KeyedIn Enterprise
v7.6
Autumn 2022 Technical Release

Release Guide

Version 7.6.0

November 2022

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
0.1	27/09/2022	All	All	J Atherton	
1.0	10/10/2022	All – minor changes	All	J Atherton	
1.1	04/11/2022	Dataview Changes, Planning Period Month tokens	All	J Atherton	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	10/10/2022	Matthew Muldoon – Chief Product Officer
1.1	08/11/2022	Matthew Muldoon – Chief Product Officer

Document Authorization

Version Number		
1.0	13/10/2022	Paul Gleghorn - SVP, Technology and Architecture
1.1	08/11/2022	Paul Gleghorn - SVP, Technology and Architecture

Overview of Service Changes

	Fixes	Enhancement
Web Application	✓	✓
Mobile Application	✗	✗
Mobile Services	✗	✗
V3 API	✗	✓
V7 Core API	✗	✗
V7 Data API	✓	✓
Enterprise Core API	✓	✓
Enterprise Data API	✓	✓
Enterprise Planning API	✓	✓
Enterprise Time/Expense API	✓	✓
Data Views	✓	✓

Release Summary

KeyedIn Enterprise's Autumn 2022 Release, v7.6, is a technical release which rolls out the remaining entities to our recently introduced Enterprise API. Additionally, this release includes a small number of usability improvements with a new reporting chart type and an alternative, percent-based allocation method of defining Task and Assignment effort within the Task Planning Gantt.

Please note – the previously communicated improvements to Dashboard loading will now be delivered in the next update release, 7.6.1.

Highlights of New Features and Improvements

New APIs

APIs for the remaining* business and system entities including Projects, Tasks, Assignments, Deliverables, Actions, Risks and Issues are now available in the Enterprise API.   Please refer to the technical API documentation for your region for further details on usage.

UK: https://keyedinenterprise.co.uk/api/docs/
US: https://keyedinenterprise.com/api/docs/
AUS: https://keyedinenterprise.net/api/docs/

* Please note, the Forecasting API will be delivered with the next major release, V8, as part of our enhanced Forecasting development.

Improvements to Dashboard loading with Refresh All capability (due 7.6.1)

Chart and Data widgets on Views and Dashboards will be fully refreshed on demand with a single click, rather than individually. Additionally, all Dashboards and Views will load asynchronously, displaying the data on widgets and databoxes when ready removing the need to wait for all processing to complete.

New Chart Type – Heat Map

A new chart type of *Heat Map* has been introduced to the enhanced report writer providing additional capabilities to summarise and visualise data, such as Risks and Issues and is available on both widgets and reports.

% Based Task and Assignment Effort Allocation for improved Effort synchronisation

A new optional Task Planning feature to allow % based task and assignment effort allocation can be enabled for individual Projects to help keep Task effort in sync with, or proportional to, Task Duration. Similarly, Assignments can be maintained based on specified % of Task Effort from the Task Duration and % Allocation.

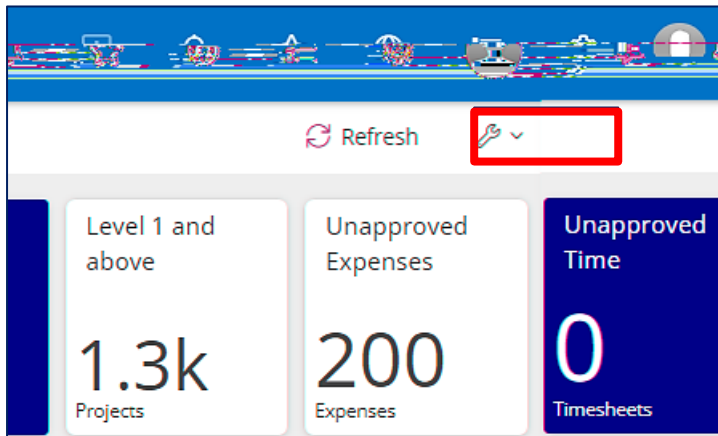# Views/Dashboards Loading Improvements with 'Refresh All' Feature (due 7.6.1)

Feature Setup

There is no additional setup required for this feature.

Feature Usage

A new Refresh button is shown on the following dashboard locations:

- Projects Home Views
- Custom Dashboards
- My Work (all Views)
- Insights
- Portfolio Analysis Dashboard

When the **Refresh** button is selected, only the widgets on the current dashboard/view are refreshed. The widgets will load asynchronously with the latest data, as and when they are ready.
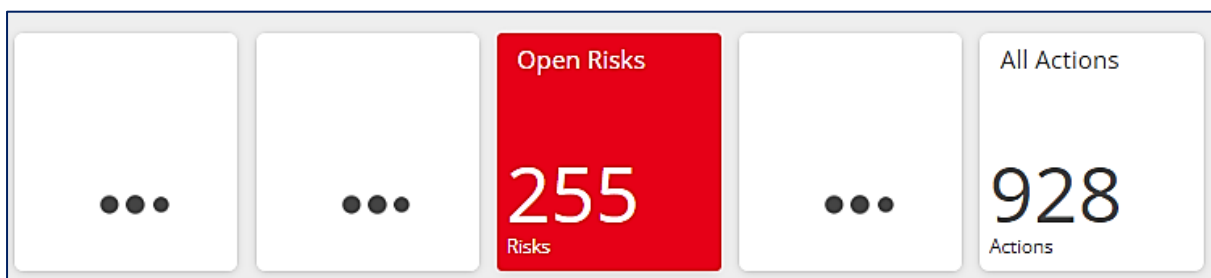
In addition to the new Refresh button, all dashboards and views will load asynchronously upon initial load, e.g., when you first navigate to that specific view after logging in.
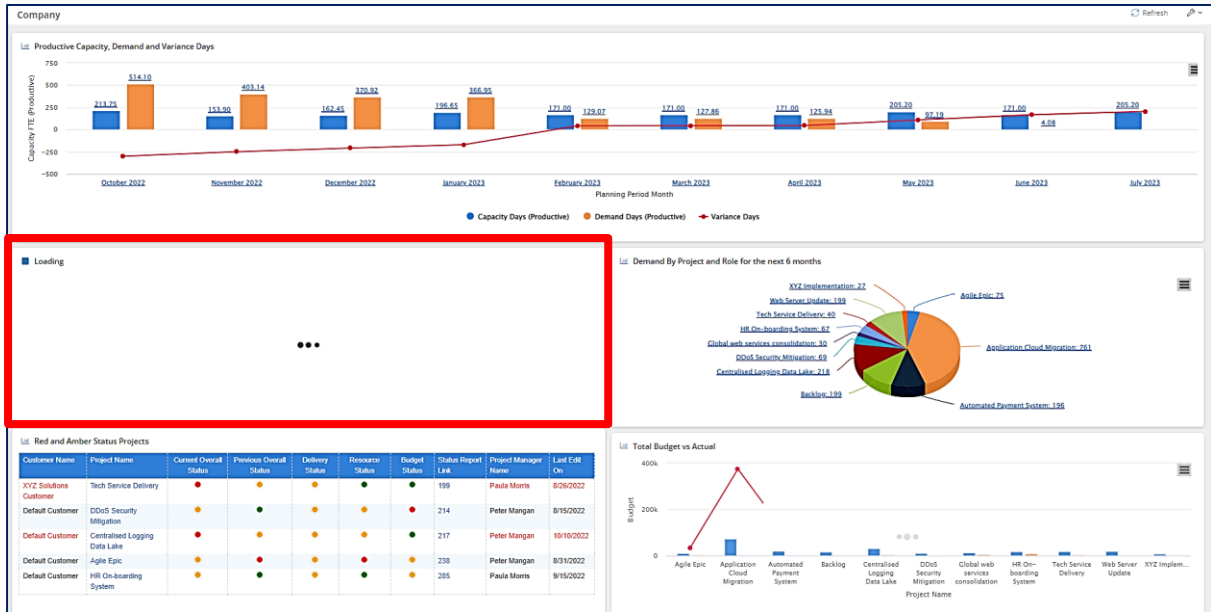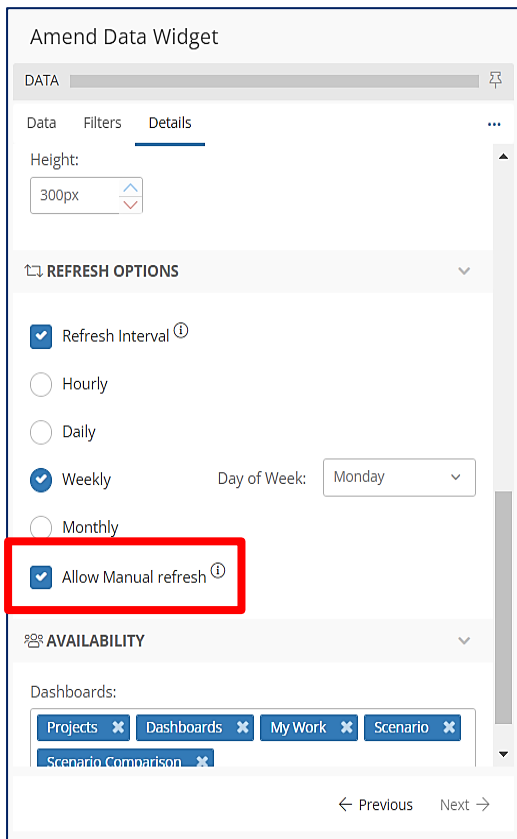

As always, you can see when a widget was last refreshed by selecting the ⓘ icon when you hover.
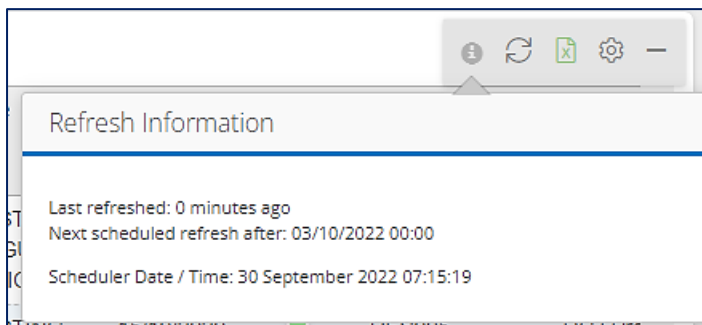
If you do not want a custom widget to refresh manually, there is the option via the widget configuration to deselect **Allow Manual refresh**.
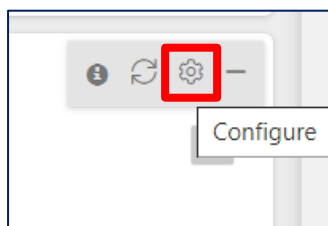
Navigate to the **Details** tab and the **Allow Manual refresh** option is available under Refresh Options.
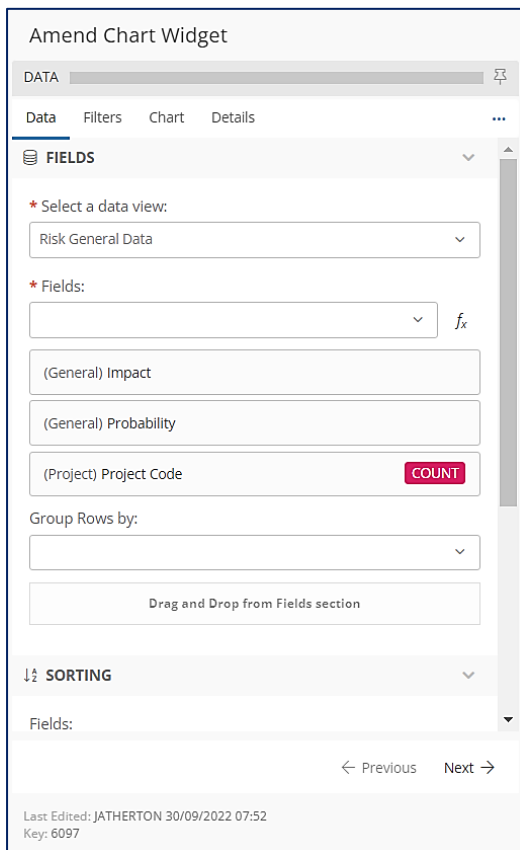
New Chart Type – Heat Map

Feature Setup

There is no setup required for this new chart type, the new Heat Map chart will be available for selection upon creating a new Chart Widget or Chart Report.

Feature Usage

The new Heat Map chart type works in a very similar way to all other chart types and is available within all dashboards including custom, when configured as a widget. An example of how to configure a basic risk heat map (probability vs impact) is provided below.

First, select a data view and the associated fields along with any filter(s) required. An aggregation type (typically a count) is required for the numbers that can be reported on.

On the **Chart** tab, select the Heat Map chart type.
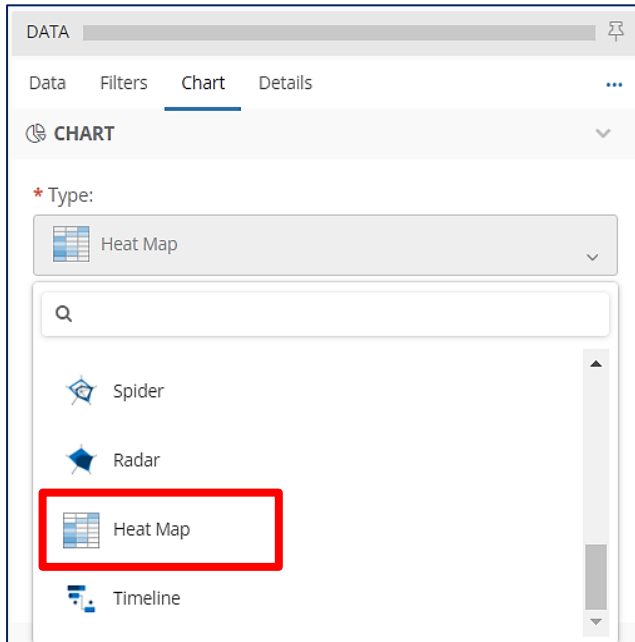
The X and Y-axis options define the columns and rows on the heat map respectively. The Primary Value defines the number/count displayed on the heat map tile.

Note: Valid data types are restricted to these custom field types: **Number Lists**, **Keywords** and **Dynamic Keywords**. Multi-select custom fields are **not** compatible. The Primary Value must have a numeric aggregation, e.g., count, min/max.
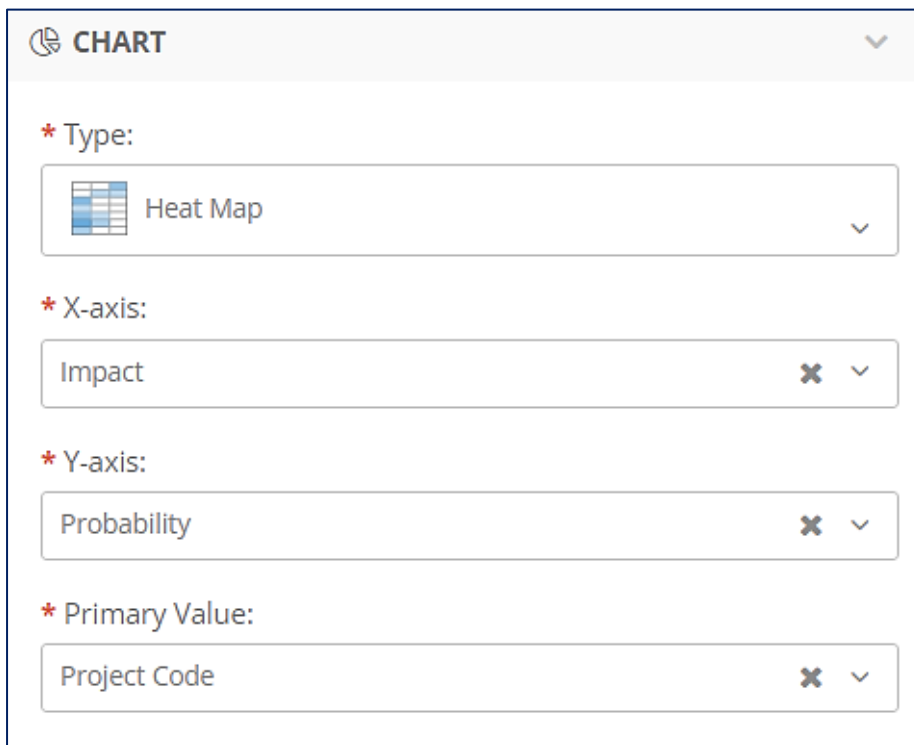
Once the X/Y-axis and the Primary Value are set, the heat map can be drawn (as shown in the preview).

Colour ranges can be customised, by default there is a single colour (blue) which applies a gradient shaded colour from the lowest to the largest values. Multiple colours can be added using the **Add Range** button and the selected colour will apply to any values falling within that percentile.

If the number lists, keywords or dynamic keywords selected for the X and Y axis have any stored values associated with them, **Display Possible Scores** can be selected from the **Display** section. Number lists have their own definable values, whereas keywords and dynamic keywords will use the value corresponding to the sort order (e.g., if there are 3 values on the X axis this will run from 1-3 from left to right). This will take the value in X and multiply it with the value in Y across the heat map grid and display the score in the top right of each tile. Once selected, the colour range(s) are now applied to the scores instead of the primary value (see Example 1- page 11).
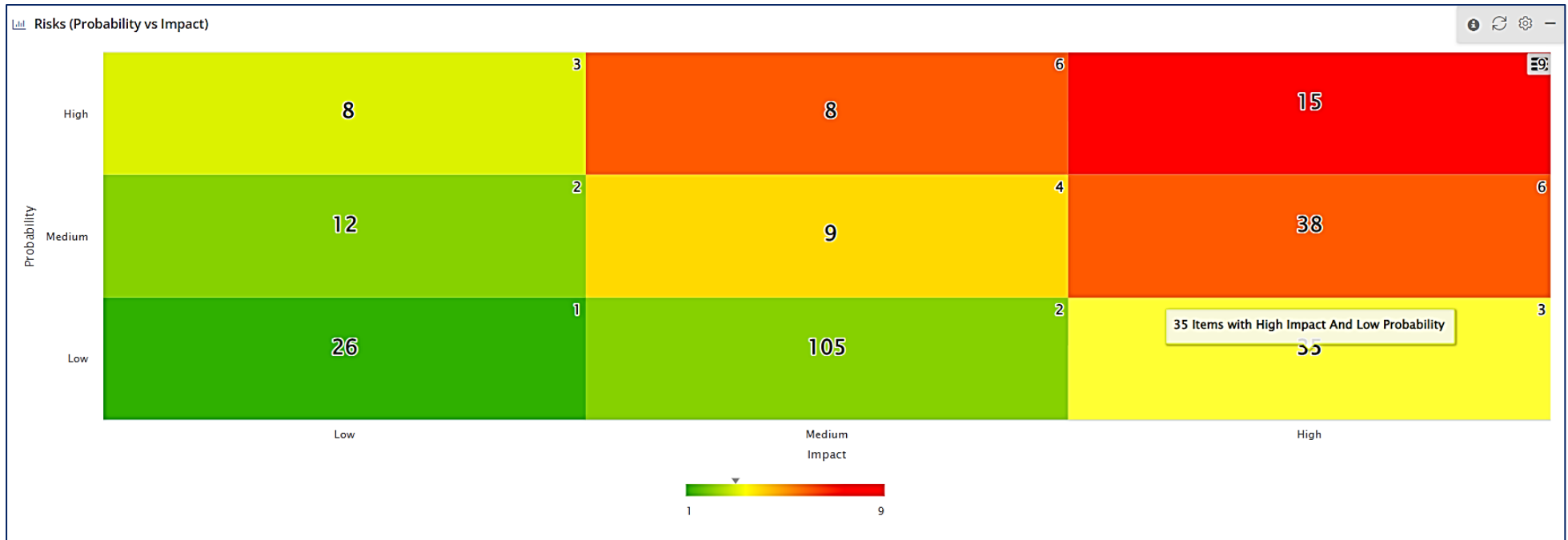

If **Exclude Unspecified Values** is deselected, any additional row and column will be added to the heat map displaying any unspecified values (see Example 2 – page 12).

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Example 1

Example 1 shows a heat map using multiple colour ranges (green being lowest, red being highest) with the Display Possible Scores and Exclude Unspecified Values checkboxes selected. The scores range from 1-9, as shown by the legend, with 1 being low probability (1) x low impact (1) and 9 being high probability (3) x high impact (3). Hovering over any tile will display text describing the number of items within that specific tile.

Example 2

Example 2 shows a heat map using the default colour range with both Display Possible Scores and Exclude Unspecified Values checkboxes **deselected**. As shown by the legend underneath the heat map, the range goes from 0-105, with the higher values being a darker shade of the selected colour. As Exclude Unspecified Values is deselected, there is an additional column and row added to the chart. As Display Possible Scores is not checked, the colour range goes from the Primary Value instead of the scores as shown in Example 1.

📊 **Risks (Probability vs Impact) inc. Not Specified**

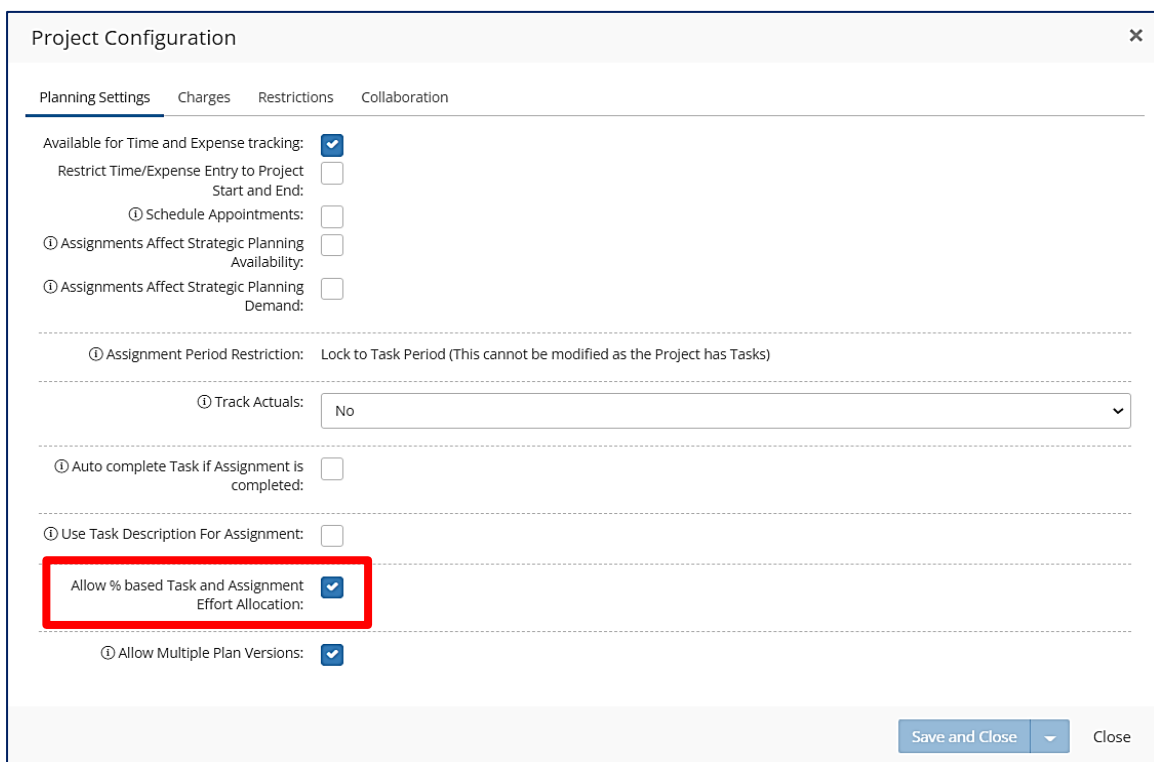| Probability	(Not Specified)	Low	Medium	High
High	0	8	8	15
Medium	0	12	9	38
Low	2	26	105	35
(Not Specified)	0	0	0	0

Impact

0   105
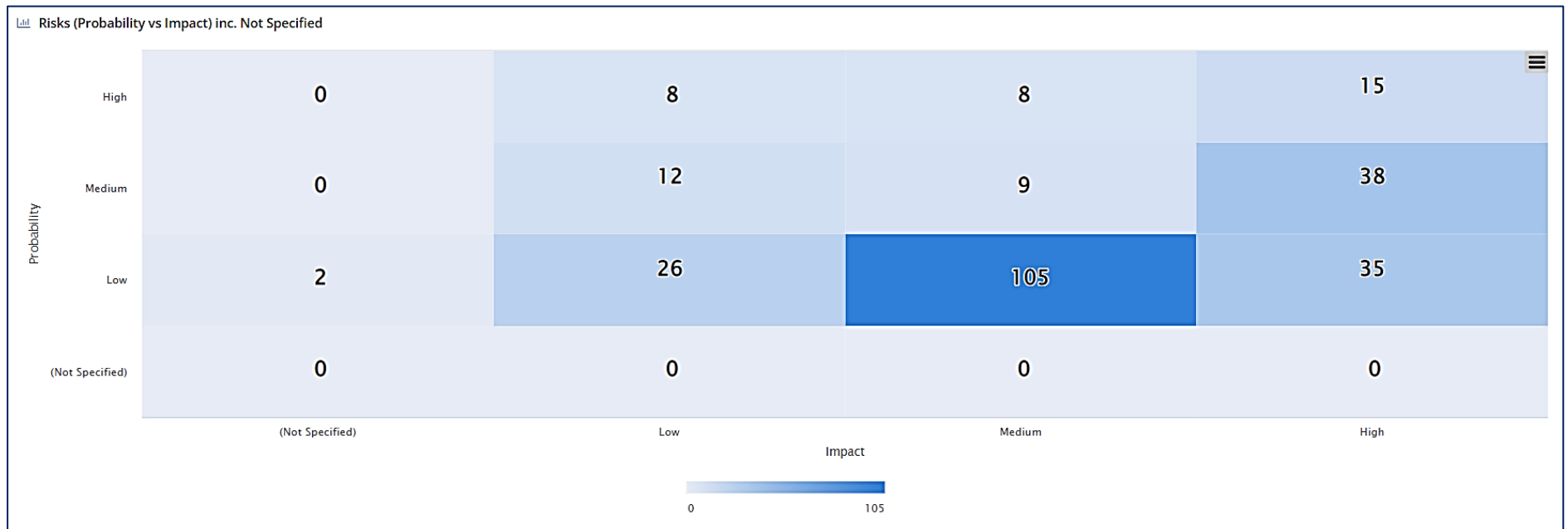
Task Gantt Planning Enhancement to allow % Based Task and Assignment Effort Allocation

An enhancement to the Task Planning Gantt allows Task and Assignment effort to be set and maintained as a percent of Task Duration and Task Effort, **respectively**.

Feature Setup

Enable **Allow % based Task and Assignment Effort Allocation** feature in Project Configuration > Planning Settings.

Note: The Assignment Period Restriction must be set to **Lock to Task Period** for this feature to be enabled. Also, Schedule Appointments cannot be used in conjunction with Allow % based Task and Assignment Effort Allocation. If the previous criteria are met, then Allow % based Task and Assignment Effort Allocation is optional and can be turned on and off. This new setting can also be updated via dataload and included on template projects.

Feature Usage

% Allocation field on the Task panel

When the feature is enabled, a new % Allocation column on the Task Gantt panel provides a three-way link between Task Duration and Effort

- Changing % Allocation updates the Task Effort leaving Duration unchanged. Effort = Duration x % Allocation

- Similarly, changing the Task duration updates the Task Effort leaving the % Allocation value unchanged.

- Changing the Effort values updates Duration leaving % Allocation unchanged. *Duration = Effort / % Allocation*

Note: For new Tasks, % Allocation will default to either 0% or 100% based in System Config Planning setting for Set Effort to Duration on new Tasks.

If attempting to amend Effort when % Allocation is 0, a prompt will warn that % Allocation must be greater than 0 in order to change effort.

If attempting to set effort against a milestone Task (with 0 duration) a pop-up will show indicating this will result in the milestone becoming a standard Task, where the Duration will be determined by the Effort and % Allocation

Changing the effort will update the duration resulting in this Task no longer being a milestone task.

Select OK to continue, or cancel to keep the existing effort.

| OK | Cancel |

% Task Effort Field on the Assignment Panel

A new **% Task Effort** column on the Task Gantt Assignment panel provides a three-way link between Task Effort and Assignment Effort.

For example, if a Task has a standard duration and effort of 5 days, % Task Effort on the first assignment defaults to 100%, so Assignment Effort = Task Effort.

	Resource		Assignment	Start	Finish	Duration	% Task Effort	Effort	Confirmed
○	Jane Peters	🔍 👤		Mon, 3 Oct 2022	Fri, 7 Oct 2022	5	100	5 📄	▾ Yes

If the Task Effort is greater than the Task Duration, the initial Assignment effort will not exceed the Assignment duration (as per current behaviour) and the % Task Effort will reflect this.

The % Task Effort can be manually changed, and this will amend the Assignment Effort and Allocated amounts accordingly.

test (Draft)

	Id	Descripti...	Start	Finish	Duration	% Allocation	Effort	Allocated	Confirmed
○	1		Mon, 3 Oct 2022 📅	Fri, 7 Oct 2022 📅	5	100	5	2.5	▾ Yes

	Resource		Assignment	Start	Finish	Duration	% Task Effort	Effort	Confirmed
○	Jane Peters	🔍 👤		Mon, 3 Oct 2022	Fri, 7 Oct 2022	5	50	2.5 📄	▾ Yes

Any additional assignments added will automatically total to 100% Task Effort.

	Resource		Assignment	Start	Finish	Duration	% Task Effort	Effort		Confirmed
○	Jane Peters	🔍👤		Mon, 3 Oct 2022	Fri, 7 Oct 2022	5	50	2.5 📋	▼	Yes
○		🔍👤		Mon, 3 Oct 2022	Fri, 7 Oct 2022	5	50	2.5 📋	▼	Yes
○		🔍👤		Mon, 3 Oct 2022	Fri, 7 Oct 2022	5	0	0 📋	▼	Yes

If the Task Effort is changed, this will also update the Assignment Effort, based on the existing % Task Effort value.

		Id	Outline	Description	Start	Finish	Duration	% Allocation	Effort	Allocated	Confirmed
⇕ ○		1	1		Mon, 3 Oct 2022 📅	Fri, 7 Oct 2022 📅	5	100	5	5	▼ Yes

	Resource		Assignment	Start	Finish	Duration	% Task Effort	Effort		Confirmed
○	Jane Peters	🔍👤		Mon, 3 Oct 2022	Fri, 7 Oct 2022	5	100	5 📋	▼	Yes

Note: Assignments can have Usage, but effort will need to be maintained manually and won't respond to changes in the % Task Effort.

Important Points to Note

- Task effort **cannot** be maintained outside of the Task Plan (e.g., on the Task widget or progress review screen). This is because duration cannot be changed anywhere other than on a task plan. The Effort field will be read only.
- Assignment Effort **can** be maintained outside of the Task Plan. Changing the assignment Effort also updates % Task Effort accordingly and vice versa)

Effort

% Task Effort:
100

* Effort:
5   📋   Usage

Actual Effort:
0

Allocated Effort:
0

Unallocated Effort:
5

Percentage Complete:
0

- % Allocation is available on Task search and % Task Effort is on the Assignment Search and within reporting (planning general data view)
- If the **Allow % based Task and Assignment Effort Allocation** feature is turned off within project configuration after data has been entered, the % Allocation and % Task Effort values will be deleted but the existing effort for Tasks and Assignments will be retained.

Additional Tokens for Planning Period Months

Two additional tokens are available for use on search screens and in the report writer to facilitate searching and reporting on dates with respect to the system configured Planning Period months.

The new tokens are:

- **#PP-BOM#** - The date of the first day of the current planning period month
- **#PP-EOM#** - The date of the last day of the current planning period month

These are supplementary to the tokens listed below for Financial Year and Financial Quarter, previously released in v 7.5.1:

- **#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

Data View Changes for v7.6

A summary of Data View changes since the last major release (v7.5) can be found below.

New Data Views

Data View	Description
Task Assigned vs Timesheet Actuals Data	New Data View to show Task Assigned vs Timesheet Actuals
Task Monthly Cost Summary	New Data View to display Monthly Task Assigned Cost rolled up to parent tasks
Task Weekly Cost Summary	New Data View to display Weekly Task Assigned Cost rolled up to parent tasks

Updated Data Views

Data View	New Fields
Planning General Data v6.0.23	% Allocation, % Task Effort, Task Cost
Billing Information Data v6.0.6	Invoice Key, Invoice Reference, Invoice Number
Budget Forecast Comparison v6.0.6	Financial Year End, Financial Year End Quarter
Forecast Benefit Data v6.0.9	Financial Year End, Financial Year End Quarter
Forecast Demand Data v6.0.18	Financial Year End, Financial Year End Quarter, Project Type
Forecast Demand Monthly Data v6.0.4	Financial Year End, Financial Year End Quarter
Forecast Demand Only Data v6.0.20	Financial Year End, Financial Year End Quarter
Forecast Expenditure Data v6.0.12	Financial Year End, Financial Year End Quarter
Forecast Summary Data v6.0.18	Financial Year End, Financial Year End Quarter
Resource Demand Data v6.0.6	Financial Year End, Financial Year End Quarter
Expense General Data v6.0.7	Financial Year End, Financial Year End Quarter
Resource Expected/Planned/Actual Calendar Data v6.0.8	Productive Actual, 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 not applied automatically. Please contact your customer representative for installation guidance if required.
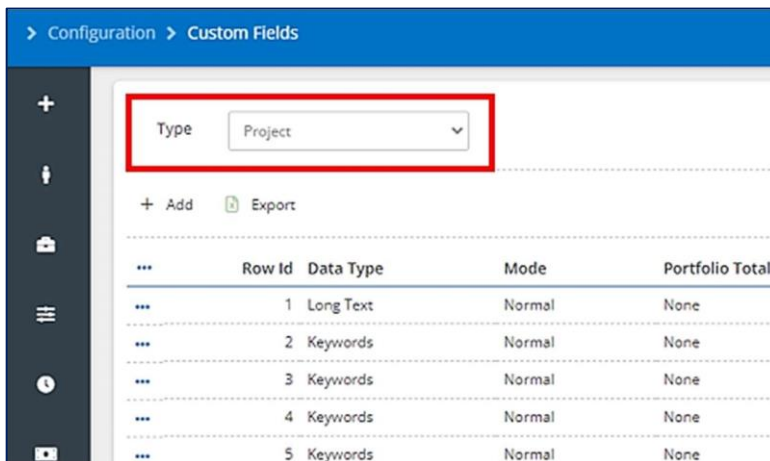
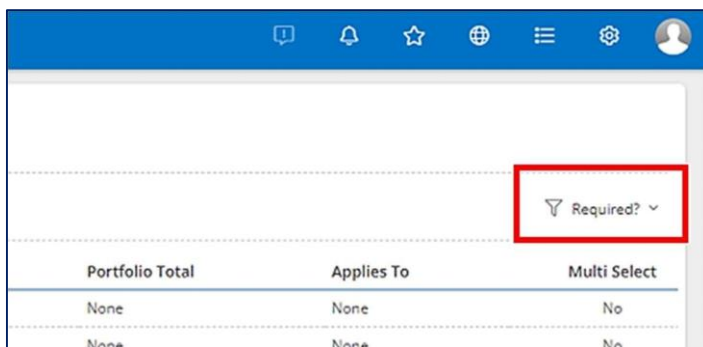# Summary of Additional Features since the last Major Release (v7.5)

7.5.1 (September 2022)

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.
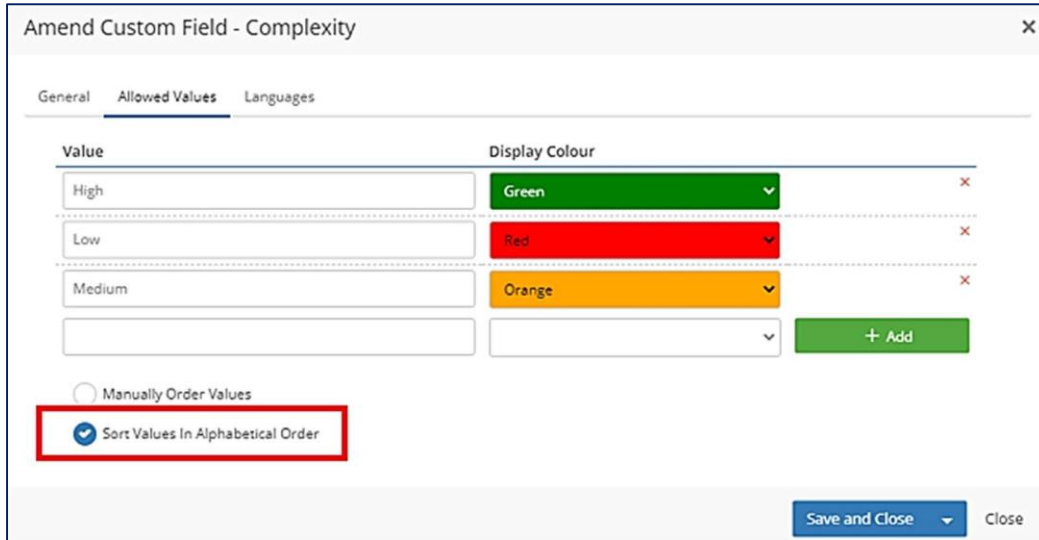

This change also applies to new values created by users "on the fly" for **Dynamic Keyword** custom fields, such as on the Project record. In the example below, adding a new location of 'Manchester' will automatically sort the values in alphabetical order without the need to re-sort in the main configuration screen.
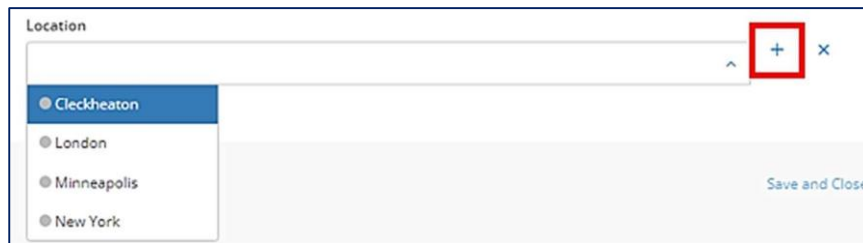
Please note, the automatic sorting will not currently apply to Dynamic Keyword values added on legacy technology screens (such as Actions, Risks and Issues), until these areas are rewritten.

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.
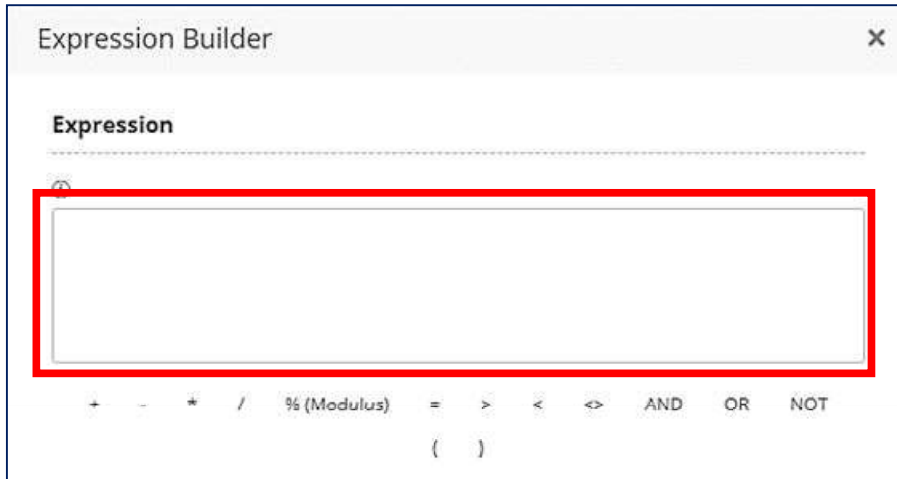
UI Feedback Improvements

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.