KeyedIn Projects
v7.3
Winter 2020/21 Release

Release Guide

Version 7.3.0

March 2021

Contents

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Version Control

Version Num er	D te	Rev[redacted]	[redacted]ct[redacted]	Pre red By	Next Review D te
1.0	17/03/2021	[redacted]ges	All	R Thompson	
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Document Approval

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1.1	30/03/2021	Paul Gleghorn / SVP Technology and Architecture

Overview of Changes

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We A lic tion	✓	[redacted]
Mo ile A [redacted]	×	[redacted]
M [redacted] ile Servic[redacted]	[redacted]	✓
[redacted]	[redacted]	✓
[redacted] Views	[redacted]	✓

[redacted]

Release Summary

KeyedIn Projects v7.3 is the first major relea[redacted]delivering excitin[redacted] our market leading Task Planning and Re[redacted]rtin[redacted]unctionality to furth[redacted]e execution and delivery within an agile[redacted]nvir[redacted]ment.

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

In summary, this release introduces:

- A new Kanban style [redacted]**sk Bo[redacted]rd** as an alternative way to visualise and manage the progress [redacted]collaborative agile environment.
- The ability to **out[redacted]ut re[redacted]s** to create powerful automated MI [redacted] stakeholders.
- Further additions to the **enh[redacted]**
  - Add IFrame widgets [redacted] applications (such as P[redacted]
  - Schedule enhanced rep[redacted]
  - Access enhanced report[redacted]
  - Work more easily with the [redacted] improvements.

  ** Ability to schedule enhance*[redacted]*in the subsequent major release (7.*[redacted]

- Various enhancements to support c[redacted]egrations (such as JIRA) to better manage Task Plan[redacted]
  - Ability to control *Multiple Plan Versi*[redacted]t level.
  - An Integration custom field initially i[redacted]se with the Task Entity to allow integrations to update thes[redacted]s without overwriting an[redacted] existing checked out plan.
  - Supporting enhancements to the T[redacted] with additional control over Task creation.

- Product Editions, a new licensing model to more competitively tailor our product offering to new customers given the evolving PPM market.

    - **KeyedIn nter rise (KI)** – the new name for KeyedIn Projects, offering **full function lity**.

    - **KeyedIn Ad**[redacted] – Strategic Portfolio Analysis for ***Investment-l***[redacted]

    - **KeyedIn Projec**[redacted]ement for ***Project delivery and ex***[redacted]

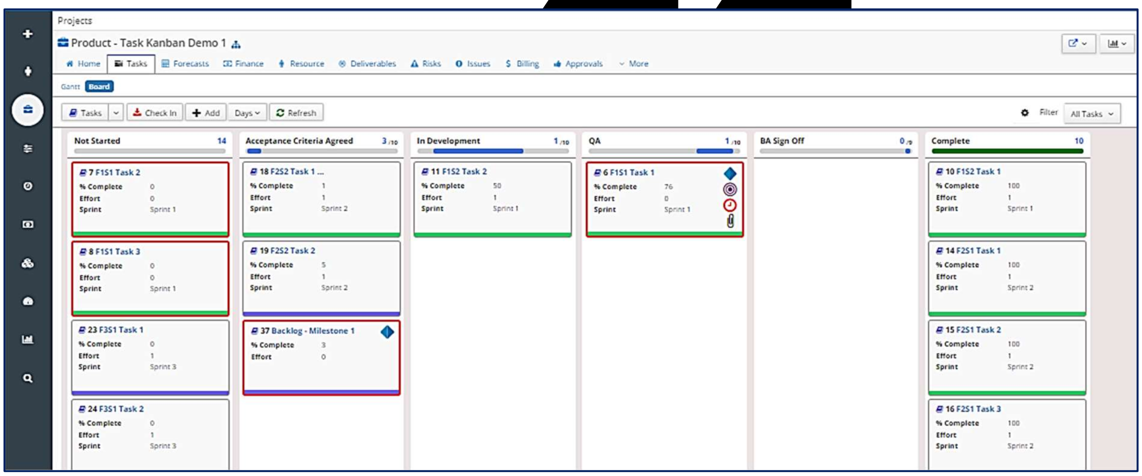
  Please note, all existing cu[redacted]ected and will be transferred across to the Ke[redacted]rt of their next renewal process. Please refe[redacted] video for more information.

Standard maintenance and support fixe[redacted]ed in this release, and customers will be notified separately vi[redacted]pport Portal for any of their tickets that have been resolved.

Task Board

Feature Summary

The Task Board provides an alternative, interact[redacted]way to vi[redacted]ise and manage the progress of Tasks within an agile environment [redacted]perate[redacted]gside our standard Task Planning Gantt functionality.



The Task Board provides the following key features:

- Tasks are represented as tiles in configurable columns based on the **current** [redacted] **sk ercent com lete** for the active Project.
- Dr[redacted]een Board columns to update percent complete to [redacted]dary of the new column without requ[redacted]
- Hover [redacted]etails such as dates, duration, effort and the [redacted]ces, or click through to the standard Task View[redacted]
- The default [redacted]on-Summary) Tasks and milestones, but users can “ro[redacted]Summary Task levels (subject to specific Task configura[redacted]o visualise and manage progress at a higher level.

Feature Usage

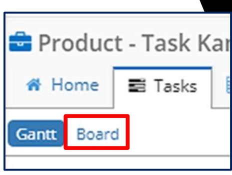
This section is aimed at general users of the Task Board and assumes it has been pre-configured by an administrator for appropriate use within your organisation. Administrators should refer to the later section on *Feature Setup* once an understanding of the operation has been established.

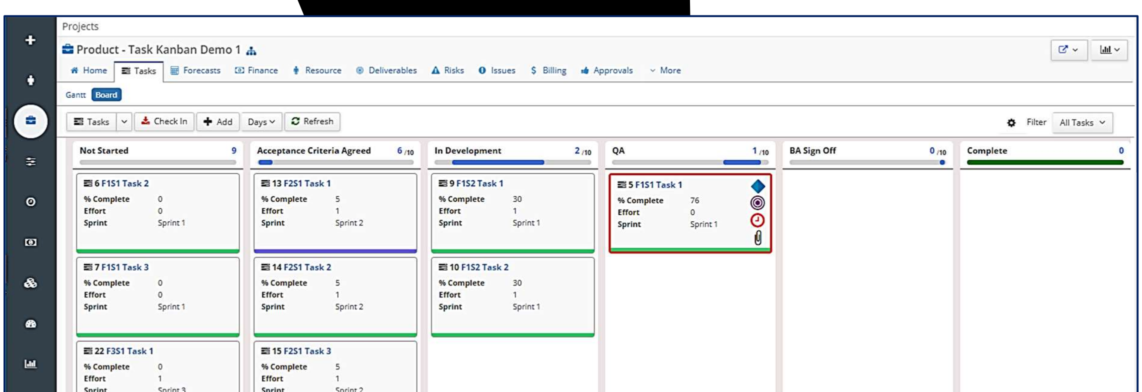
Accessing the Board and switching to/from Gantt

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[redacted]rd** option to view the Board – you will be prompted to save any changes, if ap[redacted]



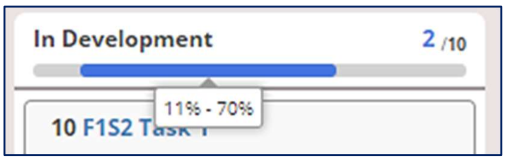


Board View Basics

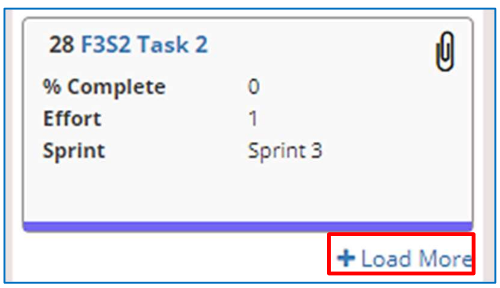
The Board provides the ability to visualise progress of Tasks which could represent traditional project tasks, or agile work items (such as development activities).

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 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.



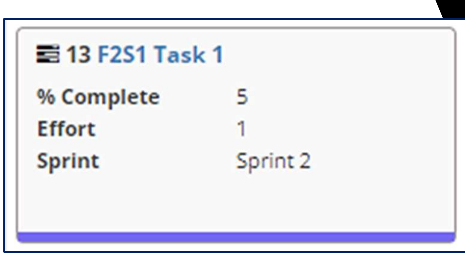
When the Board is first loaded, the first ten Tasks are shown for each column, ordered by ID, ascending. Additional Tasks can be displayed by using the *Load More* button.



Task Fields

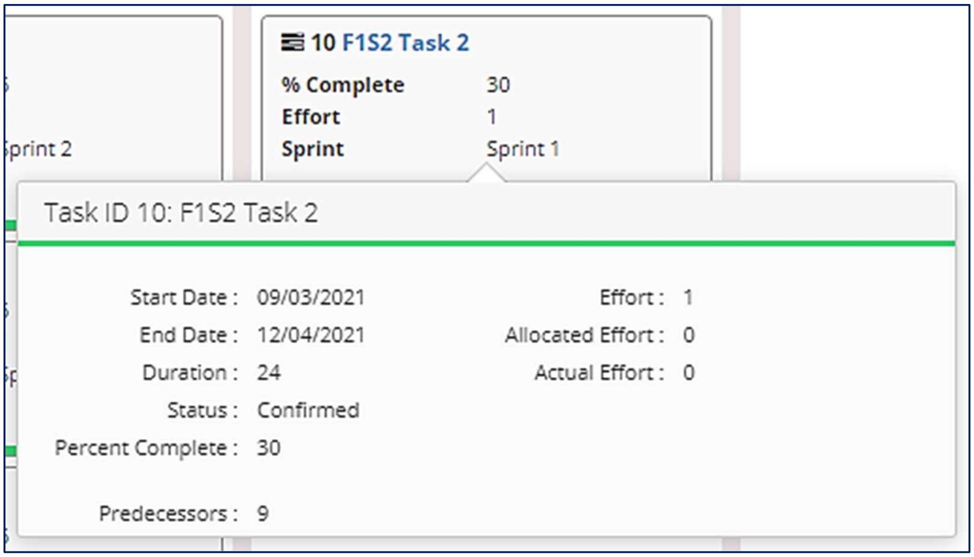
By default, the Task ID and Description will always show at the top of the tile.

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 th** [redacted] **t *Sprint* is** [redacted] **Custom** [redacted] **ield** [redacted]



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.

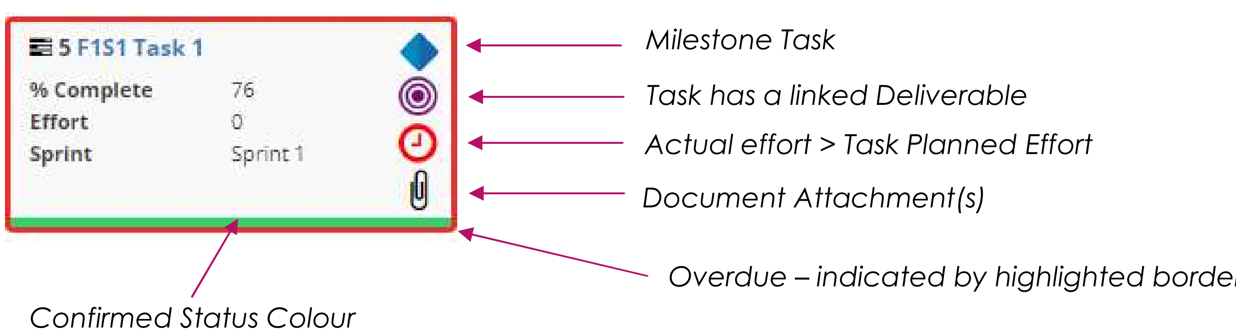


The Task Description on the tile is a hyperlink that can be clicked to drill into the View/Edit screen – further detail will be covered in a later section. In the event the Task Description is blank, the ID will act as the hyperlink.

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 📎 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.

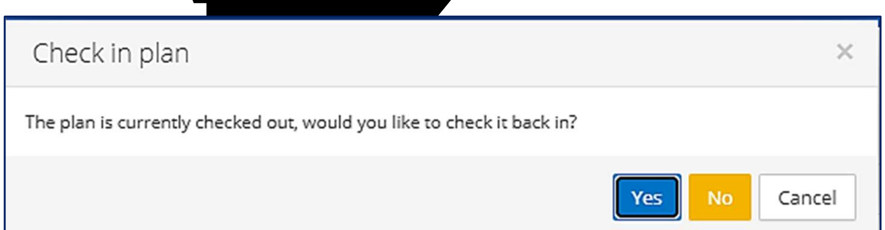
Board Menu Options

The following menu options are available:

- [redacted]**sks** selector is only shown when the Task Plan Gantt is configured in a sp[redacted] and allows the user to roll-up and view Summary Task levels. Ple[redacted]ation on viewing Summary Tasks.

- **Che**[redacted]e checked out if you need to make chang[redacted]n, effort or attaching a document. Otherw[redacted]d-in, in order to move the Task by drag and drop[redacted]

  Note, if the[redacted]u will prompted to check back in when navigating a[redacted]

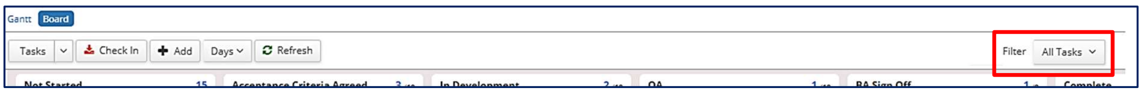


- **Add** new Task – allows a new Task to be inserted. Not available when viewing Summary Tasks.

- **D**[redacted]**ys/Hours** selector – to toggle duration and effort related fields between Da[redacted]urs. This setting is retained on a per-user basis.

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

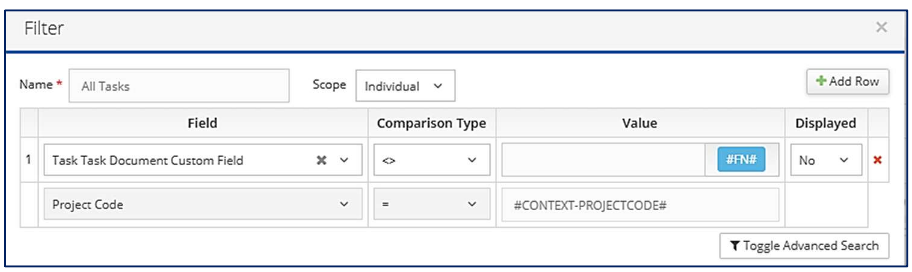
Additionally, the standard Tasks Filter is available and can be used to further restrict the view of Tasks by filtering on the available list of standard and custom Task Fields, subject to permissions.



Examples of Task filters could be:

- 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*



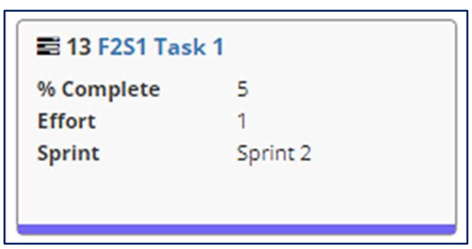
Moving a Task using Drag and Drop

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 only be overwritten if that field was specifically changed by the Gantt Task Plan user.

Viewing and Editing Task Details

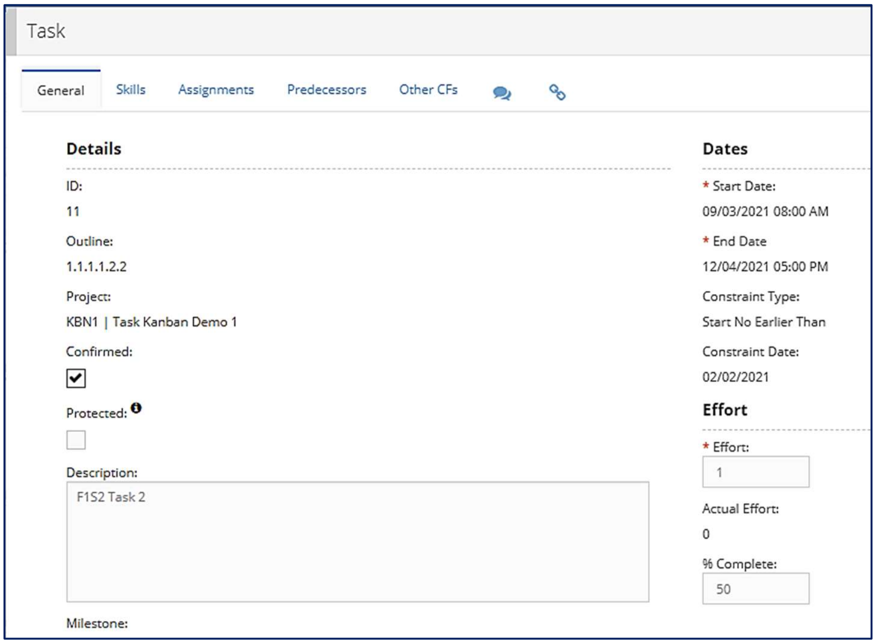
Clicking the Task description opens the full Task dialogue screen. This will be in view only mode unless the plan is checked out to you (by using the check out button on the menu bar).



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[redacted]nnot** be edited when this screen is accessed via the Board:

- Start and End Da[redacted]ask to a Milestone Task)
- Constraints
- Predecessors
- Assignments



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.

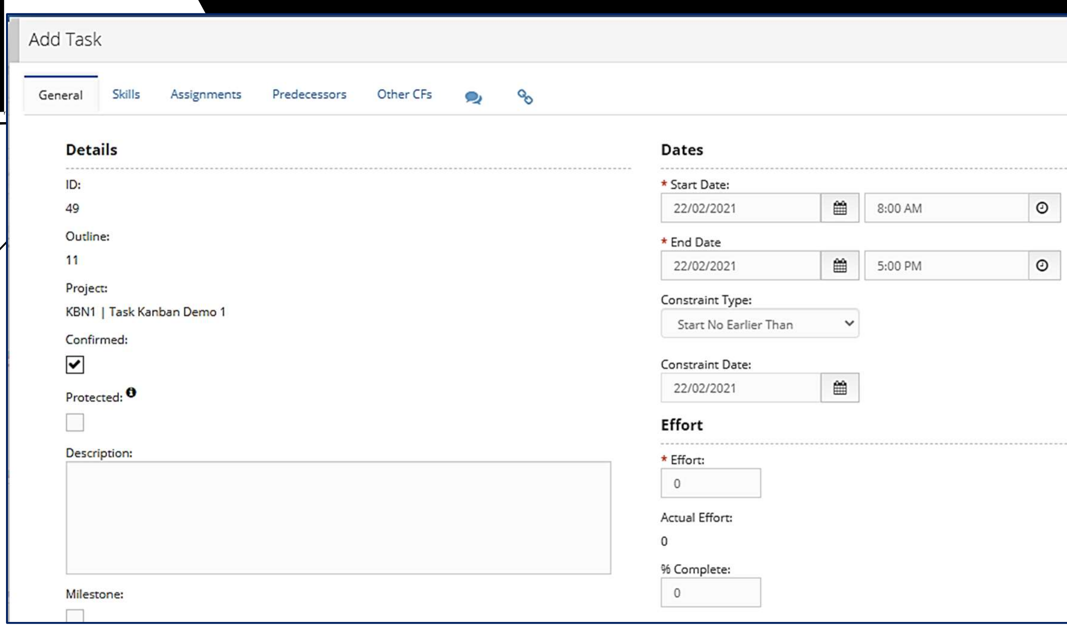
Adding a New Task

The option to add a new Task is ava[redacted]ble 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. **[redacted]he constr[redacted]int ty[redacted]e[redacted]nd d[redacted]te c[redacted]nnot[redacted]e[redacted]mended in this mode,[redacted]nd should [redacted]e done vi[redacted]the n[redacted]**



The following items **c[redacted]nnot** be maintained when this screen is accessed via the Board:

[redacted]

- 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

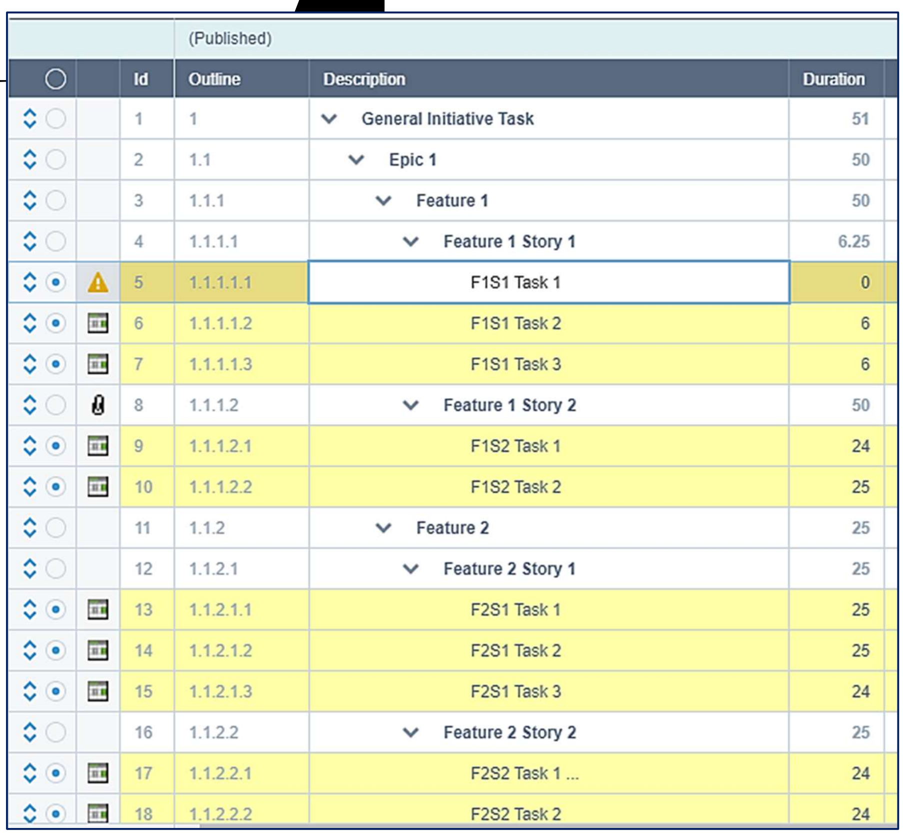
In addition to viewing standard Tasks and Milestones, the Board is also able to display Summary Tasks, subject to certain conditions being met.

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.

As an example, the yellow ghlighted standard Tasks are all at the same outline level (i.e. 5 levels deep, x x.x)



		Id	Outline	Description	Duration
			(Published)		
		1	1	General Initiative Task	51
		2	1.1	Epic 1	50
		3	1.1.1	Feature 1	50
		4	1.1.1.1	Feature 1 Story 1	6.25
		5	1.1.1.1.1	F1S1 Task 1	0
		6	1.1.1.1.2	F1S1 Task 2	6
		7	1.1.1.1.3	F1S1 Task 3	6
		8	1.1.1.2	Feature 1 Story 2	50
		9	1.1.1.2.1	F1S2 Task 1	24
		10	1.1.1.2.2	F1S2 Task 2	25
		11	1.1.2	Feature 2	25
		12	1.1.2.1	Feature 2 Story 1	25
		13	1.1.2.1.1	F2S1 Task 1	25
		14	1.1.2.1.2	F2S1 Task 2	25
		15	1.1.2.1.3	F2S1 Task 3	24
		16	1.1.2.2	Feature 2 Story 2	25
		17	1.1.2.2.1	F2S2 Task 1 ...	24
		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 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.

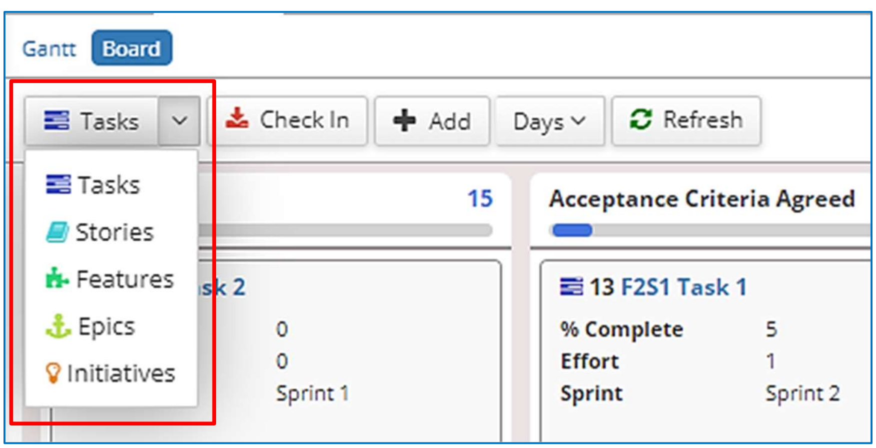
This is only an example, and the names for the levels can be tailored to your organisation's requirements. Further detail is covered in the Feature Setup section

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

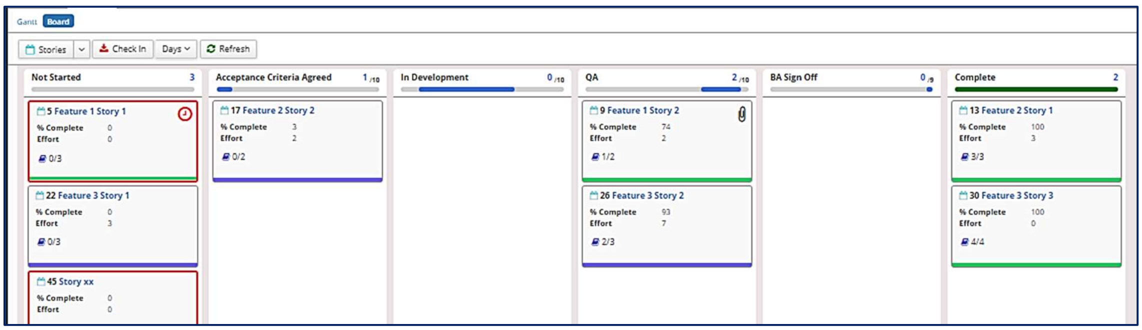
Provided the above conditions are met, you will have the option to roll-up to Summary Levels from the Board view using the selection button as shown



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

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

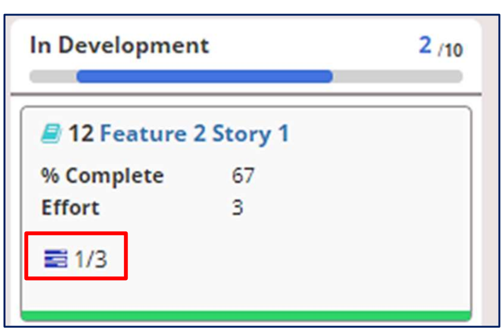
By selecting a level above Level 1, only the Summary Tasks at that level will be shown. The Summary Tasks will be displayed in the column based on their current percent complete, as calculated based on the duration weighted percent complete of their child Tasks.



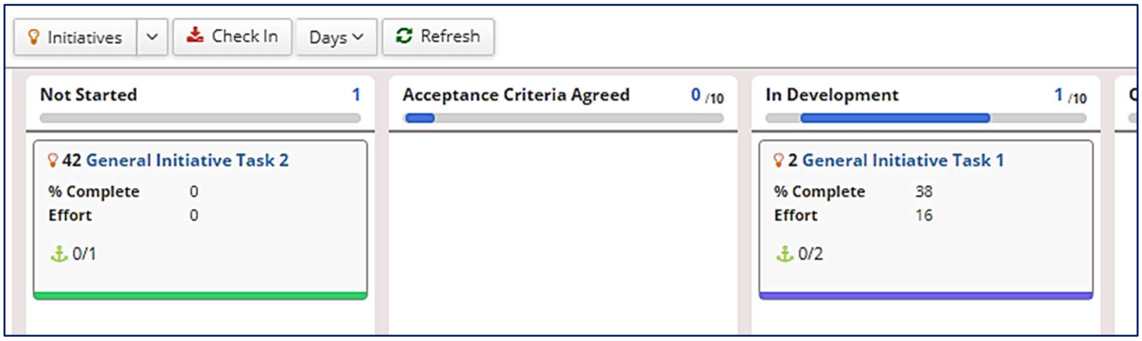
Summary Task tiles cannot be dragged to other columns, but otherwise behave like standard Task tiles in with respect to Task highlighting, the display of additional information on hover, and ability to view/edit for further details.

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.

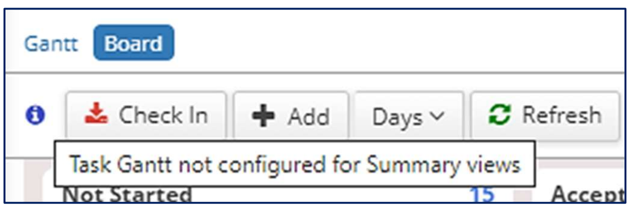
In this example, the Summary Task (ID 12) has three direct child Tasks, one of which is complete.



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.



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.



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

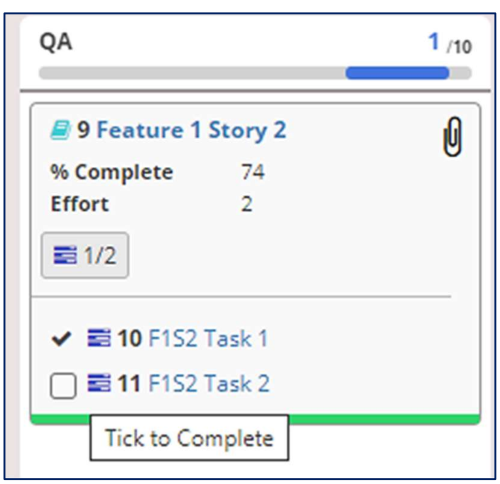
Summary View: Viewing and Editing Child Tasks

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.

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.



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.

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.

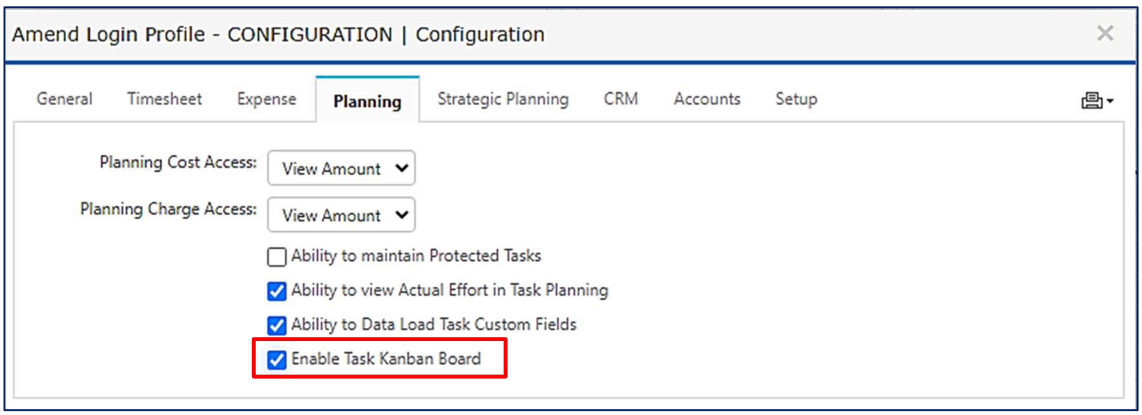
Task Board - Setup and Configuration

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

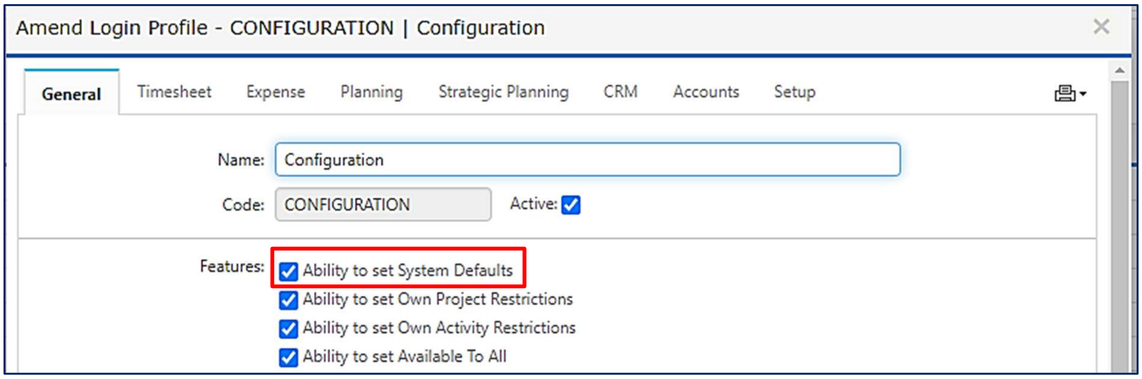
The Task Board view is only available if the Enhanced Task Plan Gantt is enabled (this will be enabled by default for new clients after March 2018).

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

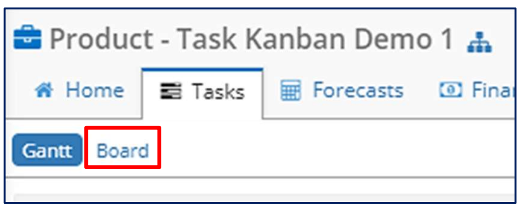


Task Board Configuration

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.

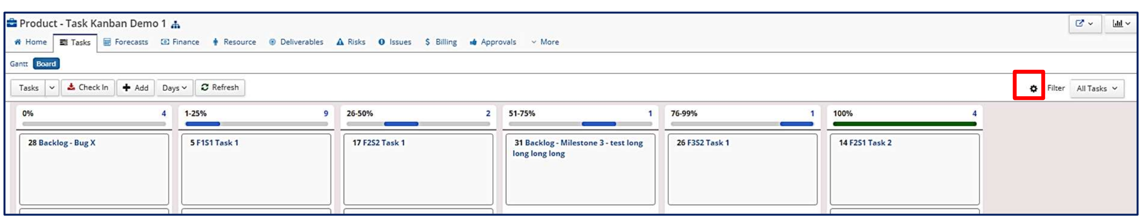


For initial setup, once the Board view has been enabled, navigate to a Task Plan ensuring the Published version is active and select ***Board***.



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.



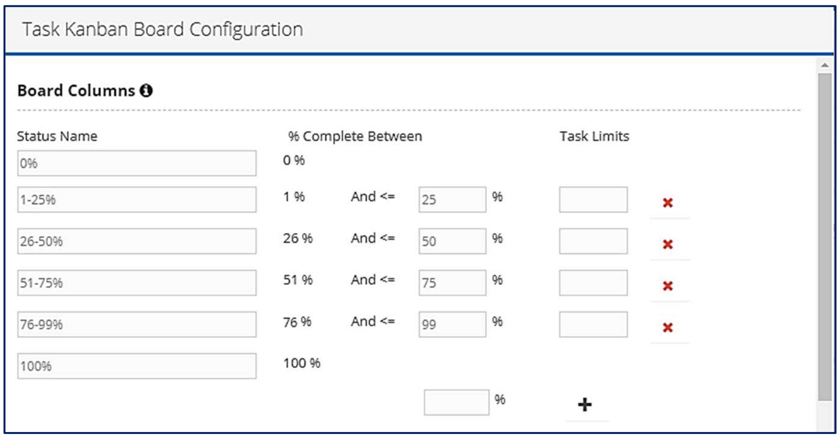
This opens the Board configuration screen, which is broken down into sections, and further explained in more detail:

- 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.

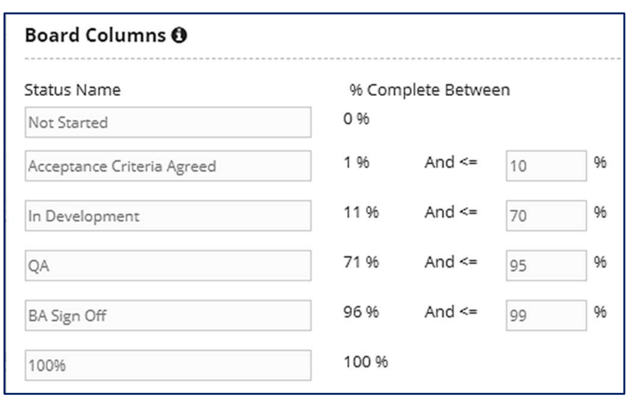
The Status Names and boundaries can be custom configured, up to a maximum of ten, and a minimum of three. The 0% and 100% boundaries are fixed and cannot be changed.



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.



Adding Board Columns

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.

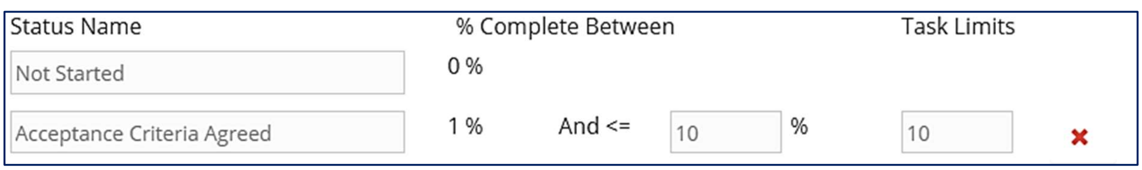
Deleting Board Columns

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.

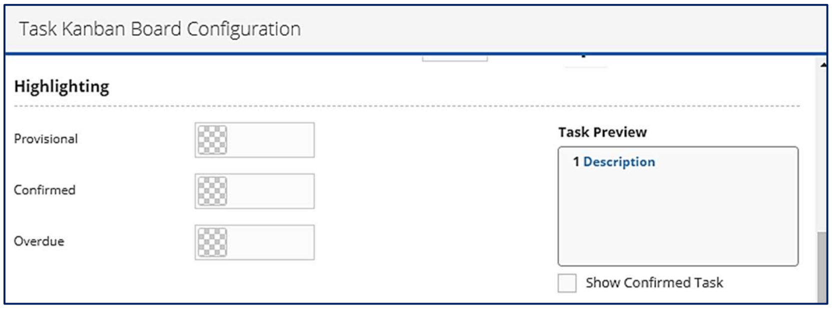
For example, based on the configured Task Limit of 10 for the second status:



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



This section allows optional configurable colours to be set to distinguish **Provision[redacted]l**, **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 [redacted]**sk Preview** tile automatically updates to provide an example.

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

Task Display Symbols

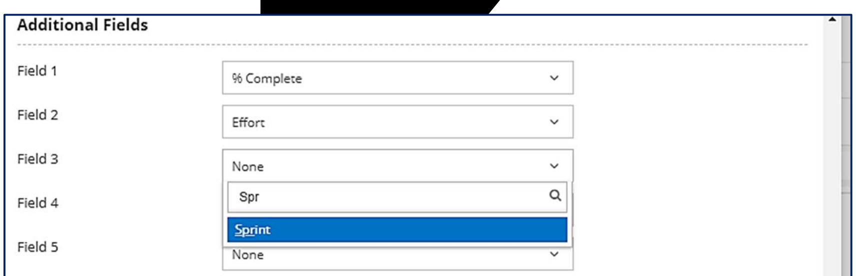
Four Display Symbols can be optionally toggled to display on the Task:

- **Milestone** – where the Task is a standard Milestone Task.
- **Linked Deliver**[redacted]**le** – where Task has a linked Deliverable (either to the current Project or ano[redacted]
- **Actu**[redacted]**l** [redacted]**ffort** [redacted] the Actual Effort recorded against the Task ([redacted]orded against the Task.
- **Att**[redacted]**ch**[redacted]ard document atta[redacted] custom field attac[redacted]tered on separately).

The [redacted]sk Preview tile updates with an example of where the conditions are met:

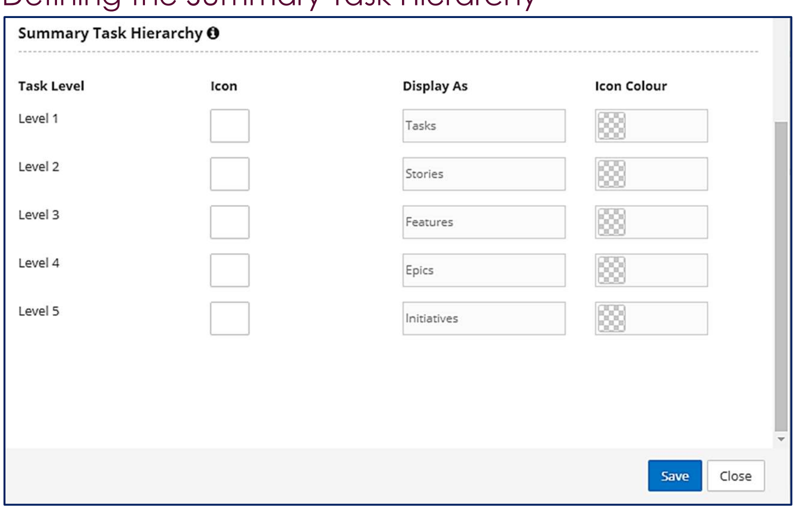
Displaying Additional Fields

Up to five additio[redacted]lected to display on the tiles, which can include Custom F[redacted]ead search to find and select the fields.



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

Defining the Summary Task Hierarchy



Task Levels

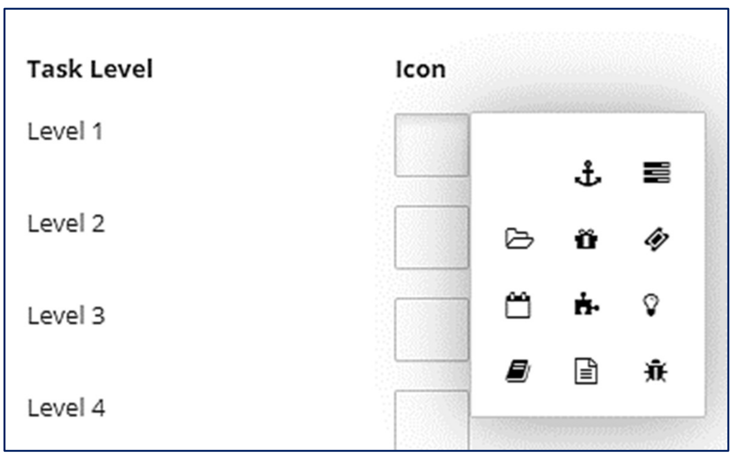
Up to five Task levels can be configured to view on the Board. Level 1 represents standard Tasks (or Milestone Tasks), which can be either standalone, or as a child of another Task.

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

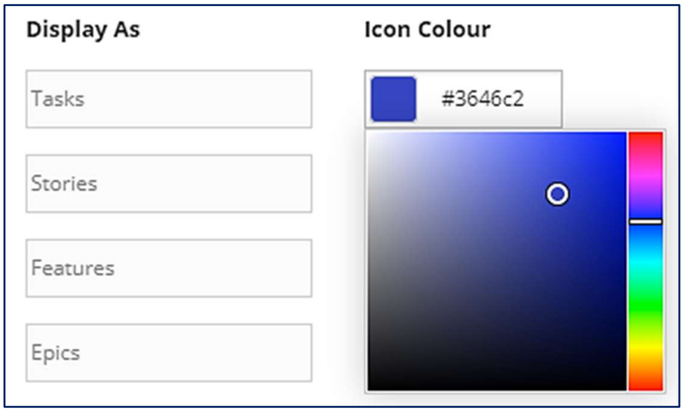
Each level can be represented by an optional icon. To select an icon, click into the *Icon* box for the level and choose the most suitable.



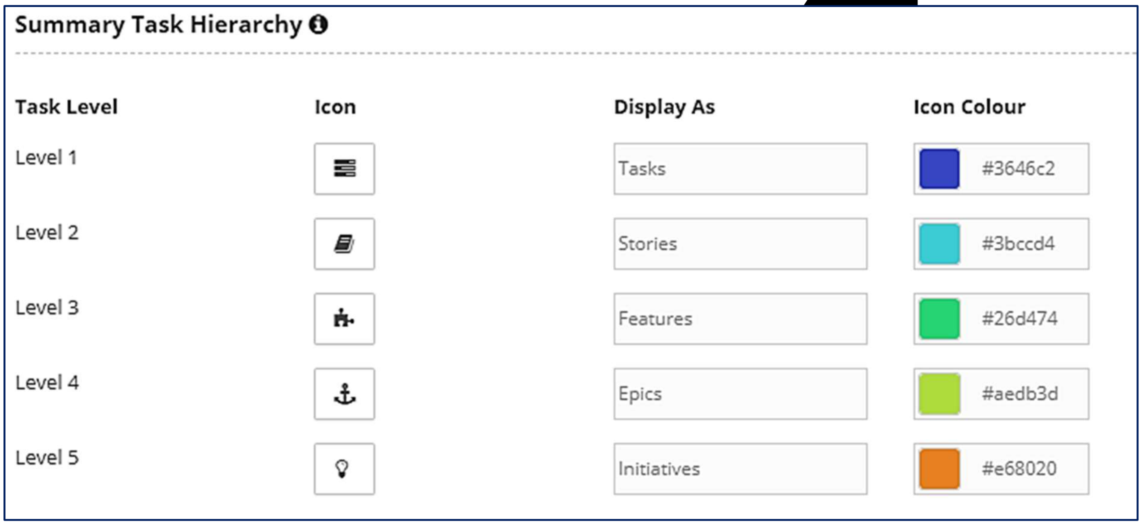
o remove [redacted] **n icon**, select the blank upper left area on the selection panel.

The same ic [redacted] ore than once, but an alert will display to warn of [redacted] uplicate use [redacted]

The co [redacted] ed using the colour selector. To remove [redacted]



Once complete, an example of a configured hierarchy might be[redacted]



Conditions Required to View Summary Tasks on the Board

In addition to the hierarchy names and colours being defined in Board configuration, two further conditions must be met to allow roll up to higher level Summary Tasks.

- **Auto-c**[redacted]**lcul**[redacted]**te % Com**[redacted]**lete for Summ**[redacted]**ry** [redacted] **sks must** [redacted] **e en**[redacted]**led** within Configu[redacted]ing Settings. This [redacted]utoma[redacted]rive the Summary[redacted]ars[redacted] on the we[redacted]
- [redacted]**he hier**[redacted]**rc**[redacted] (or milest[redacted]

[redacted] the belo[redacted] outl[redacted]

		(Published)		
	Id	Outline	Description	Duration
	1	1	General Initiative Task	51
	2	1.1	Epic 1	50
	3	1.1.1	Feature 1	50
	4	1.1.1.1	Feature 1 Story 1	6.25
	5	1.1.1.1.1	F1S1 Task 1	0
	6	1.1.1.1.2	F1S1 Task 2	6
	7	1.1.1.1.3	F1S1 Task 3	6
	8	1.1.1.2	Feature 1 Story 2	50
	9	1.1.1.2.1	F1S2 Task 1	24
	10	1.1.1.2.2	F1S2 Task 2	25
	11	1.1.2	Feature 2	25
	12	1.1.2.1	Feature 2 Story 1	25
	13	1.1.2.1.1	F2S1 Task 1	25
	14	1.1.2.1.2	F2S1 Task 2	25
	15	1.1.2.1.3	F2S1 Task 3	24
	16	1.1.2.2	Feature 2 Story 2	25
	17	1.1.2.2.1	F2S2 Task 1 ...	24
	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.

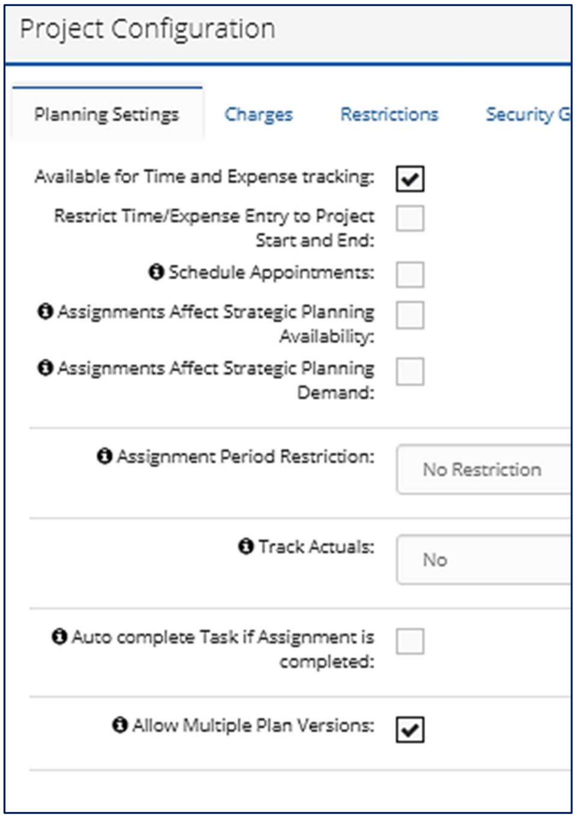
To complement this, a Task Custom field can now be flagged as an 'Integration' field. This will behave like a normal read-only field in the UI, but will allow the API/Integration to directly update the value to the database without needing to check the plan out. Provided that the API/Integration only 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.

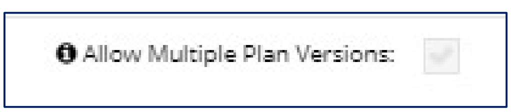
Ability to maintain Multiple Plan Versions by Project

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)



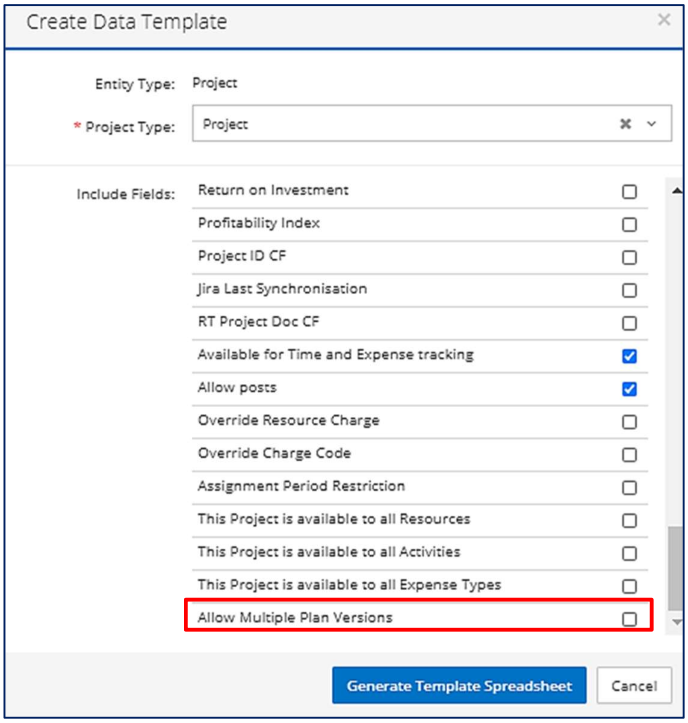
If enabled at the System Level, new Projects will automatically be set to 'Allow Multiple Plan Versions'. Projects added from a Template will use the configuration of the Template.

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.

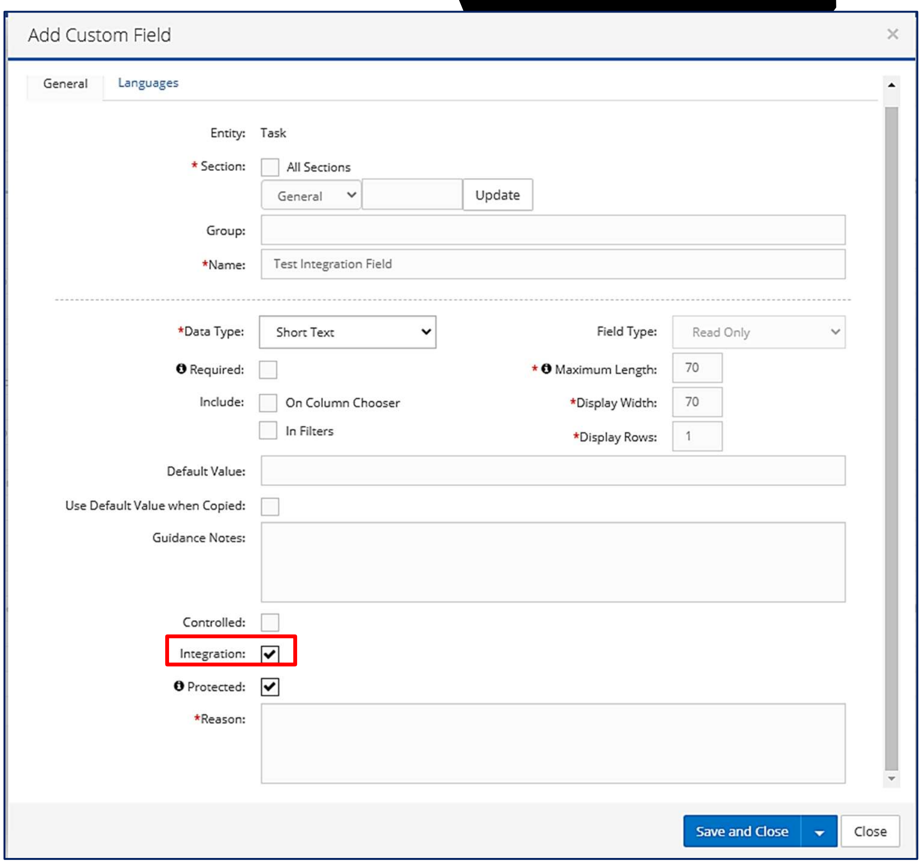
This setting can also be updated via the Project dataload.


Create Data Template
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[redacted]tion**, has been added to the Custom Field configuration screen. This is initially inte[redacted]se with the Task entity where customers have Task Plan integrations and [redacted] KeyedIn Projects from a third party.

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



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

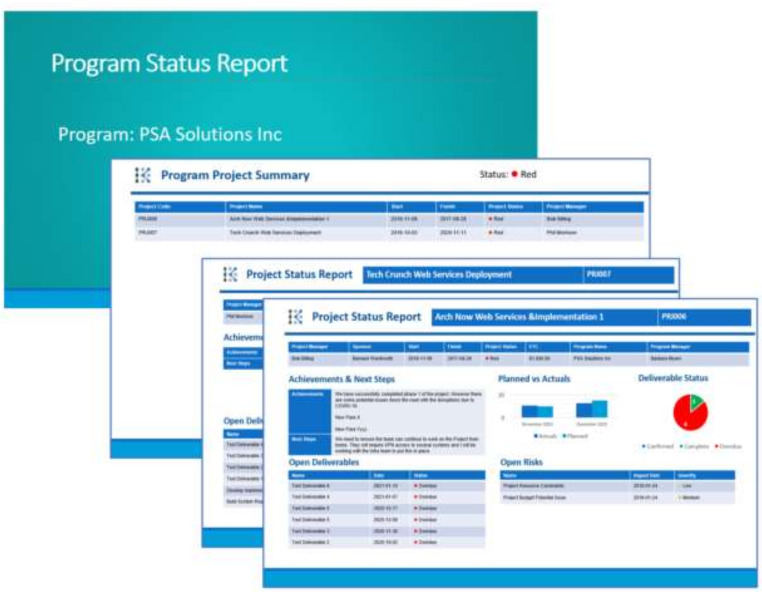
Feature Summary

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.

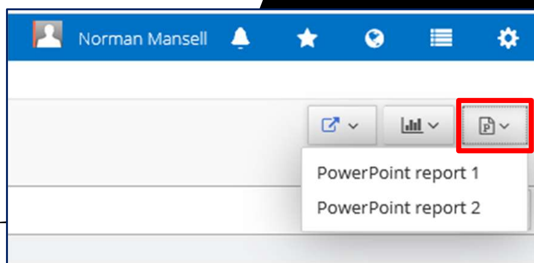


Running a PowerPoint report

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

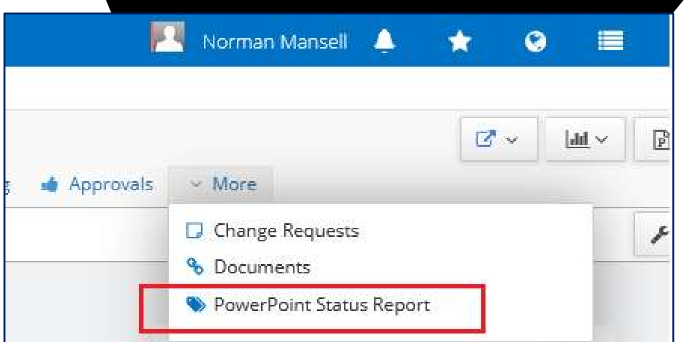
rom the Project d sh o rd

Select the new Pow [redacted] list of available PowerPoint reports:

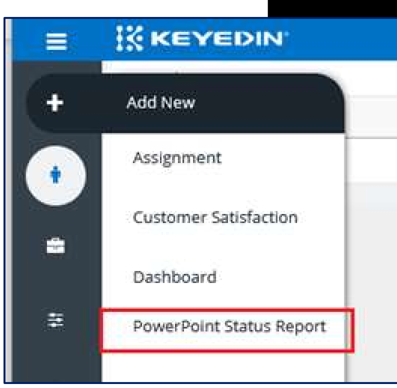


rom n Action

Create [redacted] Project d [redacted] nu.

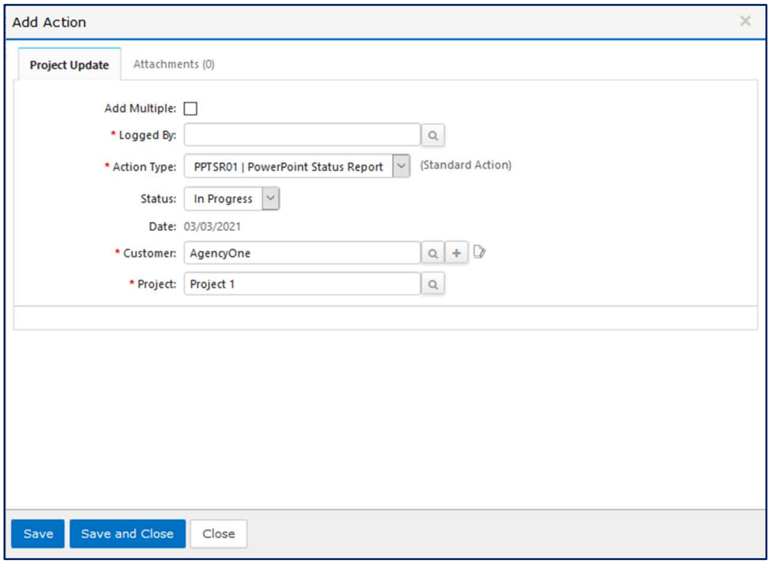


Or



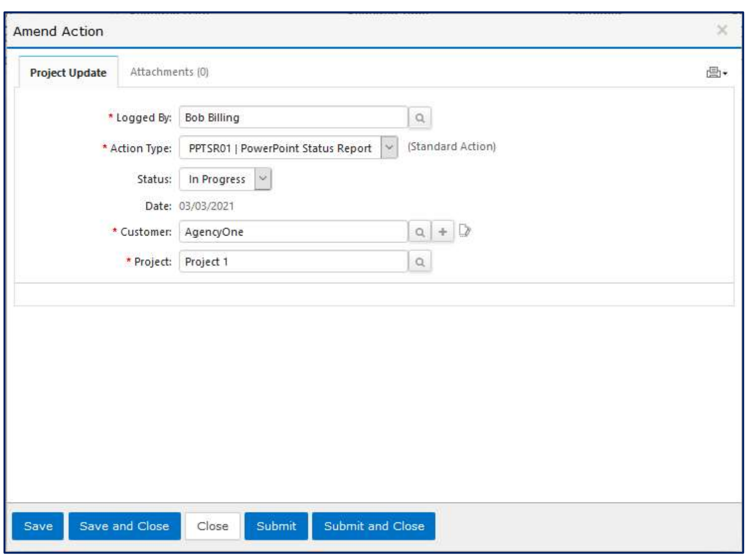
The **Add Action** form is displayed, based on how the Action has been configured.

Enter the details for the action and press save.

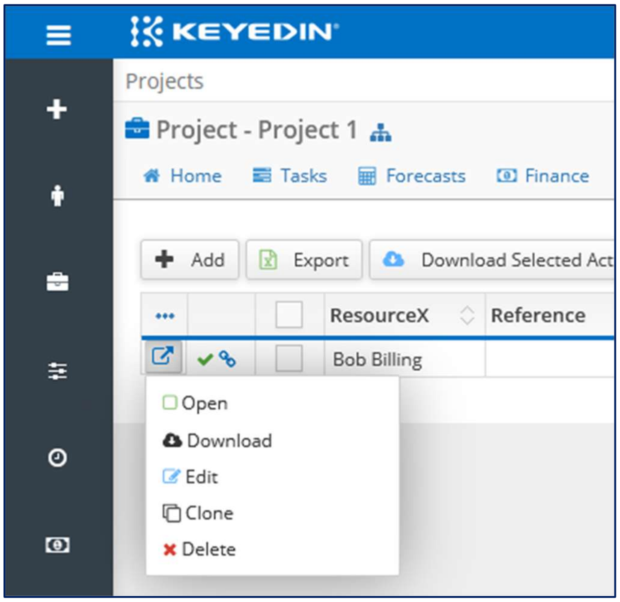


The report can then be previewed using the option under the print icon.

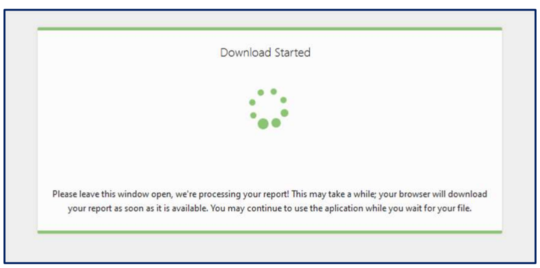
Once ready, press *Submit & Close* to complete the action and generate the PowerPoint report.



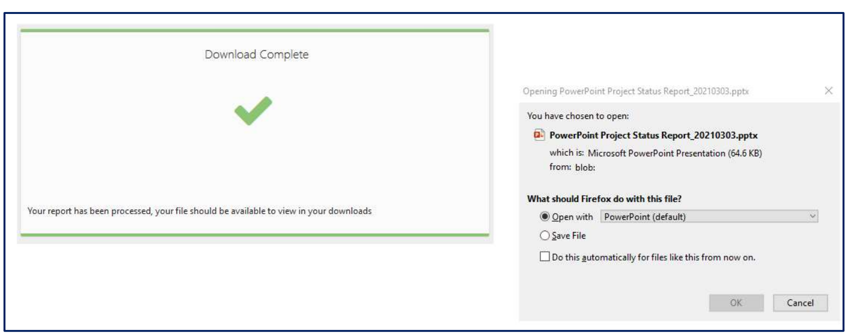
The PowerPoint report is then saved as an attachment against the action type and can be downloaded again when required from the Search or Summary.



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.

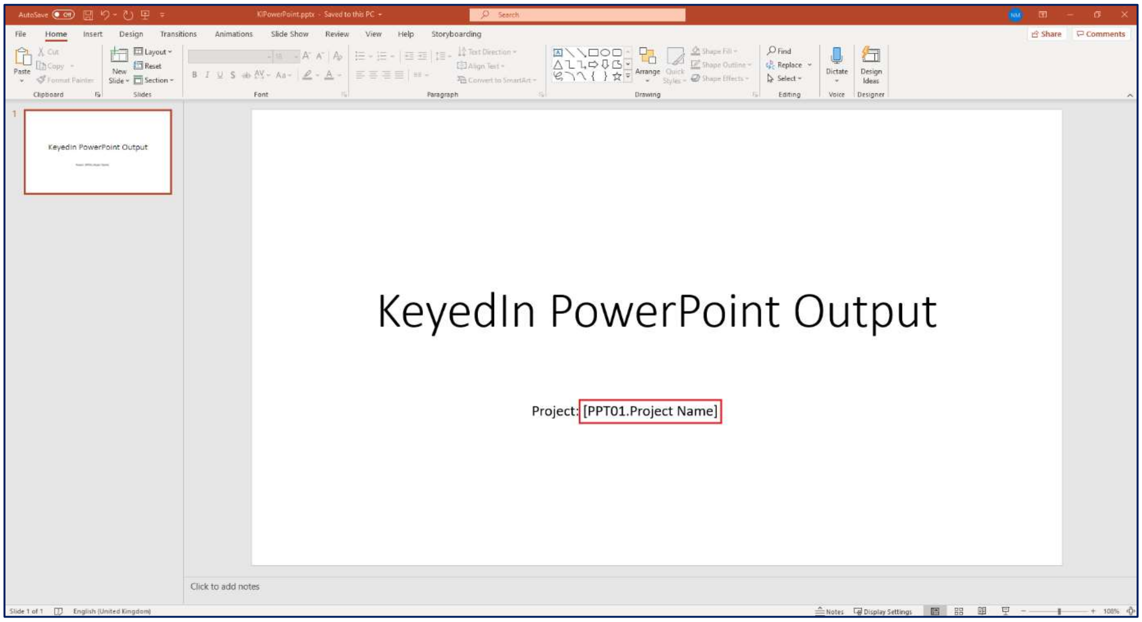


Once the report is complete this is indicated in the window and you will be prompted by your browser to download the file.



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

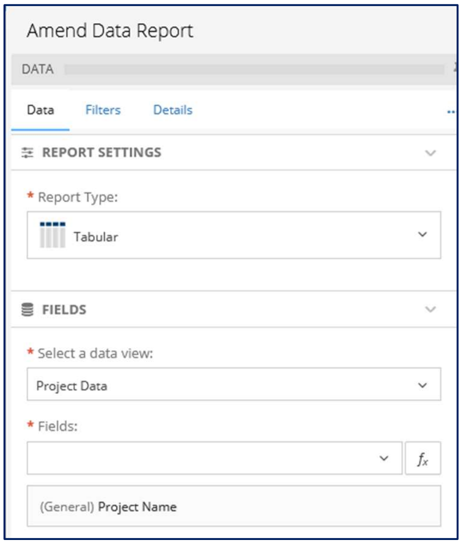
PowerPoint templates use placeholders to reference the data they require from report/s in KeyedIn.

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

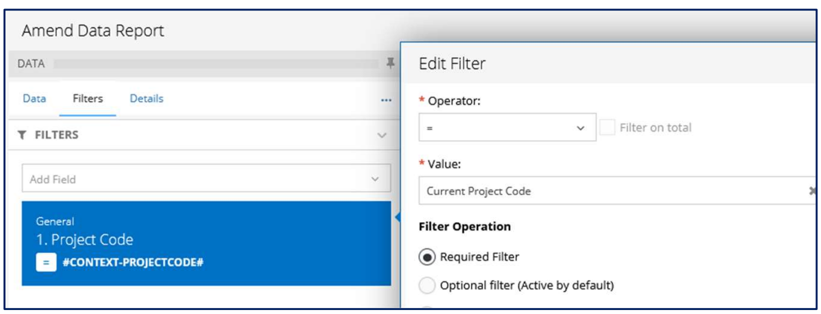
[UniqueReportReference.FieldName]

e.g. [PPT01.Project Name].

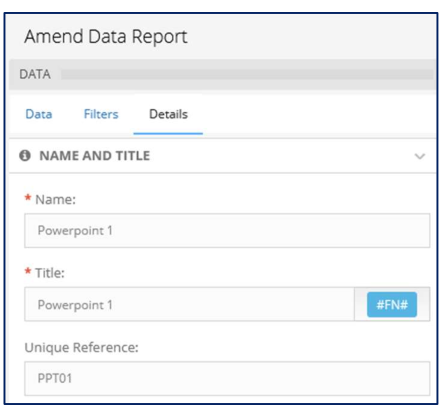
For example, to display the Project name on our first slide, first create a data report in KeyedIn to return the Project Name and any other details, as appropriate.



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



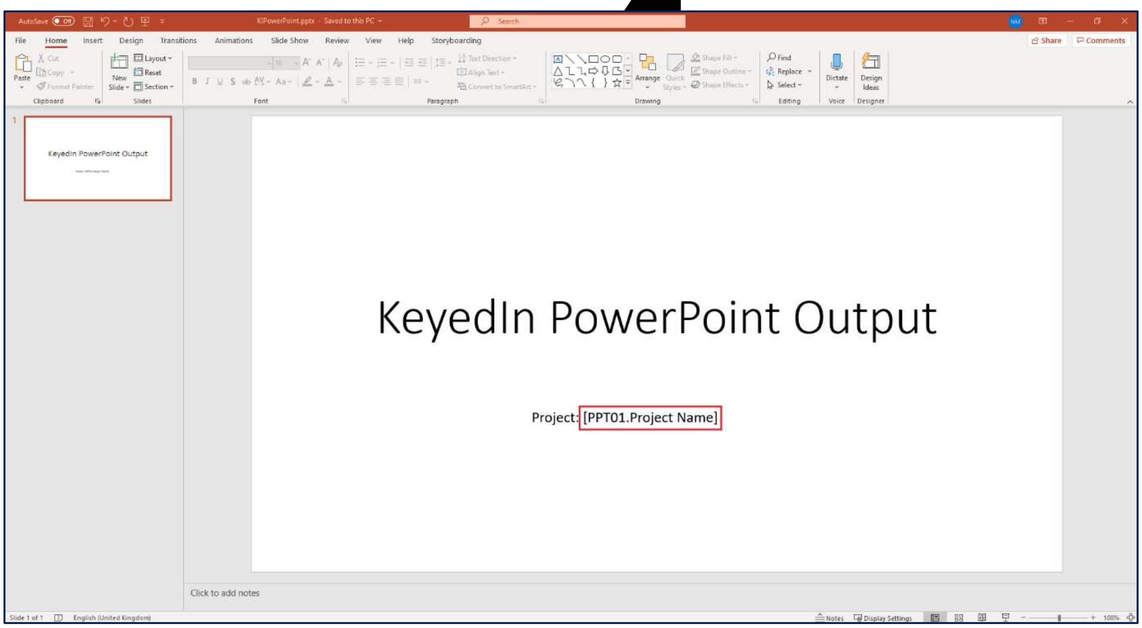
Give the report a name and description and for this example set the unique reference to PPT01.



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.

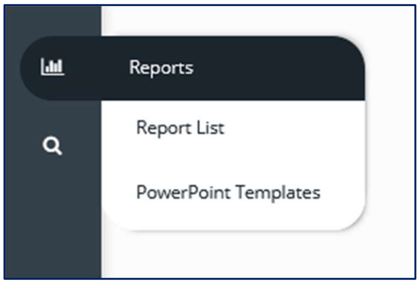
Now enter a placeholder in your PowerPoint document to reference the report data, this is simply entered as text in the PowerPoint document.



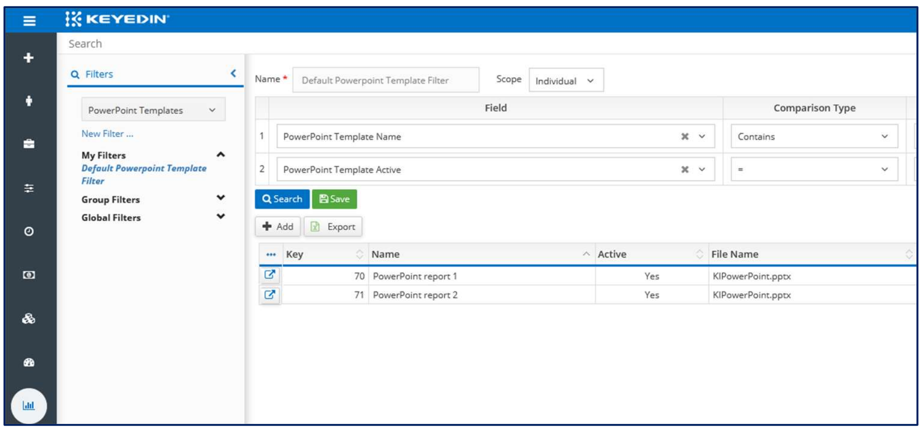
Then add your PowerPoint template in to KeyedIn.

Adding a PowerPoint template to KeyedIn

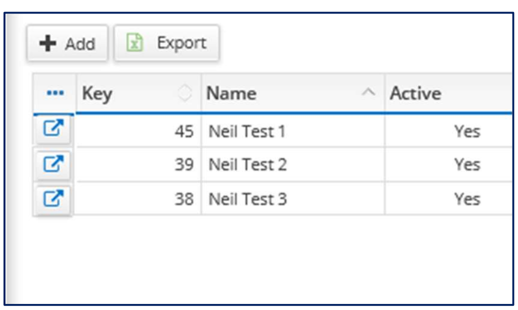
From the **Reports** item on the left menu, a new sub menu item **PowerPoint Templates** is available. Select this item to navigate to the search screen for the templates.



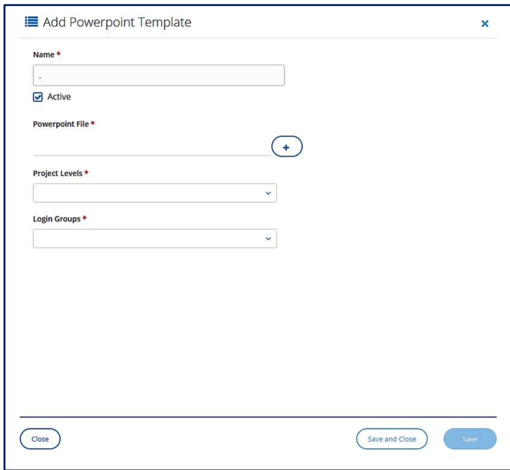
The PowerPoint template search screen appears like other search screens and allows filters to be applied to restrict the items displayed.



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



This displays the Add PowerPoint template form.



N[redacted]me
En[redacted]me to identify the report on screen.

Acti[redacted]
Chec[redacted]e (it will then be visible to users).

Power[redacted]
Select t[redacted]emplate to be used for your report. Note that only[redacted]

Project Lev[redacted]
Select whic[redacted]board the report is available on.

Login Grou[redacted]s[redacted]
Select which lo[redacted]rt is available to.

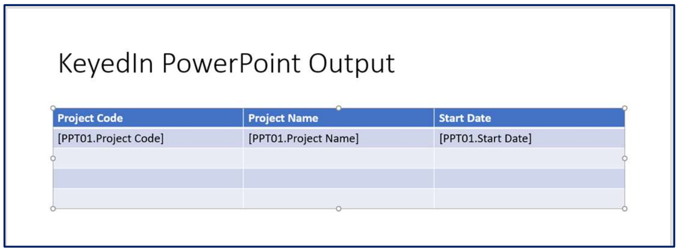
Slide Limits
There is a limit of[redacted]s per pptx Template file. This may result in more slides when the PowerPoint r[redacted]is generated due to repeating slides. The limit on these is 50.

Further Template Configuration

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.

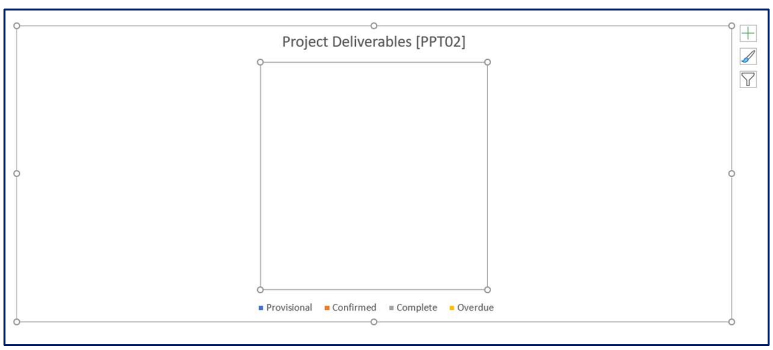
e.g.



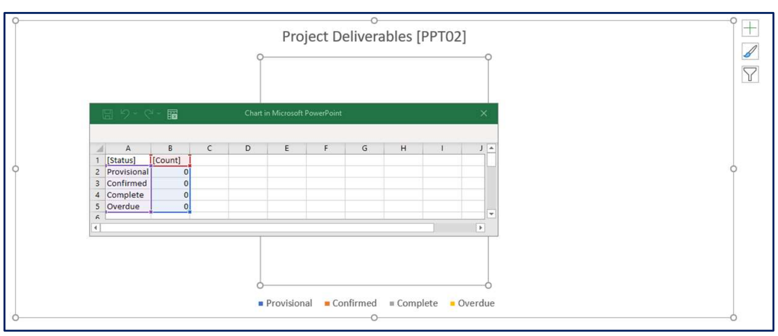
Enter the maximum number of records to be displayed by entering the corresponding number of table rows. Any empty table rows will be removed when the report is generated, but if there are not enough rows to fit all the data, the additional data will not be shown.

Adding Charts to the PowerPoint template

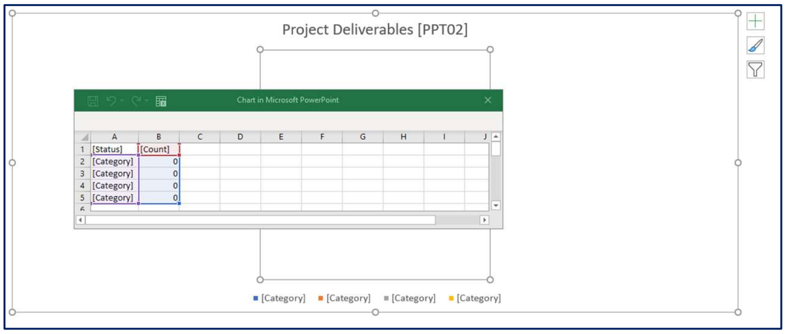
Add a chart to your PowerPoint template, set the title text and add a placeholder to the end of the title to reference the report to be used for the chart. This is the unique reference for the report within square brackets e.g. [PPT02].



Next, edit the data for your chart.



Or



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)

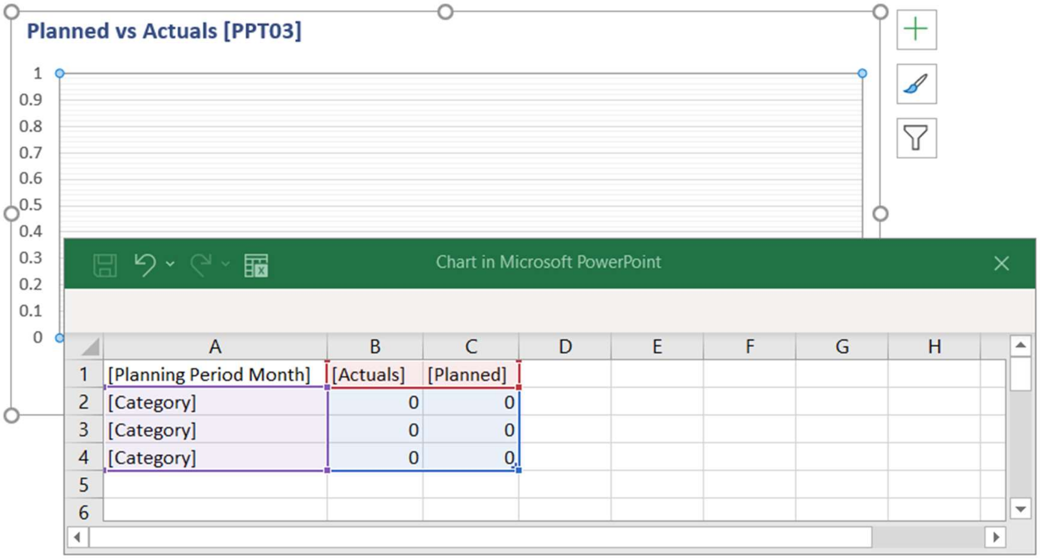
In the count column enter 0s (This data will be automatically retrieved and replaced from the data report when the PowerPoint report is run)

Note sing D tes for c tegories

If you use date [redacted] these will need to be formatted as text in the report for [redacted]

Multiple series of da [redacted] example below there are two series of dat [redacted]

Bar Chart


Planned vs Actuals [PPT03]
1
0.9
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
0
Chart in Microsoft PowerPoint
A
B
C
D
E
F
G
H
[Planning Period Month]
[Actuals]
[Planned]
[Category]
[Category]
[Category]

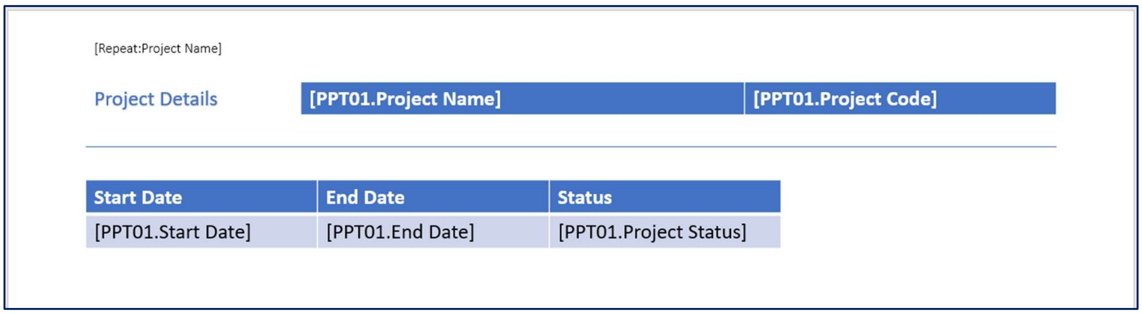
he following st nd rd ch rt ty es within PowerPoint c n e used

Clustered Column
Stack[redacted]
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

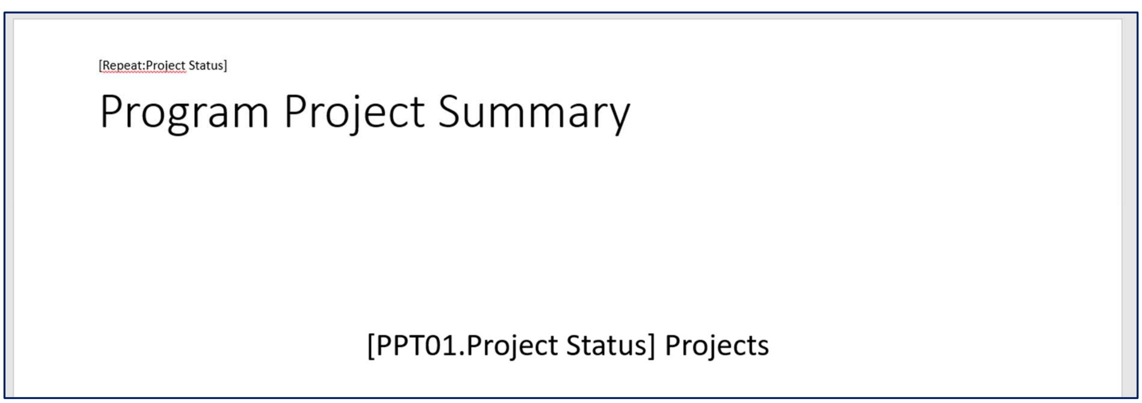
Slides can be set to repeat for each row of data returned by the report. For example, if the report is run at Program level the report could contain the same slide(s) for each of the Projects contained within the program.

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.



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.



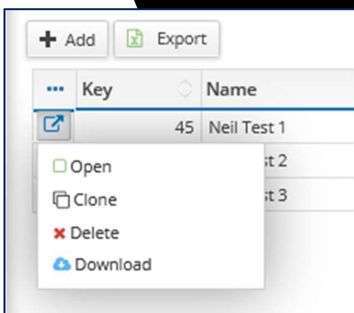
[Repeat:Project Name]

Project Details	[PPT01.Project Name]	[PPT01.Project Code]

Start Date	End Date	Status
[PPT01.Start Date]	[PPT01.End Date]	[PPT01.Project Status]

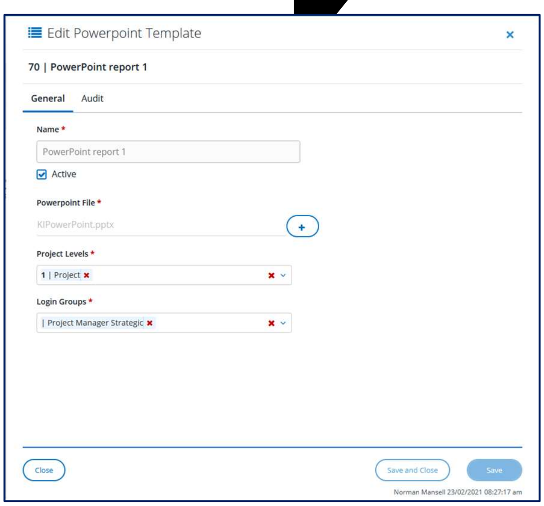
Search Screen Inline Me[redacted]

On the search screen [redacted] menus allow the user to **O en**, **Clone**, **Delete** or **Downlo d** existing P[redacted]Point templates.



O en

Opens an existing Pow[redacted]mplate to allow data amendments. See *Amen[redacted]* *a PowerPoint templat[redacted]*



Clone

Create a copy of a PowerPoint template by selecting the **Clone** option from the inline menu on the search screen. The **Add em l te** form is displayed, pre-populated with the details from the cloned templ[redacted]

Delete

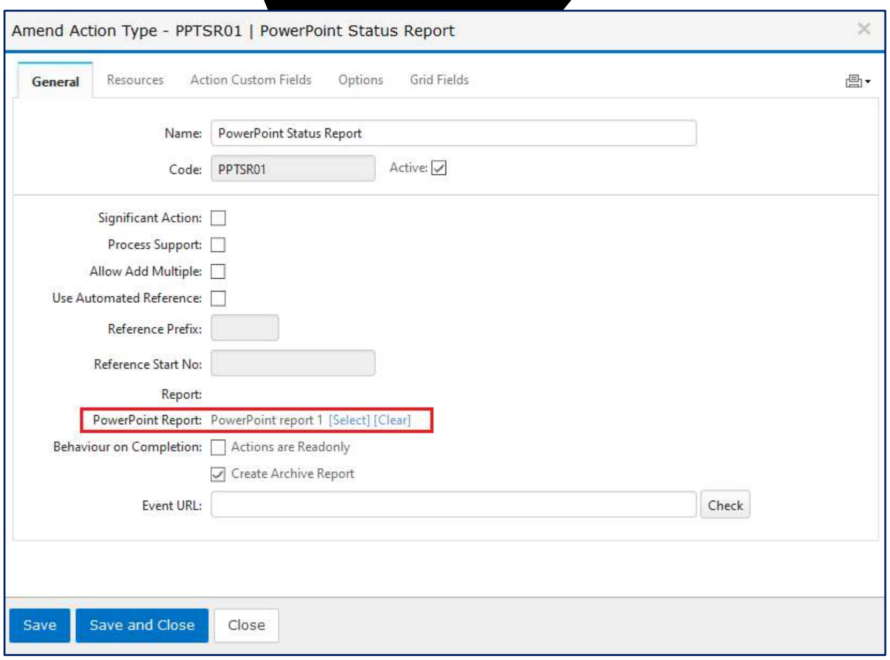
Deletes an existing PowerPoint template.

Downlo[redacted]d

Downlo[redacted]owerPoint (pptx) template attached to an existing PowerPoint template[redacted]fer between KeyedIn configurations.

Linking a PowerPoint template to an action

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



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.

he RL for c lling the V Re orting API, sed on your server region is

K https://rep [redacted] uk [redacted]

SA [redacted]

Austr [redacted]

Docume [redacted]

K https:// [redacted]

SA https:// [redacted]

Austr li http [redacted]

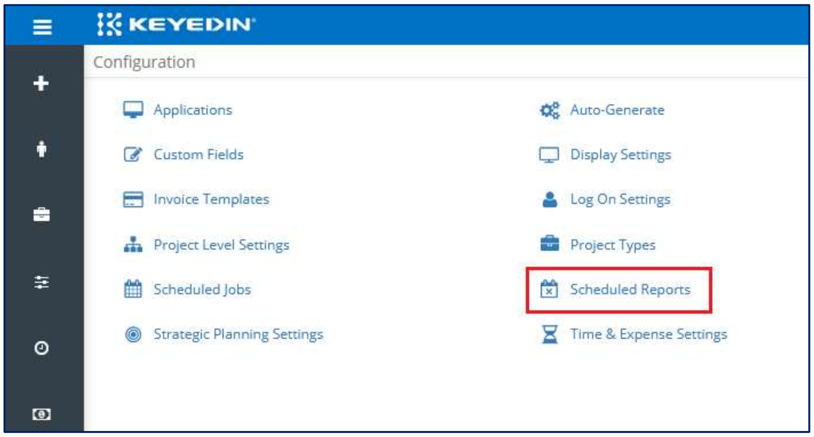
Enhanced reports via the Report Scheduler

Feature Summary

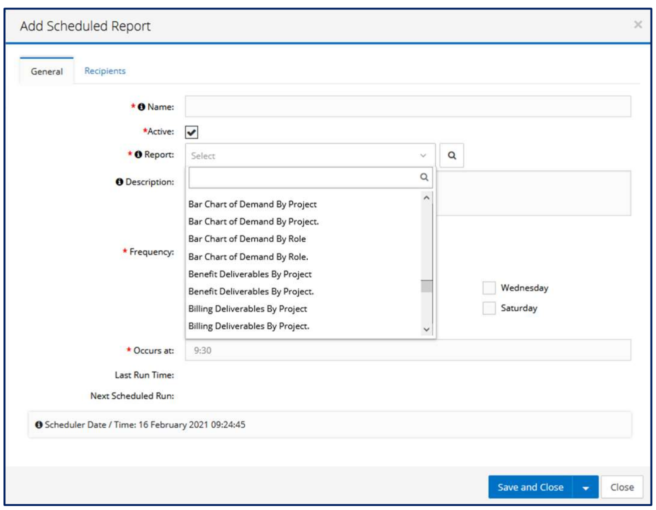
Enhanced reports [redacted] via the report scheduler (excluding PDF reports to be releas [redacted]

Using [redacted]

Navigate to the report scheduler from the system Configuration screen.



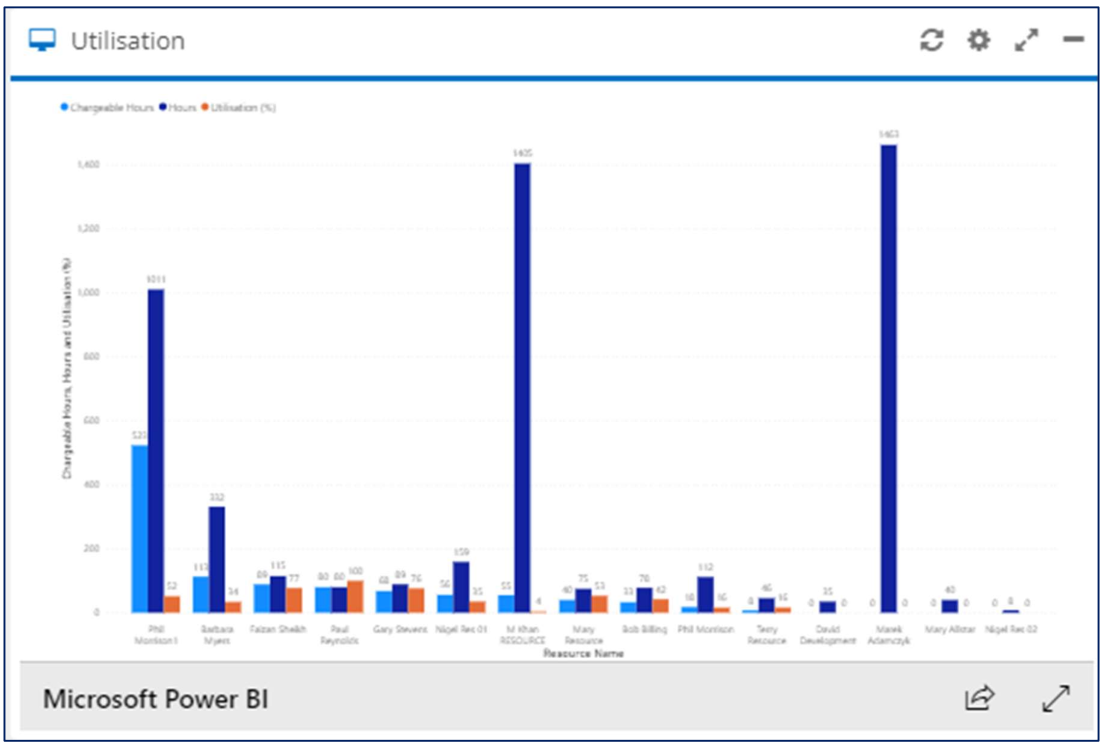
Either add a new scheduled report or edit an existing one. In the report dropdown list, you now see both original and enhanced reports. These can be selected and configured in the same way irrespective of type.



IFrame Widget

Feature Summary

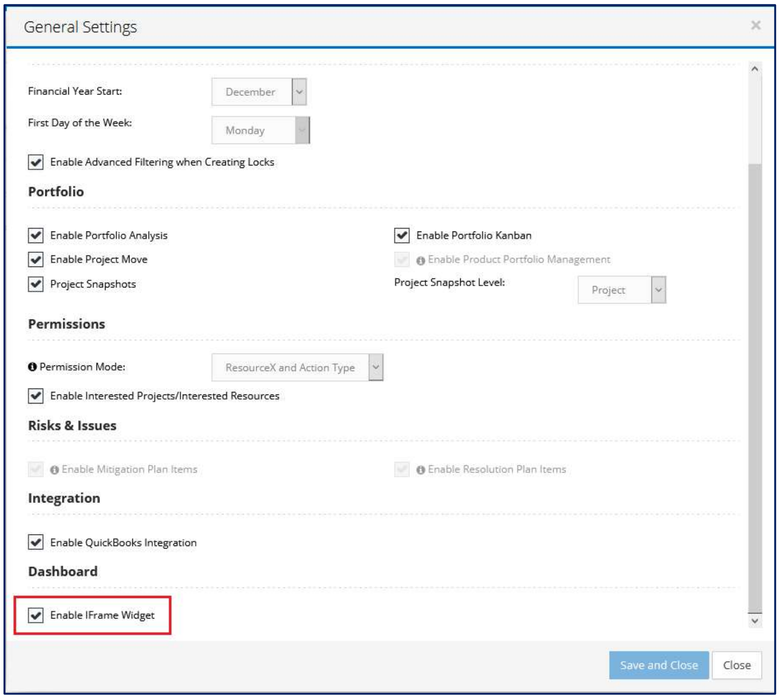
An IFrame widget type is now available, allowing the embedding of external web sites within a KeyedIn dashboard (My Work, Projects or Custom Dashboards). For example to show output generated in a Business Information tool.



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

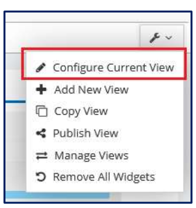
Using

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

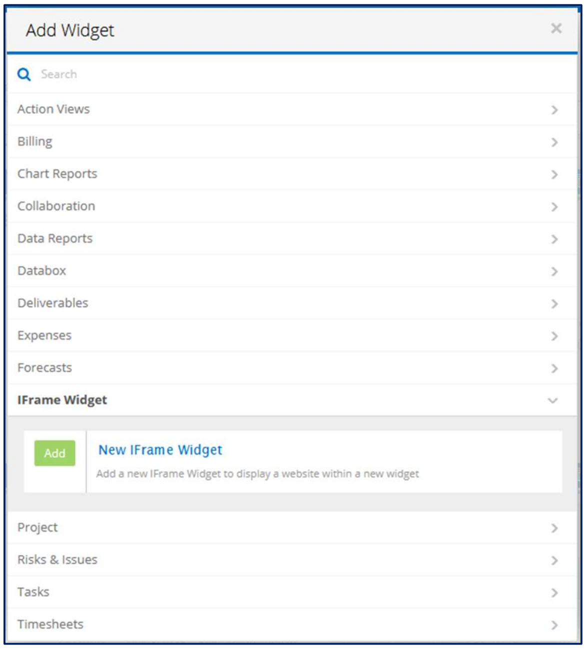


Once the IFrame widget functionality has been enabled, an IFrame widget can be added to a dashboard.

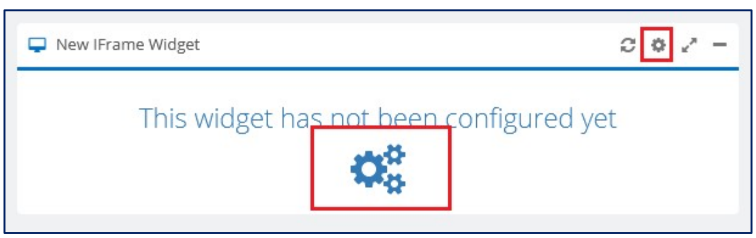
This is done in the same way as any other widget is added, by navigating to the dashboard and selecting the **Configure Current View** option.



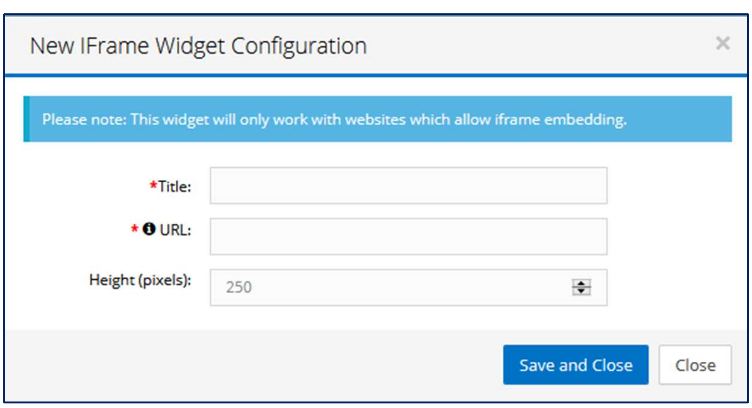
The Add Widget form has a new menu item called **I[redacted]r[redacted]me Widget**, expanding this shows the **New I[redacted]r[redacted]me Widget** item, click on the **Add** b[redacted]add the widget to your dashboard.



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



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



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

[redacted]**RL** is a required field and is the address of the website you wish to display in the IFra[redacted]clude parameters and the #CONTEXT-PROJECTCODE# token.

e.g.

https://M[redacted]com?MyParam1=Param1&MyParam2=#CONTEXT-PROJECTCODE#

Height is th[redacted]t of the widget on the dashboard in pixels.

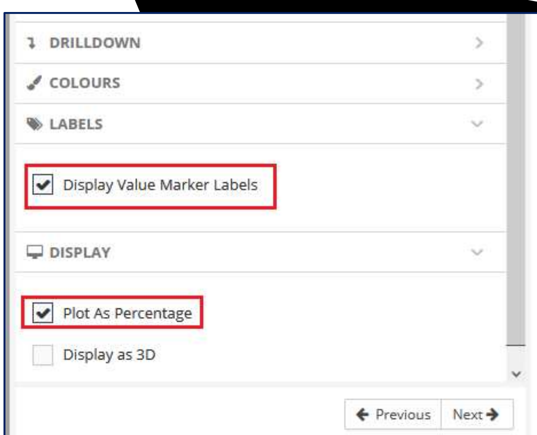
Pie chart labels displayed as [redacted]or value

Feature Summary

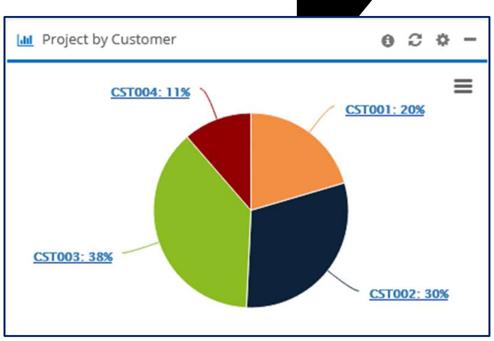
Pie chart labels were previously always displayed in percentage, they can now be displayed either as a percentage or value.

Using

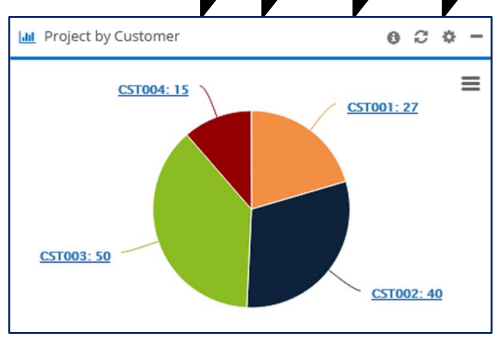
To display labels on a Pie chart, select the **Dis[redacted]l[redacted]y V[redacted]lue M[redacted]rker L[redacted]els** tick box. To switch the label between percentage and valu[redacted]**Plot As Percent[redacted]ge** tick box.



Labels displayed as pe[redacted]ge.



Labels display[redacted]a[redacted]alue



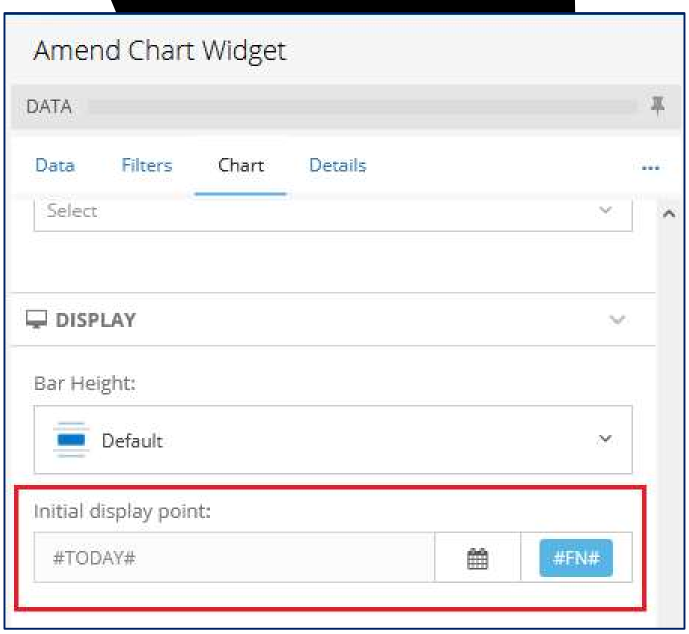
Gantt widge[redacted]ity to set the initial display poi[redacted]

Feature Summ[redacted]y

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.

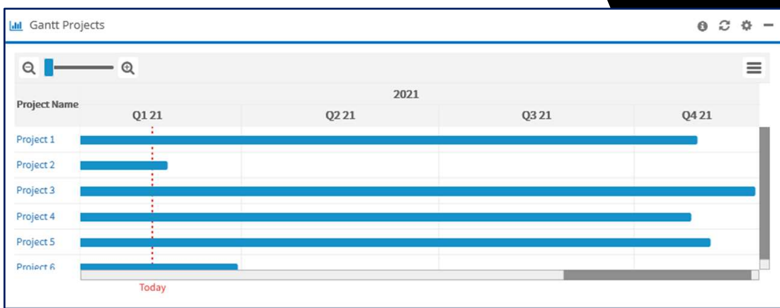
Using

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

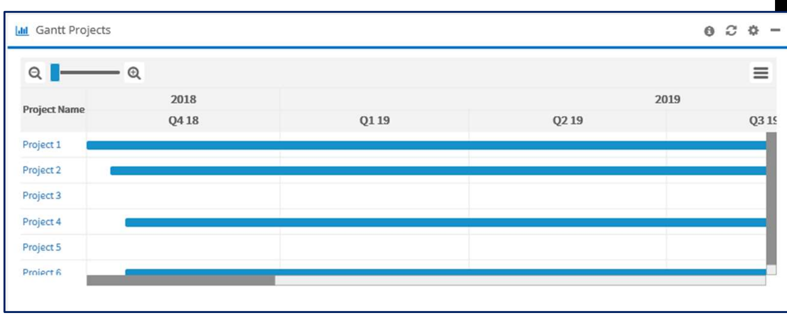


With the initial display point set to #TODAY# the Gantt chart is automatically scrolled to show today's date in the current view.

In the example below a date marker of [redacted] has been used to indicate this more clearly.



If no initial display point is set, the chart will be scrolled to it[redacted]



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

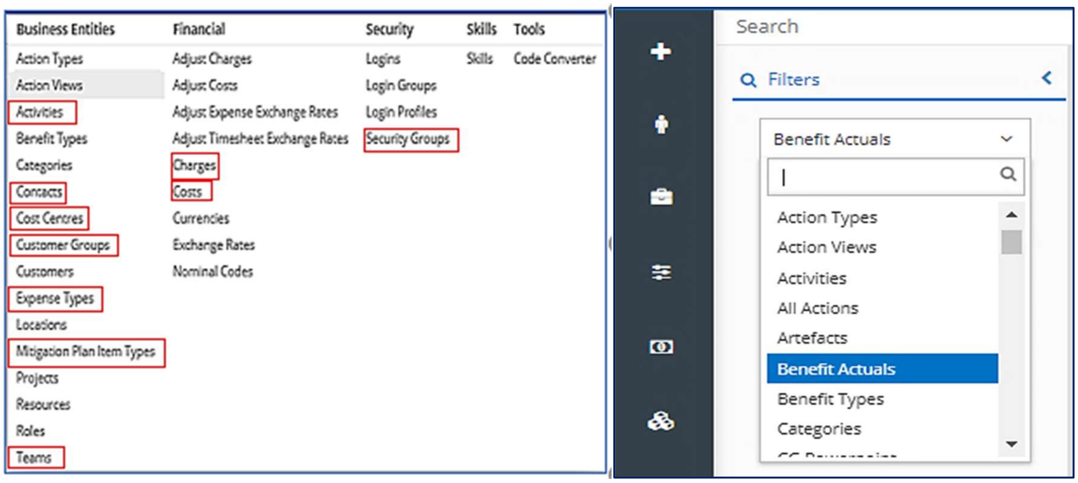
The main stylistic changes to note include the new "slide in" and "slide out" panel operation, along with font and spacing changes to provide a modern and user-friendly way of working.

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.

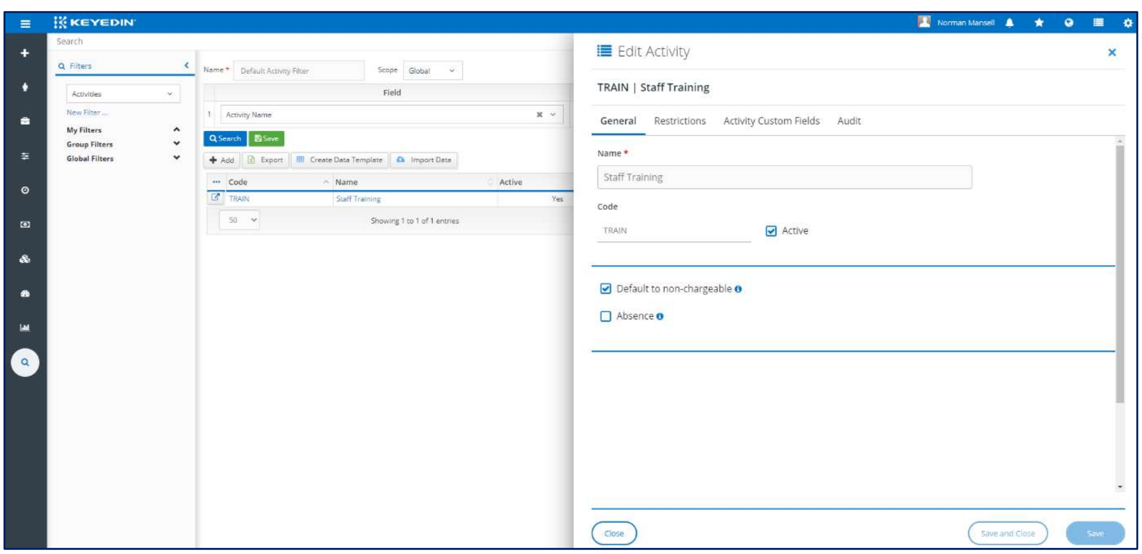
Furthermore, the Advanced Search, Document Attachment, Custom Fields and Notes functions (where applicable), have also been improved. Note that existing filters do not operate on the new style advanced Search so will need to be recreated as appropriate.

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.



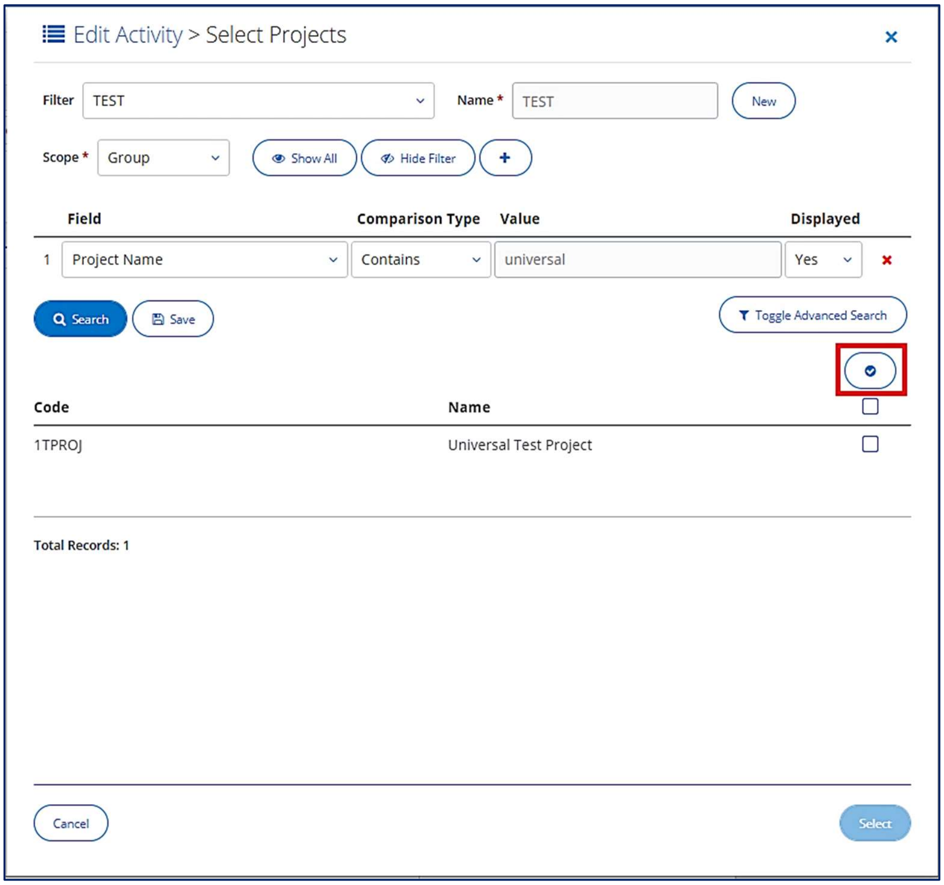
As with the new Administration screens made available in the last release, these new entity screens slide in from the right as per below:



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:

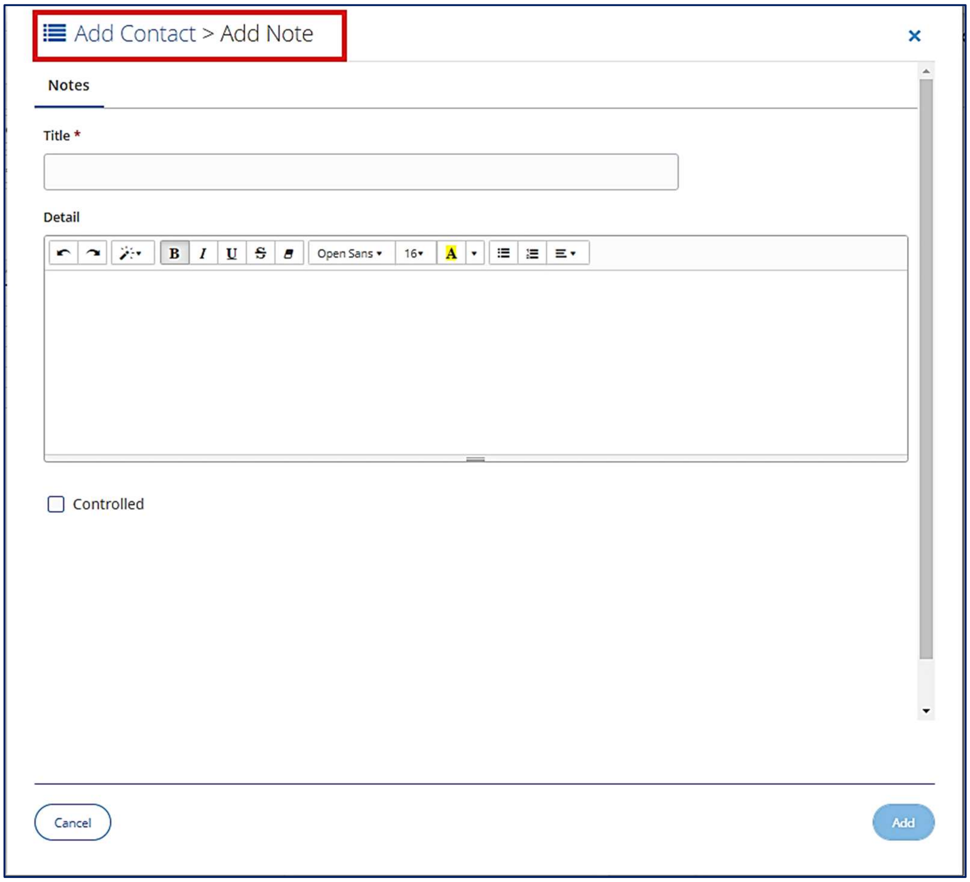


This function can be found when searching for Resources and Projects on Expense Type and Activity entities along with Resources, Projects and Clients on the Security Group entity, and Resources on the Cost and Charge entities. This has all the same functions as the previous Advanced Search function and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

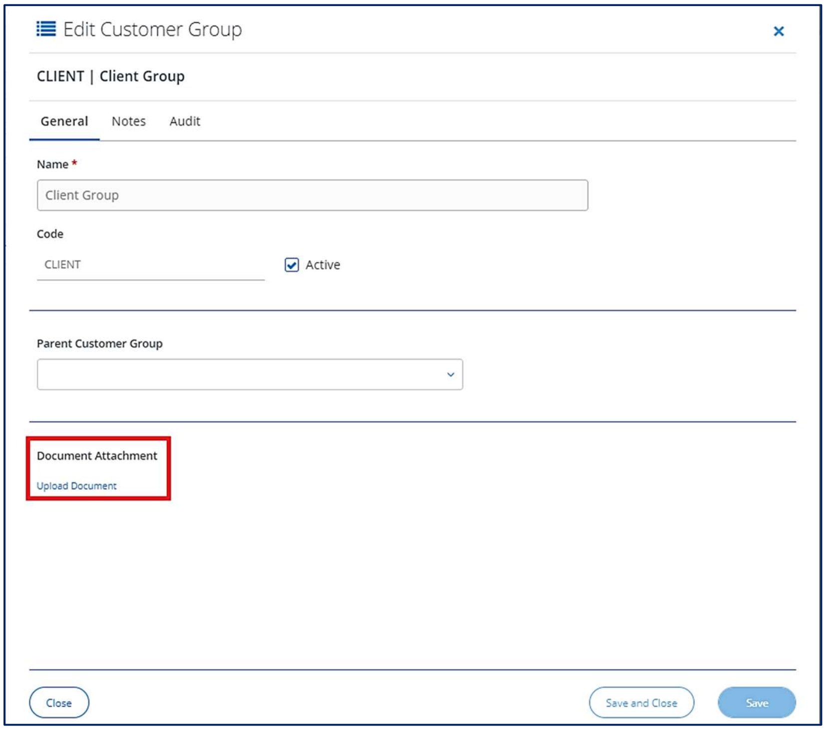
Active Breadcrumbs

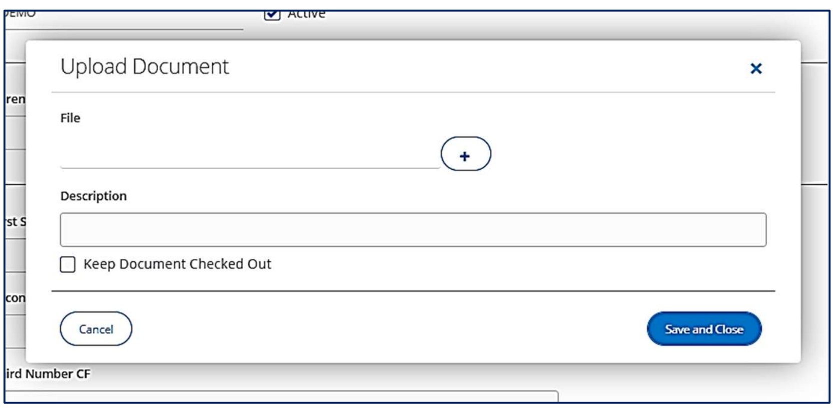
A new way to visualise nested dialogue screens is provided so it is easier for the User to keep track of where they are.

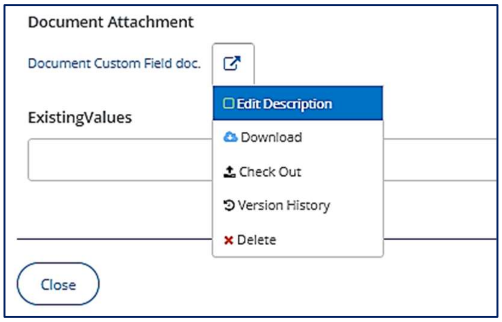


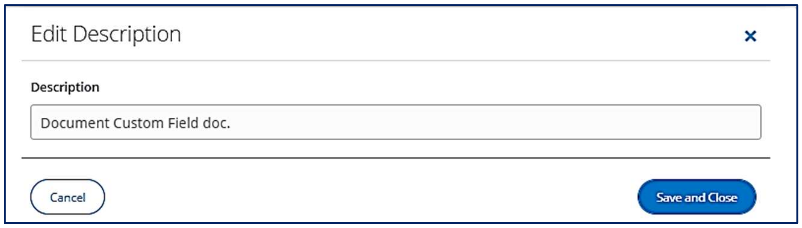
Document Attachments (Custom Field)

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.



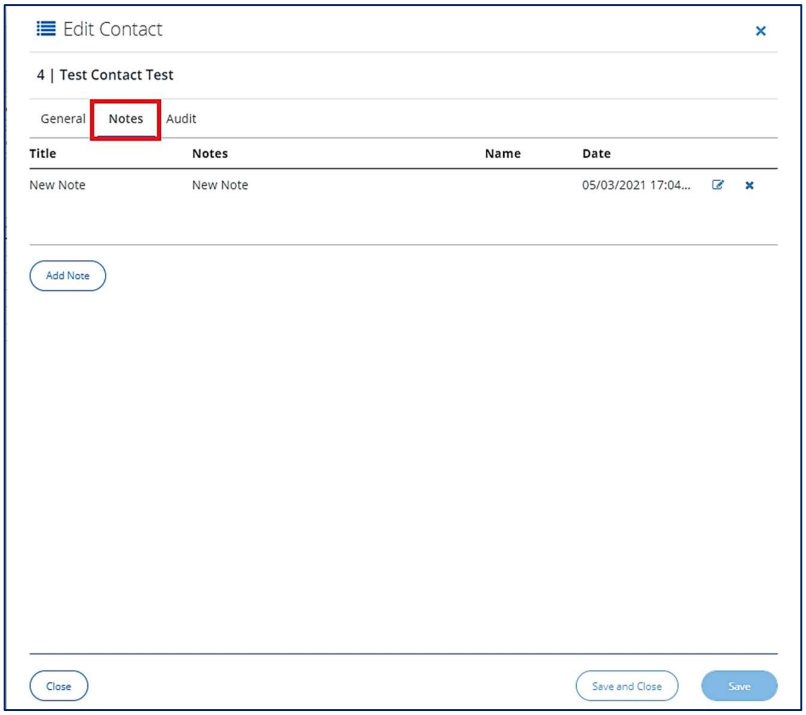




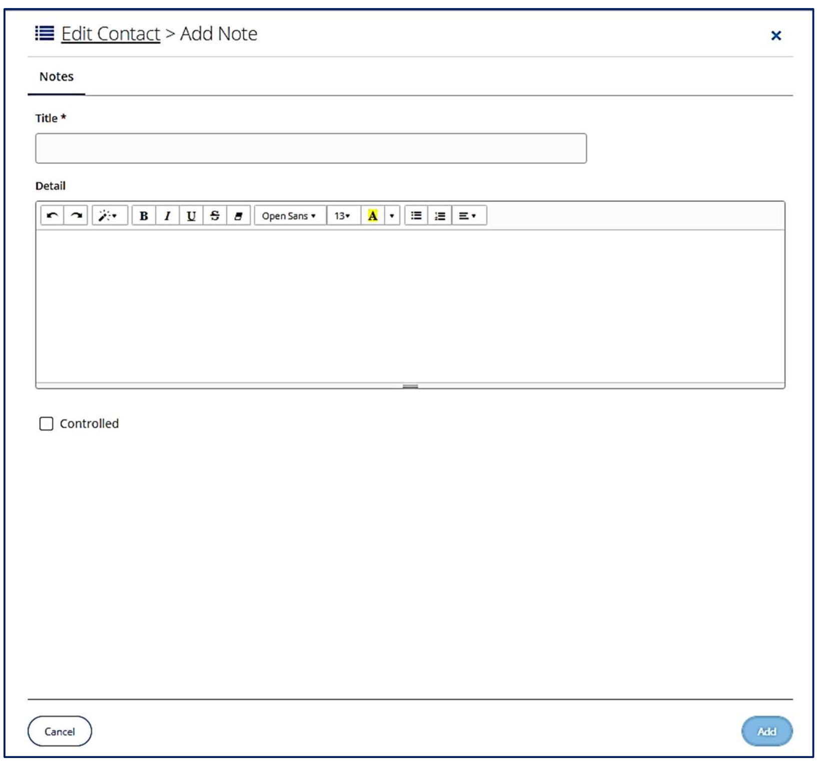


Notes

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.



Edit Contact
4 | Test Contact Test
General
Notes
Audit
Title
Notes
Name
Date
New Note
New Note
05/03/2021 17:04...
Add Note
Close
Save and Close
Save



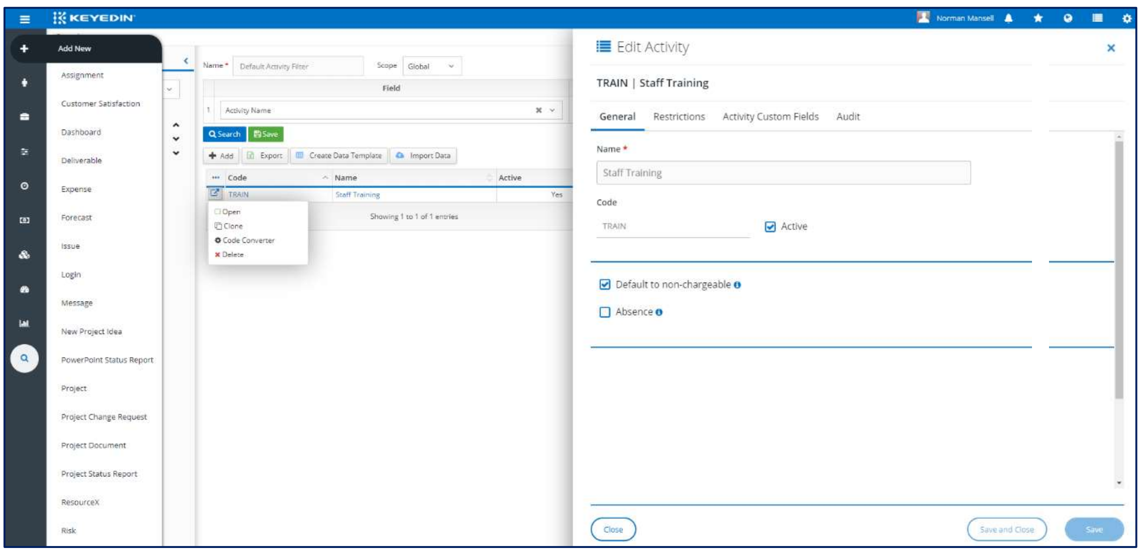
Edit Contact > Add Note
Notes
Title *
Detail
Controlled
Cancel
Add

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.

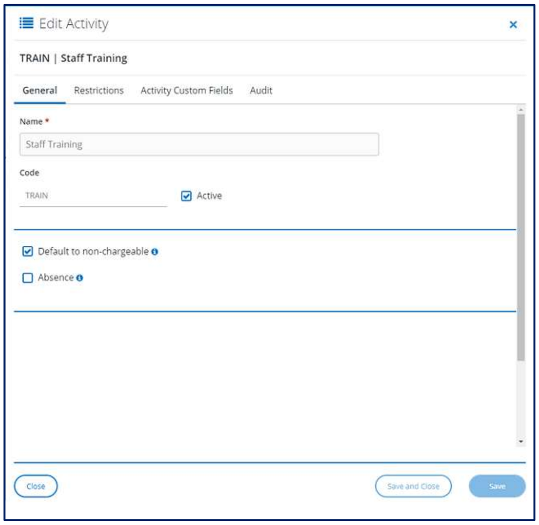
Any new entry or actions picked from the Search list, are selectable and will replace the currently viewed entry after giving an option to save any changes. This cuts down on clicks and unnecessary navigation, allowing a smoother user experience.

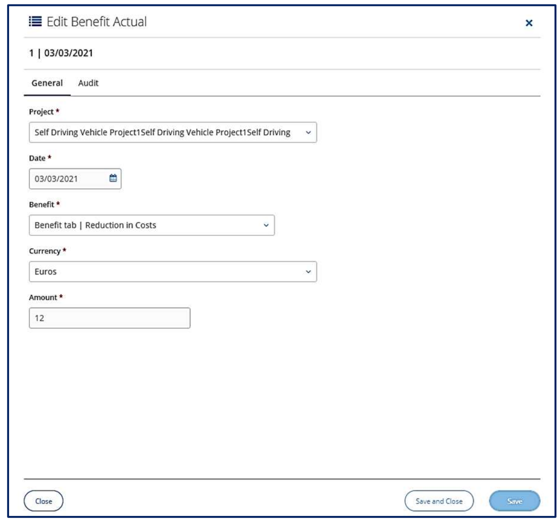
In the example below you can see the row action icon has been opened, with the edit screen still in view.

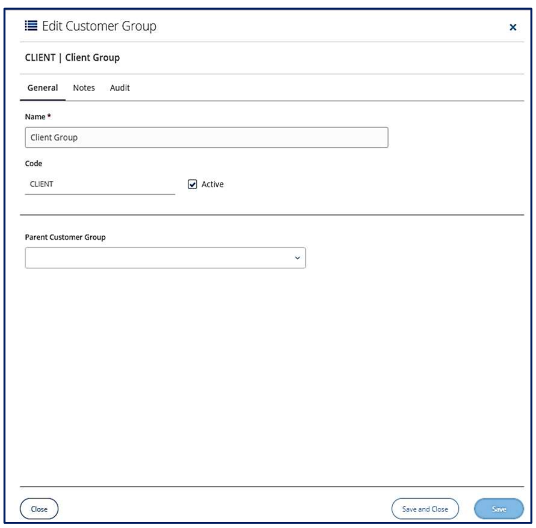


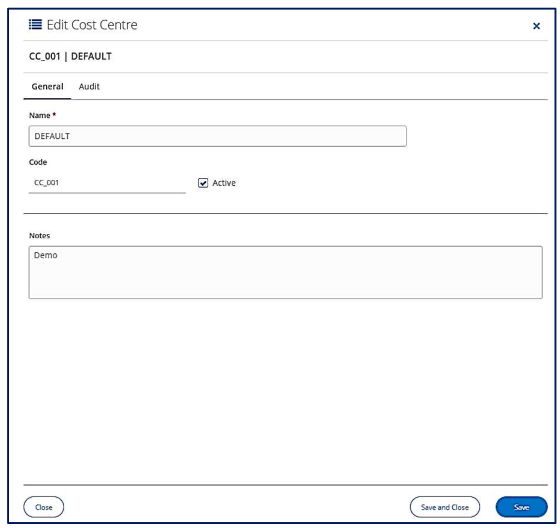
The new Administration screen formats are shown in the following sections.

Business Entities

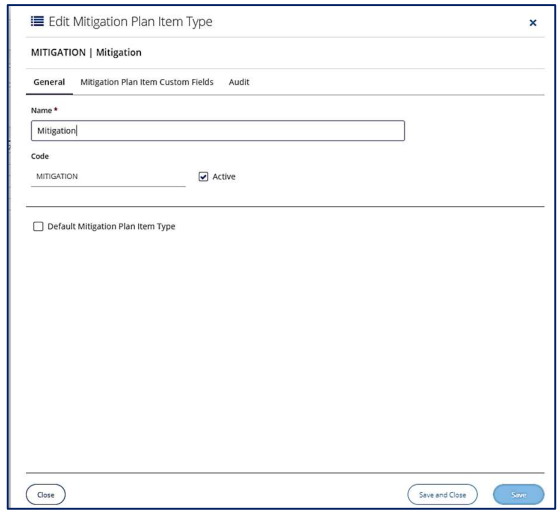


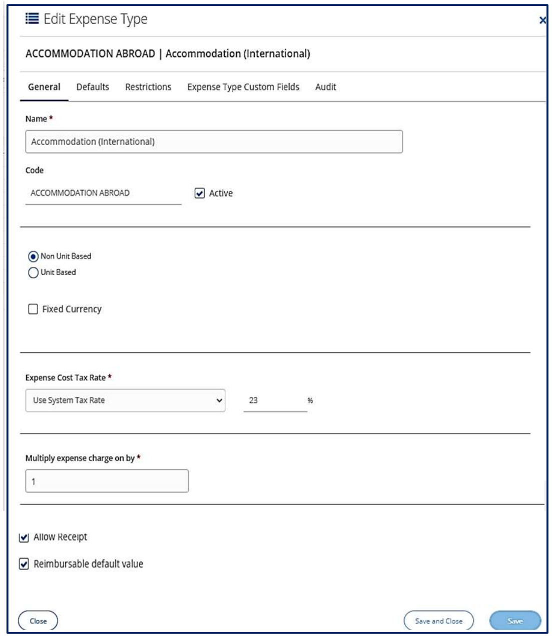


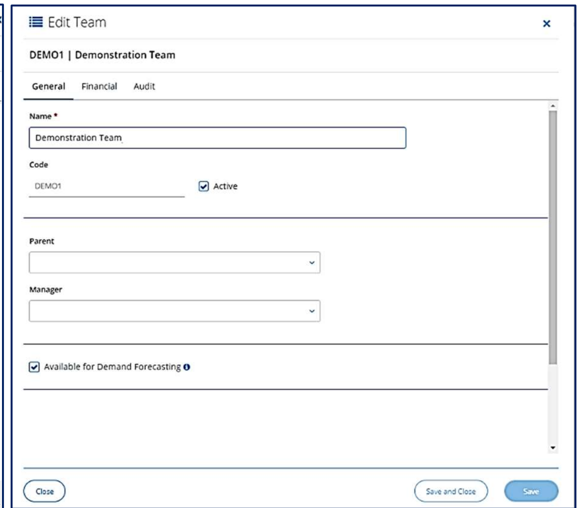




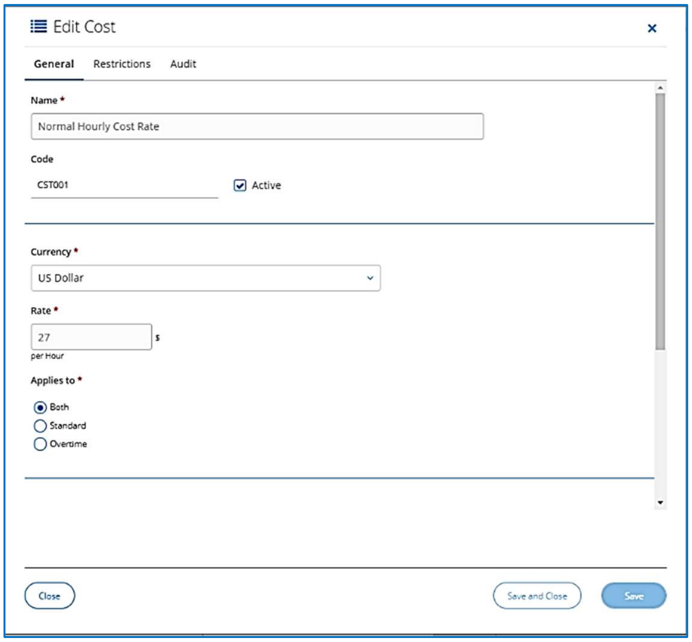

Edit Contact
6 | Demon Stration Contact
General
Notes
Audit
Title
Mr
Active
First Name *
Demon
Middle Name(s)
Stration
Surname *
Contact
Customer *
Architecture Now
Position
Team
Address Line 1
Copy From Customer
Address Line 2
City
State
Country
Post Code
Telephone
Copy From Customer
Mobile
Fax
Copy From Customer
Email
Close
Save and Close
Save

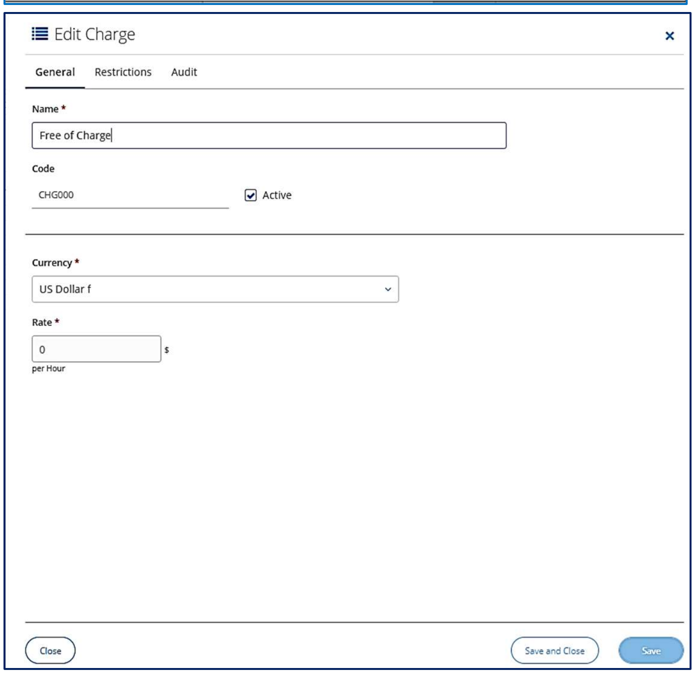

Edit Mitigation Plan Item Type
MITIGATION | Mitigation
General
Mitigation Plan Item Custom Fields
Audit
Name *
Mitigation
Code
MITIGATION
Active
Default Mitigation Plan Item Type
Close
Save and Close
Save


Edit Expense Type
ACCOMMODATION ABROAD | Accommodation (International)
General
Defaults
Restrictions
Expense Type Custom Fields
Audit
Name *
Accommodation (International)
Code
ACCOMMODATION ABROAD
Active
Non Unit Based
Unit Based
Fixed Currency
Expense Cost Tax Rate *
Use System Tax Rate
23
%
Multiply expense charge on by *
1
Allow Receipt
Reimbursable default value
Close
Save and Close
Save

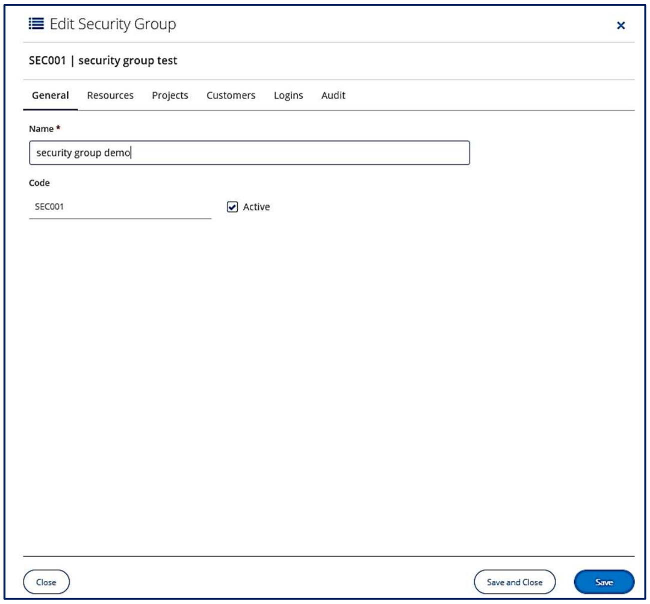

Edit Team
DEMO1 | Demonstration Team
General
Financial
Audit
Name *
Demonstration Team
Code
DEMO1
Active
Parent
Manager
Available for Demand Forecasting
Close
Save and Close
Save

Financial Entities





Security Entity



“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.

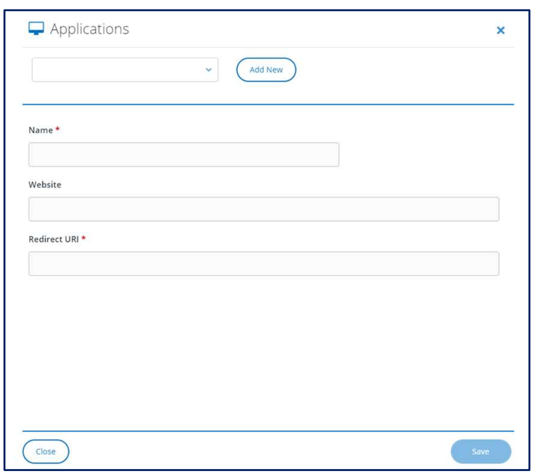
Feature Usage

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



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 https://www.getpostman.com/oauth2/callback 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**.

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 [redacted] (KI[redacted])** [redacted] the new name for KeyedIn Projects, offering **full function[redacted]lity**.
- **KeyedIn Ad**[redacted] Strategic Portfolio Analysis for ***Investment-l***[redacted]
- **KeyedIn Projec**[redacted]ement for ***Project delivery and ex***[redacted]

As part of this we will also be si[redacted]del to standardize on 1 licence per active resource[redacted]ble up" licences and reference two licences per a[redacted]

What it means to existing customers [redacted]

Very little, because:

- Existing customers automatically [redacted]edIn Enterprise at the next renewal following 1st April.
- There is no change to licence co[redacted]sult of this, despite KIE being more expensive.
- There is no change to functionali[redacted]s a result of this, including access to future improvements.

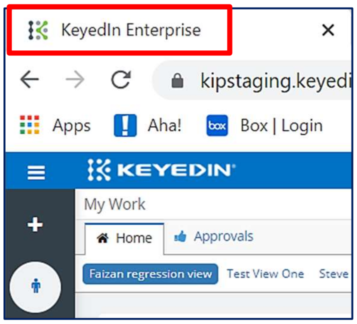
The switch process will be part of normal renewal discussions:

- 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.

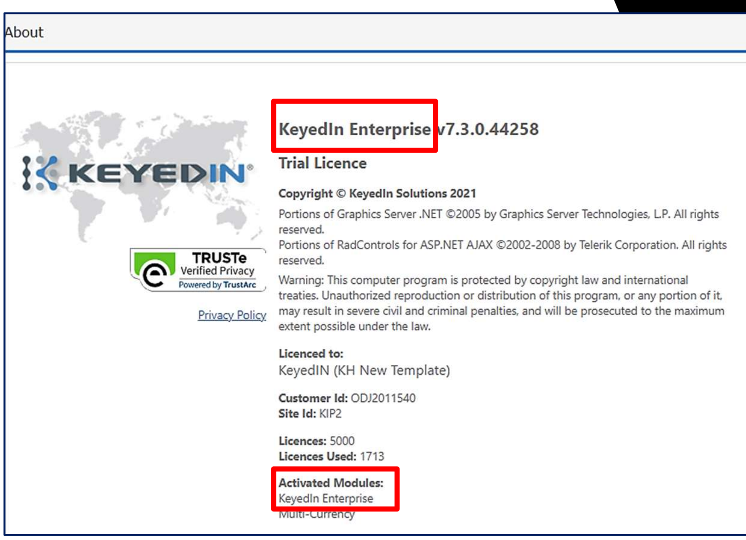
* A simple report is available to check any customers concerned they may be in a position of unintentional licence over-use.

Changes visible post switch to Key[redacted]n Enterprise

The **KeyedIn [redacted]** Edition n[redacted]me will be shown in the browser tab name instead of KeyedIn Projects.

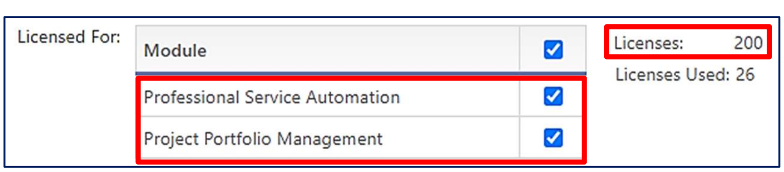


The **KeyedIn [redacted]** Edition name will be shown in the **A[redacted]out** details heading instead of KeyedIn Projects and also in **Activ[redacted]ted Modules** instead of Professional Service Automation and Project Portfolio Mar[redacted]



The **Licensed [redacted]** field on the Resource record will show a s[redacted]entry.

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



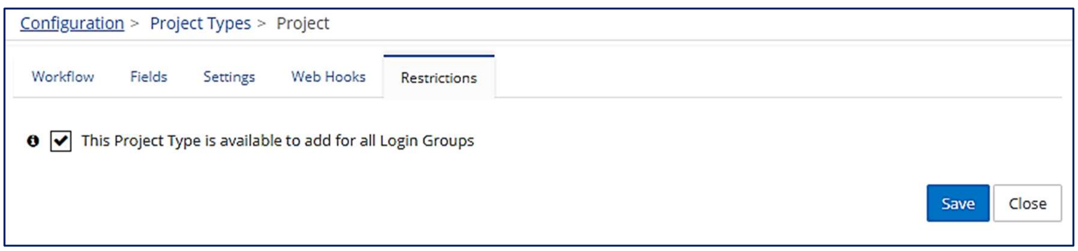
Other Notable Changes

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

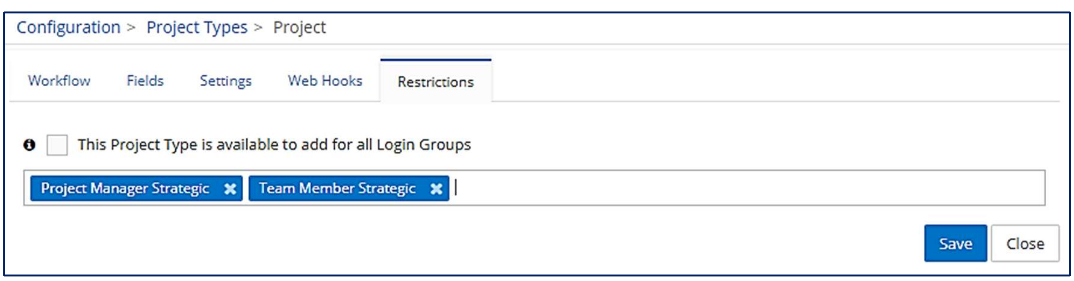
A new *Restrictions* tab has been added to the Project Type configuration screen to further control the creation of new Projects by Login Group, for the selected Project Type.

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.

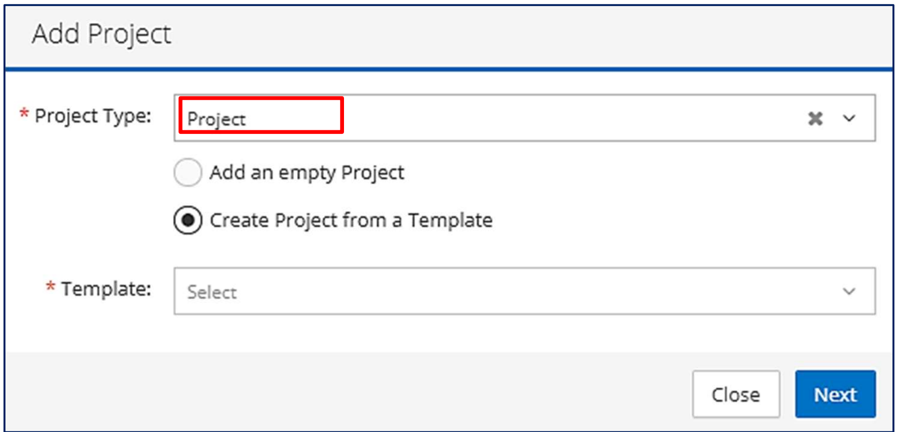
By default, all new and existing Project Types will be configured to allow Project creation for all Login Groups.



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.



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.



The new restriction only c[redacted]ether the Login Group is allowed to **cre[redacted]te** Projects and still require[redacted]gin Profile > Project permission (or Login > Administration > Main[redacted]tup permission) in order to access the Add Proje[redacted] functionality. Furth[redacted]aintenance and configuration of the Project will conti[redacted] be controlled by t[redacted] existing permissions.

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

Data View Changes for v7.3

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

d ted D t Views

The D[redacted]lated with the displayed *field(s)*:

D t Vie[redacted]	[redacted]
Pl[redacted] v6.0[redacted]	[redacted] Summarised Timesheet Actuals
Skills[redacted] v.6.0.[redacted]	[redacted]urce Department

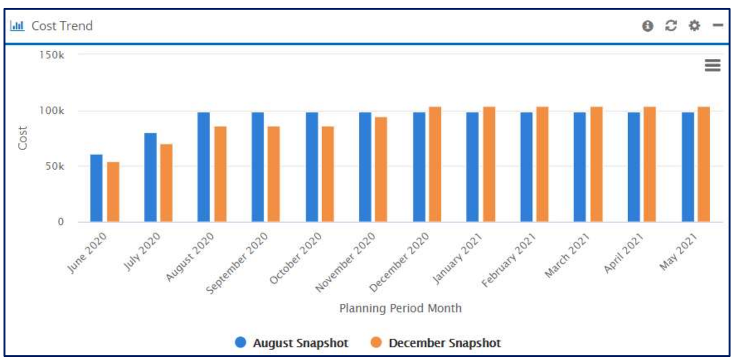
Summary of Additional Features since the last Major Release (v7.2)

7.2.1 (December 2020)

Scheduled Jobs for Project Snapshots

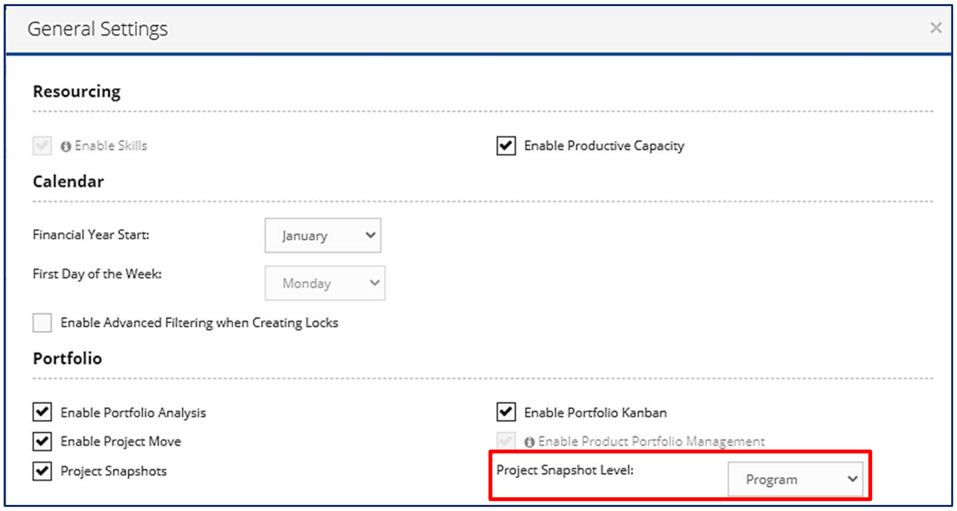
Project Snapshots enable specific 'point in time' data relating to a group of Projects along with their associated forecasts and deliverables to be captured for trend reporting purposes. Note that additional dataviews are needed for snapshot reporting, which can be requested via the KIP Support Portal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

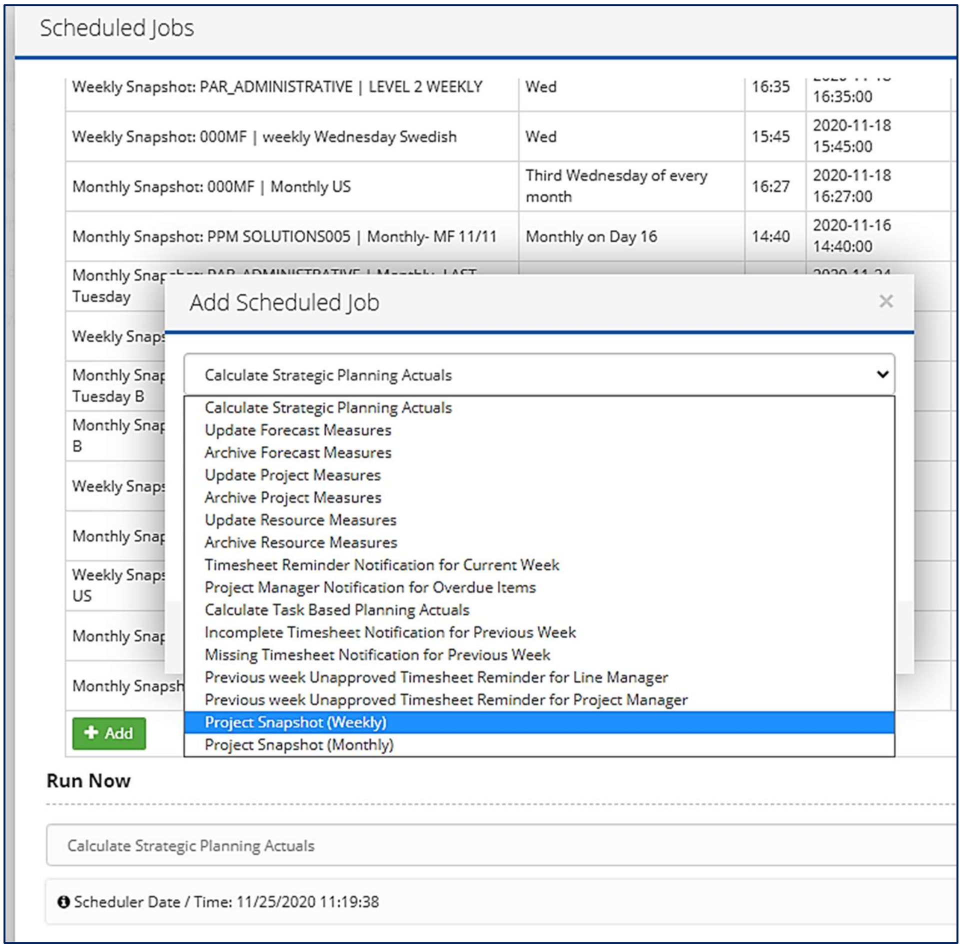
The snapshots will be taken from the pre-defined Project level as configured within *Configuration > General Settings*. The selected, plus all child Projects at the lower hierarchy levels are included in the snapshot.



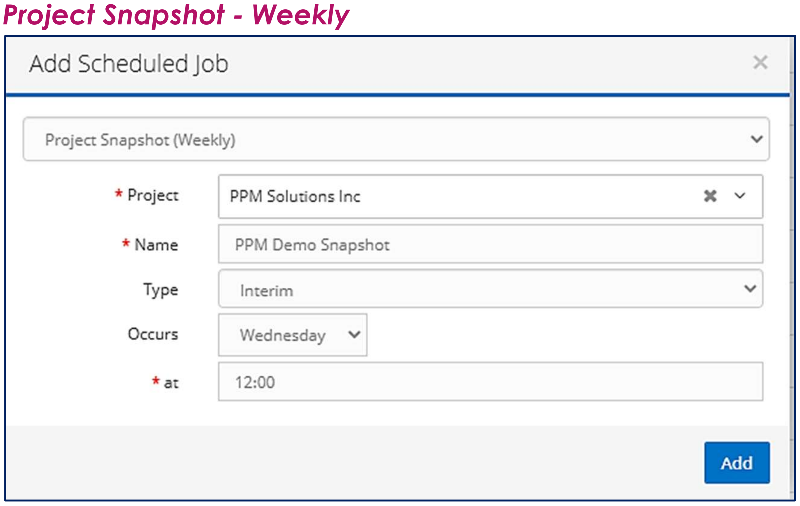
Scheduled Snapshot Configuration

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.

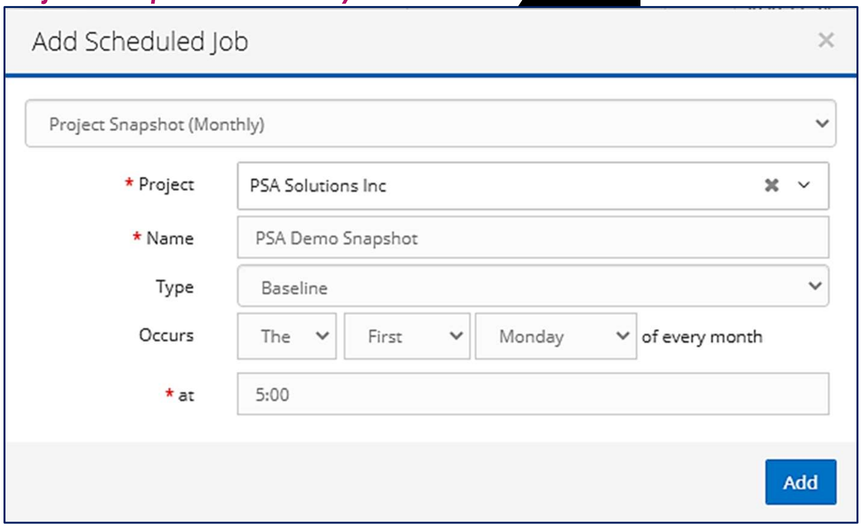
In *Configuration* > *Scheduled Jobs* choose between Project Snapshot (Weekly) or Project Snapshot (Monthly).



Project Snapshot - Weekly



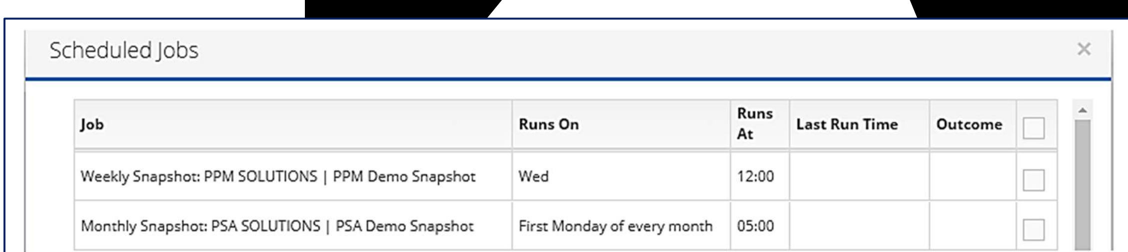
Project Snapshot - Monthly



In either case, enter

- **Project** – select based on the pre-defined Project Level.
- **N**[redacted]**me** – type a descriptive name to identify the snapshot.
- [redacted] **y**[redacted]se from Interim or Baseline - used for filtering and reporting pur[redacted]
- **Occ**[redacted]gle day of the week.
  - o[redacted]merical day (e.g 10) or use the [redacted]an expression based on a repeating p[redacted]
- **At** selec[redacted]scheduler time (based on where the system is h[redacted]

Click Add to confirm a[redacted]eduler with the job. The **L**[redacted]**st Run** [redacted]**ime** and **Outcome** will update o[redacted]been run.



Scheduled Jobs

Job	Runs On	Runs At	Last Run Time	Outcome	
Weekly Snapshot: PPM SOLUTIONS | PPM Demo Snapshot	Wed	12:00			
Monthly Snapshot: PSA SOLUTIONS | PSA Demo Snapshot	First Monday of every month	05:00			

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

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.

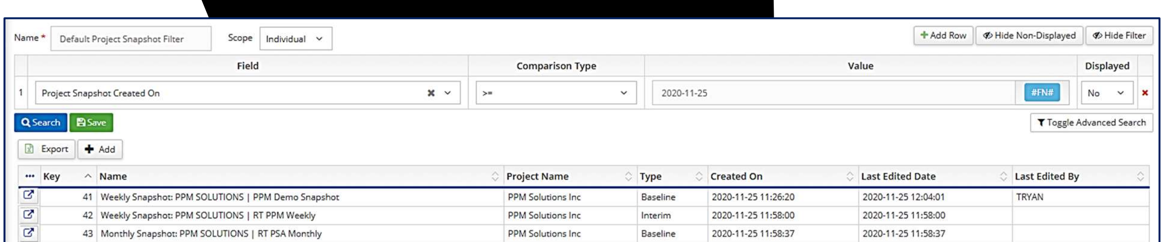
Enhancements to the Project Snapshots Search Screen

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[redacted]ted On** – will display the date and time it was run (either manual or sche[redacted]
- **L[redacted]st** [redacted] the date and time a change was made, for ex[redacted]n.
- **L[redacted]s**[redacted]ove change.

The *Create*[redacted] in the search screen, and the three fi[redacted]elated data views for use when reporti[redacted]



[redacted]

Protect Custom Fields from Deletion

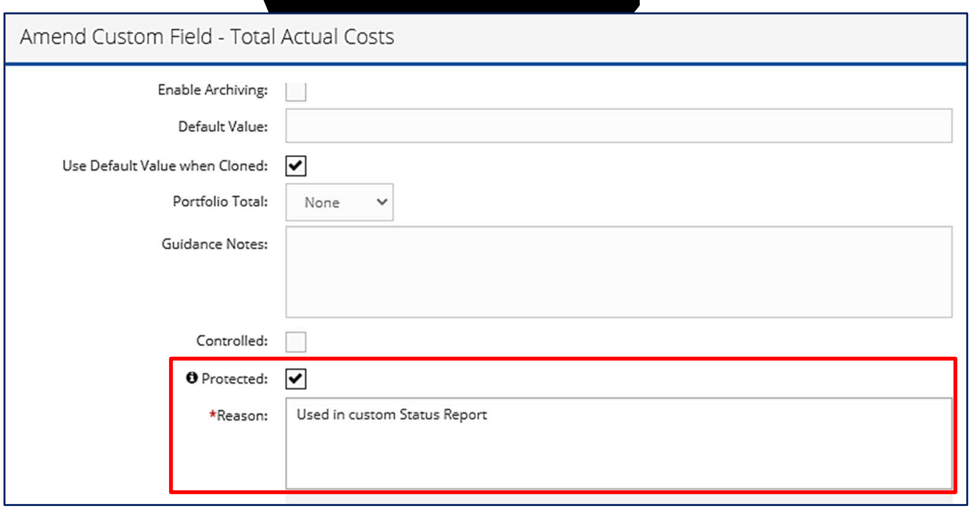
Two new fields have been added to the Custom Field configuration screen to help prevent custom fields from being inadvertently deleted. A typical use case might be when the field is used in custom reports or measures, or important fields where historic data must be preserved.

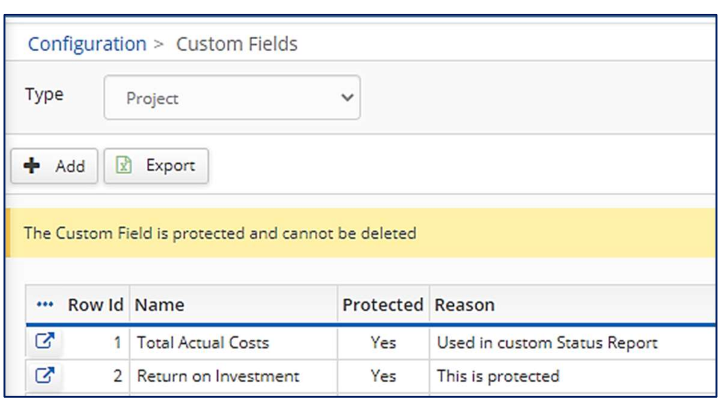
- **Protected** – a Boolean field that can be ticked to prevent deletion.
- **Re[redacted]son** – a required field when ticking the Protected option to specify a rea[redacted]

A warning w[redacted] to delete a protected custom field, and the field [redacted]n is still required.

The two new fi[redacted] field search screen, column chooser and Custom Fie[redacted]

Customers are en[redacted]iguration's custom measures, calculations and c[redacted]fields as appropriate.

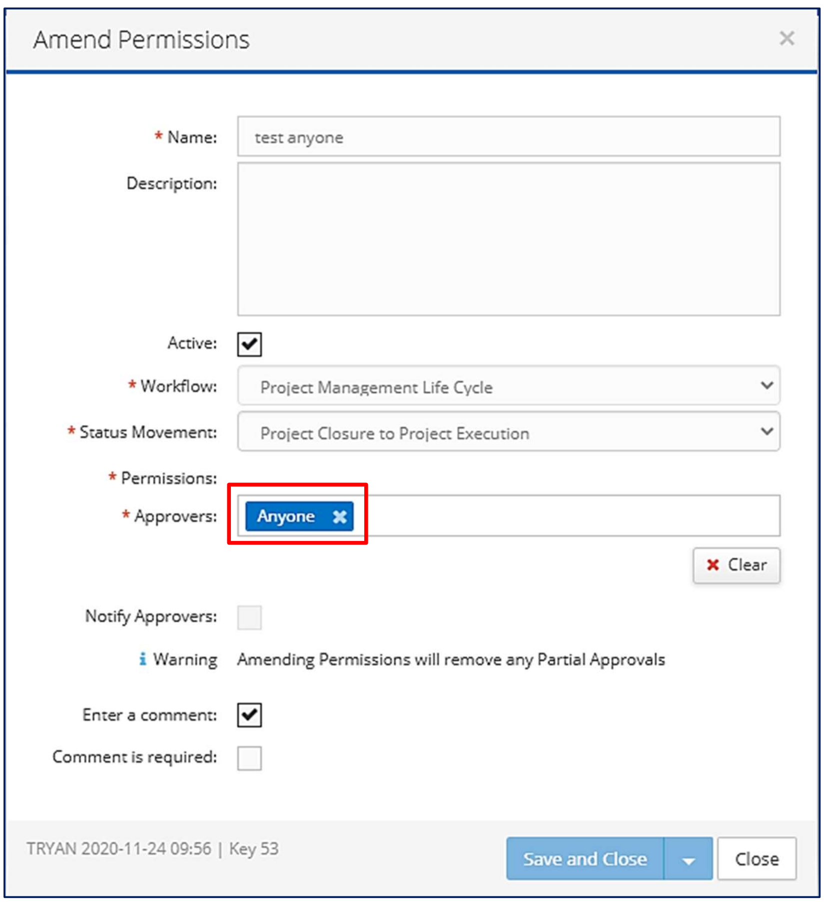


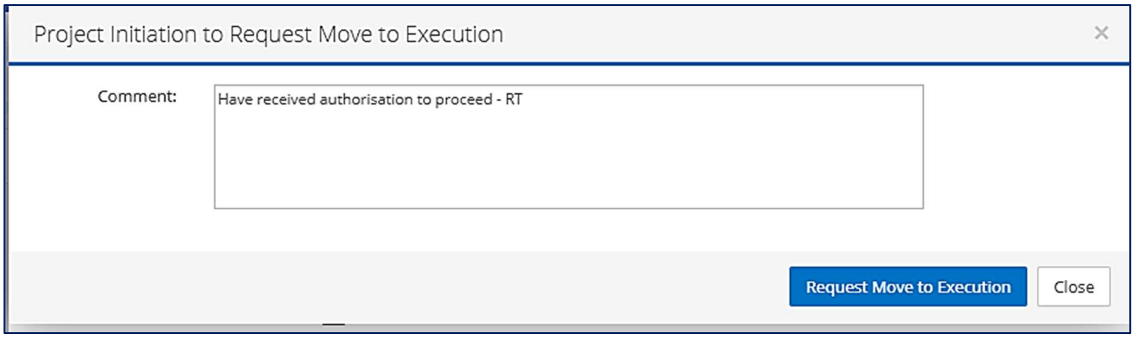


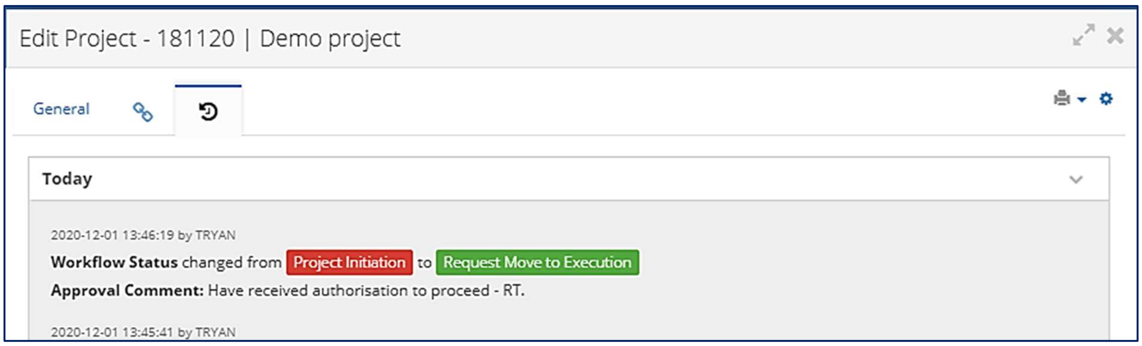
Project Type Permissions: New #ANYONE# Token to Capture a Comment on Status Move

When configuring Project Type permissions to determine which user(s) are allowed to change the Project's status, a new token of **#ANYON_#** ~~has be~~en 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.





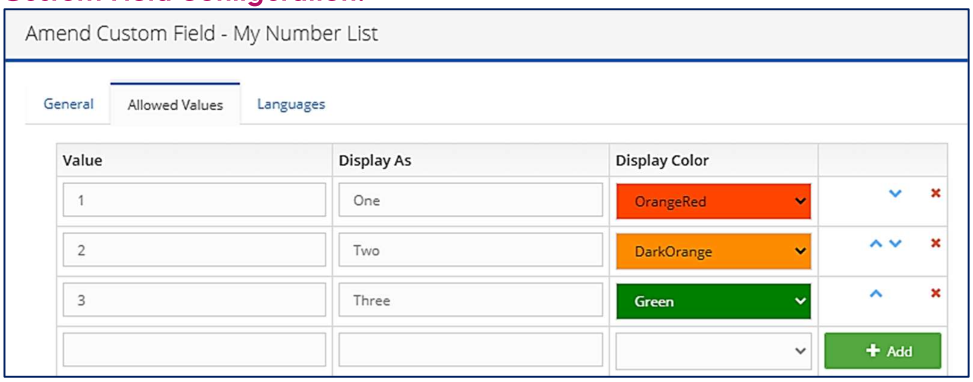


Please note that ‘*Notify Approvers*’ is not available when the #ANYONE# approver is in use as that would result in spurious emails to all users. Similarly, the #ANYONE# token cannot be used if additional approvers are specified.

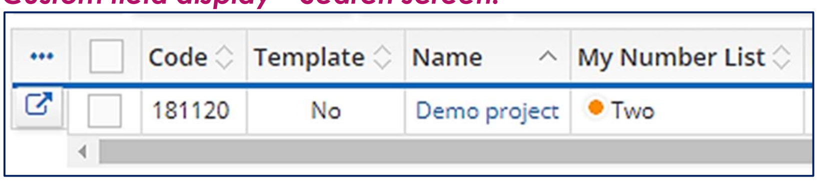
Improved Display of Number List Custom Fields on Search Screens

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.

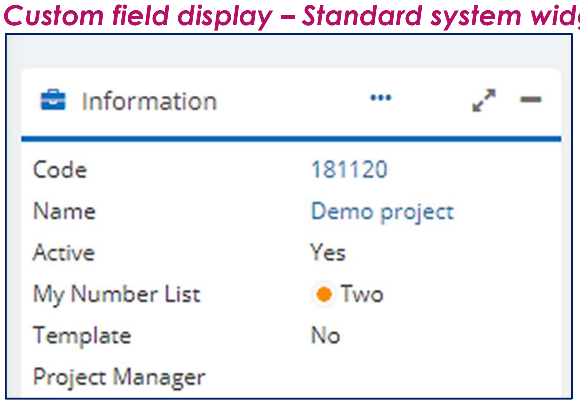
Custom Field configuration:



Custom field display – Search screen:

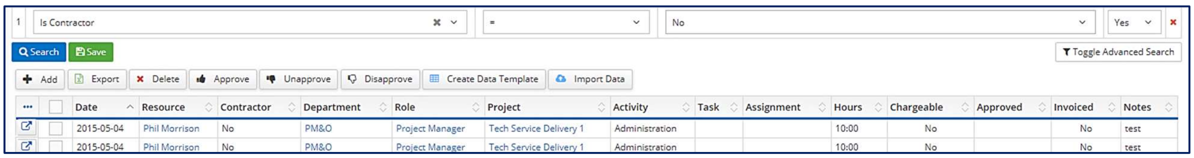


Custom field display – Standard system widget:



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).

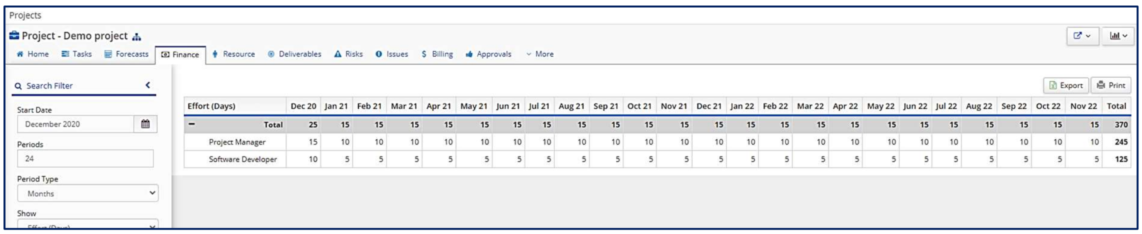


To return a list of ‘Employees’ only, set the *Is Contractor* filter to “= No”.

Ability to View up to 24 Years Finance and Forecast Data

Finance Tab

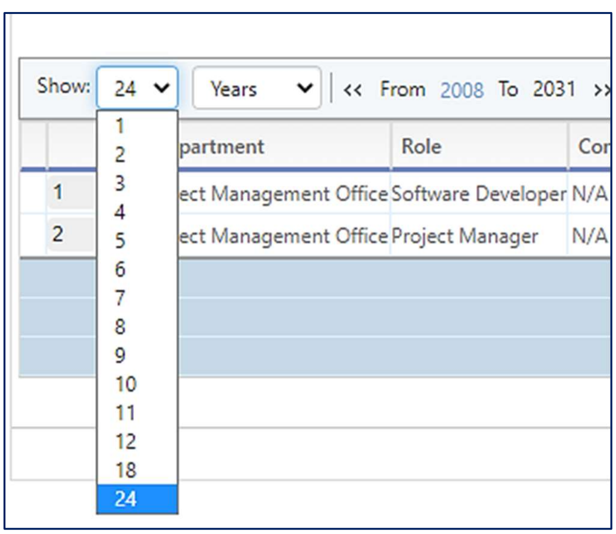
It is now possible to view up to ‘24’ periods of data in the *Projects* > *Finance* tab, be it weeks, quarters, months, or years. This has been increased from the previous limit of 12 and provides a level of consistency similar with that available within the Forecast screens.



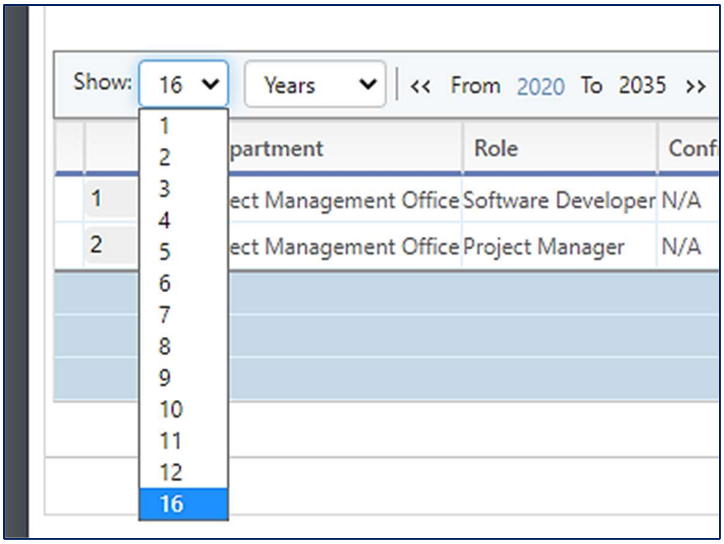
Forecast Tab

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:

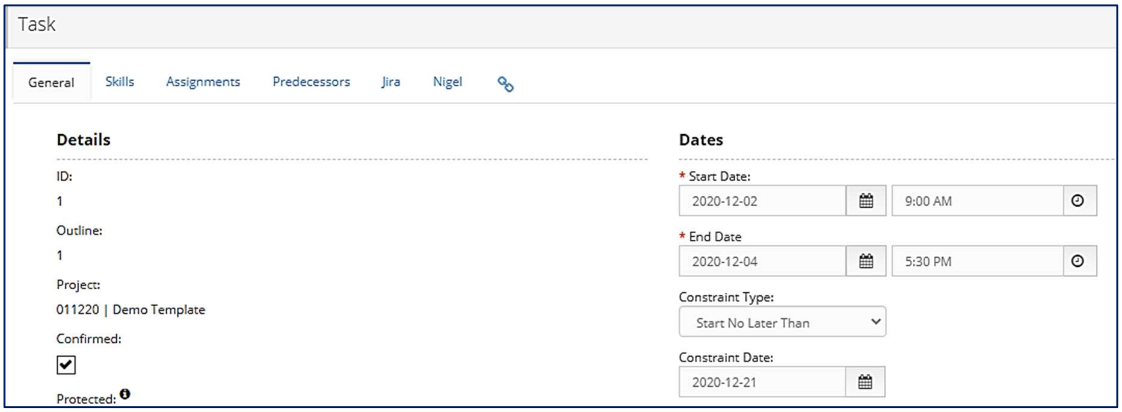


If viewed from 2020, 16 years are available:



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

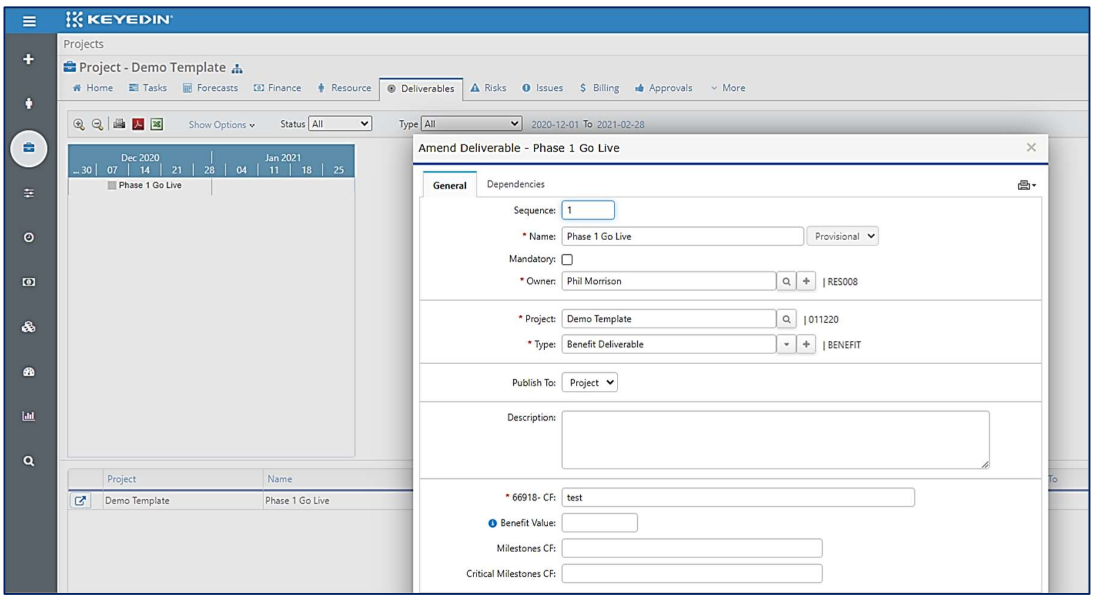
A small, time saving improvement has been made to the Task Edit screen, whereby removing the Constraint Type will now automatically remove the Constraint Date. Previously this would have resulted in a validation warning on save if the user had not manually cleared this.



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.



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.