

KeyedIn Enterprise January 2023 v7.6.2 Update Release

Release Summary

Version 7.6.2

25th January 2023

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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	13/1/2023	ALL	ALL	J Atherton	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	13/1/2023	Matthew Muldoon – Chief Product Officer

Document Authorization

Version Number	Approval Date	Approved By (Name/Title)
1.0	13/1/2023	Paul Gleghorn – SVP, Technology and Architecture

Overview of Changes

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

Release Summary

KeyedIn Enterprise v7.6.2 is a scheduled maintenance update release with general support fixes and minor feature enhancements. Enhancements include improvements to Dashboard loading and a new eDays option on the Task Gantt.

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

Highlights of New Features and Improvements

Improvements to Dashboard loading with Refresh All capability

Chart and Data widgets on Views and Dashboards will be fully refreshed on demand with a single click, as well as 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.

eDays

New option available via the Task Gantt which allows individual tasks to be scheduled continuously (24 hours a day), ignoring non-working time.

Agency and Contractor added to Resources Search

Two new options available via the Column Chooser

Project Manager and Project Sponsor added as additional field options in Portfolio Kanban

Now available via the Additional Fields option within the Portfolio Kanban settings

Views/Dashboards Loading Improvements with 'Refresh All' Feature

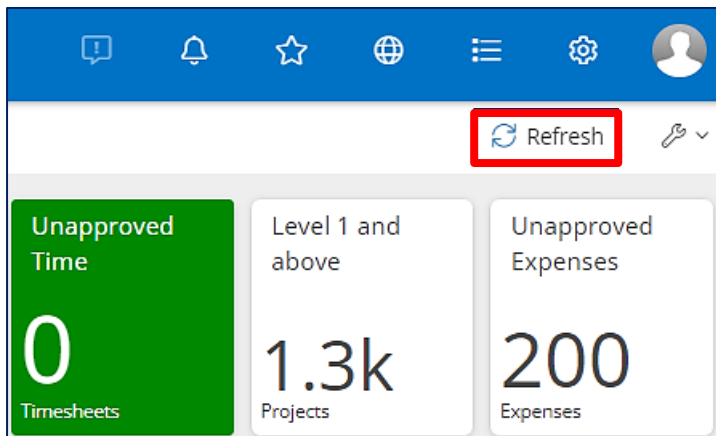
Feature Setup

There is no additional setup required for this feature.

Feature Usage

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

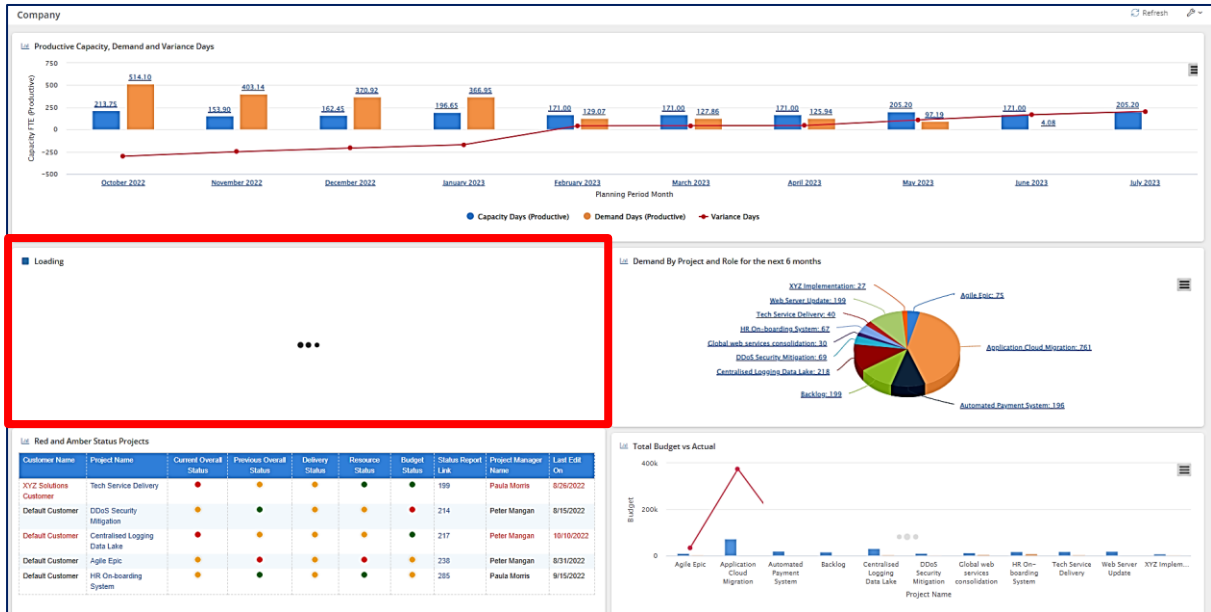
- Projects Home Views
- Custom Dashboards
- My Work (all Views)
- Insights
- Portfolio Analysis Dashboard



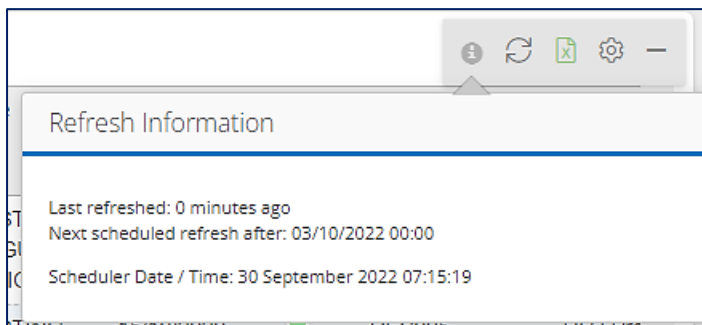
When the **Refresh** button is selected, only the widgets on the current dashboard/view are refreshed. The widgets will load asynchronously with the latest data, as and when they are ready.



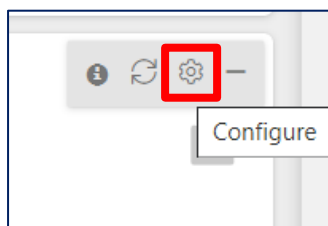
In addition to the new Refresh button, all dashboards and views will load asynchronously upon initial load, e.g., when you first navigate to that specific view after logging in.



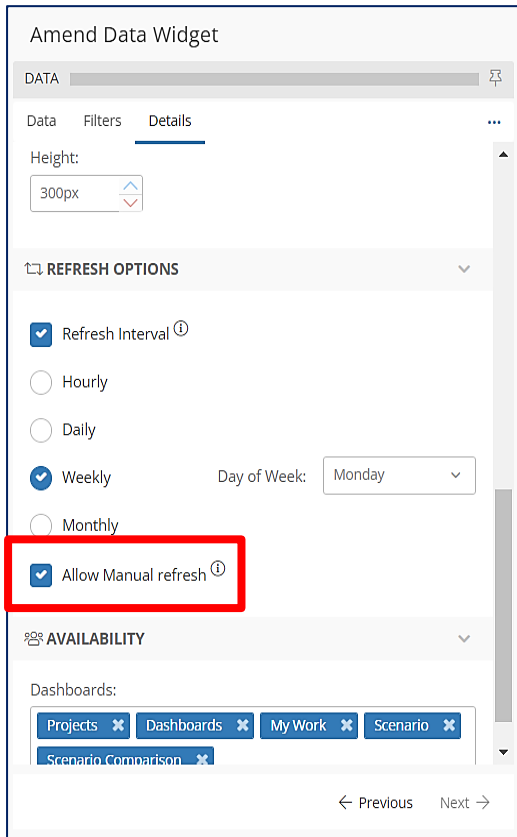
As always, you can see when a widget was last refreshed by selecting the icon when you hover.



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.



eDays

Feature Setup

Enable **Allow eDays Scheduling** feature in Project Configuration > Planning Settings.

Project Configuration

Planning Settings
Charges
Restrictions
Interested Resources
Project Links
Collaboration

Available for Time and Expense tracking:

Restrict Time/Expense Entry to Project Start and End:

① Schedule Appointments:

① Assignments Affect Strategic Planning Availability:

① Assignments Affect Strategic Planning Demand:

① Allow eDays Scheduling:

Feature Usage

Once Allow eDays Scheduling is enabled, there are new columns available on the task panel and the assignment panel labelled 'eDay'. This will allow you to select whether or not the task is scheduled using the project calendar, as it does currently, or you can select 'eDay' to reflect 24/7 eDays scheduling.

Project eDays Overview

Home
Tasks
Forecasts
Finance
Resource
Deliverables
Risks

Gantt Board

Version Control
Check In
Expand | Collapse
Save | Rollback
Import | Export

(Published)						
	Id	Outline	Description	eDay	Duration	Start
	1	1	Task 1	<input type="checkbox"/>	10	Fri, 13 Jan 2023

The eDays option will only affect Duration, it doesn't have any impact on Effort. If a Task has a Duration of 1, Effort will be reflected as 3 because this is now taking into account the project calendar, which is set to 8 hours a day for this particular project. So even though the Task has a 1 day Duration it will still take 3 days of human-effort to complete this Task. The Effort column can be manually changed without affecting the Duration.

Project eDays Overview									
Home Tasks Forecasts Finance Resource Deliverables Risks Issues Billing Approvals									
Gantt Board									
(Published)									
	Id	Outline	Description	eDay	Duration	Start	Finish	Effort	
	1	1	Task 1	<input type="checkbox"/>	10	Fri, 13 Jan 2023	Fri, 27 Jan 2023	10	
	4	2	Task 2	<input checked="" type="checkbox"/>	10	Fri, 13 Jan 2023	Mon, 23 Jan 2023	30	
	5	3	Task 3	<input checked="" type="checkbox"/>	1	Fri, 13 Jan 2023	Sat, 14 Jan 2023	3	

On the task edit screen you can see any Task which has been selected as an eDay, is running continuously for the number of calendar days selected.

Task

General Skills Assignments Predecessors

Details

ID: 4

Outline: 2

Project: PRJ037 | eDays Overview

Dates

* Start Date: 1/13/2023 8:00 AM

* End Date: 1/23/2023 8:00 AM

eDay:

If a Task has a predecessor which is an eDay, the eDay task will start immediately when the previous tasks ends and run for 24 hours (if the Duration is set as 1).

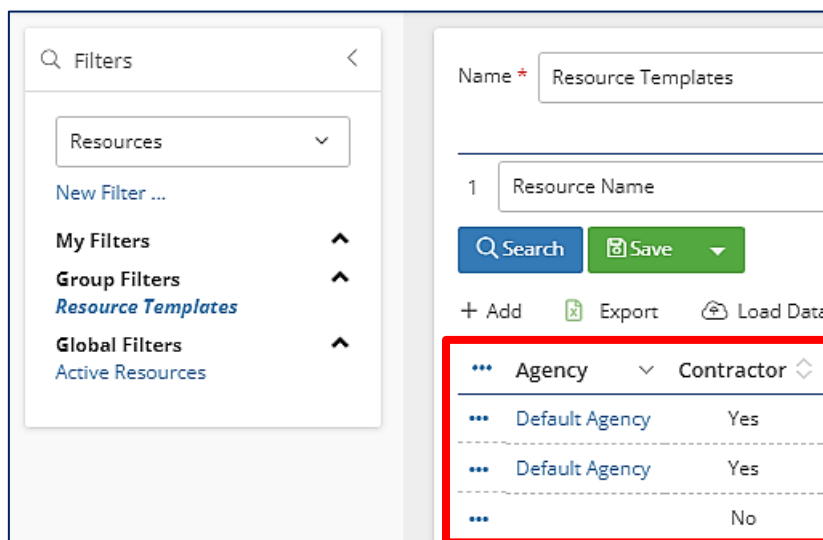
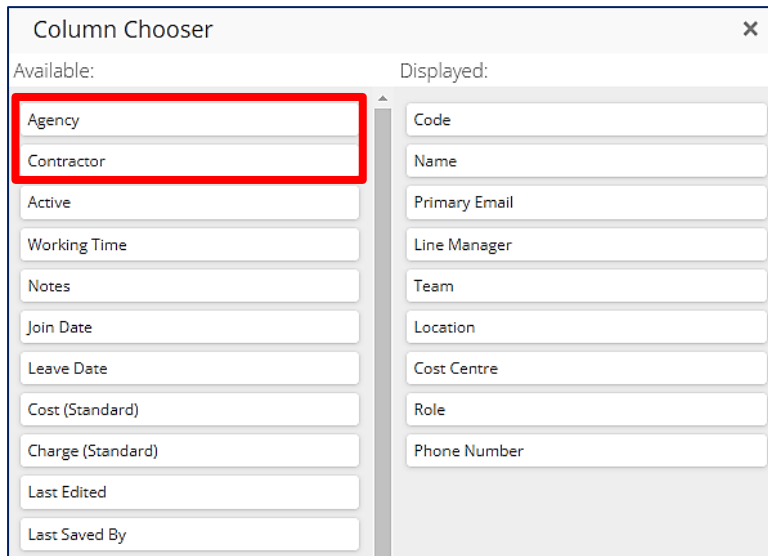
(Published)									
Outline	Description	eDay	Duration	Start	Finish	Effort	Allocated	Predecessors	
1	Task 1	?	10	Fri, 13 Jan 2023	Sat, 28 Jan 2023	13	0		
1.1	Task 2	<input type="checkbox"/>	10	Fri, 13 Jan 2023	Fri, 27 Jan 2023	10	0		
1.2	Task 3	<input checked="" type="checkbox"/>	1	Fri, 27 Jan 2023	Sat, 28 Jan 2023	3	0	4	

***Note – if there is a mix of eDay and non-eDay child tasks, the summary task will display '?' within the eDay column.**

Agency and Contractor added to Resources Search

Feature Usage

Agency and Contractor can be added to Resources via Search by using the column chooser.



Project Manager and Project Sponsor added as additional field options in Portfolio Kanban

Feature Usage

Project Manager and Project Sponsor can be added to the Portfolio Kanban view.

Standard Project (PPM)

Workflow WIP Limits

1. Project Initiation

2. Project Planning

3. Project Execution

4. Project Closure

On-Hold

Additional Fields

Field

Field

Portfolio Kanban

Workflow

+ Add

<p>1. PROJECT INITIATION 1</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>PRJ037 eDays Overview</p> <p>Project Manager George Harrison</p> <p>Sponsor John Lennon</p> </div>	<p>2. PROJECT PLANNING 0</p>
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Data View Changes

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

Data View	New Fields
Planning General Dataview v6.0.23	eDay
Planning Assignment Effort with Resource Charge Rates v6.0.9	eDay
Task Actual and Planned Data by Resource V7.0.4	eDay

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