KeyedIn Enterprise September 2022 v7.5.1 Update Release

Release Summary

Version 7.5.1

22nd September 2022

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section Number	Prepared By	Next Review Date
0.1	19/07/2022	ALL	ALL	J Atherton	
1.0	06/09/2022	ALL – Additions/amendments new tokens, data view changes.	ALL	R Thompson	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	13/09/2022	Colin Gibbins – Principal Product Expert

Document Authorization

Version Number	Approval Date	Approved By (Name/Title)
1.0	12/09/2022	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	✗	✗
Enterprise Core API	✓	✗
Enterprise Data API	✓	✗
Enterprise Time/Expense API	✓	✗
Data Views	✗	✓

Release Summary

KeyedIn Enterprise v7.5.1 is a scheduled maintenance update release with general support fixes, enhancements to Custom Field configuration, and new system tokens and data views for improved reporting on fiscal planning periods.
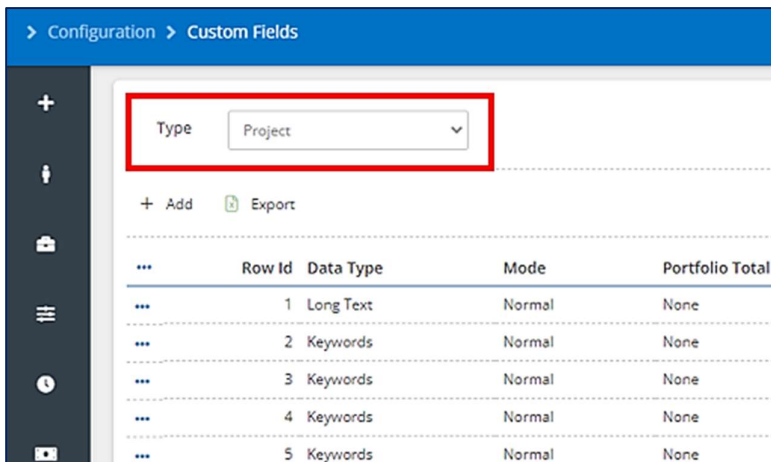
Further to client feedback on the new v7.5 user interface, a small number of additional styling improvements have been made, specifically to Forecasts and Timesheets to aid usability.

Customers will be notified separately via our internal Support process (Freshdesk) for any of their tickets that have now been resolved in this Release.
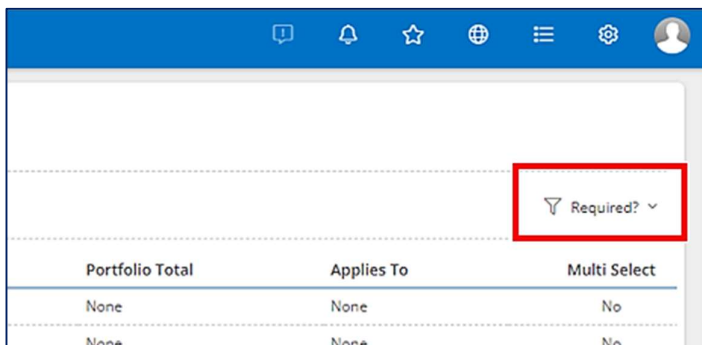
Remember last Entity Type and Filter used in Custom Fields

Within **Configuration** > **Custom Fields**, the most recently selected Type and Filter will now be remembered, on a per-user basis, until a new selection is made.
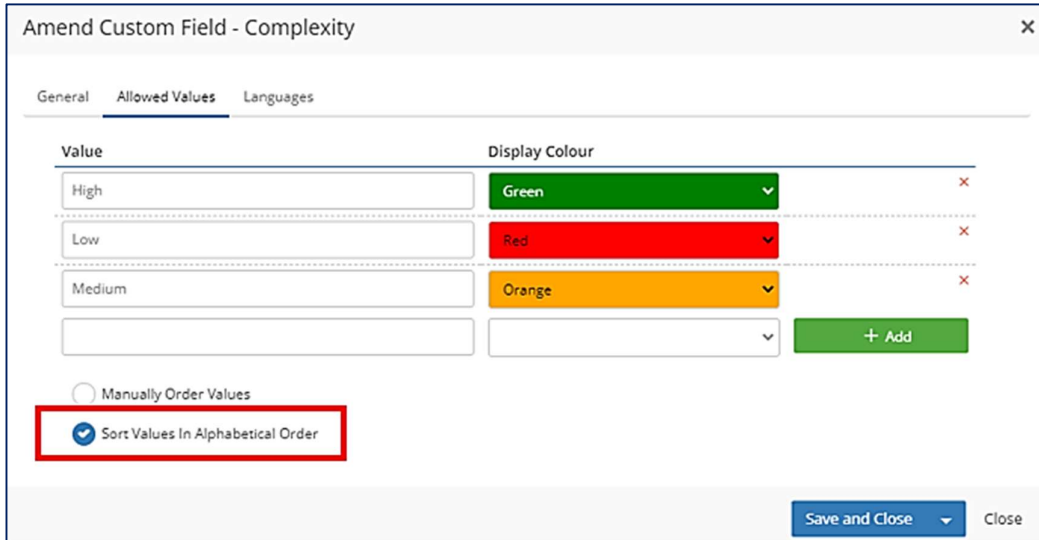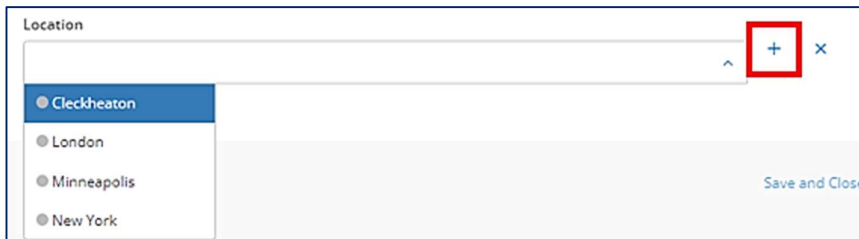
Type:

Filter:

Sort in Alphabetical Order Setting in Custom Fields

If selected, the *Sort Values in Alphabetical Order* option is now retained upon saving for Allowed Values within **Keyword**, **Dynamic Keyword** and **Number List** custom fields.
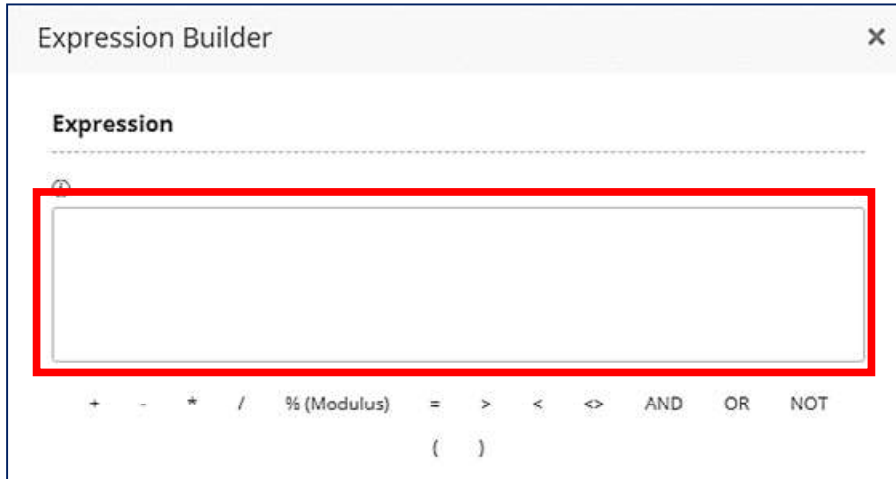

This change also applies to new values created by users "on the fly" for **Dynamic Keyword** custom fields, such as on the Project record. In the example below, adding a new location of 'Manchester' will automatically sort the values in alphabetical order without the need to re-sort in the main configuration screen.

Please note, the automatic sorting will not currently apply to Dynamic Keyword values added on legacy technology screens (such as Actions, Risks and Issues), until these areas are rewritten.

Increased Expression Field for Calculated Custom Fields

The Expression entry box within the Expression Builder for calculated Custom Fields has been increased in size, improving ease of entry and reducing the need to scroll. The vertical scroll bar will appear if the expression exceeds the visible space.

UI Feedback Improvements

Use of a stronger font colour on text entry fields has been applied throughout the system to provide a greater contrast against the background. Additionally, further improvements have been made to Forecasts and Timesheets as shown below.

Forecasts

Forecast gridlines have been reinstated as well as alternate row shading for clearer differentiation of Forecast rows and columns.

Tip: For users of small screens (such as laptops), please consider using the 'zoom out' feature of your web browser to accommodate more data in the view. Note, this should be done **before** selecting the Forecast.

Timesheets

The header panel on the main Timesheet entry screen has been reorganised for more efficient use of space, and to allow more entry rows to be accommodated in a single view.

Additional Tokens for Financial Year and Quarter Reporting

Four additional system tokens are available for use on search screens and the report writer to facilitate searching and reporting on dates with respect to the system Financial Year Start month, configured in *General Settings*.

Importantly, these tokens take account of system configured planning periods, including split periods and where a period may be set to start or end outside of the calendar month.

The new tokens are:

- **#PP-BOFY#** - The date of the first day of the current financial year
- **#PP-EOFY#** - The date of the last day of the current financial year
- **#PP-BOFQ#** - The date of the first day of the current financial quarter
- **#PP-EOFQ#** - The date of the last day of the current financial quarter

Example where the system Financial Year Start Month is **June**

First planning period of June 2022 begins: **30th May 2022**

Period Start	Period End	Month
23/05/2022	29/05/2022	May 2022
30/05/2022	05/06/2022	June 2022
06/06/2022	12/06/2022	June 2022

Last planning period of May 2023 ends: **4th June 2023**

Period Start	Period End	Month
22/05/2023	28/05/2023	May 2023
29/05/2023	04/06/2023	May 2023
05/06/2023	11/06/2023	June 2023

#PP-BOFY# and **#PP-EOFY#** would therefore reference 30th May 2022 and 4th June 2023, respectively, when used during the current financial year.

Similarly, with a June financial year start, the current financial quarter (Q2) for September starts on 5th September, based on system configured planning periods.

Period Start	Period End	Month
01/09/2022	04/09/2022	August 2022
05/09/2022	11/09/2022	September 2022
12/09/2022	18/09/2022	September 2022

#PP-BOFQ# therefore references 5th September 2022 when used during the current financial quarter.

As per current functionality, tokens can be extended to future or past periods. Based on the previous example, **#PP-BOFY+2#** would reference the start period of the financial year beginning June 2024.

Additional tokens for #PP-BOM# and #PP-EOM# (for planning period months) will be delivered in a future release.

Please also refer to the following Data View Changes for additional data view fields to enhance reporting on Financial Year and Quarter End.

Data View Changes

The data views listed below have been amended to additionally include fields for **Financial Year End** (and **Financial Year End Quarter**, where specified), to reflect the year in which the current financial period ends.

For financial years that do not run from January to December, we assume that "***Fiscal Year 2023***" is generally referred to the financial period ending in 2023, such as June 2022-May 2023 (for example).

Please note, to ensure any existing reports and report filters remain unaffected, the existing **Financial Year** and **Financial Quarter** fields in these data views continue to operate as before, reflecting the financial year start as specified in General Settings.

Data View	New Fields
Budget Forecast Comparison v6.0.6	Financial Year End
Forecast Benefit Data v6.0.9	Financial Year End
Forecast Demand Data v6.0.16	Financial Year End
Forecast Demand Monthly Data	Financial Year End
Forecast Demand Only Data v6.0.4	Financial Year End
Forecast Expenditure Data v6.0.12	Financial Year End
Forecast Summary Data v6.0.18	Financial Year End
Resource Demand Data v6.0.5	Financial Year End
Expense General Data v6.0.7	Financial Year End, Financial Year End Quarter
Resource Expected/Planned/Actual Calendar Data v6.0.7	Financial Year End, Financial Year End Quarter
Time and Expense General Data v6.0.7	Financial Year End, Financial Year End Quarter
Timesheet General Data v6.0.15	Financial Year End, Financial Year End Quarter

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