KeyedIn Projects
v7.3
Winter 2020/21 Release

Release Guide

Version 7.3.0

March 2021

Contents

Document Management 4
Version Control 4
Document Approval 4
Document Authorization 4
Overview of Changes 4
Release Summary 5
Task Board 7
Feature Summary 7
Feature Usage 8
Accessing the Board and switching to/from Gantt 8
Board View Basics 8
Moving a Task using Drag and Drop 13
Viewing and Editing Task Details 13
Adding a New Task 15
Viewing Summary Tasks 17
Summary View: Viewing and Editing Child Tasks 21
Task Board - Setup and Configuration 23
Enabling the Board view 23
Task Board Configuration 23

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

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.

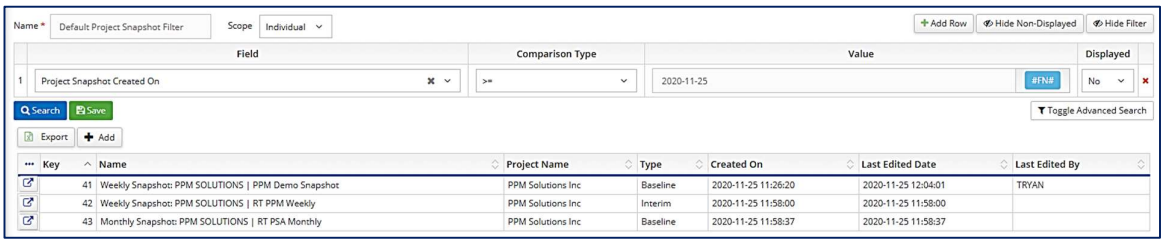
Enhancements to the Project Snapshots Search Screen

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:

- **Created On** – will display the date and time it was run (either manual or scheduled).
- **Last Edited Date** – will display the date and time a change was made, for example changing from Baseline to Interim.
- **Last Edited By** – the user who made the above change.

The *Created On* and *Last Edited Date* can also be filtered in the search screen, and the three fields are also available in the Project snapshot related data views for use when reporting on the snapshot data.



Protect Custom Fields from Deletion

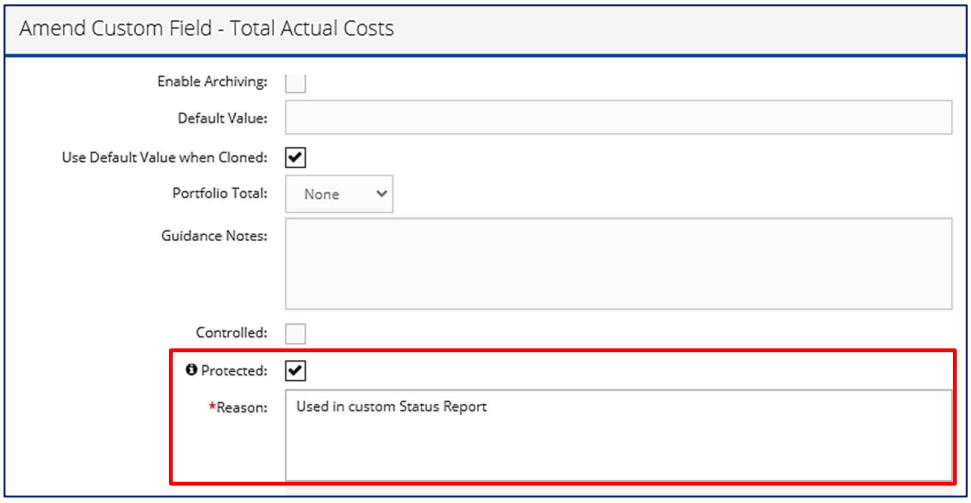
Two new fields have been added to the Custom Field configuration screen to help prevent custom fields from being inadvertently deleted. A typical use case might be when the field is used in custom reports or measures, or important fields where historic data must be preserved.

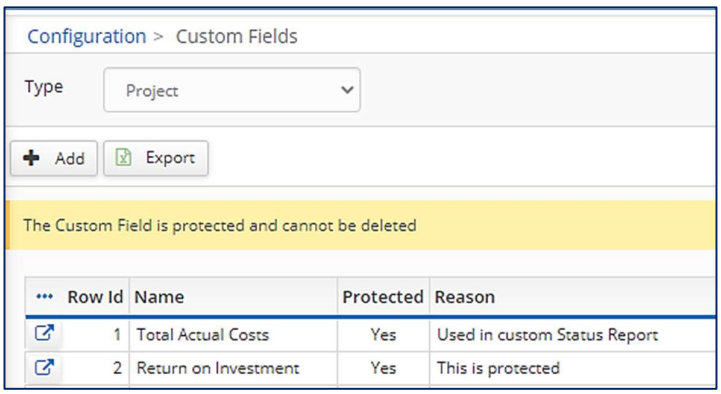
- **Protected** – a Boolean field that can be ticked to prevent deletion.
- **Reason** – a required field when ticking the Protected option to specify a reason.

A warning will be displayed when attempting to delete a protected custom field, and the field must first be unprotected if deletion is still required.

The two new fields are available on the custom field search screen, column chooser and Custom Field Data data view.

Customers are encouraged to review their configuration's custom measures, calculations and custom reports to setup these fields as appropriate.

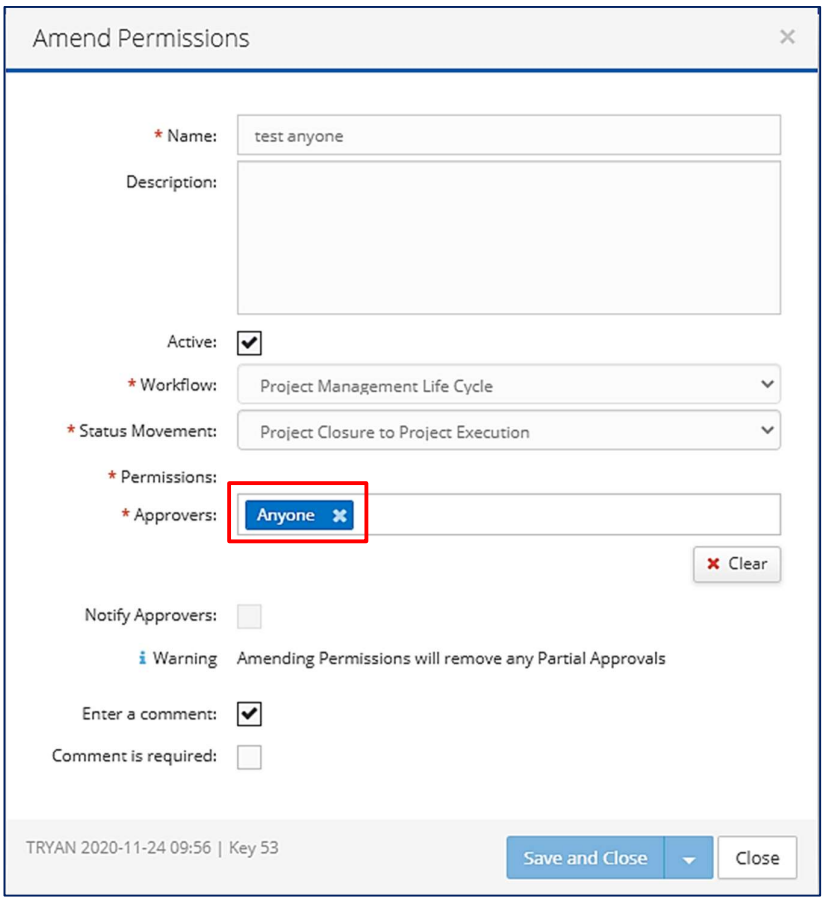


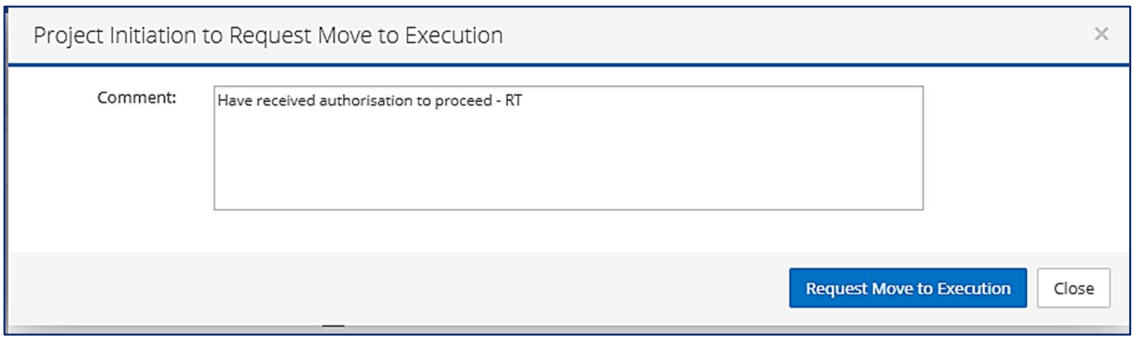


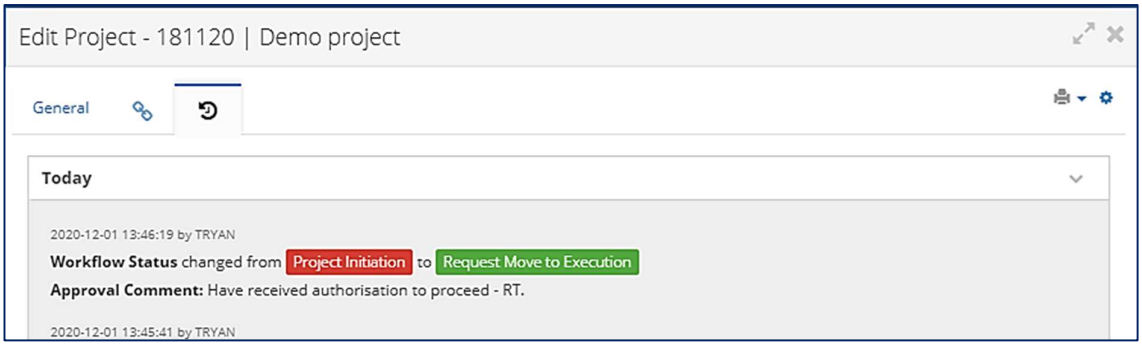
Project Type Permissions: New #ANYONE# Token to Capture a Comment on Status Move

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







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.

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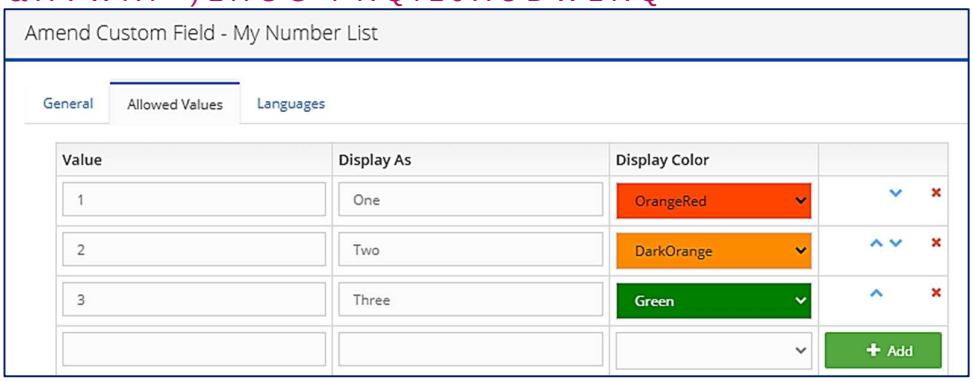

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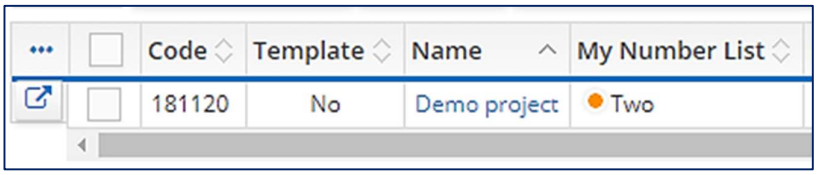

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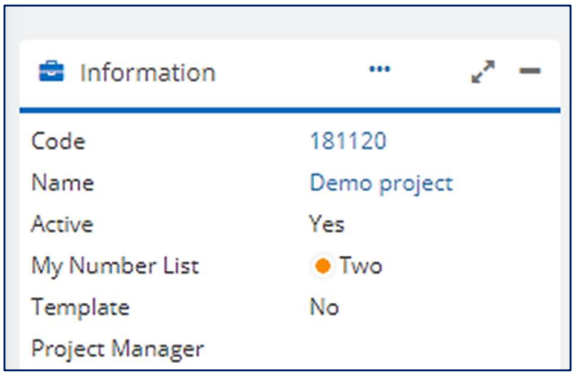
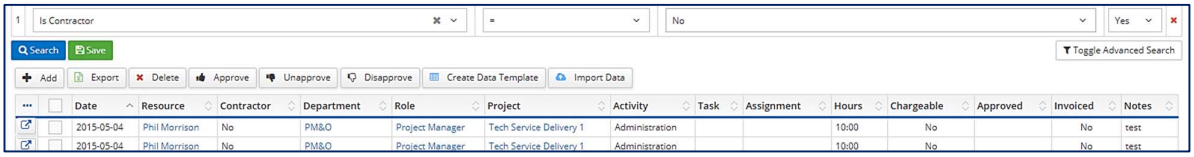


Timesheet Search: Ability to Filter by Resource Type

The , V & R Q W fuLOWHU has been added to the list of Timesheet search filters, allowing users to filter by Resource Type (i.e Employee or Contractor).

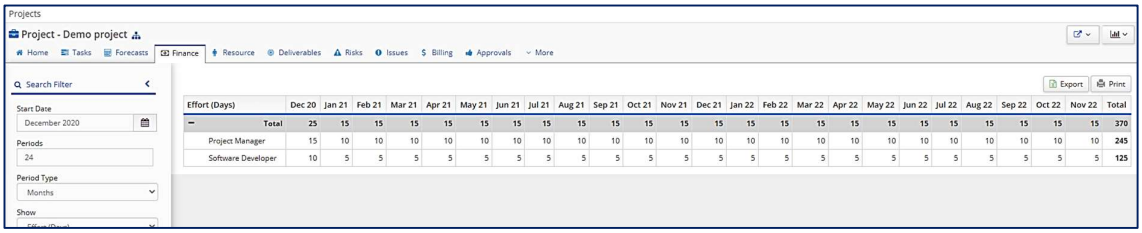


To return a list of 'Employees' only, set the *Is Contractor* filter to "= No".

Ability to View up to 24 Years Finance and Forecast Data

Finance Tab

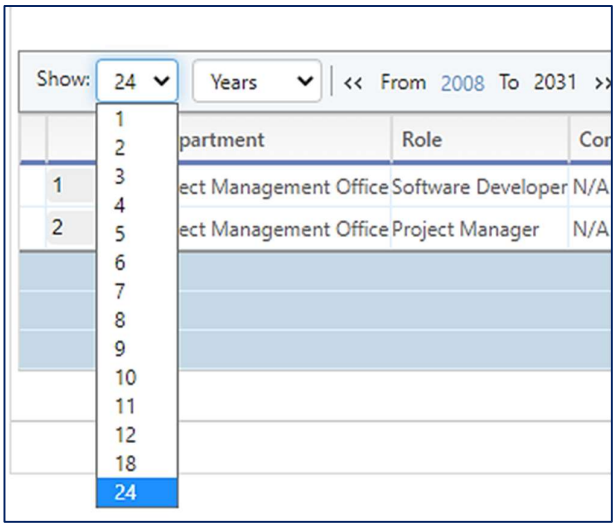
It is now possible to view up to '24' periods of data in the *Projects* > *Finance* tab, be it weeks, quarters, months, or years. This has been increased from the previous limit of 12 and provides a level of consistency similar with that available within the Forecast screens.



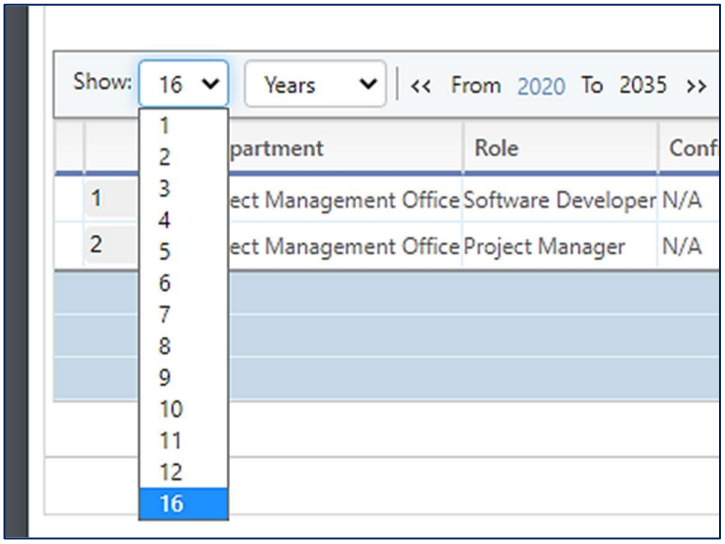
Forecast Tab

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:

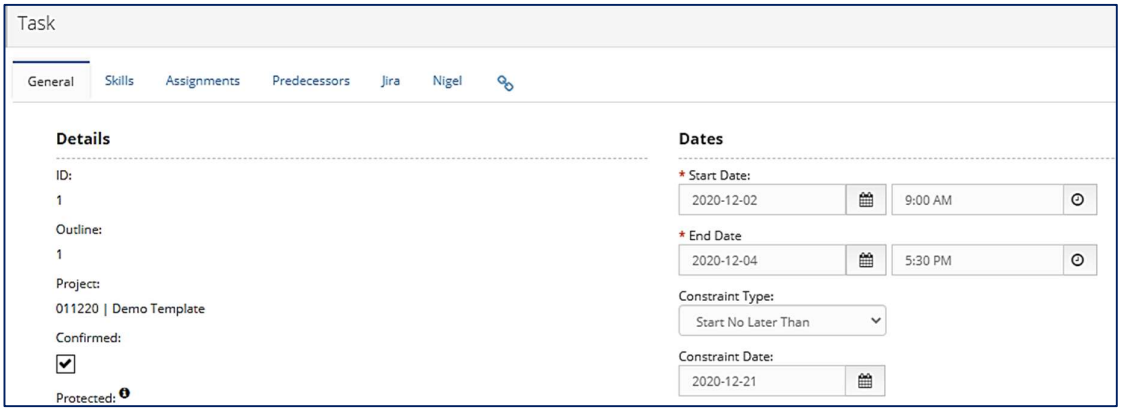


If viewed from 2020, 16 years are available:



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

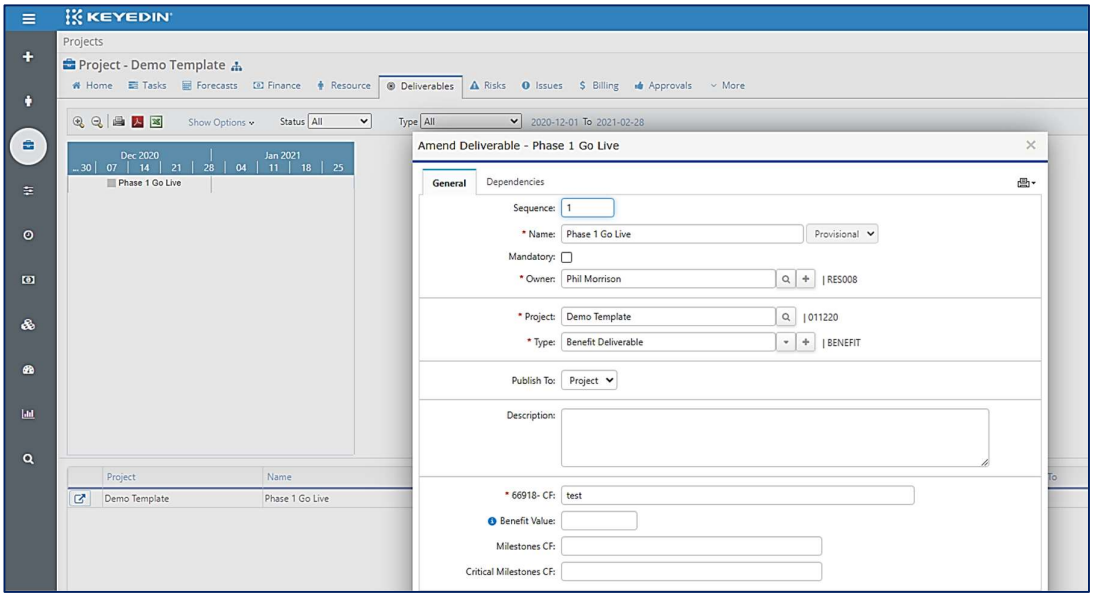
A small, time saving improvement has been made to the Task Edit screen, whereby removing the Constraint Type will now automatically remove the Constraint Date. Previously this would have resulted in a validation warning on save if the user had not manually cleared this.



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.