sprint 2 E 15 F153 Task 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 3 % Complete 3 Sprint Sprint 2 E 15 F153 Task 3 % Complete 3 Sprint Sprint 3 Sprint Sprint 3 Sprint 3 Sprin</th>	Product - Task Kanban Demo 1 ↓         # Hone ■ Tasks       Enrecess GB Prance ↑ Resource ⊕ Deliverables ▲ Roks ● Issues \$ Billing ↓ A         # Hone ■ Tasks       ● Forecass GB Prance ↑ Resource ⊕ Deliverables ▲ Roks ● Issues \$ Billing ↓ A         Matt Deeps       ▲ Add Deys ∨ Ø Refresh         Tasks       ▲ Add Deys ∨ Ø Refresh         Not Started       ●         Acceptance Criteria Agreed       6.10         Im Development       2.10         Im 6 F151 Task 2       Im Complete 0         W Complete 0       Fiffert         Sprint       Sprint         Sprint       Sprint	Product - Task Kanban Demo 1 ▲       # Hone Taske Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       # Hone Taske Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Deliverables ▲ Risks O Issues S Billing de Approvals ~ More       Image: Status Forecasts (2) Finance P Resource O Citeria Agreed 0 reports (2) Finance P Resource O Deliverables (2) Finance P Resource O Deliverables (2) Finance P Resource P	Product - Task Kanban Demo 1 ☆ # Hone Tasks references 62 Preace P Delverables ☆ Roks 0 Issues \$ Billing @ Approvals ~ More and Const Tasks references Cas Preace Citeria Agreed 6 m B 13 F231 Task 1 % Complete 0 Sprint Sprint 1 F1 4 F231 Task 2 % Complete 0 Sprint Sprint 1 E 14 F231 Task 2 % Complete 0 Sprint Sprint 1 E 15 F153 Task 1 % Complete 5 Sprint Sprint 2 F1 5 F153 Task 1 % Complete 0 Sprint Sprint 2 E 14 F231 Task 3 % Complete 0 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 0 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 0 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 1 % Complete 3 Sprint Sprint 2 E 15 F153 Task 3 % Complete 5 Sprint Sprint 2 E 15 F153 Task 3 % Complete 3 Sprint Sprint 2 E 15 F153 Task 3 % Complete 3 Sprint Sprint 3 Sprint Sprint 3 Sprint 3 Sprin

### Board View Basics

The Board provides the ability to visualise progress of Tasks which could represent traditional project tasks, or agile work items (such as development activities).

Tasks are displayed in the columns based on their current percent complete. These percent bands should be pre-configured by a system administrator and the same

9

KEYEDIN®

view applies globally to all users across all Projects. Up to ten Board columns can be configured, but the first and last are fixed to 0% and 100% complete, to represent items that are 'Not Started' and 'Completed', respectively.

The percent bands for each column are visually represented based on the configured low and high boundaries and hovering over the bar at the top of a column displays a tooltip to indicate the column's percent range.

In Development	2 /10
10 F1S2 Task 1	5

When the Board is first loaded, the first ten Tasks are shown for each column, ordered by ID, ascending. Additional Tasks can be displayed by using the *Load More* button.

28 F3S2 Task 2		Ŋ
% Complete	0	Ŭ
Effort	1	
Sprint	Sprint 3	
	+ Loa	ad More

#### **Task Fields**

By default, the Task ID and Description will always show at the top of the tile.

The system administrator may configure up to five additional fields to display on the Task tile, including any Custom Fields. In this example, three additional fields have been made available. Note that Sprint is Custom ield

🖹 13 F2S1 Tas	k1		
6 Complete	5		
ffort	1		
Sprint	Sprint 2		



#### Additional Task Information

By hovering over the Task Description or any of the additional fields, a pop-up displays a further subset of core Task fields. Predecessors, Successors and Assigned Resources will only be shown if they exist on the Task.

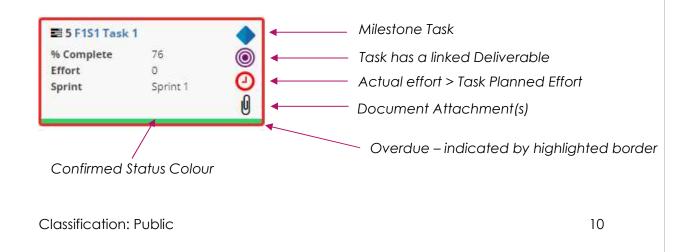
print 2	E 10 F1S2 Tas % Complete Effort Sprint	sk 2 30 1 Sprint 1	
Task ID 10: F1S2	Task 2		
	09/03/2021 12/04/2021	Effort : 1 Allocated Effort : 0	
ρ Duration :	24	Actual Effort : 0	
Status : Percent Complete :	Confirmed 30		
Predecessors :	9		

The Task Description on the tile is a hyperlink that can be clicked to drill into the View/Edit screen – further detail will be covered in a later section. In the event the Task Description is blank, the ID will act as the hyperlink.

#### **Task Indicators**

Tasks on the Board may be highlighted in certain colours and / or display symbols to indicate key information. These indicators are optional and can be enabled individually by a system administrator. Further detail is configured in the Feature Setup section.

With fully configured display options, a Task may appear as follows:



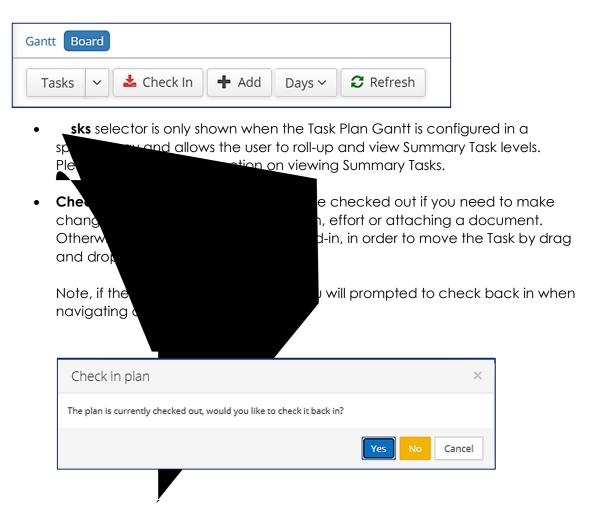


A tooltip is displayed when hovering over a symbol to explain its meaning.

The Document Attachments symbol **U** will also display the count of attachments on the Task. Please note, this applies to standard Task Document attachments, and *not* any Task Document *Custom Field* attachments that may have been configured.

#### **Board Menu Options**

The following menu options are available:



- Add new Task allows a new Task to be inserted. Not available when viewing Summary Tasks.
- **D**\_ys/Hours selector to toggle duration and effort related fields between Do toggle duration on a per-user basis.

Classification:

• **Refresh** button – updates the Board with the latest changes, for example where other users are making amendments.

Additionally, the standard Tasks Filter is available and can be used to further restrict the view of Tasks by filtering on the available list of standard and custom Task Fields, subject to permissions.

Gantt Board				
Tasks 🗸 📥 Check In	+ Add Days	∽ 2 Refresh		Filter All Tasks 🛩
Contraction				

Examples of Task filters could be:

KEYEDIN

- Tasks that are Provisional or Confirmed
- Tasks with a Resource Assignment (or specific Resource)
- Tasks with a Document Custom Field attachment
   Tip: use this syntax to return any Tasks with a Custom Field attachment:

[Document Custom Field] < > blank

Fil	ter							×
Nan	ne * All Tasks	Scope	Indi	ividual 🗸			+ Add I	Row
	Field		С	omparison Type	Value		Displayed	
1	Task Task Document Custom Field	× ×	][-	~ ~		#FN#	No v	<b>x</b>
	Project Code	~	][-	- ~	#CONTEXT-PROJECTCODE#			
						<b>▼</b> Toggle A	dvanced Sea	arch



#### Moving a Task using Drag and Drop

The primary interaction with the Board is to view and move Tasks between columns to update the percent complete to reflect the current status of the work. Tasks can be dragged between columns and the percent complete will be updated to the lower (Percent From) boundary of the new column. If Automatically Record the Completion Date on Tasks and Assignments is set in Configuration > Planning Settings, the Task completed date will also be updated when moving to the 100% complete column.

Drag and Drop is available to any user who has permission to maintain Tasks on the Project and does **not** require the plan to be checked out. If another user is working on the checked-out Task Plan in the Gantt which is then saved at a later point in time, the percent complete will <u>only</u> be overwritten if that field was specifically changed by the Gantt Task Plan user.

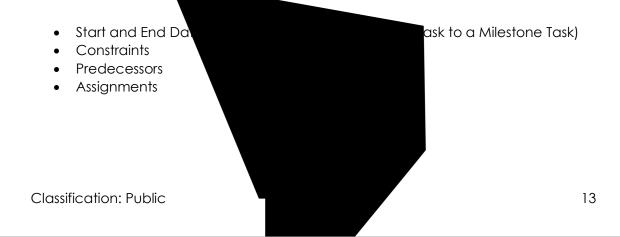
#### Viewing and Editing Task Details

Clicking the Task description opens the full Task dialogue screen. This will be in view only mode unless the plan is checked out to you (by using the check out button on the menu bar).

13 F2S1 Tas	k 1
% Complete	5
Effort	1
Sprint	Sprint 2

When the plan is checked in, the Task dialogue screen provides the same read only view as when accessed from the Task Plan Gantt.

When the plan is checked out to you, the screen opens in a restricted edit mode. The following items **c\_nnot** be edited when this screen is accessed via the Board:



v7.3 March 2021 Winter Release

eneral Skills Assignr	ments Predecessors	Other CFs	2	00	
Details					Dates
ID:					* Start Date:
11					09/03/2021 08:00 AM
Outline:					* End Date
1.1.1.1.2.2					12/04/2021 05:00 PM
Project:					Constraint Type:
KBN1   Task Kanban Dem	o 1				Start No Earlier Than
Confirmed:					Constraint Date:
✓					02/02/2021
Protected: 0					Effort
					* Effort:
Description:					1
F1S2 Task 2					Actual Effort:
					0
					% Complete:
					50

This is because the Task Plan Gantt runs complex calculations to automatically adjust dates based on any constraints and dependencies between Tasks, which is only currently available when working in the Gantt tab. Therefore if more detailed editing of dates, constraints and dependencies is required then please revert to the Gantt view to make such changes.

The one exception where users are allowed to set a start and end date is covered in the next section for adding a new Task in the Board view.

Note – if a Task is set to Confirmed or Provisional via the Board > Task Edit screen, any Assignments on the Task will also be updated to the same status. This is consistent with behaviour in the Task Widget and Bulk Edit feature – in principle because an Assignment cannot be Confirmed if the Task is not Confirmed, and the user is not currently able to edit Assignments in the Board view. The behaviour in the Gantt > Task edit screen remains unchanged where the user is able to maintain the Task and Assignment status independently and is alerted on save if the combination is invalid.

### Adding a New Task

The option to add a new Task is available on the standard Board view when the Plan is checked out to you, viewing standard (non-Summary) Tasks.

When adding a new Task, the default start and end date is set to today's date (unless the Plan Start Date is in the future, in which case it will use that). The Task start and end times will default to those specified in *Configuration* > *Planning Settings*.

The Start and End Date can be changed to a different date, but once the Task has been added, any further date changes must be made in the Task Plan Gantt view.

A default constraint of 'Start No Earlier Than' is applied when adding a Task via the Board view – which is a requirement to prevent it from reverting to the Task Plan start date. he constr\_int ty e\_nd d\_te c\_nnot\_e\_mended in this mode, \_nd should e done vi\_the n

neral Skills Assignments Predecessors Other CFs 👳 🗞		
Details	Dates	
ID:	* Start Date:	
49	22/02/2021 🛗 8:00 AM	0
Outline:	* End Date	
11	22/02/2021 🛗 5:00 PM	٥
Project:	Constraint Type:	
KBN1   Task Kanban Demo 1	Start No Earlier Than	
Confirmed:		
	Constraint Date:	
Protected: 0	22/02/2021	
	Effort	
Description:	* Effort:	
	0	
	Actual Effort:	
	0	
	% Complete:	
Milestone:	0	

The following items **c\_nnot** be maintained when this screen is accessed via the Board:



- Constraint Type and Date (a start no earlier constraint is applied based on the Task Start date)
- New Task Assignments cannot be added using the Task Edit screen accessed via the Board view.
- Task Predecessors cannot be added or maintained using the Task Edit screen accessed via the Board view.

Any new Tasks added via the Board view will be created as standalone Tasks at the bottom of the Task Plan Gantt, using the latest available Task ID.

## 

### Viewing Summary Tasks

In addition to viewing standard Tasks and Milestones, the Board is also able to display Summary Tasks, subject to certain conditions being met.

#### **Task Plan Conditions**

The underlying Task Plan Gantt must be correctly configured from a hierarchical standpoint, where indenting (or nesting) Tasks creates a Summary Task structure.

The hierarchy structure **must** e uniform – this means that all standard Tasks that are child Tasks, must exist at the same outline level.

level (i.e. 5 levels deep, x

As an example, the yellow ghlighted standard Tasks are all at the same outline x.x)

		(Published)		
0	ld	Outline	Description	Duration
<b>\$</b> 0	1	1	✓ General Initiative Task	51
<b>\$</b> 0	2	1.1	✓ Epic 1	50
<b>\$</b> 0	3	1.1.1	✓ Feature 1	50
00	4	1.1.1.1	V Feature 1 Story 1	6.25
۵ ا	5	1.1.1.1.1	F1S1 Task 1	. (
••	6	1.1.1.1.2	F1S1 Task 2	
۰ ا	7	1.1.1.3	F1S1 Task 3	6
0	8	1.1.1.2	V Feature 1 Story 2	50
•	9	1.1.1.2.1	F1S2 Task 1	24
۰ ا	10	1.1.1.2.2	F1S2 Task 2	2
<b>\$</b> 0	11	1.1.2	✓ Feature 2	2
<b>\$</b> 0	12	1.1.2.1	V Feature 2 Story 1	2
۰ 🗉	13	1.1.2.1.1	F2S1 Task 1	2
۰ ا	14	1.1.2.1.2	F2S1 Task 2	2
۰ ا	15	1.1.2.1.3	F2S1 Task 3	24
00	16	1.1.2.2	V Feature 2 Story 2	2
۰ 🗉	17	1.1.2.2.1	F2S2 Task 1	2
۰ ا	18	1.1.2.2.2	F2S2 Task 2	24

The Task Plan can support many levels of nesting, but only 5 levels are available to view on the Board (e.g standard Tasks, and up to 4 Summary Levels).

# KEYEDIN

These highlighted Tasks above are the lowest level Tasks and are referred to as 'Level 1' Tasks when viewed on the Kanban Board.

The Summary Tasks range from Level 2 to Level 5 where:

- Level 2 has been configured as Stories
- Level 3 has been configured as Features
- Level 4 has been configured as Epics
- Level 5 is the top level representing the Initiative.

This is only an example, and the names for the levels can be tailored to your organisation's requirements. Further detail is covered in the Feature Setup section

#### System Configuration Conditions

The System Administrator should ensure that Auto-calculate % Complete for Summary Tasks is enabled within Configuration > Planning Settings. This is required in order to automatically derive the Summary Task % complete so that it appears in the correct Board column based on the duration weighted child Task(s) percent complete.

#### Switching between levels on the Board

Provided the above conditions are met, you will have the option to roll-up to Summary Levels from the Board view using the selection button as shown

Gantt Board				
📰 Tasks 🗸	📩 Check In 🛛 🕂 Add	Days 🗸	2 Refresh	
➡ Tasks	15	Accep	otance Criter	ia Agreed
	k 2	13	8 F2S1 Task 1	
👶 Epics	0		mplete	5
V Initiatives	0	Effor	-	1
	Sprint 1	Sprin	nt	Sprint 2

The number of levels shown will reflect the number of levels detected on the Task Plan, up to a maximum of five.

KEYEDIN

The icons and colours representing each level can also be configured, and is covered in the next section - Task Board – Setup and Configuration.

By selecting a level above Level 1, only the Summary Tasks at that level will be shown. The Summary Tasks will be displayed in the column based on their current percent complete, as calculated based on the duration weighted percent complete of their child Tasks.

ot Started 3	Acceptance Criteria Agreed 1,10	In Development 0,10	QA 2,10	BA Sign Off 0,9	Complete
5 Feature 1 Story 1	17 Feature 2 Story 2       % Complete       3       Effort       2       # 0/2		Image: Second		13 Feature 2 Story 1       % Complete     100       Effort     3       2 3/3     3
22 Feature 3 Story 1 6 Complete 0 Ifort 3 © 0/3			<sup>™</sup> 26 Feature 3 Story 2 <sup>™</sup> 46 omplete 9:3     Effort 7 <i>⊈</i> 2/3		30 Feature 3 Story 3       % Complete       100       Effort       0       # 4/4

Summary Task tiles cannot be dragged to other columns, but otherwise behave like standard Task tiles in with respect to Task highlighting, the display of additional information on hover, and ability to view/edit for further details.

The additional information shown on Summary Tasks relates to the number of direct child Tasks, and how many of those are completed, along with the icon (if configured) representing the level of the child Task.

In this example, the Summary Task (ID 12) has three direct child Tasks, one of which is complete.

In Developmer	nt	2 /10
/ 12 Feature	2 Story 1	
% Complete	67	
Effort	3	
<b>1</b> /3		

This applies to all levels of Summary Task, so an example of viewing a higher level is shown below, where the Summary Task continues to be shown in the Board column

according to its current percent complete. The icons (if configured) will reflect the level of the Summary Tasks and their child Tasks.

Initiatives 🗸 📥 Ch	eck In Days 🗸	2 Refresh			
lot Started	1	Acceptance Criteria Agreed	0 /10	In Development	1 /10
💡 42 General Initiative	Task 2			<b>2</b> General Initiative Task 1	
% Complete 0				% Complete 38	
Effort 0				Effort 16	
÷ 0/1				± 0/2	

If any of the conditions are not met then only level 1 Tasks/Milestones will be available and information symbol will replace the roll-up selector, as shown below.

Gai	ntt Board				
0	📩 Check In	+ Add	Days 🗸	C R	efresh
	Task Gantt not c	onfigured fo	or Summary	views	Accept

For example, the following hierarchy is invalid as although Tasks 14 and 15 are both "standard" Tasks, the outline level is not consistent.

		T . T . T . Am . Am	I TOL TOUTL
	11	1.1.2	✓ Feature 2
	12	1.1.2.1	<ul> <li>Feature 2 Story 1</li> </ul>
	13	1.1.2.1.1	✓ F2S1 Task 1
31.8	14	1.1.2.1.1.1	F2S1 Task 2
31.8	15	1.1.2.1.2	F2S1 Task 3
	16	1.1.2.2	<ul> <li>Feature 2 Story 2</li> </ul>



#### Summary View: Viewing and Editing Child Tasks

At any Summary level, the child Task icon and count of child Tasks can be clicked to view an expanded breakdown of the IDs, Descriptions and completion status, represented by a tick.

📩 12 Feature	2
% Complete	62
Effort	5
/2 1/2	
✓ 🖉 13 Featu	
🗎 17 Featu	re 2 Story 2

The Task description can be clicked on to either view, or edit if the plan is checked out.

As Summary Tasks derive certain data from child Tasks (such as Effort, percent complete, and Status), the editable Task data is generally limited to Description and Custom Fields.

Additionally, if viewing Level 2 Summary Tasks (so the direct children are the lowest level "standard" Tasks), and the Plan is checked out to you, the option to 'tick to complete' is provided which will set the Task to 100% complete without needing to open the dialogue screen.

QA	1 /10
9 Feature 1 Story 2	Q
% Complete 74	
Effort 2	
■ 1/2	
✔ 📰 10 F1S2 Task 1	
🔲 📰 11 F1S2 Task 2	
Tick to Complete	

## 

v7.3 March 2021 Winter Release

An information warning will be shown any time the user changes the percent complete on a Child Task whilst viewing the Summary level, to indicate that at least one Summary Task may now also have an updated percent complete.

The Summary Task initially remains in its original column to allow any additional editing but selecting the *Refresh Now* option on the banner will move the tile to the correct column if necessary.

antt Board					
The board column for one or more Summar	y Task(s) may be out of date.				C Refresh Now
🥔 Stories 🗸 📥 Check In 🛛 Days 🗸	C Refresh				🏟 Filter 🛛 All Tasks 🗸
Not Started 3	Acceptance Criteria Agreed 1 /10	In Development 2 /10	QA 1/10	BA Sign Off 0,9	Complete 3
S Feature 1 Story 1 % Complete 0 Effort 0 Effort 0 Effort 0	17 Feature 2 Story 2     % Complete 5 Effort 2     Ø/2	26 Feature 3 Story 2     46 Gomplete 44 Effort 2     20	Gomplete 100 Effort 2      Z2		If Feature 2 Story 1       % Complete     100       Effort     3       Image: 3/3     3/3

Please note the Milestone Task and Linked Deliverable symbols are not relevant to Summary Tasks, but all other visualisation and display symbols will still apply if enabled.



### Task Board - Setup and Configuration

This section provides detail for System Administrators responsible for providing user access to the Board, and configuring the display and visualisation options which will apply globally to all system users.

#### Enabling the Board view

The Task Board view is only available if the Enhanced Task Plan Gantt is enabled (this will be enabled by default for new clients after March 2018).

Access to the Board view is controlled by a new Login Profile setting, **Enable Task Kanban Board**, which is not initially set by default.

Amend Login Profile - CONFIG	URATION   Configuration	×
General Timesheet Expense	Planning Strategic Planning CRM Accounts Setup	≞ -
Planning Charge Access: Vie	w Amount w Amount bility to maintain Protected Tasks bility to view Actual Effort in Task Planning bility to Data Load Task Custom Fields hable Task Kanban Board	

#### Task Board Configuration

It is recommended that the Board view is first configured by a System Administrator who has the **Login Profile setting > Ability to set System Defaults** before being made generally available as the specific setup applies globally to all users within the client system.

v7.3 March 2021 Winter Release

Amend Log	nend Login Profile - CONFIGURATION   Configuration					
General	Timesheet Expense Planning Strategic	Planning CRM	Accounts	Setup		
	Name: Configuration Code: CONFIGURATION	Active: 🗸			)	
	Features: Ability to set System Defaults Ability to set Own Project Re Ability to set Own Activity Re Ability to set Available To All	strictions				

For initial setup, once the Board view has been enabled, navigate to a Task Plan ensuring the Published version is active and select **Board**.

🖻 Product - Task Kanban Demo 1 🚠						
🖀 Home 📑 Tasks	Forecasts	💿 Fina				
Gantt Board						

All standard Tasks (excluding Summary Tasks) on the Gantt will now be represented as tiles on Board, in columns based on their percent complete.

To configure the Board options, select the 🐣 cog icon.

📽 Product - Task Kanban Demo 1 🏶 Home 🛛 Tesks 🗟 Forecasts 🔅		🛆 Risks 🕕 Issues 💲 Billing 👍 Ap	ravals ~ More			S × 100 ×
Gantt Board Tasks v 📥 Check In 🕂 Add D	ays∨ 🛛 🕽 Refresh					🚯 Filter 🛛 All Tasks 🗸
0% 4	1-25% 9	26-50% 2	51-75% 1	76-99%	100% 4	
28 Backlog - Bug X	5 F1S1 Task 1	17 F252 Task 1	31 Backlog - Milestone 3 - test long long long long	26 F352 Task 1	14 F2S1 Tesk 2	

This opens the Board configuration screen, which is broken down into sections, and further explained in more detail:

- Board Columns
- Highlighting
- Display Symbols
- Additional Fields
- Summary Task Hierarchy



#### Setting Up Board Columns

By default, six columns are pre-configured based on the percent complete boundaries shown below, where the Status Names are initially a textual description of the percent boundaries.

The Status Names and boundaries can be custom configured, up to a maximum of ten, and a minimum of three. The 0% and 100% boundaries are fixed and cannot be changed.

Board Columns 0							
Status Name	% Com	plete Betwe	en		Task Limits		
0%	O 96						
1-25%	1 %	And <=	25	96		×	
26-50%	26 %	And <=	50	96		×	
51-75%	51 %	And <=	75	96		×	
76-99%	76 %	And <=	99	96		×	
100%	100 %						

#### **Editing Board Columns**

Amending the 'Percent To' boundary automatically adjusts the 'Percent From' of the successive Status. In the below example, the Status Names have also been amended.

Percent To must be greater than 0, less than 100 and not already exist.

Board Columns 0				
Status Name	% Com	plete Betwe	en	
Not Started	O 96			
Acceptance Criteria Agreed	1 96	And <=	10	96
In Development	11 96	And <=	70	96
QA	71 96	And <=	95	96
BA Sign Off	96 %	And <=	99	96
100%	100 %			



#### Adding Board Columns

	<u>т</u>
	- T

To add a new column, enter the upper range (*Percent To*) value in the box at the bottom of this section and it will be automatically inserted at the appropriate position in the table. The *Percent From* boundary will be automatically determined, and successive statuses will be adjusted to ensure no overlap.

The new Percent To must be greater than 0, less than 100 and not already exist.

#### **Deleting Board Columns**

To delete an existing column, simply click the red cross *icon*. The Percent From boundary on the successive status will be adjusted to maintain a contiguous range of boundaries.

#### Task Limits

Task Limits can be optionally set to provide a visual indication where the number of Task tiles in a column exceeds the limit. It does not restrict the number of allowed tiles per column.

For example, based on the configured Task Limit of 10 for the second status:

Status Name	% Con	nplete Betwee	en		Task Limits	
Not Started	0 %					
Acceptance Criteria Agreed	1 %	And <=	10	%	10	×

If the number of Tasks in that column is less than or equal to the limit, the numerator is shown in blue.



If the number of Tasks in that column exceeds the limit, the numerator is shown in red.





### Task Highlighting Options

Task Kanban I	Board Configuration	
Highlighting		
Provisional		Task Preview
Confirmed		1 Description
Overdue		
		Show Confirmed Task

This section allows optional configurable colours to be set to distinguish **Provision**, **I**, **Confirmed** and **Overdue** Tasks.

The Provisional and Confirmed status is set on the Task itself. An overdue Task is defined as one where it is less than 100% complete and the Task End Date is before the current date.

Colours for each option can be selected using the HEX colour picker, and the **Preview** tile automatically updates to provide an example.

Provisional	#5b51c2	Task Preview
		1 Description
Confirmed	#2fd46b	(C)
		e
Overdue	#f02b2b	Ú

Use the Show Confirmed Task option to toggle the preview colour between Provisional and Confirmed.

### Task Display Symbols

Four Display Symbols can be optionally toggled to display on the Task:

- Milestone where the Task is a standard Milestone Task.
- Linked Deliver le where Task has a linked Deliverable (either to the current Project or another set)
- Actu I \_ffort > Task
- Att\_ch
   atta

Actual Effort recorded against the orded against the Task. ard document t custom field Itered on separately).

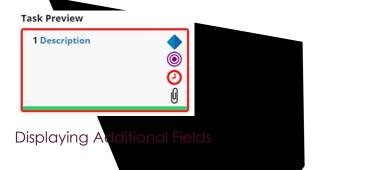
Classification: P

# 

v7.3 March 2021 Winter Release

Display Symbols		
Milestone	✓	•
Linked Deliverable	✓	۲
Actual Effort > Planned Effort	✓	0
Attachment	✓	Q

The \_sk Preview tile updates with an example of where the conditions are met:



Up to five addition include Custom F

lected to display on the tiles, which can lead search to find and select the fields.

% Complete	~	
Effort	~	
None	~	
Spr	Q	
Sprint None	~	
	Effort None Spr <u>Sprint</u>	Effort v None v Spr Q Sprint

To remove an existing field, select the 'None' option at the top of the list.

## Defining the Summary Task Hierarchy

Task Level	Icon	Display As	Icon Colour
Level 1		Tasks	
Level 2		Stories	
Level 3		Features	
Level 4		Epics	
Level 5		Initiatives	



#### Task Levels

Up to five Task levels can be configured to view on the Board. Level 1 represents standard Tasks (or Milestone Tasks), which can be either standalone, or as a child of another Task.

Levels 2 and above represent Summary Level Tasks (i.e Tasks that have Child Tasks).

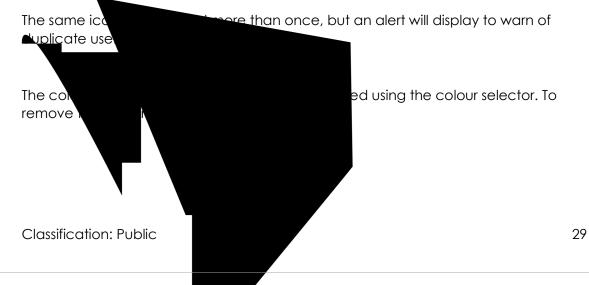
By default, the levels are referred to as **Level 1** through to **Level 5**, as per the Task Level column, however the names of these levels can be optionally custom defined by entering a name in the *Display As* column. The above example shows a typical agile development setup based on Tasks, Stories, Features etc.

#### Task Level Icons

Each level can be represented by an optional icon. To select an icon, click into the *Icon* box for the level and choose the most suitable.

Task Level	Icon
Level 1	j. ≣
Level 2	6 Ö Ø
Level 3	
Level 4	

o remove \_n icon, select the blank upper left area on the selection panel.



Display As	Icon Colour		
Tasks	#3646c2		
Stories		0	
Features			
Epics			
unce complete, c Summary Task Hiera	an example of a config archy 0	gured hierarchy migh	t be
Task Level	lcon	Display As	lcon Colour
Level 1		Tasks	#3646c2
Level 2		Stories	#3bccd4
Level 3	ġ.	Features	#26d474
Level 4	÷	Epics	#aedb3d
Level 5	\$	Initiatives	#e68020
Level 5		Initiatives asks on the Board colours being defined	#e68020
ummary Tasks. • Auto-c_lcu	I te % Com lete for S		
ummary Tasks. • Auto-c lcu Configu Summary on the we • he hier rcu (or miles)	ing Settings		
ummary Tasks. • Auto-c lcu Configu Summary on the we • he hier rc	ing Settings		

		(Published)		
0	ld	Outline	Description	Duration
0	1	1	✓ General Initiative Task	51
<b>\$</b> 0	2	1.1	✓ Epic 1	50
00	3	1.1.1	✓ Feature 1	50
<b>\$</b> 0	4	1.1.1.1	<ul> <li>Feature 1 Story 1</li> </ul>	6.25
۵ ا	5	1.1.1.1.1	F1S1 Task 1	0
۰ 🗉	6	1.1.1.1.2	F1S1 Task 2	6
۰ 🖬	7	1.1.1.3	F1S1 Task 3	6
<b>\$</b> 0	8	1.1.1.2	<ul> <li>Feature 1 Story 2</li> </ul>	50
۰ 🗉	9	1.1.1.2.1	F1S2 Task 1	24
۰ 🗉	10	1.1.1.2.2	F1S2 Task 2	25
0	11	1.1.2	✓ Feature 2	25
<b>\$</b> 0	12	1.1.2.1	<ul> <li>Feature 2 Story 1</li> </ul>	25
۰ 🗉	13	1.1.2.1.1	F2S1 Task 1	25
۰ 🗉	14	1.1.2.1.2	F2S1 Task 2	25
۰ 🗉	15	1.1.2.1.3	F2S1 Task 3	24
<b>\$</b> 0	16	1.1.2.2	<ul> <li>Feature 2 Story 2</li> </ul>	25
۰ 🗉	17	1.1.2.2.1	F2S2 Task 1	24
۰ 🖬	18	1.1.2.2.2	F2S2 Task 2	24

The Task Plan can support many levels of nesting, but only 5 levels are available to view on the Board (e.g. standard Tasks, and up to 4 Summary Levels).

These highlighted Tasks above are the lowest level Tasks and are referred to as 'Level 1' Tasks when viewed on the Board.

The Summary Tasks range from Level 2 to Level 5 where:

- Level 2 has been configured as Stories
- Level 3 has been configured as Features
- Level 4 has been configured as Epics
- Level 5 is the top level representing the Initiatives.

This is just an example, and the names for the levels can be configured for your requirements and use case.

Regardless of the hierarchy structure, standalone Tasks or Milestones will always be visible at the basic level 1 view.

# Enhancements to Support Task Plans Using Integrations

A number of changes have been implemented to further facilitate the use of Task Plans with inbound integrations, such as JIRA.

Project Task Plans using integrations are only supported where 'single plan versioning' is in use. Up until now this configuration setting has only been available at the System Level (*Configuration > Planning Settings > Enable Multiple Plan Versions*), meaning all Task Plans used this setting. For v7.3, additional control over multiple plan versions has been extended to the Project level to allow flexibility.

The Task API has also been enhanced so any updates via the integration will fail safe if the Task plan is checked out to another user, rather than overwriting the check out which could have previously resulted in loss of unsaved changes.

To complement this, a Task Custom field can now be flagged as an 'Integration' field. This will behave like a normal read-only field in the UI, but will allow the API/Integration to directly update the value to the database without needing to check the plan out. Provided that the API/Integration only needs to update Task 'Integration' custom fields, then the user can concurrently work on a checked out Task Plan whilst the integration runs. If the Integration needs to update any other Task Fields, then the plan will only be checked out if not currently in use, otherwise the Integration update will not be successful, with information provided by an error message.

Furthermore, the Task API also provides additional control over Task creation, with the ability to add a Task above, below, or as a child of another Task, using the reference Task Key. Please refer to the standard API documentation for further details.

Further information on the user interface changes relating to the above enhancements is provided below.

### Ability to maintain Multiple Plan Versions by Project

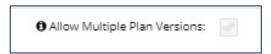
For v7.3, provided Multiple Plan Versions is already enabled in Configuration > Planning Settings, additional control is also provided at the Project configuration level (within Project Edit > Configuration > Planning Settings tab)



Project Configuration	
Planning Settings Charges Restr	ictions Security G
Available for Time and Expense tracking:	✓
Restrict Time/Expense Entry to Project Start and End:	
O Schedule Appointments:	
Assignments Affect Strategic Planning Availability:	
Assignments Affect Strategic Planning Demand:	
Assignment Period Restriction:	No Restriction
O Track Actuals:	No
• Auto complete Task if Assignment is completed:	
Allow Multiple Plan Versions:	✓

If enabled at the System Level, new Projects will automatically be set to 'Allow Multiple Plan Versions'. Projects added from a Template will use the configuration of the Template.

The setting for any existing Projects will remain unaffected, however this Project setting can only be unticked if the Plan has one Task Plan version, otherwise it will appear selected but greyed out.



Versions can be deleted within the Tasks Gantt > Manage Plan Versions screen.

This setting can also be updated via the Project dataload.

# 

v7.3 March 2021 Winter Release

Create Data Tem	plate	:	×
Entity Type:	Project		
* Project Type:	Project	× ×	
Include Fields:	Return on Investment		
	Profitability Index		
	Project ID CF		
	Jira Last Synchronisation		
	RT Project Doc CF		
	Available for Time and Expense tracking		
	Allow posts		
	Override Resource Charge		
	Override Charge Code		
	Assignment Period Restriction		
	This Project is available to all Resources		
	This Project is available to all Activities		
	This Project is available to all Expense Types		
	Allow Multiple Plan Versions		-
	Generate Template Spreadsheet	Cancel	



### Ability to designate a [Task] Custom Field as "Integration"

A new checkbox, **Integr\_tion**, has been added to the Custom Field configuration screen. This is initially integrations and the way with the Task entity where customers have Task Plan integrations and the KevedIn Projects from a third party.

When ticking the Integration fi the field is automatically flagge Please provide a brief descriptio to 'Read Only', and unintended deletion. before saving.

eneral Languages				
Entity:	Task			
* Section:	All Sections			
	General 🗸	Update		
Group:				
*Name:	Test Integration Field			1
*Data Type:	Short Text 🗸	Field Type:	Read Only	
• Required:		* 0 Maximum Length:	70	
Include:	On Column Chooser	*Display Width:	70	
	In Filters	*Display Rows:	1	
Default Value:				1
Use Default Value when Copied:				
Guidance Notes:				1
Controlled:				
Integration:				
O Protected:	✓			
*Reason:				

The Field Type has been marked as Read Only, to reflect how it behaves in the UI, for example it cannot be edited a standard KeyedIn user. However, and as previously described, an associated change has been made to the Task API to allow Task 'Integration' custom fields to be updated directly by the Integration without requiring check-out.

# PowerPoint Output

## Feature Summary

This new feature allows customers to specify their own reports based on PowerPoint templates, with the output created as an editable PowerPoint file. This is designed to significantly increase customer reporting flexibility and reduce the need for custom developed reports.

The PowerPoint report works by allowing administrators to create a PowerPoint template that references standard KeyedIn reports to populate the final output. Multiple reports can be used by a single PowerPoint report to allow different areas of the system to be reported on, along with graphical representations defined in the PowerPoint template.

When the report is run, either from the Project dashboard or from an Action, it will use the Project context from the current location, allowing the report to be populated with the relevant contextual data. This makes it particularly useful for Status reporting at all levels in the Project Hierarchy.

For levels above the detailed Project, summary information and groupings are supported so that consolidated Program and Portfolio "packs" can be created ready for final amendment and issue.





#### Running a PowerPoint report

PowerPoint reports can be run from either the Project Dashboard or from an Action depending on how they have been set up.

#### <u>rom the</u> Project d\_sh\_o\_rd

Sele	ct the new Pow	lict of available PowerPoint repor
	Norman Mansell 🌲 ★ 😒 🧮	<b>\$</b>
	PowerPoint report 1 PowerPoint report 2	
rom	n_n_Action	
Crec	ate Project de	ήυ.
	🔼 Norman Mansell 💄 ★	❷ ■
	G	
5	Approvals v More	
	Change Requests	F
	PowerPoint Status Report	
Or		
	Assignment	
	Customer Satisfaction	
=	Dashboard	
=	PowerPoint Status Report	
Ι		



The Add Action form is displayed, based on how the Action has been configured.

Enter the details for the action and press save.

dd Action			
Project Update	Attachments (0)		
	d Multiple:		
	logged By:	Q	
* A	ction Type: PPT SR01   PowerPoint Status Rep	ort v (Standard Action)	
	Status: In Progress		
	Date: 03/03/2021		
	Customer: AgencyOne	a + D	
	* Project: Project 1	Q	
Save Save a	nd Close Close		

The report can then be previewed using the option under the print icon.

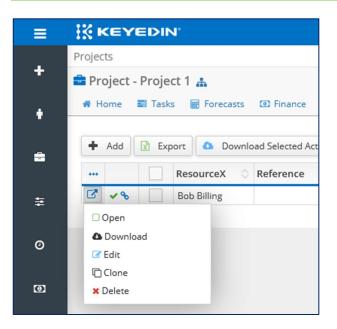
Once ready, press Submit & Close to complete the action and generate the PowerPoint report.

	11 120	
Project Update Attachme	nts (0)	C.
* Logged By:	Bob Billing	٩
* Action Type:	PPTSR01   PowerPoint Status Report	(Standard Action)
Status:	In Progress 🗸	
Date:	03/03/2021	
* Customer:	AgencyOne	a + D
* Project:	Project 1	a

The PowerPoint report is then saved as an attachment against the action type and can be downloaded again when required from the Search or Summary.

## 

v7.3 March 2021 Winter Release



When the PowerPoint report is being generated either by the preview or when the submit button is pressed, a separate window is displayed indicating this. While the report is being generated you can continue working on other areas of the system.

Download Started
*e •*
s window open, we're processing your report! This may take a while; your browser will downloa as soon as it is available. You may continue to use the aplication while you wait for your file.

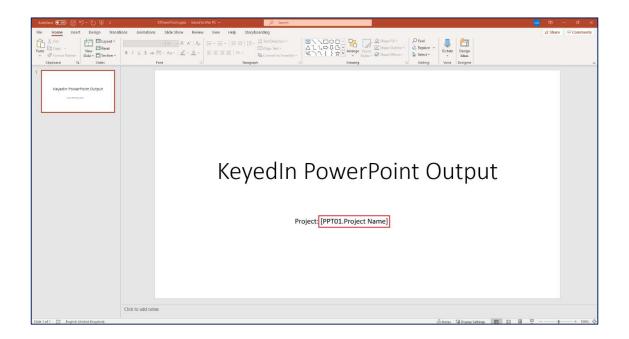
Once the report is complete this is indicated in the window and you will be prompted by your browser to download the file.

Download Complete	
	Opening PowerPoint Project Status Report_20210303.pptx 🛛 🗙
~	You have chosen to open: PowerPoint Project Status Report_20210303.pptx which is: Microsoft PowerPoint Presentation (64.6 KS) from: blob:
Your report has been processed, your file should be available to view in your downloads.	What should Firefax do with this file?
	OK Cancel



#### Configuring PowerPoint templates

Create a new PowerPoint document to start configuring it as a template for use within KeyedIn.



#### Adding a data reference to a PowerPoint template

PowerPoint templates use placeholders to reference the data they require from report/s in KeyedIn.

The fields in a report are referenced from the PowerPoint template using a placeholder in the format:

[UniqueReportReference.FieldName]

e.g. [PPT01.Project Name].

For example, to display the Project name on our first slide, first create a data report in KeyedIn to return the Project Name and any other details, as appropriate.

K	KEYEDIN®
---	----------

Amend Data Report	
DATA	
Data Filters Details	
	~
* Report Type:	
Tabular	~
FIELDS	~
* Select a data view:	
Project Data	~
* Fields:	
	$\sim f_x$
(General) Project Name	

The report must contain a filter which filters on the Current Project Code (CONTEXT-PROJECTCODE).

General 1. Project Code = #CONTEXT-PROJECTCODE#		Filter Operation <ul> <li>Required Filter</li> </ul>	
Add Field	~	* Value:	
T FILTERS	~	= V Filter on total	
Data Filters Details		* Operator:	
DATA	Ŧ	Edit Filter	
Amend Data Report			

Give the report a name and description and for this example set the unique reference to PPT01.

Amend Data Report	
DATA	
Data Filters Details	
NAME AND TITLE	~
* Name:	
Powerpoint 1	
* Title:	
Powerpoint 1	#FN#
Unique Reference:	
PPT01	

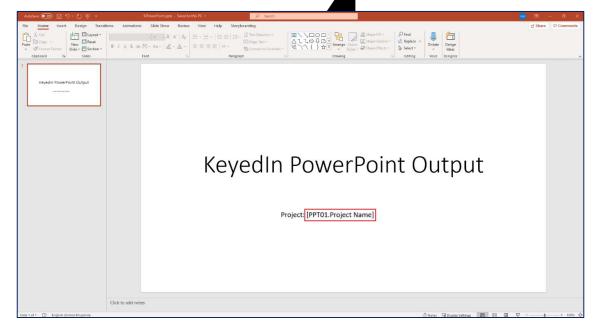
## KEYEDIN®

v7.3 March 2021 Winter Release

Note: The new Unique Reference field has been added to reports to allow PowerPoint templates to identify the report/s it will use. The unique reference is set on the Details tab for the report.

The use of the unique reference is to allow a set of PowerPoint templates and their associated reports to be loaded into any environment without having to amend the template details that reference customer specific report keys.

Now enter a placeholder in your PowerPoint document to reference the report data, this is simply entered as text in the PowerPoint document.



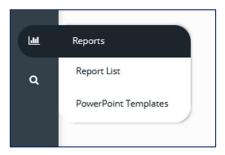
Then add your PowerPoint template in to KeyedIn.

#### Adding a PowerPoint template to KeyedIn

From the **Re orts** item on the left menu, a new sub menu item **PowerPoint em I tes** is available. Select this item to navigate to the search screen for the templates.

# KEYEDIN

v7.3 March 2021 Winter Release



The PowerPoint template search screen appears like other search screens and allows filters to be applied to restrict the items displayed.

=	KEYEDIN					
+	Search					
Ť	Q Filters <	Name * Default Powerpoint Template Filter Scope Individual ~				
•	PowerPoint Templates V Field Comparison Type					
=	New Filter	1 PowerPoint Template Name 🕱 🗸	Contains 🗸			
ŧ	My Filters  Default Powerpoint Template Filter	2 PowerPoint Template Active 🗶 🗸	× ×			
Ŧ	Group Filters	Q Search 🛛 🖀 Save				
ø	Global Filters 🗸 🗸	+ Add 📝 Export				
		••• Key $\Diamond$ Name $\land$ Active $\Diamond$ F	File Name 🔗			
Θ			KIPowerPoint.pptx			
		C 71 PowerPoint report 2 Yes 1	KIPowerPoint.pptx			
80						
60						

Press the + Add button to add a new PowerPoint template.

	Key		Name ^	Active
Z		45	Neil Test 1	Yes
2		39	Neil Test 2	Yes
2		38	Neil Test 3	Yes

This displays the Add PowerPoint template form.

## KEYEDIN<sup>®</sup>

v7.3 March 2021 Winter Release

Add Powerpoint Template	×
Name *	
Active	
Powerpoint File *	
Project Levels *	
· · · · · · · · · · · · · · · · · · ·	
Login Groups *	
Close	Save and Close Save
l_me	
	he report on screen.
.cti	
Ched	e (it will then be visible to users).
owerh	
elect th	emplate to be used for your report. Note
nat only	
roject Lev	
elect which	board the report is available on.
ogin Grous	
elect which lo	ort is available to.
lide Limits	
	per pptx Template file. This may result in more slides when
ne PowerPoint i	enerated due to repeating slides. The limit on these is 50.
urther Template Config	auration
	<i>j</i> =

#### Adding Tables to the template

Add a table to your PowerPoint template and add column titles to the first line. On the second line (or the first line of the body of the table) enter the names of the fields to be displayed from your report, in square brackets and prefixed with the unique reference.

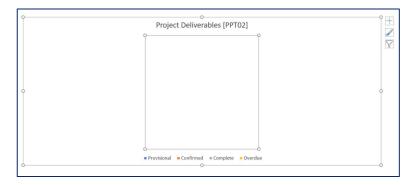
e.g.

KE	<b>FEDIN</b> °			v7.3 March 2021 Winter Release
KeyedIn Pow	verPoint Output			
Project Code	Project Name	Start Date		
[PPT01.Project Code]	[PPT01.Project Name]	[PPT01.Start Date]		
9			0	
	0			

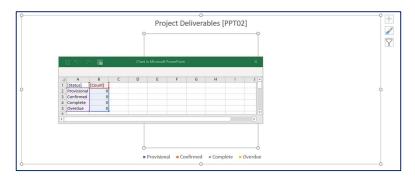
Enter the maximum number of records to be displayed by entering the corresponding number of table rows. Any empty table rows will be removed when the report is generated, but if there are not enough rows to fit all the data, the additional data will not be shown.

#### Adding Charts to the PowerPoint template

Add a chart to your PowerPoint template, set the title text and add a placeholder to the end of the title to reference the report to be used for the chart. This is the unique reference for the report within square brackets e.g. [PPT02].



Next, edit the data for your chart.



Or

## KEYEDIN

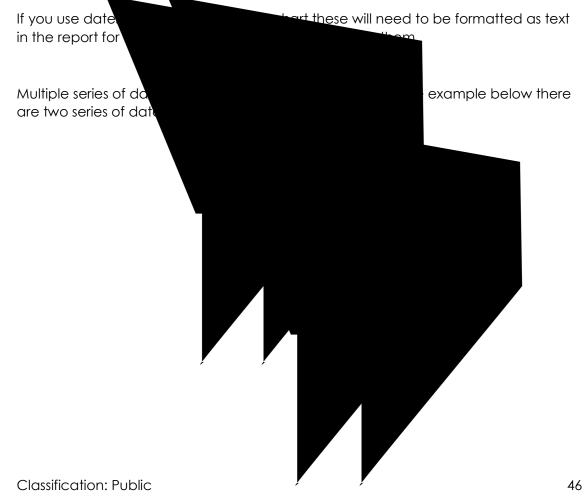
v7.3 March 2021 Winter Release

			^						
8 21	9 - 🖬	Cha	t in Microsofi	PowerPoint	ł			×	
A h.	B	C D	E	F	G	н	1	JA	
1 [Status]	[Count]								
2 [Category									
3 [Category 4 [Category									
5 [Category									
6	· • • •							¥	
4								Þ	
			<u> </u>						

Set the column headings to be the fields from your report, e.g. [Status] and [Count].

In the status column set the status categories to be displayed, this can either be done by naming the specific categories to be displayed or by specifying the [Category] placeholder, in which case the report will pick up the category names from the report (Note: The chart will only display the number of categories that you specify, if the data contains 5 categories but you only specify the [Category] placeholder 4 times, the last category will be excluded)

In the count column enter 0s (This data will be automatically retrieved and replaced from the data report when the PowerPoint report is run)

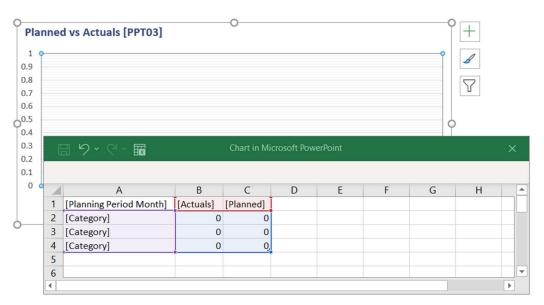


#### Note sing D\_tes for c\_tegories

# 

v7.3 March 2021 Winter Release

## Bar Chart





#### he following st\_nd\_rd ch\_rt ty es within PowerPoint c\_n\_e used

Clustered Column. Stack Percent Stacked Column **Clustered Column 3D** Stacked Column 3D Percent Stacked Column 3D Column 3D Line Stacked Line Percent Stacked Line Line with Markers Stacked Line with Markers Percent Stacked Line with Markers Line 3D Pie Pie 3D Percent Stacked Bar **Clustered Bar 3D** Clustered Bar Stacked Bar Stacked Bar 3D Percent Stacked Bar 3D Area Stacked Area Percent Stacked Area Area3D StackedArea3D PercentsStackedArea3D Doughnut Radar Radar with Markers Filled Radar Series of Mixed Types (Can only contain the above chart types)



#### **Repeating Slides**

Slides can be set to repeat for each row of data returned by the report. For example, if the report is run at Program level the report could contain the same slide(s) for each of the Projects contained within the program.

This is achieved by adding the placeholder [Repeat: *Field Name*] to the top of the slide to be repeated. *Field Name* identifies which field the slide is repeated for, in the example below the slide will be repeated for each Project Name.

[Repeat:Project Name]			
Project Details	[PPT01.Project Name]	[Pi	PT01.Project Code]
Start Date	End Date	Status	
	[PPT01.End Date]		

#### **Repeating Slides with Nesting**

Repeating slides can be nested to allow grouping of data. For example, we can insert a slide which repeats by Project Status and then have detailed slide(s) which repeats by Project name. This will result in a Status slide for each status and within that group slides for all the Projects at that status.

[Repeat:Project Status]

**Program Project Summary** 

[PPT01.Project Status] Projects

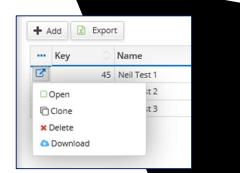
KEYEI	DIN®	v7.3	March 2021 Winter Rel
[Repeat:Project Name] Project Details	[PPT01.Project Name]		[PPT01.Project Code]
Start Date	End Date	Status	

## 

v7.3 March 2021 Winter Release

#### Search Screen Inline Mer

On the search screen provinenus allow the user to **O** en, **Clone**, **Delete** or **Downlo\_d** existing Provine templates.



#### O en

Opens an existing PowerPoint template

inplate to allow data amendments. See Ameng

General Audit		
Name *		
PowerPoint report 1		
Active		
Powerpoint File *		
KIPowerPoint.pptx	(+)	
Project Levels *		
1   Project ×	<b>x</b> ~	
Login Groups *		
Project Manager Strategic 🗙	<b>x</b> ~	

#### Clone

Create a copy of a PowerPoint template by selecting the **Clone** option from the inline menu on the search screen. The **Add em I te** form is displayed, prepopulated with the details from the cloned templated with templated wit

#### Delete

Deletes an existing PowerPoint template.

## 

v7.3 March 2021 Winter Release

#### Downlo\_d

Downloa BowerPoint (pptx) template attached to an existing PowerPoint template

#### Linking a PowerPoint template to an action

A PowerPoint te a report can be. Report option will action when it is cr ction Type in much the same way that as been chosen, the Create Archive I store a copy of the report against the

General	Resources Act	ion Custom Fields Opti	ons Grid Fields		
	Name:	PowerPoint Status Report			
	Code:	PPTSR01	Active: 🔽		
	Significant Action:				
	Process Support:				
	Allow Add Multiple:				
Use Au	utomated Reference:				
	Reference Prefix:				
	Reference Start No:				
	Report:				
L	PowerPoint Report:	PowerPoint report 1 [Select	t] [Clear]		
Behavi	iour on Completion:	Actions are Readonly			
		Create Archive Report			
	Event URL:			Check	

## Enhanced Reports via API

## Feature Summary

Enhanced reports are now available to run via the V7 API. Both Tabular and Column reports can be run. The V7 API uses OAuth 2.0 to authenticate requests.



K	KEYEDIN®	v7.3 March 2021 Winter Releas	e
	KEYEDIN		
+	Configuration		
	Applications	Ø6 Auto-Generate	
٠	Custom Fields	Display Settings	
-	Invoice Templates	💄 Log On Settings	
	Project Level Settings	Project Types	
Ŧ	Cheduled Jobs	Scheduled Reports	
ø	Strategic Planning Settings	Time & Expense Settings	
0			

Either add a new scheduled report or edit an existing one. In the report dropdown list, you now see both original and enhanced reports. These can be selected and configured in the same way irrespective of type.

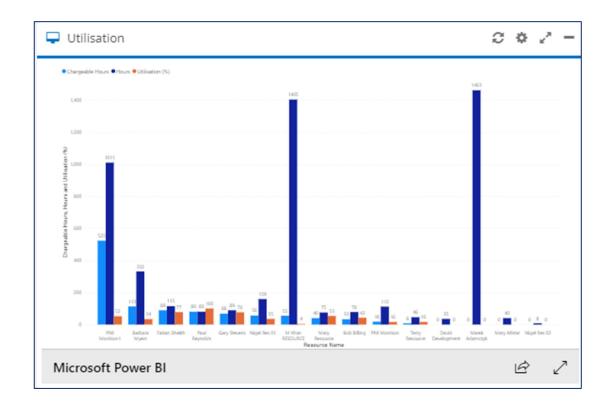
General Recipients				
* O Name:				
*Active:	~			
* O Report:	Select	~	Q	
O Description:		Q		
* Frequency:	Bar Chart of Demand By Project Bar Chart of Demand By Project. Bar Chart of Demand By Role Bar Chart of Demand By Role. Benefit Deliverables By Project. Benefit Deliverables By Project. Billing Deliverables By Project. Billing Deliverables By Project.	• • • • • • • • • • • • • • • • • • •		Wednesday Saturday
* Occurs at:	9:30			
Last Run Time:				
Next Scheduled Run:				
Scheduler Date / Time: 16 February	ary 2021 09:24:45			



## **IFrame Widget**

## Feature Summary

An IFrame widget type is now available, allowing the embedding of external web sites within a KeyedIn dashboard (My Work, Projects or Custom Dashboards). For example to show output generated in a Business Information tool.



Note: Many websites do not allow themselves to be embedded within IFrames of other sites. This is outside of the control of KeyedIn.

#### Using

The IFrame widget is not available by default, it requires switching on in *Configuration > General Settings*.



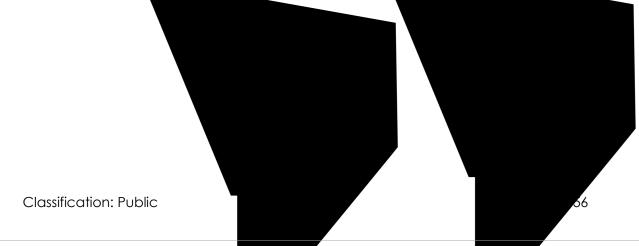
Financial Year Start:	December 🗸			
First Day of the Week:	Monday			
Enable Advanced Filtering when 0	reating Locks			
Portfolio				
<ul> <li>Enable Portfolio Analysis</li> </ul>		Enable Portfolio Kanban		
<ul> <li>Enable Project Move</li> </ul>		🔄 👩 Enable Product Portfoli	o Management	
<ul> <li>Project Snapshots</li> </ul>		Project Snapshot Level:	Project 🗸	
Permissions				
Permission Mode:	ResourceX and Action	Fype v		
<ul> <li>Enable Interested Projects/Interested</li> </ul>	sted Resources			
Risks & Issues				
O Enable Mitigation Plan Items		Enable Resolution Plan	Items	
Integration				
<ul> <li>Enable QuickBooks Integration</li> </ul>				
Dashboard				
<ul> <li>Enable IFrame Widget</li> </ul>				

Once the IFrame widget functionality has been enabled, an IFrame widget can be added to a dashboard.

This is done in the same way as any other widget is added, by navigating to the dashboard and selecting the **Configure Current View** option.



The Add Widget form has a new menu item called **I\_r\_me\_Widget**, expanding this shows the **New I\_r\_me\_Widget** item, click on the **Add** by a standard the widget to your dashboard.



## KEYEDIN

v7.3 March 2021 Winter Release

Add Widget	×
Q Search	
Action Views	>
Billing	>
Chart Reports	>
Collaboration	>
Data Reports	>
Databox	>
Deliverables	>
Expenses	>
Forecasts	>
IFrame Widget	$\sim$
Add New IFrame Widget Add a new IFrame Widget to display a website within a new widget	
Project	>
Risks & Issues	>
Tasks	>
Timesheets	>

You now have an unconfigured IFrame widget on your dashboard, drag the widget to the required location and resize accordingly then save the dashboard.

New IFrame Widget	2 <b>0</b> 2 -
This widget has not been configured ye	et

The widget can be configured by clicking on the cog icon.

New IFrame Widg	et Configuration	×
Please note: This widge	t will only work with websites which allow iframe embeddi	ng.
*Title:		
* 🖲 URL:		
Height (pixels):	250	
	Save and Cl	ose Close

# KEYEDIN

e.g.

https://M

Height is th

**itle** is a required field and is the title of the widget displayed at the top of the widget when displayed on the dashboard.

■RL is a required field and is the address of the website you wish to display in the IFrate and the #CONTEXT-PROJECTCODE# token.

:om?MyParam1=Param1&MyParam2=#CONTEXT-PROJECTCODE#

t of the widget on the dashboard in pixels.

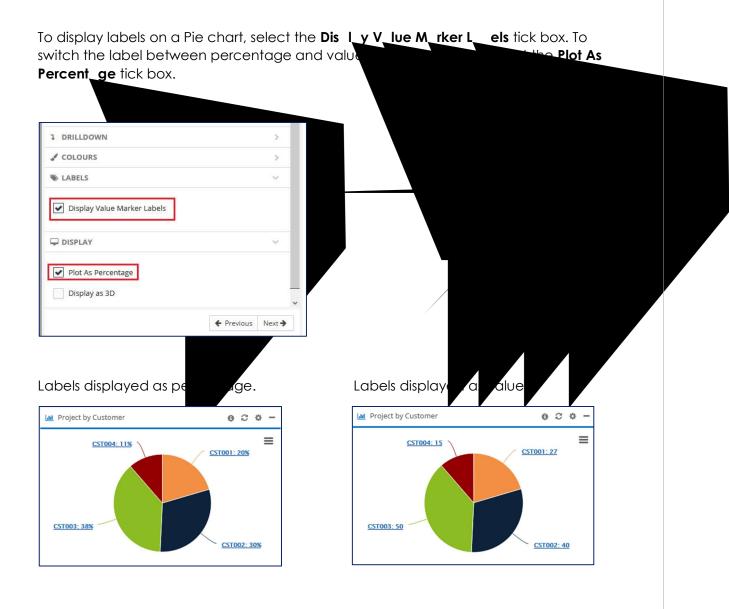


# Pie chart labels displayed as <sup>o</sup> or value

## Feature Summary

Pie chart labels were previously always displayed in percentage, they can now be displayed either as a percentage or value.

#### Using



## KEYEDIN

v7.3 March 2021 Winter Release

# Gantt widge any to set the initial display point

## Feature Summe

When displaying a Gantt widget which covers a long period of time and therefore requires scrolling, it is now possible to specify which part of the timeline is displayed when the chart is first displayed. The user can still scroll the chart to whichever part of the Gantt they would like to see.

#### Using

In the Display settings for a Gantt widget, there is a new option to set the **Initi**. **I Dis I y Point**, this allows either a specific date to be chosen or a token e.g. #TOD

Amend Chart Widge	t			
DATA				Ŧ
Data Filters Chart	Details			
Select			~	^
🖵 DISPLAY			$\sim$	
Bar Height:				
Default			2	
Initial display point:				1
#TODAY#		<b>m</b>	#FN#	

With the initial display point set to #TODAY# the Gantt chart is automatically scrolled to show today's date in the current view.



In the example below a date marker of **od\_y** has been used to indicate this more clearly.

antt Projects				0.0	o –
<b>—</b>	Q				=
oject Name		2021			
Jecchanne	Q121	Q2 21	Q3 21	Q4 21	
ject 1				0	- 11
ject 2					- 11
ject 3					
ect 4					- 11
ject 5					- 11
iert 6					
	Today				
no initio	al display p	oint is set, the cl	nart will be s	crolled	to it
	al display p	oint is set, the cl	nart will be s		
no initio	al display p	oint is set, the cl	nart will be s		to it
Gantt Projects	al display p	oint is set, the cl	nart will be s		
Gantt Projects		oint is set, the cl	nart will be s		c o -
Gantt Projects	Q	oint is set, the cl	nart will be s	0 (	c o -
Gantt Projects	- ଭ୍ 2018			0 (	c o - ≡
Gantt Projects	- ଭ୍ 2018			0 (	c o - ≡
Gantt Projects	- ଭ୍ 2018			0 (	c o - ≡
Gantt Projects	- ଭ୍ 2018			0 (	c o - ≡
ect 1 ect 3	- ଭ୍ 2018			0 (	c o - ≡

## KEYEDIN<sup>®</sup>

# Administration Screen Changes

Following on from the initial Administration section updates in release 7.2, this release features the next set of Administration screen changes that incorporate a new, modern look & feel, utilise a new single web page architecture and provide an audit trail of changes. When complete, in a future release, this will provide improved access to APIs for all entities. The APIs for all entities refactored so far are available in this release.

#### Summary

The upgraded Administration entities for this release are:

- Activities
- Benefit Actuals
- Charges
- Clients/Customer Groups
- Contacts
- Costs
- Cost Centres
- Expense Types
- Risk/Mitigation Plan Item Types
- Departments/Teams
- Security Groups

The main stylistic changes to note include the new "slide in" and "slide out" panel operation, along with font and spacing changes to provide a modern and userfriendly way of working.

These entities also benefit from the new audit functionality. This adds a number of benefits including traceability for quality monitoring, enhanced security and a reference point for any changes made. The new Administration entities, including the seven entities refactored in the v7.2 release, also benefit from an enhanced editing experience where the background search results remain active and clickable behind the new entry screens. This allows the user to continue to navigate the larger area on screen despite having an entry screen open. There is also the addition of clickable breadcrumbs for nested entry screens.

Furthermore, the Advanced Search, Document Attachment, Custom Fields and Notes functions (where applicable), have also been improved. Note that existing filters do not operate on the new style advanced Search so will need to be recreated as appropriate.

### Changes in Detail

The upgraded Administration screens replace the existing ones and are accessed in the normal manner, using the menu below, except for Benefit Actuals that can be found in the existing Search function.

<b>Business Entities</b>	Financial	Security	Skills	Tools		Search	
Action Types	Adjust Charges	Logins	Skills	Code Converter	+	1.1.1	
Action Views	Adjust Costs	Login Groups				Q Filters	
Activities	Adjust Expense Exchange Rates	Login Profiles			•		
Benefit Types	Adjust Timesheet Exchange Rates	Security Groups				Benefit Actuals	~
Categories	Charges					1	Q
Contacts	Costs				-		~
Cost Centres	Currencies					Action Types	<b>^</b>
Customer Groups	Exchange Rates			(		Action Views	
Customers	Nominal Codes				<b>#</b>	Activities	
Expense Types						All Actions	
Locations						Artefacts	
Mitigation Plan Item Typ	es -				Ø		_
Projects						Benefit Actuals	_
Resources					•	Benefit Types	
Roles					&	Categories	-
Teams						CC Deveraging	· ·

As with the new Administration screens made available in the last release, these new entity screens slide in from the right as per below:

=	KEYEDIN				🔣 Norman Mansell 🌲 ★ 🥥 🗮 🔅
+	Search Q. Filters	<		Edit Activity	×
		_	Name* Default Activity Fiber Scope Global v	TRAIN   Staff Training	
	Activities	~	Field		
۲	New Filter My Filters	^	1 Activity Name X V	General Restrictions Activity Custom Fields Audit	
	Group Filters	Ŷ	Q Search Seve		*
₽	Global Filters	*	🔶 Add 📄 Export 💷 Create Data Template 🗠 Import Data	Name *	
ø			Code   Name   Active	Staff Training	
U			TRAIN Staff Training Yes	Code	
Θ			50 v Showing 1 to 1 of 1 entries	TRAIN Active	
				Active .	
&				·	
				Default to non-chargeable 0	
1776				Absence 6	
iai.				Absence	
					100
				Close	Save and Close Save

The background remains active and is now 'clickable' so that anything on the left can still be selected and a new entry screen will swipe in over the existing one if the hyperlinks or other row actions are selected.



#### Advanced Search (Restrictions)

Used for selecting Restrictions, the Advanced Search function has been refactored as per the screenshot below:

Edit Activity > Select	Projects	×
Filter TEST	✓ Name★ TEST	New
Scope * Group ~	Show All     Hide Filter     Hide Filter	
Field	Comparison Type Value	Displayed
1 Project Name	<ul> <li>Contains</li> <li>Universal</li> </ul>	Yes 🗸 🗙
Q Search 🖹 Save		▼ Toggle Advanced Search
Code	Name	
1TPROJ	Universal Test Project	
Fotal Records: 1		
Cancel		Select

This function can be found when searching for Resources and Projects on Expense Type and Activity entities along with Resources, Projects and Clients on the Security Group entity, and Resources on the Cost and Charge entities. This has all the same functions as the previous Advanced Search function and is in the same styling as the other new Administration screens.

The Select All button highlighted selects all search results whereas the check box below it selects a subset of results based on what has been loaded into the page view. Additional results can be loaded by scrolling and then selecting using the check boxes. This allows search results to be viewed before being selected.



#### Active Breadcrumbs

A new way to visualise nested dialogue screens is provided so it is easier for the User to keep track of where they are.

■ Add Contact > Add Note	;
Notes	
Title *	
Detail	
▶         ■         I         U         ⊕         Ø         Open Sans *         16*         ▲         •         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         Ⅲ         №         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●         ●	
Controlled	
Cancel	Add



#### **Document Attachments (Custom Field)**

The custom field document attachments functionality has been enhanced for a more user-friendly experience with improved styling, check in/check out function and version history.

Edit Customer Group			×
CLIENT   Client Group			
General Notes Audit			
Name *			
Client Group			
Code			
CLIENT Active			
Parent Customer Group	~		
	·		
Document Attachment			
Upload Document			
Close		Save and Close	Sape
Close		Save and Close	) Save
		Save and Close	Save
		Save and Close	) Save
Upload Document		Save and Close	
		Save and Close	
Upload Document	+	Save and Close	
Upload Document	+	Save and Close	
Upload Document File	*	Save and Close	
Upload Document File	+	Save and Close	
Upload Document File Description		Save and Close	
Upload Document File Description	*		

KE	<b>EDIN</b> °		v7.3 March	2021 Winter Release
Document Attachment Document Custom Field doc. ExistingValues Close	Edit Description  Control  Contro  Control  Control  Control  Control  Control  Control  Control  Co			
Edit Description			×	
Cancel	loc.	Save	and Close	
Edit Customer Gr	oup > Version History Version Modif	ied	×	
Document Custom Field	1	11/03/2021 12:13:53 pm		

#### Notes

This replicates all previous functionality but is consistent with other style updates. This Notes function can be found on Customer/Client Group and Contact entities in this release. Here you can see the Notes function in action using the Contact entity as an example. The Audit function shows whether a Note has been added, amended or deleted.

# 

v7.3 March 2021 Winter Release

📕 Edit Con	tact		:
4   Test Conta	ct Test		
General Not	es Audit		
Title	Notes	Name	Date
New Note	New Note		05/03/2021 17:04 🗭 🗙
Add Note			
Close			Save and Close Save
Notes			
inde -			
Detail			
<b>~~</b>	B I U S a Open Sans • 13• A	• = = =	
Controlled			

# 

#### Active Backgrounds

When the User has a slide-in screen open, previously the background was disabled. The User can now still access that background and use hyperlinks and any other clickable functions. This enables the user to switch between specific entries without having to close screens.

Any new entry or actions picked from the Search list, are selectable and will replace the currently viewed entry after giving an option to save any changes. This cuts down on clicks and unnecessary navigation, allowing a smoother user experience.

In the example below you can see the row action icon has been opened, with the edit screen still in view.

=	KEYEDIN					🔣 Norman Mansell 🛕	* 9		þ
+	Add New			and a second second		Edit Activity		×	
•	Assignment	-	Name * Default Activity Filts	er Scope Global Field	~	TRAIN   Staff Training			
	Customer Satisfaction		1 Activity Name		× ×	General Restrictions Activity Custom Fields Audit			
	Dashboard	÷	Q Search Save					*	
æ	Deliverable	*		Create Data Template 🛛 🛆 Import Dat		Name * Staff Training		- 1	
ø	Expense		Code	<ul> <li>Name</li> <li>Scaff Training</li> </ul>	C Active	Code		- 1	
(8)	Forecast		Clone	Showing 1 to 1 of 1 ent	ries	TRAIN V Active		- 1	
æ	issue		© Code Converter × Delete						
8	Login					Default to non-chargeable 0			
Lai.	Message					Absence o		- 1	
	New Project Idea						_		
٩	PowerPoint Status Report							- 1	
	Project								
	Project Change Request								
	Project Document								
	Project Status Report							-	
	ResourceX								2
	Risk					Close Save and Close		Save	1



The new Administration screen formats are shown in the following sections.

#### **Business Entities**

Edit Activity	× I≣ Edit Benefit Actual
TRAIN   Staff Training	1   03/03/2021
General Restrictions Activity Custom Fields Audit	General Audit
Name * Staff Training	Project *     Self Driving Vehicle Project1Self Driving Vehicle Project1Self Driving      v Date *
Code TRAIN CACIve	03/03/2021  Benefit *  Benefit tab   Reduction in Costs v
Default to non-chargeable Absence	Currency* Euros ~ Annoent * 12
Close Save and Close	Some (Some and Close) (Some and Close) (Some and Close)
I Edit Customer Group	× I≣ Edit Cost Centre
CLIENT   Client Group	CC_001   DEFAULT
General Notes Audit	General Audit
Name *	Name *
Client Group	DEFAULT
Code Cubit  Cubit Code Cubit C	code <u>cc.001</u> Active
Parent Customer Group	Notes
v	Demo
Close Save and Close	Cose Save and Cose Save Save Save Save Save Save Save Sav

# KEYEDIN

#### v7.3 March 2021 Winter Release

Edit Contact	Edit Mitigation Dias Itom Turo
Edit Contact	x IIII Edit Mitigation Plan Item Type x
6   Demon Stration Contact	MITIGATION   Mitigation
General Notes Audit	General Mitigation Plan Item Custom Fields Audit
Title	Mame * Mitigation
Mr → Active	Code
First Name *	MITIGATION  Active
Demon	
Middle Name(s)	Default Mitigation Plan Item Type
Stration	
Surname *	
Contact	
Customer *	
Architecture Now	
Position	
Team	Close Save and Close Sove
Address Line 1	
Address Line 2	
City	
State	
Country	
Post Code	
Telephone Copy From Customer	
Mobile	
Fax	
Copy Fram Customer	
Email	
Gose Save and Gose Save	

# KEYEDIN

v7.3 March 2021 Winter Release

III Edit Expense Type →	i≣ Edit Team ×
ACCOMMODATION ABROAD   Accommodation (international)	DEMO1   Demonstration Team
General Defaults Restrictions Expense Type Custom Fields Audit	General Financial Audit
Name *	Name *
Accommodation (International)	Demonstration Team
Code ACCOMMODATION ABROAD ☑ Active	Code @ Active
Non Unit Based     Unit Based     Three Based     Fixed Currency	Parent V Manager V V
Expense Cost Tax Rate * Use System Tax Rate  23 %	Available for Demand Forecasting 0
Multiply expense charge on by *	Com (Severand Cook) (Severand Cook)
<ul> <li>☑ Allow Heceipt</li> <li>☑ Reimbursable default value</li> </ul>	
Close Sive and Close Size	



#### **Financial Entities**

General Restrictions Audit			
Name *			
Normal Hourly Cost Rate			
Code			
CST001	Active		
Currency *			
US Dollar	~		
Rate *			
27 \$			
perHour			
Applies to *			
Both			
O Standard O Overtime			
Close		Save and Close	Sove
General Restrictions Audit			
Name *			
Name * Free of Charge			
Name * Free of Charge			
Name * Free of Charge	☑ Active	]	
Name * Free of Charge	Q Active		
Name * Free of Charge Code CHG000	Q Active	]	
Name * Free of Charge Code CHG000			
Name * Free of Charge Code CHG000 Currency * US Dollar f			
Name * Free of Charge Code CHG000 Currency * US Dollar f			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$			
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$		2	
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate *		2	
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$		2	
Name * Free of Charge Code CHG000 Currency * US Dollar f Rate * 0 \$		2	



### Security Entity

📕 Edit	Security G	Group						×
SEC001	security gro	up test						
General	Resources	Projects	Customers	Logins	Audit			
Name *								
security (	group demo							
Code								
SEC001			🖌 Activ	e				
						_		
Close )							ve and Close	Save

# "Applications" Configuration Item

#### Feature Summary

A new item is available on the main configuration screen, called "Applications". This is used to configure an external application to use the new KeyedIn V7 APIs.



#### Feature Usage

Note: For full details on how to use this feature see the API documentation for your region:

UK: https://coreapi.keyedinprojects.co.uk/apidocs

USA: https://coreapi.keyedinprojects.com/apidocs

Australia: https://coreapi.keyedinprojects.net/apidocs

	Applications		×
Website		~ Add New	
	Name *		
Redirect UR) *	Website		
eureci un	De discret (10) *		
close Save			

The key component of this screen is the **Redirect RI**. This is the URI that the OAuth server redirects to, which contains an authorization code that it must pass back to the OAuth server in order to retrieve the access token. This may be set up locally by the user or may be a URI provided by an application or service; it is entirely dependent on the way you are using the OAuth server. In the case of Postman, the Redirect URI can be set to <u>https://www.getpostman.com/oauth2/callback</u> which is a URI that Postman itself provides. The other fields are inconsequential and can be set to whatever is desired. Take note of the supplied **A lic tion ID** and **A lic tion Secret**.

ment for **Project** 

del to standardize

ble up" licences

dln Enterprise at the next

sult of this, despite KIE being more

## KEYEDIN

## Product Editions

#### Summary

The PPM software market is changing to separately recognise Portfolio Delivery and Portfolio Selection. KeyedIn Projects offers both areas, but the name does not reflect the broad functionality offered.

For 1st April 2021, KeyedIn Projects will be rebranded into 3 Editions:

- KeyedIn \_\_nter \_ risg (KI\_)\_ the new name for KeyedIn Projects, offering full function\_lity.
- KeyedIn Ad Investment-Ia
- KeyedIn Project delivery and ext

As part of this we will also be sin on 1 licence per active resource and reference two licences per d

#### What it means to existing customers a

Very little, because:

- Existing customers automatically renewal following 1<sup>st</sup> April.
- There is no change to licence co expensive.
- There is no change to functional<sup>2</sup> is a result of this, including access to future improvements.

#### The switch process will be part of normal renewal discussions:

- Prior to renewal, KI Sales will review and confirm licence usage is in line with the licence agreement\*.
- Any unintentional over-use would feed into normal renewal discussions, so these can be normalised.
- Once confirmed, KeyedIn Support will switch Edition type to KIE and align to the correct licence numbers as per each customer's agreement.

\* A simple report is available to check any customers concerned they may be in a position of unintentional licence over-use.

## KEYEDIN

### Changes visible post switch to Key on Enterprise

The **KeyedIn** <u>\_\_\_\_\_\_</u>risg Edition name will be shown in the browser tab name instead of KeyedIn Projects.

<b>i</b> ≪ Ke	eyedIn Er	nterpris	e		×
← -	> G		kips	staging.ke	eyedi
🚺 Ар	ps 🚺	Aha!	box	Box   Log	in
Ξ	Жк	EYEI	DIN		
+	My Worl	ne 🗯	Appro	Vals Fest View One	Steve

The **KeyedIn** <u>\_nter</u> risg Edition name will be shown in the **A** out details heading instead of KeyedIn Projects and also in **Activ** ted Modules instead of Professional Service Automation and Project Portfolio Markets

pout		
	KeyedIn Enterprise v7.3.0.44258	
KEYEDIN	Trial Licence	
KETEVIN	Copyright © KeyedIn Solutions 2021	
TRUSTe	Portions of Graphics Server .NET ©2005 by Graphics Server Technologies, L.P. All rights reserved. Portions of RadControls for ASP.NET AJAX ©2002-2008 by Telerik Corporation. All rights	
Verifield Privacy Powered by TrustArc Privacy Policy	reserved. Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.	
	Licenced to: KeyedIN (KH New Template)	
	Customer Id: ODJ2011540 Site Id: KIP2	
	Licences: 5000 Licences Used: 1713	
	Activated Modules: Keyedin Enterprise Multi-Currency	
a lia ana di an fia		
le licensed or lie	Id on the Resource record will show	v a see entry.
mend ResourceX - RES001	Phil Morrison	

This replaces the two entries shown below. Licenses	will also be corrected to align to
each customer's agreement and reflect the single li	cence per Resource basis.

Licensed For:	Module	Licenses:	200
	Professional Service Automation	Licenses Us	ed: 26
	Project Portfolio Management		

Classification: Public

Licensed For: Module

KeyedIn Enterprise

## Other Notable Changes

### Ability to restrict Project Creation by Login Group (per Project Type)

A new *Restrictions* tab has been added to the Project Type configuration screen to further control the creation of new Projects by Login Group, for the selected Project Type.

The intended use case is for clients that have many users needing access to Project Setup, but where more granular control over the specific *Project Types* those users are allowed to create Projects for is required, that would otherwise require more complex setup and maintenance using Security Groups.

By default, all new and existing Project Types will be configured to allow Project creation for all Login Groups.

Configuration	<u>1</u> > Proje	ct Types >	Project			
Workflow	Fields	Settings	Web Hooks	Restrictions		
0 🗸 This F	Project Typ	oe is availabl	le to add for all l	Login Groups	Save	Close

To restrict Project Creation by Login Group, uncheck the box and select the Login Group(s) allowed to create new Projects for this Project Type.

Configuratio	on > Proje	ect Types >	Project						
Workflow	Fields	Settings	Web Hooks	Restrictions					
0 This	Project Ty	pe is availab	le to add for all	Login Groups					
Project Ma	anager Strat	tegic 🗶 T	eam Member Str	ategic 🗙					
								Save	Close

When adding a new Project (new or from a Template), the Project Type will only be visible and available for selection in the dropdown menu by pre-configured Login Groups.

v7.3 March 2021 Winter Release

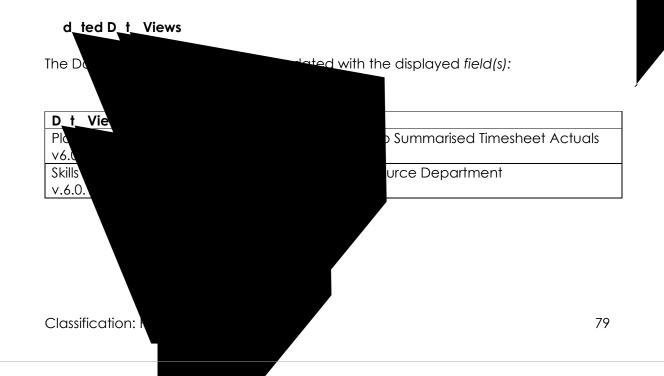
Add Projec	t
* Project Type:	Project 🗶 🗸
	Add an empty Project
	Create Project from a Template
* Template:	Select ~
	Close Next

The new restriction only concrete the Login Group is allowed to **crete** Projects and still require the gin Profile > Project permission (or Login > Administration > Main and outpermission) in order to access the Add Proje functionality. Further admittenance and configuration of the Project will contribute to existing permissions.

Please note, the creation of Projects via data load and the API is not affected by change.

## Data View Changes for v7.3

Data View changes are not applied automatically. Please contact your customer representative for installation guidance.



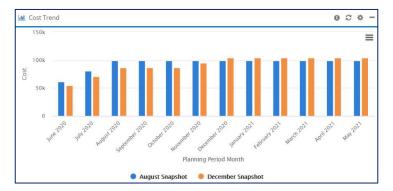
## Summary of Additional Features since the last Major Release (v7.2)

## 7.2.1 (December 2020)

### Scheduled Jobs for Project Snapshots

Project Snapshots enable specific 'point in time' data relating to a group of Projects along with their associated forecasts and deliverables to be captured for trend reporting purposes. Note that additional dataviews are needed for snapshot reporting, which can be requested via the KIP Support Portal if these are required.

An example trend report based on snapshot data is shown below. Large snapshot datasets (e.g. the whole change portfolio) can also be reported on via the API.



For customers who have Project Snapshots enabled, two new scheduled jobs are available to automate weekly, or monthly snapshots to help eliminate the dependency on a user running these manually.

The snapshots will be taken from the pre-defined Project level as configured within Configuration > General Settings. The selected, plus all child Projects at the lower hierarchy levels are included in the snapshot.

v7.3 March 2021 Winter Release

General Settings			>
Resourcing			
• Enable Skills		Enable Productive Capacity	
Calendar			
Financial Year Start:	January 🗸		
First Day of the Week:	Monday 🗸		
Enable Advanced Filtering v	vhen Creating Locks		
Portfolio			
<ul> <li>Enable Portfolio Analysis</li> </ul>		✓ Enable Portfolio Kanban	
Enable Project Move		📝 🤂 Enable Product Portfolio Management	
<ul> <li>Project Snapshots</li> </ul>		Project Snapshot Level: Program	~

#### Scheduled Snapshot Configuration

The scheduled snapshot configuration screen allows snapshots to be defined in the same way as the existing manual configuration, but with the addition of selecting the desired scheduling options.

In Configuration > Scheduled Jobs choose between Project Snapshot (Weekly) or Project Snapshot (Monthly).

#### v7.3 March 2021 Winter Release

neekly shapsho	: PAR_ADMINISTRATIVE   LEVEL 2 WEEKLY	Wed	16:35	16:35:00
Weekly Snapshot	: 000MF   weekly Wednesday Swedish	Wed	15:45	2020-11-18 15:45:00
Monthly Snapsho	ot: 000MF   Monthly US	Third Wednesday of every month	16:27	2020-11-18 16:27:00
Monthly Snapsho	pt: PPM SOLUTIONS005   Monthly- MF 11/11	Monthly on Day 16	14:40	2020-11-16 14:40:00
	Add Scheduled Job			2020 11 24
Weekly Snaps				
Monthly Snap Tuesday B	Calculate Strategic Planning Actuals			~
Monthly Snap B	Calculate Strategic Planning Actuals Update Forecast Measures Archive Forecast Measures			
Weekly Snap:	Update Project Measures Archive Project Measures			
Monthly Snap	Update Resource Measures Archive Resource Measures			
Weekly Snaps US	Timesheet Reminder Notification for Curren Project Manager Notification for Overdue Ite Calculate Task Based Planning Actuals			
Monthly Snap	Incomplete Timesheet Notification for Previo Missing Timesheet Notification for Previous			
Monthly Snapsh	Previous week Unapproved Timesheet Remi Previous week Unapproved Timesheet Remi	inder for Line Manager		
+ Add	Project Snapshot (Weekly) Project Snapshot (Monthly)			
n Now				

#### Project Snapshot - Weekly

Add Scheduled J	ob	×
Project Snapshot (We	ekly)	~
* Project	PPM Solutions Inc	× ×
* Name	PPM Demo Snapshot	
Туре	Interim	~
Occurs	Wednesday 🗸	
* at	12:00	
		Add

#### KEYEDIN<sup>®</sup> v7.3 March 2021 Winter Release **Project Snapshot - Monthly** Add Scheduled Job × Project Snapshot (Monthly) ~ \* Project PSA Solutions Inc **x** ~ PSA Demo Snapshot \* Name ~ Туре Baseline Occurs The 🗸 First Monday ✓ of every month $\sim$ \* at 5:00 Add In either case, enter Project - select based on the pre-defined Project Level. • **N\_me** – type a descriptive name to identify the snapshot.

<ul> <li>y from Interim or E purp</li> <li>Occ</li> </ul>	3aseline - use	d for filte	ring and r	eporting	3
	ime	erical day	he week. y (e.g 10) c on based c		
<ul> <li>At select system is he</li> </ul>	sch	eduler tir	me (based	l on whe	ere the
Click Add to confirm a <b>Outcome</b> will update a	eduler w been run.	ith the jo	b. The <b>L s</b>	st Run ir	me and
Scheduled Jobs					×
Job	Runs On	Runs At	Last Run Time	Outcome	
Weekly Spanshot: PPM SQLUTIONS L PPM Demo Spanshot	Wed	12:00			

First Monday of every month

05:00

Please note that the 'Run Now' functionality for Project Snapshots scheduled jou not available. If an immediate snapshot is required, this should be run manually using the existing process via the Project Snapshots Search Screen.

**Classification:** Public

Monthly Snapshot: PSA SOLUTIONS | PSA Demo Snapshot

It is not possible to edit a scheduled job once configured, therefore if you wish to make a change to a scheduled snapshot, please delete and re-add as appropriate.

Multiple snapshots for the same Project can be configured (providing the snapshots do not have the same name) however we advise against scheduling more than one snapshot per Project per week given the potentially large volumes of data which may impact reporting performance.

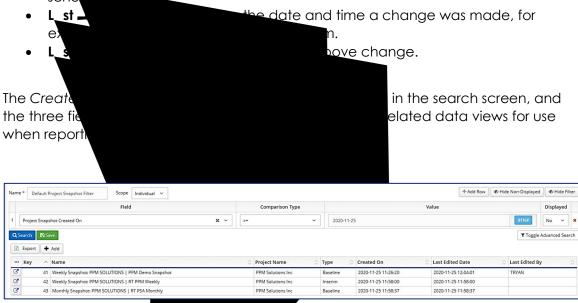
#### Enhancements to the Project Snapshots Search Screen

KEYEDIN

Successfully run Snapshots will be available to view on the Project Snapshots search screen – note the existing Login Profile > Strategic Planning permission Ability to take Project Snapshots is required to access this screen.

The following fields have been added to the Project Snapshots search screen:

Cre\_ted On – will display the date and time it was run (either manual or sche





## KEYEDIN

## Protect Custom Fields from Deletion

Two new fields have been added to the Custom Field configuration screen to help prevent custom fields from being inadvertently deleted. A typical use case might be when the field is used in custom reports or measures, or important fields where historic data must be preserved.

- Protected a Boolean field that can be ticked to prevent deletion.
- Re son a required field when ticking the Protected option to specify a real

A warning w and the field

The two new fit and Custom Fiel n is still required. field search screen, column chooser

to delete a protected custom field,

Customers are en calculations and c

iguration's custom measures, fields as appropriate.

Amend Custom Field - Total	Actual Costs
Enable Archiving: Default Value: Use Default Value when Cloned: Portfolio Total: Guidance Notes:	None v
Controlled: Protected: *Reason:	Used in custom Status Report

Con	figuratio	on > Custom Fields		
Гуре	2	Project	~	
• /	Add	Export		
The (	Custom F	eld is protected and canno	t be deleted	
•••	Row Id	Name	Protected	Reason
C	1	Total Actual Costs	Yes	Used in custom Status Report
C	2	Return on Investment	Yes	This is protected

Project Type Permissions: New #ANYONE# Token to Capture a Comment on Status Move

When configuring Project Type permissions to determine which user(s) are allowed to change the Project's status, a new token of **#ANYON\_#** has been added to the dropdown selector.

This allows customers to continue to allow any user to move the Project between workflow statuses, but when used in conjunction with the '*Enter a Comment*' field it will now allow the capture of a supporting reason, which can be either mandatory or optional, to provide additional audit traceability.

Amend Permissio	ns	×
* Name:	test anyone	
Description:		
Active:	✓	
* Workflow:	Project Management Life Cycle	*
* Status Movement:	Project Closure to Project Execution	~
* Permissions:		
* Approvers:	Anyone 🗶	
	×	Clear
Notify Approvers:		
i Warning	Amending Permissions will remove any Partial Approvals	
Enter a comment:		
Comment is required:		
comment is required:		
TRYAN 2020-11-24 09:56	Key 53 Save and Close 👻	Close

	v7.3 March 2021 Winter Release
Project Initiation to Request Move to Execution	×
	^
Comment: Have received authorisation to proceed - RT	
	Request Move to Execution Close
Edit Project - 181120   Demo project	2 <sup>,8</sup> X
General 🗞 🍤	ê • ¢
Today	~
2020-12-01 13:46:19 by TRYAN Workflow Status changed from Project Initiation to Request Move to Execution Approval Comment: Have received authorisation to proceed - RT. 2020-12-01 13:45:41 by TRYAN	

Please note that 'Notify Approvers' is not available when the #ANYONE# approver is in use as that would result in spurious emails to all users. Similarly, the #ANYONE# token cannot be used if additional approvers are specified.

KEYEDIN

### Improved Display of Number List Custom Fields on Search Screens

For consistency in display, any Number List custom fields which have been configured with 'Display As' text and a Display Colour will now show the display text alongside the colour in search results and standard system widgets, where previously only the colour would have been shown.

#### Custom Field configuration:

end Custom Field -	My Number List		
eneral Allowed Values	Languages		
Value	Display As	Display Color	
1	One	OrangeRed 🗸	~
2	Тwo	DarkOrange 🗸	~~
3	Three	Green 🗸	^
		~	+ Add

Custom field display – Search screen:

•••		Code 🗘	Template 🗘	Name ^	My Number List 🗘
ß		181120	No	Demo project	• Two
	•				

### Custom field display – Standard system widget:

Information	··· 22 -
Code	181120
Name	Demo project
Active	Yes
My Number List	😐 Two
Template	No
Project Manager	



### Timesheet Search: Ability to Filter by Resource Type

The *Is Contractor* field has been added to the list of Timesheet search filters, allowing users to filter by Resource Type (i.e Employee or Contractor).

1	ls C	ontrac	ctor							<b>x</b> ~			~ No	1					~	Yes 🗸
Q	Searc	n E	Save																T Toggle A	dvanced Sean
+	Ado		Export	× Delete	-	Approve 👎	Una	pprove 5	Disapp	rove 🛄 Create I	Data Template	Import	Data							
		D	Date ^	Resource		Contractor		Departmer	nt 🗘	Role	Project		Activity	Task	Assignment	Hours	Chargeable	Approved	Invoiced	Notes
C		2	2015-05-04	Phil Morris	on	No		PM&O		Project Manager	Tech Service Delin	very 1	Administration			10:00	No		No	test
C		2	2015-05-04	Phil Morris	on	No		PM&O		Project Manager	Tech Service Delin	very 1	Administration			10:00	No		No	test

To return a list of 'Employees' only, set the *Is Contractor* filter to "= No".

### Ability to View up to 24 Years Finance and Forecast Data

#### Finance Tab

It is now possible to view up to '24' periods of data in the *Projects > Finance* tab, be it weeks, quarters, months, or years. This has been increased from the previous limit of 12 and provides a level of consistency similar with that available within the Forecast screens.

Projects																													
Project - Demo proj	_	32 Finan	rce 🛊 Resource 🐵	Deliver	ablar	A Dieke		Irruse	C Dilling		countr	u Mara																<b>G</b> , ~	<u> .411</u> ~
Q. Search Filter	< <	as hinan	T nesource	Denter	POILS	AL IUDIO	v		a county	in opp	Corana -	- more															(D) E	xport 1	De Deinet
Start Date		E	Effort (Days)	Dec	20 Jar	n 21 Fe	eb 21	Mar 21	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22			
December 2020	<b></b>		- To	tal	25	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	5 370
Periods		10	Project Manager		15	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	245
24			Software Develope	e i	10	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5 125
Period Type																													
Months	~																												
Show																													
Effect (Devel)	<u> </u>																												

#### Forecast Tab

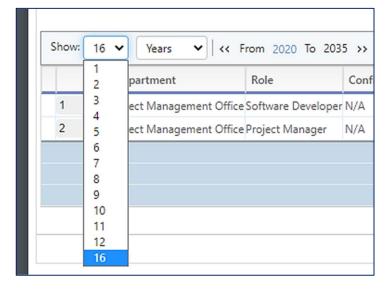
For any customers using Financial Year Forecasting, up to 24 yearly periods can now be viewed/edited within the Forecasting screen. Note, this must be configured separately within Strategic Planning Settings and is only available if *Demand of Resources* is **not** enabled.

The available selection will take into account the current 'From' date, and the number of configured planning periods, for example, based on planning periods configured to 2035, up to 24 years are available when viewed from 2008:

Show:	24 🗸	Years 🗸 🖌 Krom 2008 To 203	1 >
	1	partment Role	Co
1	3 4	ect Management Office Software Developer	N/A
2	5	ect Management Office Project Manager	N/A
	6		
	8		
	9		
	10		
	11		
	12		
	18		
	24		



If viewed from 2020, 16 years are available:



# Task Edit Screen: Automatically Clear Constraint Date when Removing Constraint Type

A small, time saving improvement has been made to the Task Edit screen, whereby removing the Constraint Type will now automatically remove the Constraint Date. Previously this would have resulted in a validation warning on save if the user had not manually cleared this.

Task						
General Skills Assignments Predecessors Jira Nigel 90						
Details	Dates					
ID:	* Start Date:					
1	2020-12-02 🗰 9:00 AM 📀					
Outline:	* End Date					
1	2020-12-04 🛍 5:30 PM 🧿					
Project:	Constraint Type:					
011220   Demo Template	Start No Later Than					
Confirmed:						
	Constraint Date:					
Protected: 0	2020-12-21					

# Ability to Update Deliverables on Template Projects within the Deliverables Tab

Some customer databases may have inherited a legacy setting preventing them from editing Deliverables directly in the Deliverables tab for template Projects.

This has now been resolved so that all customers will now be able to directly edit deliverables in this manner, rather than having to use the existing workaround by editing on the Deliverables search screen.

	×	CEYEDIN'					
	Projec	Projects					
+		🖴 Project - Demo Template 🚠					
	<b>#</b> H	🐗 Home 💵 Tasks 🗑 Forecass ID Finance 🛉 Resource 🔮 Deliverables 🛕 Risks 🛛 Issues 💲 Billing 🍁 Approvals 🗠 More					
	٠.	Q, Q, 🚇 📕 🖼 Show Options v Status All 💙 Type All V 2020-12-01 To 2021-02-28					
		Dec 2020     07   14   21   28   04	Jan 2021	Amend Deliverable - Phase 1 Go Live	×		
*	30	07 14 21 28 04	11   18   25	General Dependencies	<b>出</b> +		
*				Sequence: 1			
0				• Name: Phase 1 Go Live Provisional 🗸			
				Mandatory:			
Ø				* Owner: Phil Morrison Q +   RES008			
				* Project: Demo Template Q   011220			
æ				* Type: Benefit Deliverable +   BENEFIT			
æ					_		
				Publish To: Project 💙			
and .				Description:			
Q							
	C	Project Demo Template	Name Phase 1 Go Live	* 66918- CF: test	То		
	0	Denio tempiate	FINDE I GO LIVE	O Benefit Value:			
				Milestones CF:			
				Critical Milestones CF:			
				Citucal milliostories on			

### Deliverables API

New API end points are now available to support the Deliverables entity, including the ability to add, amend (including complete/drop/reschedule/rebaseline), delete and search on Deliverables.

The standard API documentation is available here: https://api.keyedinprojects.co.uk/V3/api-docs/ui/index#/

Please contact your customer representative or Support with regards to usage of the API.

## 7.2.3 (January 2021)

### V3 Client API: New Client Template Code Token

A new token, *Client Template* Code has been added to the Client API (POST method) to allow new Clients to be added via the API based on an existing (template) Client.

The intended use case for this change is to support the creation of Clients via the API where the new Client needs to be added to an existing security group. By optionally referencing the code of the template Client, it will inherit the existing security group(s), if configured, as well as any other Client fields not explicitly specified in the JSON.

Please contact your customer representative or Support if you require further assistance with the KeyedIn API.

### 7.2.4 (February 2021)

#### Forecast Collaboration Posts copied on clone

Where Collaboration Posts are being used on Forecasts, the posts, for each demand line, will now be copied when the Forecast is cloned. The new Forecast must first be saved before copied Posts are visible.