

KeyedIn Enterprise July 2021 v7.3.3 Update Release

Release Summary

Version 7.3.3

21st July 2021

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Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section Number	Prepared By	Next Review Date
1.0	29/06/2021	ALL	ALL	R Thompson	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	07/07/2021	Matthew Muldoon – Chief Product Officer

Document Authorization

1.0	13/07/2021	Paul Gleghorn – SVP, Technology and Architecture
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Overview of Changes

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

Release Summary

KeyedIn Enterprise v7.3.3 is a scheduled maintenance update release with general support fixes and small feature enhancements for improved usability.

The main Timesheet entry screen can now be configured to default to the Task Activity when recording time against Tasks or Assignments to help ensure greater accuracy of timesheet activity tracking.

The 'fixed' *Line Manager* filter for Time and Expenses approvals, on the *My Work > Approvals* tab, can now be removed with new login profile settings to allow greater flexibility over the Resources that can be approved using this screen (for example where the approver is a higher level manager).

Enhancements to the Resource Plan provide further control of Assignments, with new options to *Delete* and *Clone* using the inline menu.

The *Favourites* limit has been increased from 40 to 60 to support faster access to frequently used Projects and Reports. Project favourites are also now shown under the main Favourites section as well as the Project Navigator.

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

New Configuration Setting to 'Default to Task Activity' for Timesheets

A new system setting, **Default to Task Activity**, has been added to the *Configuration > Time & Expense Settings* screen to control whether the timesheet Activity field is automatically populated with the Task Activity when recording time against Tasks or Assignments in the main Timesheet entry screen.

Time & Expense Settings

Time Entry Format

Decimal
 HH:MM

Show Expected Hours

Approval Reference is mandatory

Enable Timesheet Disapprove Reason

Timesheet Disapprove Reason is mandatory

Default to Task Activity

Please ensure the *Enable Activity* setting in *Configuration > Planning Settings* is also set – this allows Activities to be set against Tasks.

Planning Settings

Tasks

Default Task Status:

Default Start Time:

Default Finish Time:

* Default Chargeable Utilisation Target (%):

Enable Activity

Set Effort to Duration on New Tasks

When the new configuration setting is enabled, the order of the Task/Assignment and Activity columns on the Timesheet Entry screen is reversed to select a Task/Assignment prior to the Activity.

Timesheet Entry

5 July - 11 July

Ryan Thompson

Submit Save

Project	Task / Assignment	Activity	Charge	\$	Mon 05/07
Timesheet Enhancements	Post Live Support	Development	N/A		

For Projects configured to track actuals against Tasks or Assignments, once a Project and Task/Assignment have been selected, the Activity field will be automatically set with the Activity associated with the Task. If the Task does not have an Activity it will remain blank and can be selected manually.

The Activity field can be changed at any time, and selecting a Task/Assignment which has a different Activity to the one selected will provide a warning with the option to replace:

Replace the Activity with the Activity of the Task?

Cancel OK

Task / Assignment	Activity	Charge	\$	Mon 05/07	Tue 06/07	Wed 07/07
Post Live Support	Administration	N/A				

For Projects **not** configured to track actuals against Tasks or Assignments, the Task/Assignment field isn't required and timesheet Activity field can be manually selected:

Project	Task / Assignment	Activity
Equity Release Launch Project	N/A	Administration

Time Entry using the My Assignments widget

When using the *Add Time* feature on the My Assignments widget, the existing behaviour remains unaffected, where the default Task Activity will continue to be selected regardless of the new configuration setting being enabled.

Other Time Entry locations – out of scope

Please note that the new setting does not have any effect when recording time using the Timesheet widget, or Timesheet pop-up screen (for example via the Timesheet search screen). These screens use older technology and will be updated as part of wider future enhancements.

Enhancements to time recording via the mobile app are also out of scope for this release.

Ability to Remove the Line Manager Approval Restriction on My Work

The addition of two new login profile settings allow independent control of the *Line Manager* filter on the Approvals tab of the My Work screen, for Time and Expense Claims, respectively.

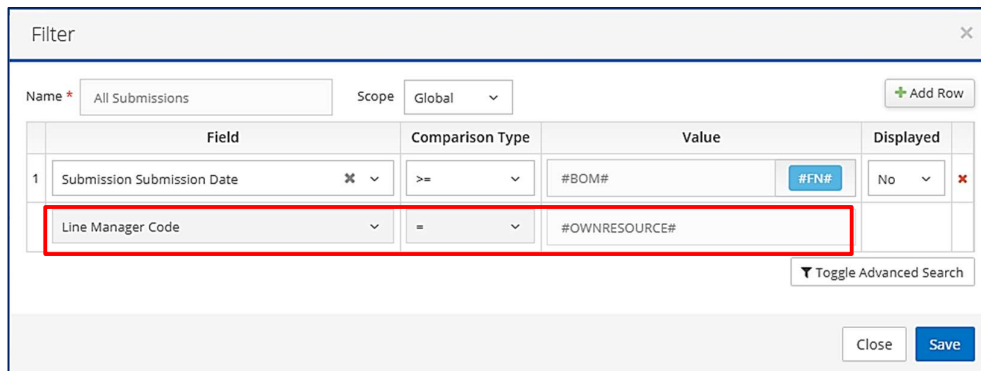
Previously, users of this screen were limited to only seeing the Resources for which they were the direct line manager of.

By selecting the 'Remove Line Manager Approval Filter from My Work' on either the *Login Profile > Timesheet* or *Login Profile > Expense* screen, the restriction will no longer apply so that all Resources which the user has permission to approve are now available. The Line Manager filter can still be added manually if required.

A typical use case for this feature is where someone other than the line manager (e.g. Team manager or higher level line manager) has approval authority over time and/or expenses.

Existing behaviour - login profile setting not checked:

The fixed Line Manager filter for #OWNRESOURCE# will continue to apply if the new login profile setting is not enabled.

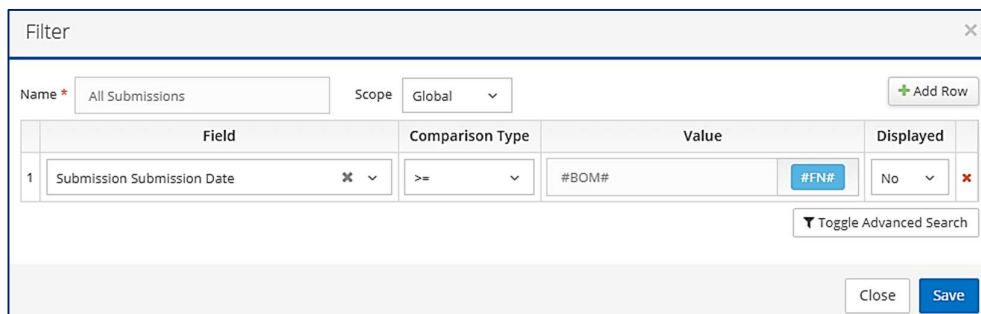


The screenshot shows a 'Filter' dialog box with the following configuration:

- Name: All Submissions
- Scope: Global
- Table with 4 columns: Field, Comparison Type, Value, and Displayed.
- Row 1: Field 'Submission Submission Date', Comparison Type '>=', Value '#BOM#', Displayed 'No'.
- Row 2: Field 'Line Manager Code', Comparison Type '=', Value '#OWNRESOURCE#'. This row is highlighted with a red border.
- Buttons: '+ Add Row', 'Toggle Advanced Search', 'Close', 'Save'.

New behaviour - login profile setting checked:

With the new login profile setting enabled, the Line Manager filter is removed for greater flexibility and can be added as a new row manually if required.



The screenshot shows the 'Filter' dialog box with the following configuration:

- Name: All Submissions
- Scope: Global
- Table with 4 columns: Field, Comparison Type, Value, and Displayed.
- Row 1: Field 'Submission Submission Date', Comparison Type '>=', Value '#BOM#', Displayed 'No'.
- Buttons: '+ Add Row', 'Toggle Advanced Search', 'Close', 'Save'.

The new Login Profile settings that control this filter are highlighted below:

Login Profile > Timesheet tab:

Amend Login Profile - PROJECT_MANAGER_STR | Project Manager Strategic

General **Timesheet** Expense Planning Strategic Planning CRM Accounts

Timesheet Submissions: Ability to Accept, Reject and Unlock Timesheet Submissions

Timesheet Cost Access: View Code & Amount

Timesheet Charge Access: Change Code & Amount

Chargeable Timesheets: Change

Timesheet Team: Change

Use Default Resource Team

Timesheet Cost Centre: Change

Timesheet Role: Change

Use Default Role

Features: Ability to maintain Overtime Status
 Ability to view Invoiced Status
 Ability to view Approval Status
 Ability to maintain Timesheet Notes
 Timesheet Notes Required
 Remove Line Manager Approval Filter on My Work
 Ability to Edit Submitted Timesheets
 Ability to enter negative Timesheet Hours
 Ability to enter time on the My Assignments widget

Direct Entry: Show Task and Assignments ⓘ
 Show Activity ⓘ
 ⓘ Row Entry Custom Fields:
 [Dropdown]

Login Profile > Expense tab:

Amend Login Profile - PROJECT_MANAGER_STR | Project Manager Strategic

General Timesheet **Expense** Planning Strategic Planning CRM Accounts

Chargeable Expenses: ▾

Expense Team: ▾
 Use Default Resource Team

Expense Cost Centre: ▾

Category: ▾
 Use Default Category

Features:
 Ability to view Approval Status
 Ability to Claim Expenses
 Ability to view Invoiced Status
 Ability to View or Edit Expense Net and VAT Amounts
 Ability to View or Edit Expense Notes
 Remove Line Manager Approval Filter on My Work

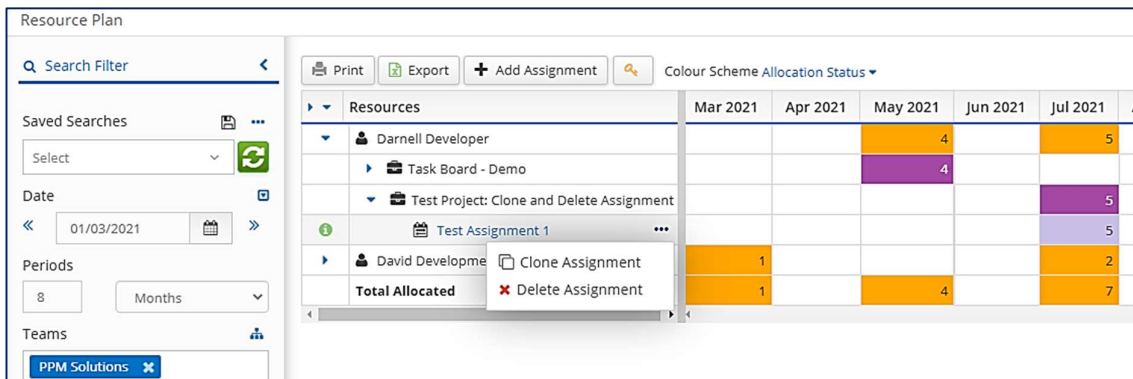
Ability to Delete or Clone an Assignment on the Resource Plan

New inline edit options have been added to the Resource Plan to allow users to delete and clone assignments directly from this view.

These functions are available to all users where they have permission to maintain Assignments for the Projects/Resources being edited and are available in all Resourcing Modes (including Strategic and Combined mode for Projects where "Assignments affect strategic availability").

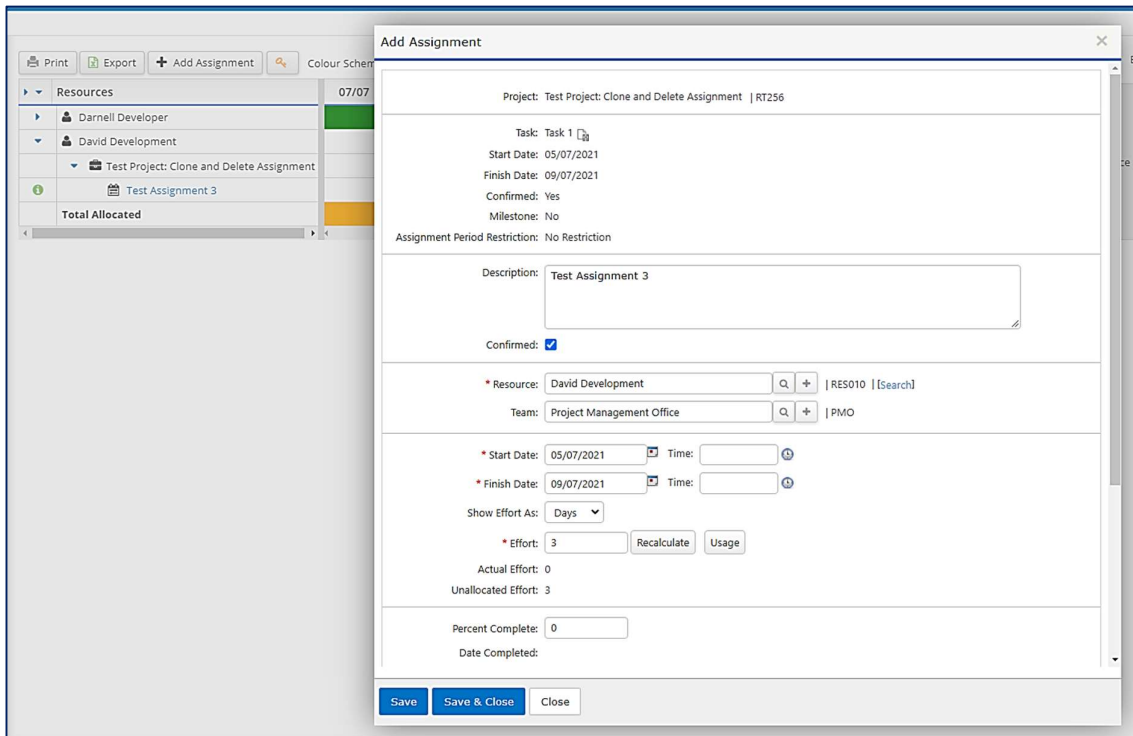
Cloning an Assignment

The Clone Assignment feature was previously only available on the Assignment Search screen. In this Release, an Assignment can now also be cloned from the Resource Plan, for quick allocation to an additional Role/Resource rather than creating a new Assignment from scratch.



Resource Plan		Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021
Resources						
Darnell Developer				4		5
Task Board - Demo				4		
Test Project: Clone and Delete Assignment						5
Test Assignment 1						5
David Developer		1				2
Total Allocated		1		4		7

The *Clone Assignment* option is shown when selecting the ellipsis [...] menu against an Assignment in the Resource Plan (subject to permissions). This will pop-up the *Add Assignment* screen pre-populated with the existing Task/Assignment details. The Effort field will default to any unallocated effort on the Task.



Note that a Task cannot have multiple assignments for the same Resource on the same dates, and so the Resource and/or Assignment dates will need to be amended before saving.

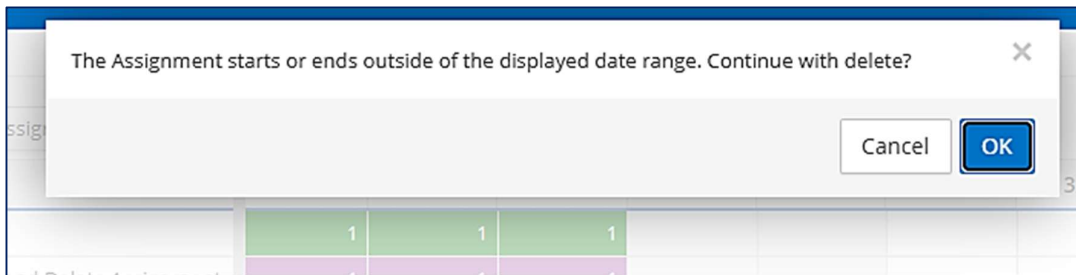
Deleting an Assignment

An Assignment can now be deleted from the Resource Plan by selecting the *Delete Assignment* option via the inline ellipsis [...] menu.

Resources		07/07	08/07	09/07
▼	Darnell Developer	1	1	1
▼	Test Project: Clone and Delete Assignment	1	1	1
ⓘ	Test Assignment 1	1	1	1
▶	David Developme			
	Total Allocated	1	1	1


Clone Assignment
✖ Delete Assignment

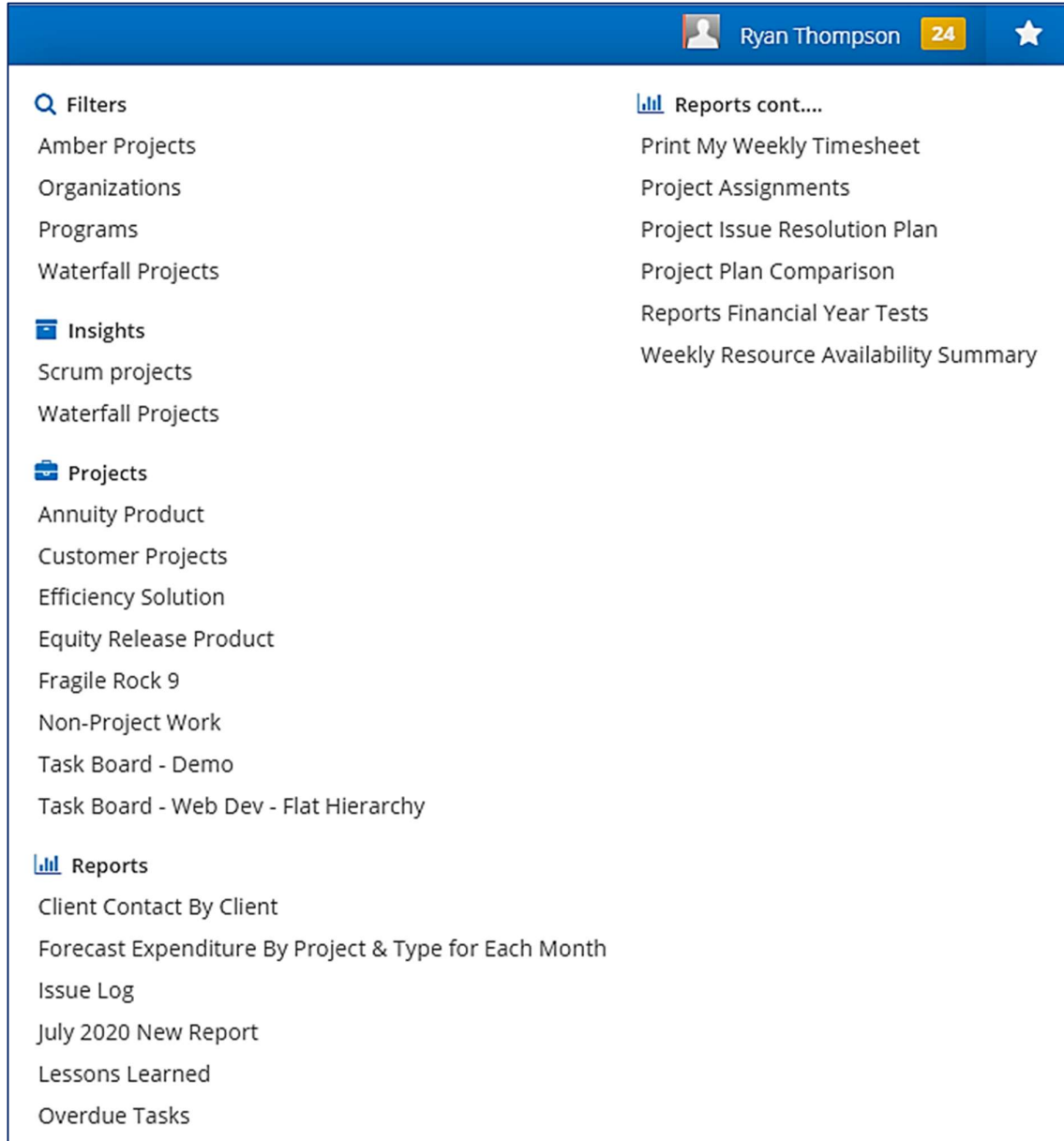
If the Assignment start or end date sits outside of the displayed date columns in the Resource Plan, a warning message will advise:










Favourites Limit Increased to 60

The limit for the number of items that can be 'favourited' has been increased from 40 to 60. This applies to any combination of Projects, Reports, Filters and Insights.

Favourited Projects are now also **shown** on this dropdown accessed using the  icon - they previously counted towards the limit but were only visible on the Project navigator view.



 Ryan Thompson 24 

-  **Filters**
 - Amber Projects
 - Organizations
 - Programs
 - Waterfall Projects
-  **Insights**
 - Scrum projects
 - Waterfall Projects
-  **Projects**
 - Annuity Product
 - Customer Projects
 - Efficiency Solution
 - Equity Release Product
 - Fragile Rock 9
 - Non-Project Work
 - Task Board - Demo
 - Task Board - Web Dev - Flat Hierarchy
-  **Reports cont....**
 - Print My Weekly Timesheet
 - Project Assignments
 - Project Issue Resolution Plan
 - Project Plan Comparison
 - Reports Financial Year Tests
 - Weekly Resource Availability Summary
-  **Reports**
 - Client Contact By Client
 - Forecast Expenditure By Project & Type for Each Month
 - Issue Log
 - July 2020 New Report
 - Lessons Learned
 - Overdue Tasks

Data View Changes

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

Data View	New Fields
Login Data v6.0.8	Last Edited Date, Last Edited By
Project Workflow Approval Audit v6.0.2	Last Edited Date, Last Edited By

Data view changes are optional. Please contact Support for installation guidance as required.