

KeyedIn Enterprise January 2022 v7.4.1 Update Release

Release Summary

Version 7.4.1

19th January 2022

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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	04/01/2022	ALL	ALL	R Thompson	
1.1	13/01/2022	Added data view changes	Data View Changes	R Thompson	
Document	Approval				
Version Number	Approval Date	Approved By (Name,	/Title)		
1.1	13/01/2022	Matthew Muldoon -	Chief Product Offic	cer	

Document Authorization

1.1	13/01/2022	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	✓	\checkmark

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Release Summary

KeyedIn Enterprise v7.4.1 is a scheduled maintenance update release with general support fixes and the following minor enhancements:

- A **Today Line** on the enhanced Task Planning Gantt to see Tasks in relation to the current date more clearly.
- On the Scheduling Resource Plan, a new **Assignment Information** pop-up panel is now available for Role Assignments ("Scheduling Requests") to see all Assignments for a selected Role without needing to expand the data.
- The ability to disable Step Notes for 'Process Support' Action Types has been introduced for use where they are not required.

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

Addition of a Today Line on the enhanced Task Planning Gantt

The Gantt chart within Task Planning has been enhanced with a new green vertical line denoting the current date to easily identify current planned Task activity, including overdue Tasks, at a glance.

03/01/2022 10/01/2022 24/01/2022 Software Development -Project Manager Project Scoping oject Manage **Requirements Definition** \Rightarrow Development Phase ftware Developer 4 · Testing Phase Test Analyst Project Manager; Imple Release & Review

Example where the current date is 4th January:

At higher zoom levels where time is displayed, the Today line aligns with the current system time:

											0	3/01	/202	2	
	Monday Tuesda			sday	V	Vedn	esda	y		Thur	sday				
00	06	12		00	06	12	00	06	12		00	06	12		0
1															

The line is also displayed when viewing the Projects timeline (above level one).



Resource Plan: View Scheduling Requests' Assignments Detail (Roles)

Feature Summary

In the v7.2 Release (Autumn 2020) the Scheduling Mode Resource Plan was enhanced with a new Resource Assignment information panel to provide improved visibility of Resource Assignment details for a selected period.

For v7.4.1, this functionality has been extended to the 'Scheduling Requests' (Role Assignments) grid.

The new panel, which can be optionally toggled on or off, replicates the existing information shown when expanding the Roles/Project details and hovering over the information symbol.

Feature Usage

This feature is available to all users of the Scheduling Mode Resource plan when the 'Show Scheduling Requests' filter option is selected.



Displaying the panel

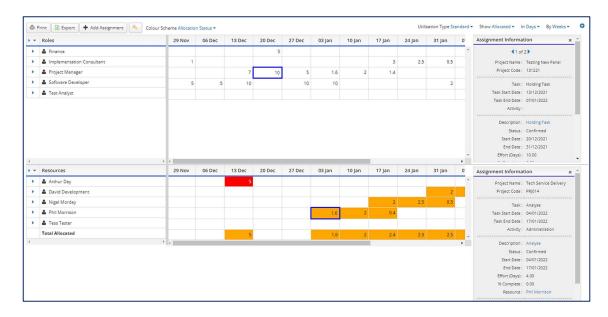
To display the new panel simply **double click on a cell against the Role row**, for any period. The panel will display to the right of the normal grid. Once shown, the panel will continue to display in future sessions until it is closed using the 'x' symbol.

-	Roles	29 Nov	06 Dec	13 Dec	20 Dec	27 Dec	03 Jan	10 Jan	17 Jan	24 Jan	31 Jan	0.	Assignment Informatio	n
•	& Finance				5							^	1 of 2	•
	Limplementation Consultant	1							3	2.5	0.5		Project Name : Te	esting New Panel
٠	🎍 Project Manager			7	10	5	1.6	2	1.4				Project Code : 13	31221
۲	Software Developer	5	5	10		10	10				2			lolding Task
	🍰 Test Analyst												Task Start Date : 13	3/12/2021
													Task End Date : 01 Activity :	7/01/2022
													Activity .	
													Description : H	lolding Task
													Status : Ci	
													Status : Cr Start Date : 20	0/12/2021
													Status : Ci	0/12/2021 1/12/2021
4		» (•	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021
4 • •	Resources	> 4 29 Nov	06 Dec	13 Dec	20 Dec	27 Dec	03 Jan	10 Jan	17 Jan	24 Jan	31 Jan	•	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021
4 • •			06 Dec	13 Dec 5	20 Dec	27 Dec	03 Jan	10 Jan	17 Jan	24 Jan	31 Jan	0 -	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021
_	Resources		06 Dec	13 Dec 5	20 Dec	27 Dec	03 Jan	10 Jan	17 Jan	24 Jan	31 Jan 2) 0 4	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021
	Resources		06 Dec	13 Dec 5	20 Dec	27 Dec	03 Jan	10 Jan	17 Jan 2	24 Jan 2.5	31 Jan 2 0.5) 0	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021
_	Resources Arthur Day David Development		06 Dec	13 Dec 5	20 Dec	27 Dec	03 Jan 1.6	10 Jan 2	17 Jan 2 0.4		2	0	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021
	Resources Arthur Day David Development Nigel Mordey		06 Dec	13 Dec 5	20 Dec	27 Dec			2		2	0.	Status : Ci Start Date : 20 End Date : 3	0/12/2021 1/12/2021

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The new Role Assignment panel can be displayed in addition to the existing Resource Assignment panel displayed by double clicking any Resource Assignment cell in the lower grid – no changes have been made to this existing behaviour.



Navigating Assignments

The new Role Assignment panel behaves like the existing Resource Assignment panel, where each scheduled Role Assignment in the selected period is displayed. If the Role has multiple Assignments, the number of Assignments is indicated at the top of panel, with navigation cursors to scroll through the detail.

Assignment Information 🛛 🗙						
∢ 1 of	4					
Project Name :	Testing New Panel					
Project Code :	131221					
Task :	Holding Task					
Task Start Date :	13/12/2021					
Task End Date :	07/01/2022					
Activity :						
Description :	Holding Task					
Status :	Provisional					
Start Date :	13/12/2021					
End Date :	14/12/2021					
Effort (Days) :	5.00					
% Complete :	0.00					
Role :	Software Developer					

Please be aware that if the **Group By Project** option is selected, the Role Assignment panel will only show the Assignments for the selected role, in the selected period for the selected Project.



To view another Role, single click on a cell against another Role row, for any period.

As per the existing behaviour, clicking anything other than a cell on the Role or Resource row (for example Project or Assignment level results row) will **not** update the panels, as the primary use case is to facilitate navigation at a Role or Resource summary level. KEYEDIN

Ability to disable Step Notes for 'Process Support' Action Types

For clients using 'Process Support' Action Types, for example where a process flow is configured over multiple steps, the individual Action Types can now be configured so that Step Notes are suppressed when moving between steps.

Where Step Notes have been disabled on a specific Action Type, the Step Notes tab and Notes box when moving steps are no longer visible.

vew Proj	step N	Attach	ments (0)
_	Move from step NB	EW PROJECT	to NEW PROJECT 2
	Pi	rocess ID: 57	
	* Assign Nex	t Step To: O	User Specified System Specified Own Current Queue (RES080 Ryan Thompson) Project Manager Line Manager
0		Notes:	

Before - existing behaviour with Step Notes allowed:

After - Step Notes disabled

New Project Request	Attachments (0)		
	NEW PROJECT	to NEW PROJECT 2	×
	Process ID: 56		
* Assign 1	Next Step To:	User Specified System Specified Own Current Queue (RES080 Ryan Thompson) Project Manager Line Manager	
	0		
	0	Line Manager	



Action Type Configuration

System Administrators, or those responsible for configuring Action Types, will now see a new option, **Disable Step Notes**, when adding or editing a Process Support Action Type.

Amend Act	tion Type - NEW	PROJECT New	Project	Idea
General	Resources Act	tion Custom Fields	Options	Grid Fields
	Name:	New Project Idea		
	Code:	NEW PROJECT		Active: 🗸
	Significant Action:			
	Process Support:			
	Disable Step Notes:			
Use Au	itomated Reference:			
	Reference Prefix:	NP		
	Reference Start No:	1		
	Report:	[Select] [Clear]		
	PowerPoint Report:	[Select] [Clear]		
		Create Project on	Completic	on

Please be aware, to suppress Step Notes for all steps of this process flow, this will need to be repeated for each Process Support Action Type associated with the Action View.

Data View Changes

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

Data View	New Fields
Action Type Data v6.0.1	Added Disable Step Notes field
	Added Client Drill Through functionality
Deliverable Audit Data	Added Client Drill Through functionality
v6.0.6	
Deliverable Data v6.0.12	Added Deliverable Dependency "Is Cross Project" field
	Added Client Drill Through functionality
Project Snapshot v6.0.5	Added Client Drill Through functionality
Forecast Budget	Added various Workflow Fields
Comparison v6.0.5	
Forecast Demand Only	Added Project Charge Rate fields
General v6.0.16	
Planning General v6.0.17	Added additional Deliverable Fields
	Moved Deliverable Fields into separate Groups
Login Profile Admin v6.0.6	Added Setup Reports field
Forecast Demand	Added Parent Project custom fields
General v6.0.12	

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