KeyedIn Enterprise June 2021 v7.3.2 Update Release

Release Summary

Version 7.3.2

9th June 2021

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section Number	Prepared By	Next Review Date
1.0	28/05/2021	ALL	ALL	R Thompson	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	01/06/2021	Matthew Muldoon – Chief Product Officer

Document Authorization

1.0	01/06/2021	Paul Gleghorn – SVP, Technology and Architecture

Overview of Changes

	Fixes	Enhancement
Web Application	✓	✓
Mobile Application	✗	✗
Mobile Services	✗	✗
V3 API	✓	✓
V7 Core API	✓	✓
V7 Data API	✗	✗
Data Views	✗	✓

Release Summary

KeyedIn Enterprise v7.3.2 is a scheduled maintenance update release with general support fixes and minor feature enhancements including the ability to filter by Project on the Capacity screen, and bulk realign Deliverables to the linked Task/Milestone date.

Performance has also been improved on the Task Plan Gantt, particularly of benefit to users of larger plans with complex dependencies.

Customers will be notified separately via our internal Support process (Freshdesk) for any of their tickets that have now been resolved in this Release.

Ability to Filter by Project on the Capacity Screen

The *Project* filter has been added to the Capacity screen to provide more granular visibility of Demand, Supply and Actuals data.

Capacity continues to be driven by Resource, and a minimum of the Location and/or Department (Team) filter must be set for any results to be returned, as per the pre-existing behaviour.

One or more Projects can be optionally filtered on to further restrict the Demand, Allocated and Actuals results to the selected Project(s). The selection of Projects will **not** affect the Capacity data which is only determined by the active Location, Team or Role filters.
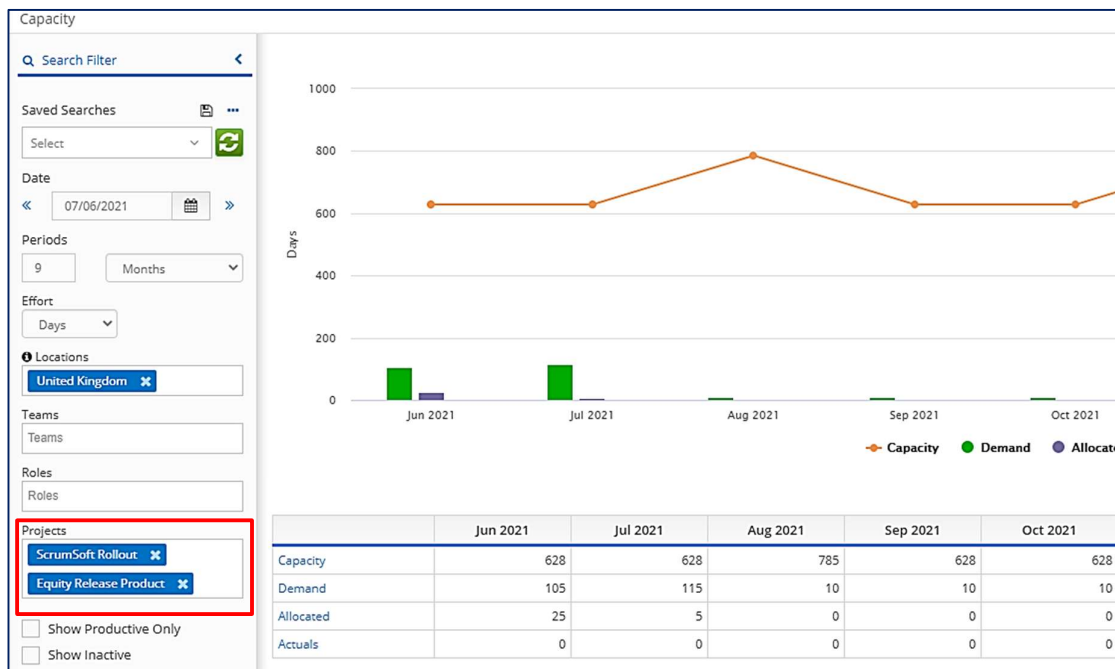
Selecting a Project above level one (such as a Programme or Portfolio) will return rolled-up data for all child Projects.

For example below, filtering on *Customer Projects* (a Level three Programme) returns results from related level one child Projects, subject to all other filter criteria:
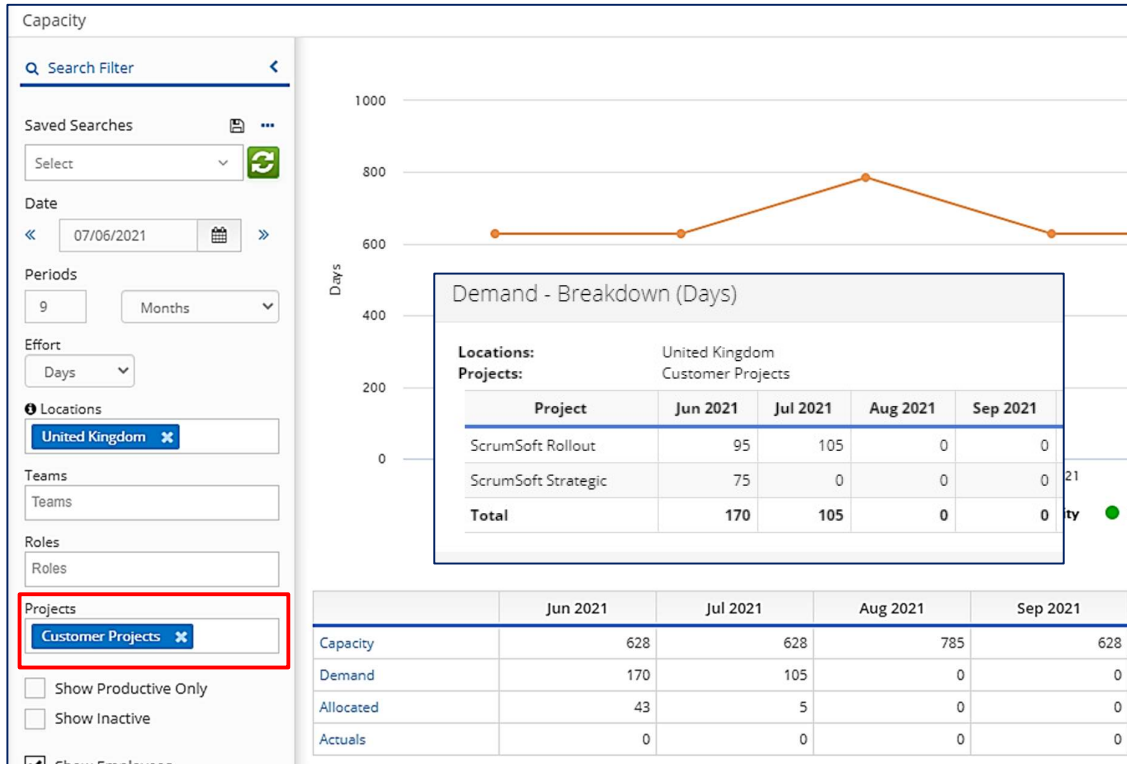

The Project filter integrates with the existing *Saved Search* functionality, to quickly pivot when multiple Project views are required, and is available in all Resourcing modes (Scheduling, Strategic and Combined).

Ability to Realign Deliverables to the Linked Task/Milestone Date

Deliverables that are associated with a linked Task (or Milestone) can now be easily realigned to the linked Task end date (or Milestone date) in bulk, eliminating the manual effort of individual adjustments.

This can also be used as part of the Project setup process, for example correcting misalignments resulting from a change to the Task Plan start date.

When using the Reschedule option on the Deliverables tab, a new adjustment option of *Realign with Linked Tasks* can be selected.
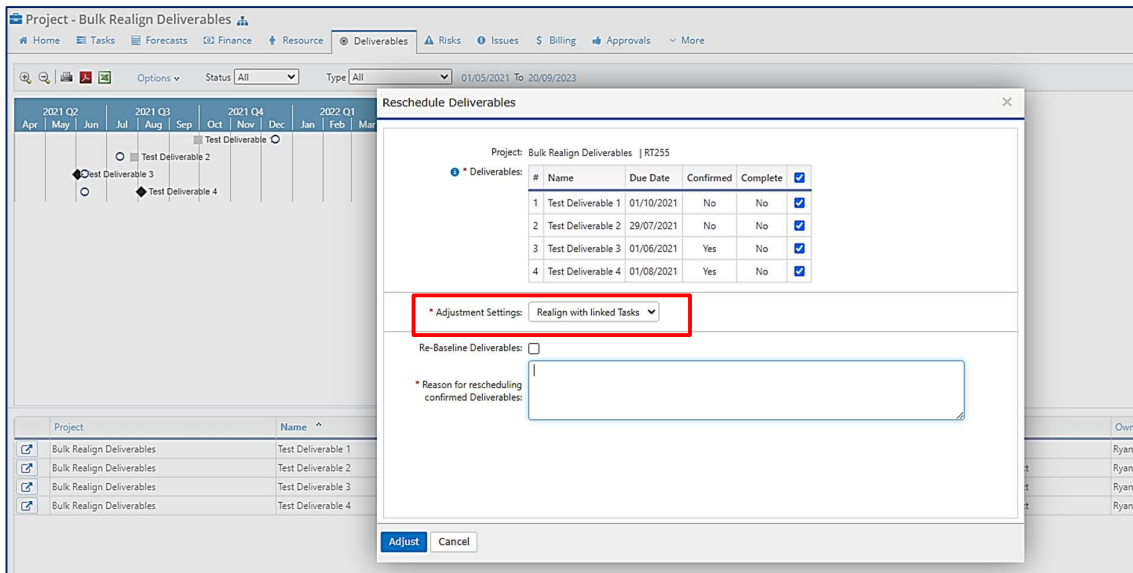
In the above example, each of the Deliverables has a linked Task (or Milestone), which are not currently aligned, as shown on the timeline view.

Using the Realign option will adjust the Delivery Date of the selected Deliverables to match the end date of the linked Task, or the Task Milestone date.
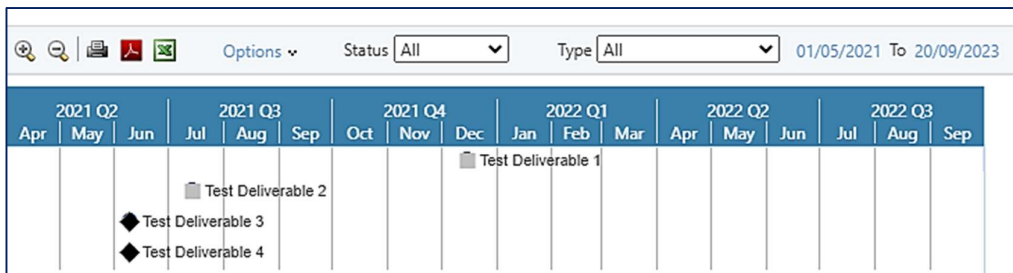
Tip: The Deliverables data view can also be used to provide a widget/report on Deliverables with associated linked Tasks dates to monitor any slippage. Please contact Support if you require assistance.

Key points to note:

- The linked Task or Milestone can exist on any Project, however Deliverables can only be realigned for one Project at a time.

- Deliverables created above level one in the project hierarchy can also be realigned, but note that this excludes Deliverables that have only been *published* above level one as those need to be realigned at the level they were created at.

- Any selected Deliverables that do not have a linked Task will simply be ignored.

- Provisional and Confirmed Deliverables can be realigned, but a reason must be entered when rescheduling Confirmed Deliverables (this will be added to the audit log, as per the existing reschedule behaviour).

- If a Confirmed Deliverable is selected but does not require realignment, then it will be ignored and the audit will not be updated.

- The Realign feature only applies where the configured entry format for Deliverables tracking is set to Days.
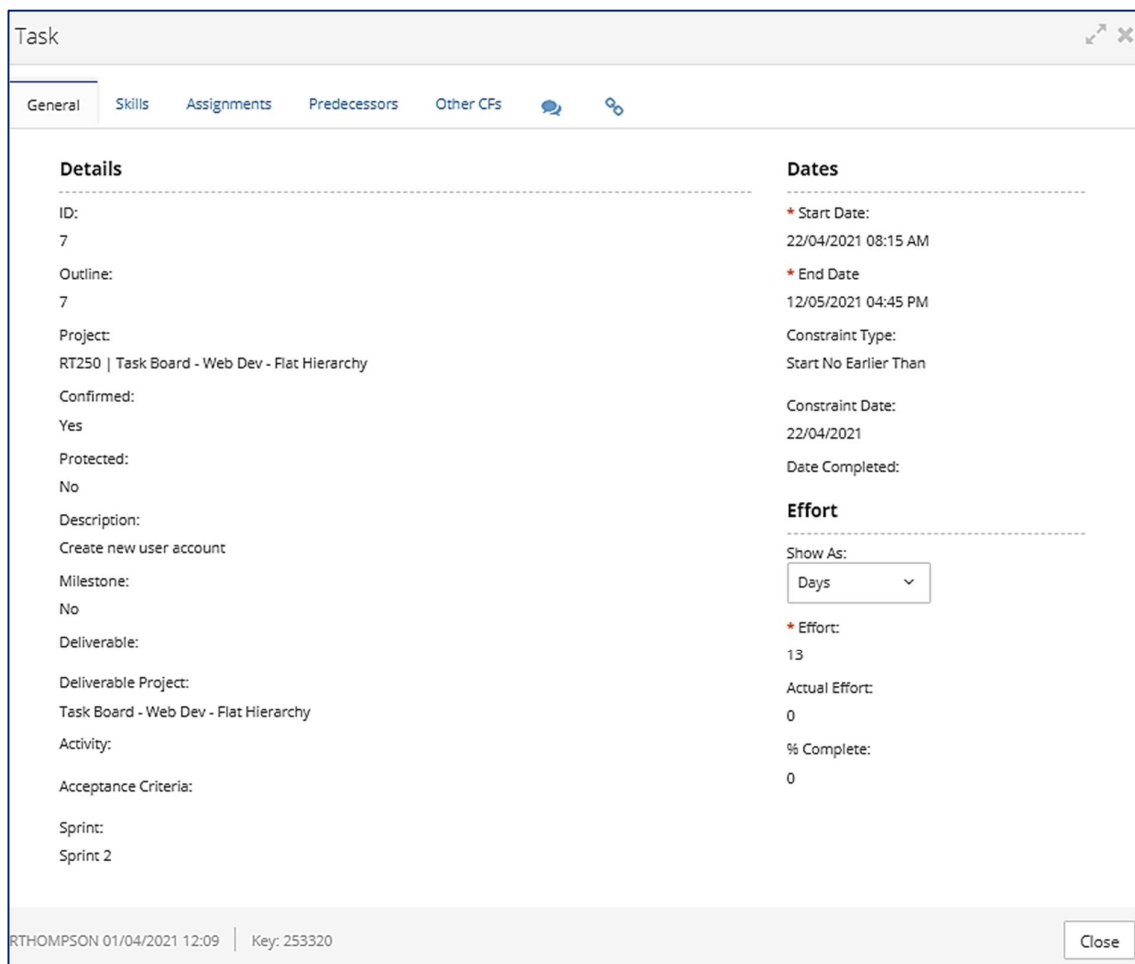
Task Planning Related Improvements

Task Plan Gantt Performance

Customers using large or complex task plans (such as significantly interdependent Tasks) will benefit from a performance enhancement, improving the speed of recalculation when a date or dependency is amended.

Only changes related to dates or dependencies will now trigger the recalculate function, resulting in an overall smoother experience.

Task Edit Screen

The legacy Task Edit screen is being phased out and replaced with the updated equivalent used with the enhanced Task Plan Gantt / Task Board:

When accessed from the locations outside of the Task Plan Gantt, such as the Task Search screen or a reporting widget drill through, the view will be read-only.

When clicking through to a Task using the Task Widget or Project Review Widget / Screen, it will open in basic edit mode, allowing a subset of fields to be amended including Activity, linked Deliverables and Custom Fields. Data relating to dates, dependencies and Assignments will remain read only in this view and should be amended on the main Task Plan Gantt screen.

An example of basic Task edit mode when accessed via the Task widget:

The legacy Assignment edit screen will be updated to the enhanced equivalent for the v7.4 Autumn release.

Customers using the old Task Plan Gantt will continue to see the legacy screens within the Gantt and are recommended to consider switching to the enhanced Gantt.

Data View Changes

The following data view changes have been made for this release:

Data View	New Fields
Forecast Demand General v6.0.11	Project Sponsor
Forecast Summary v6.0.15	Project Sponsor
Issue General v6.0.2	Project Sponsor
Risk General v6.0.5	Project Sponsor
Planning General v6.0.16	Project Available for Time and Expense Tracking flag

Data view changes are not applied automatically. Please contact Support for installation guidance.