KeyedIn Enterprise January 2022 v7.4.1 Update Release

Release Summary

Version 7.4.1

19th January 2022

Contents

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 Officer

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	✓	✓

Release Summary

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

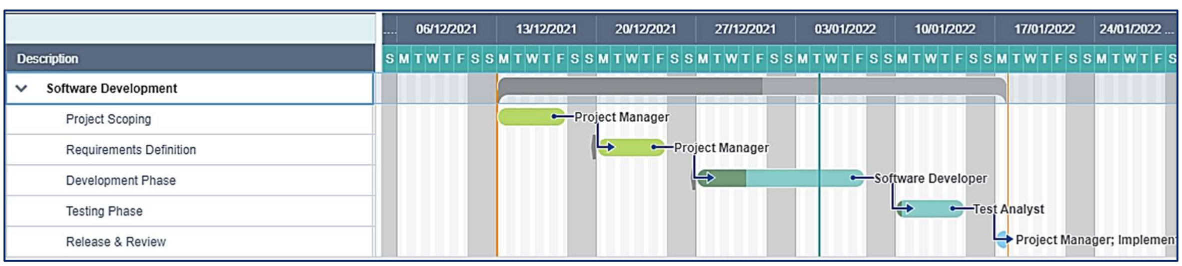
- A ***Today Line*** on the enhanced Task Planning Gantt to see Tasks in relation to the current date more clearly.
- On the Scheduling Resource Plan, a new **Assignment Information** pop-up panel is now available for Role Assignments ("Scheduling Requests") to see all Assignments for a selected Role 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.

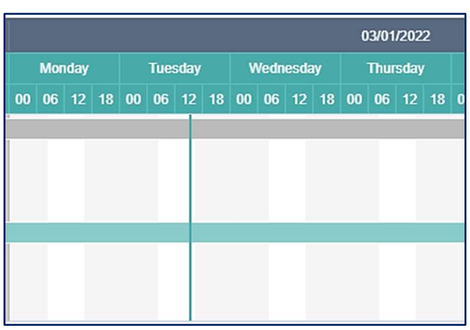
Addition of a *Today* Line on the enhanced Task Planning Gantt

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.

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:



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

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

Feature Summary

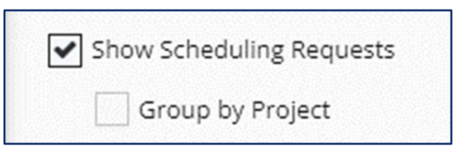
In the v7.2 Release (Autumn 2020) the Scheduling Mode Resource Plan was enhanced with a new Resource Assignment information panel to provide improved visibility of Resource Assignment details for a selected period.

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.

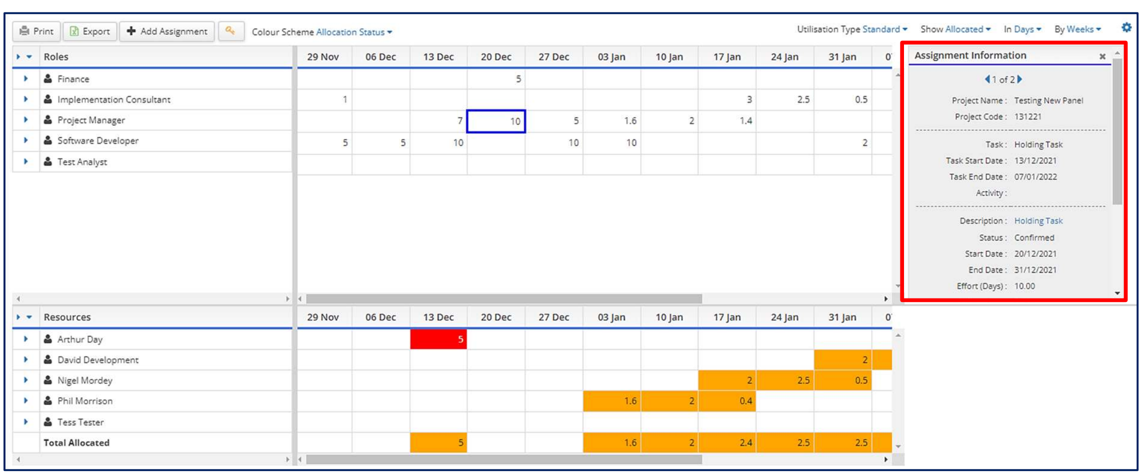
Feature Usage

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

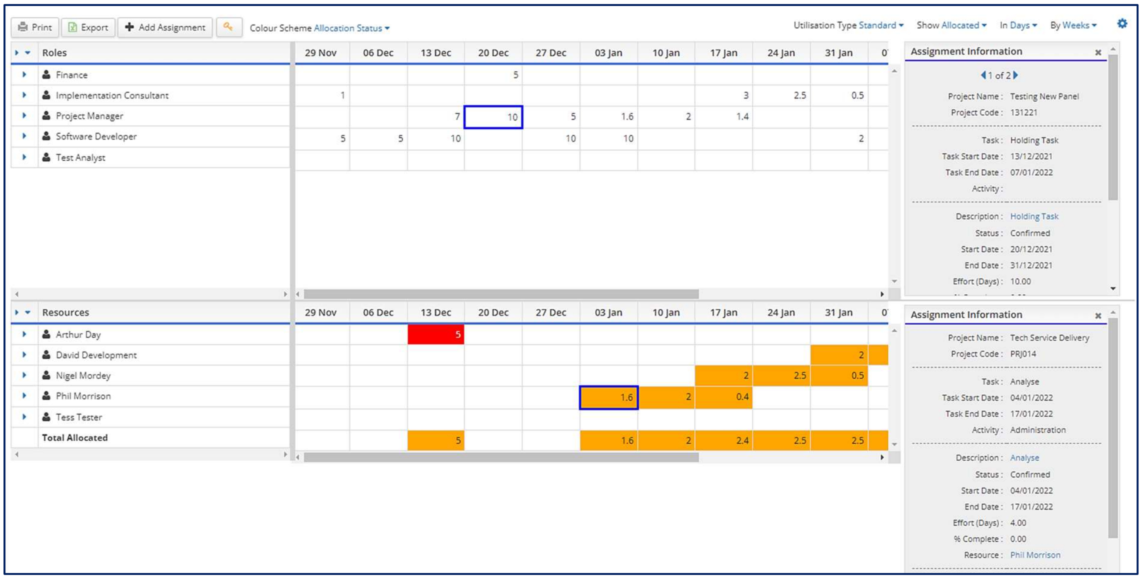


Displaying the panel

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.

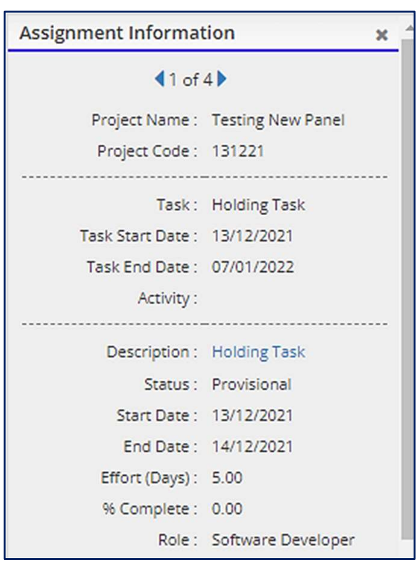


The new Role Assignment panel can be displayed in addition to the existing Resource Assignment panel displayed by double clicking any Resource Assignment cell in the lower grid – no changes have been made to this existing behaviour.



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.



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.

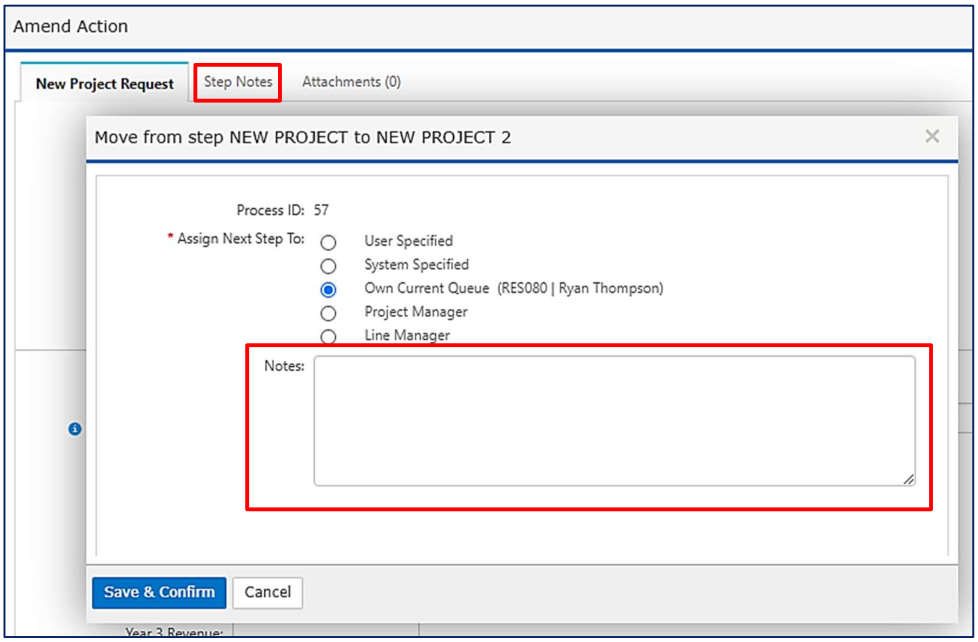
As per the existing behaviour, clicking anything other than a cell on the Role or Resource row (for example Project or Assignment level results row) will **not** update the panels, as the primary use case is to facilitate navigation at a Role or Resource summary level.

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

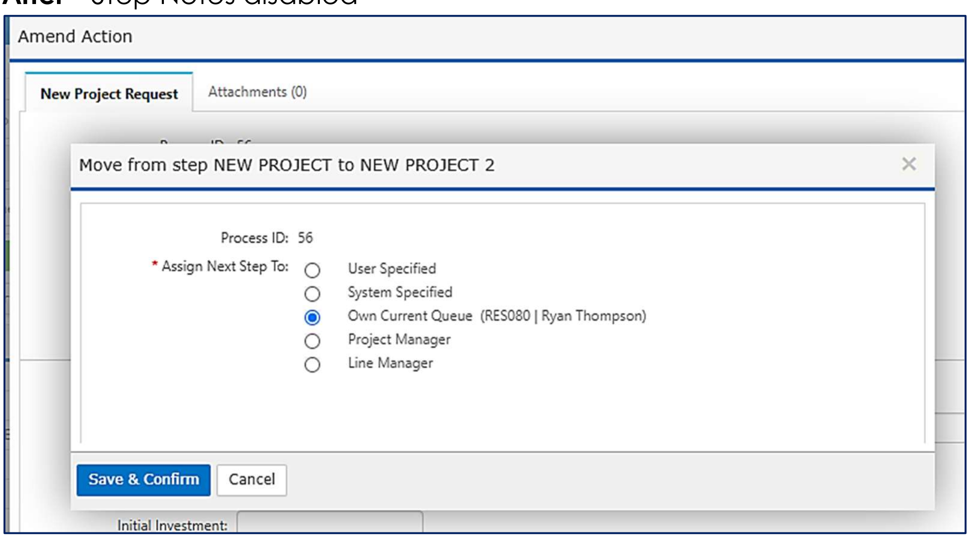
For clients using 'Process Support' Action Types, for example where a process flow is configured over multiple steps, the individual Action Types can now be configured so that Step Notes are suppressed when moving between steps.

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.

Before - existing behaviour with Step Notes allowed:

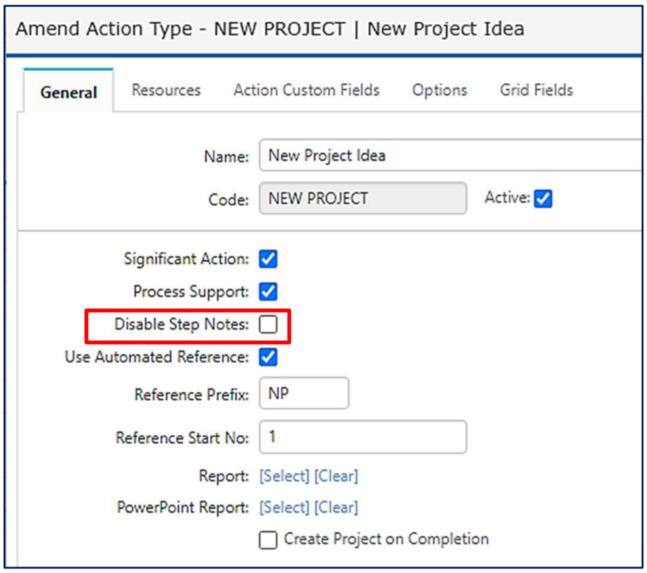


After - Step Notes disabled



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.



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 v6.0.6	Added Client Drill Through functionality
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 Comparison v6.0.5	Added various Workflow Fields
Forecast Demand Only General v6.0.16	Added *Project Charge Rate* fields
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 General v6.0.12	Added *Parent Project* custom fields

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