

KeyedIn Enterprise March 2023 v7.6.4 Update Release

Release Summary

Version 7.6.4

March 2023

Contents

Document Management.....	2
Version Control.....	2
Document Approval.....	2
Document Authorization.....	2
Overview of Changes	2
Release Summary.....	3
Highlights of New Features and Improvements	3
Set Custom Dashboard as Startup Page	4
Feature Usage.....	4
Maximise option - Report based widgets	5
Feature Usage.....	5
Clear Project Fields - return workflow step	6
Feature Usage.....	6
Task Board Levels increased to 10 (from 5).....	7
Feature Usage.....	7
Data load Customer/Client Group	8
Feature Usage.....	8
Data View Changes	9

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section Number	Prepared By	Next Review Date
1.0	09/3/2023	ALL	ALL	J Atherton	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	10/3/2023	Matthew Muldoon – Chief Product Officer

Document Authorization

Version Number	Approval Date	Approved By (Name/Title)
1.0	10/3/2023	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	✓	✓
Planning API	✓	✓
Data Views	✗	✗

Release Summary

KeyedIn Enterprise v7.6.4 is an update release with general support fixes and minor feature enhancements. Enhancements include setting a custom dashboard as the startup page, clearing project fields on return workflow steps and an increase to the number of Task Board Kanban levels to 10 from 5.

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

Set Custom Dashboard as Startup Page

A Custom Dashboard can be set as a Startup Page, which is controlled via Logins.

Maximise option added to Report based widgets

Maximise option now available on Dashboards, Insights and Project Level views.

Clear Project fields on Return workflow step

Project Fields can be cleared on return workflow steps as they are no longer mandatory by default.

Task Board Levels increased to 10

The Task Kanban Board Levels have been increased to 10, the previous limit was 5.

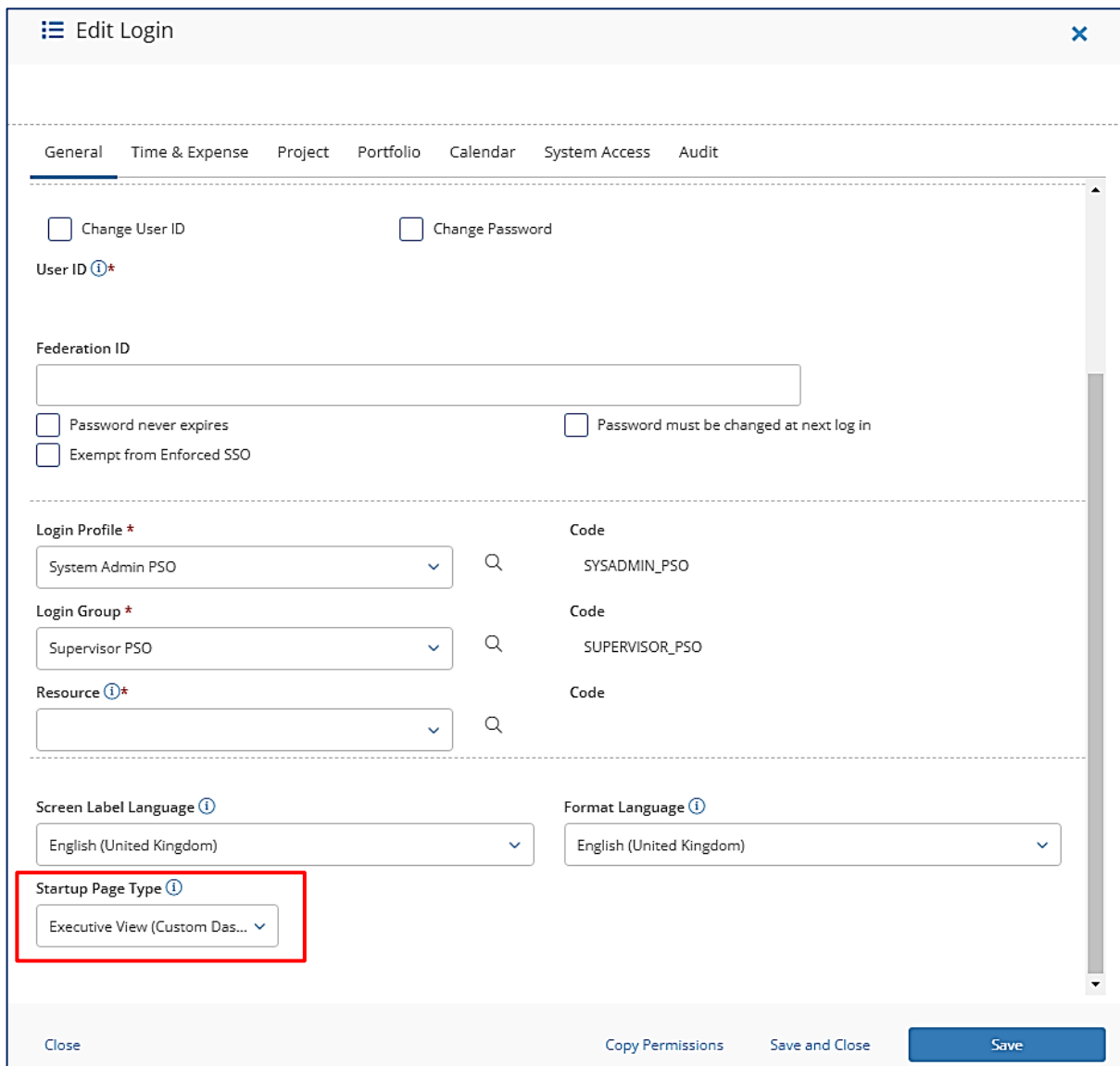
Data load Customer/Client Group

Customer/Client Group can now be data loaded using the Customer Group Code.

Set Custom Dashboard as Startup Page

Feature Usage

Any published custom dashboard, which an individual login has access to, can be set as their startup page. This option is set via Logins > General tab and is available alongside the current choices such as My Work, Projects, Timesheet Entry etc.



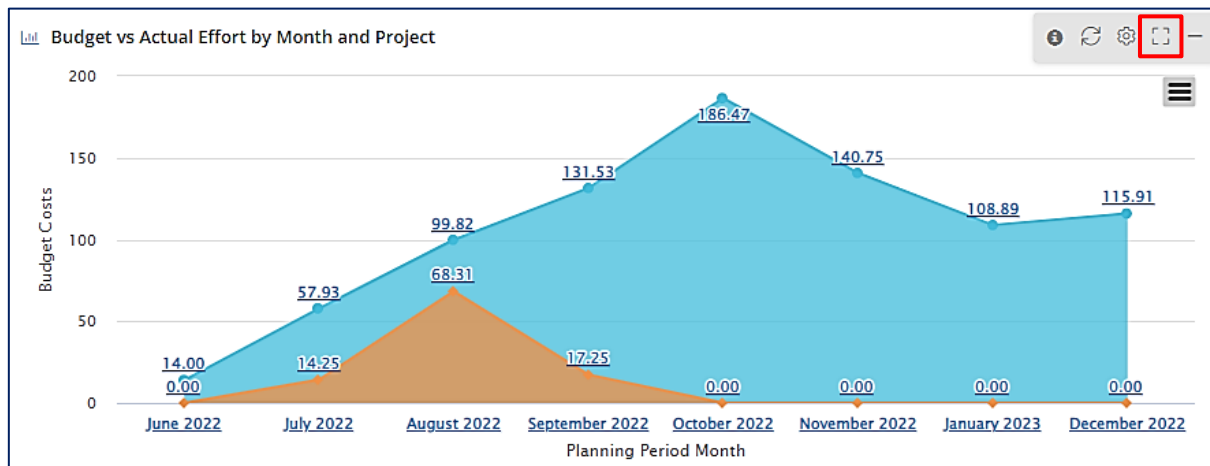
The screenshot shows the 'Edit Login' configuration window with the following elements:

- General Tab:** Includes checkboxes for 'Change User ID' and 'Change Password'.
- User ID:** A text input field.
- Federation ID:** A text input field.
- Security Options:** Checkboxes for 'Password never expires', 'Exempt from Enforced SSO', and 'Password must be changed at next log in'.
- Login Profile:** A dropdown menu set to 'System Admin PSO' with a search icon and a 'Code' field containing 'SYSADMIN_PSO'.
- Login Group:** A dropdown menu set to 'Supervisor PSO' with a search icon and a 'Code' field containing 'SUPERVISOR_PSO'.
- Resource:** A dropdown menu with a search icon and a 'Code' field.
- Screen Label Language:** A dropdown menu set to 'English (United Kingdom)'.
- Format Language:** A dropdown menu set to 'English (United Kingdom)'.
- Startup Page Type:** A dropdown menu set to 'Executive View (Custom Das...)', which is highlighted with a red rectangular box.
- Buttons:** 'Close', 'Copy Permissions', 'Save and Close', and a blue 'Save' button.

Maximise option - Report based widgets

Feature Usage

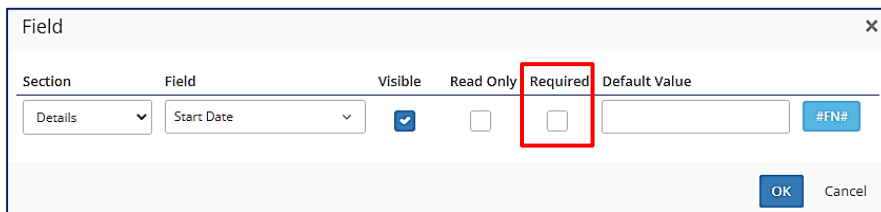
The maximise (and the subsequent minimise) option has been added to report based widgets. This is now available on all Dashboards, Insights and Project Level views.



Clear Project fields - Return workflow step

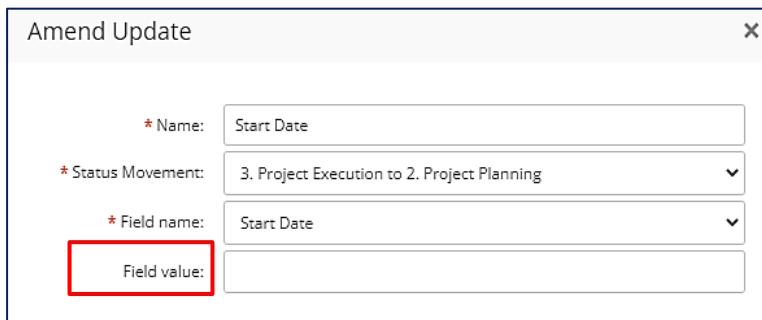
Feature Usage

Project fields can now be made non-mandatory on a return workflow step. This can be achieved from Configuration > Project Types > [Project Name] > Fields and by either adding a new field, or editing an existing, the Required check box can be left blank.



Section	Field	Visible	Read Only	Required	Default Value
Details	Start Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	#FN#

Now for any workflow step/update where the field is **not** set as required (see above), the field value will not be mandatory and can be left blank. The example in the screenshot below is for a return workflow step where the Start Date is mandatory in step 3 (Project Execution) but is not mandatory in step 2 (Project Planning).



* Name: Start Date

* Status Movement: 3. Project Execution to 2. Project Planning





















* Field name: Start Date

Field value:

Task Kanban Board Levels increased to 10 (from 5)

Feature Usage

There are now up to 10 Task Kanban Board Levels within the Task Kanban Board Configuration. The Task Board provides an interactive and agile view of tasks and this new update has doubles the number of board levels available.

Task Kanban Board Configuration			
Task Board Levels ⓘ			
Task Level	Icon	Display As	Icon Colour
Level 1		Tasks	 #22e332
Level 2		Stories	 #ed7321
Level 3		Features	 #3920e0
Level 4		Sprint	 #e6de6c
Level 5		Requirement	 #e0e0e0
Level 6			
Level 7			
Level 8			
Level 9			
Level 10			

Data load Customer/Client Group

Feature Usage

Customer (or Client) Group Code has been added to the Customer data load as a new optional field. This will assist with both new customer creation and amending existing customers.

Customer Dataload	
Create Data Template	Import Data
Country	<input type="checkbox"/>
Post Code	<input type="checkbox"/>
Website	<input type="checkbox"/>
Email	<input type="checkbox"/>
Phone	<input type="checkbox"/>
Fax	<input type="checkbox"/>
Agency	<input type="checkbox"/>
Account Code	<input type="checkbox"/>
Tax Number	<input type="checkbox"/>
Payment Terms	<input type="checkbox"/>
Customer Group Code	<input type="checkbox"/>
Last Modified	<input type="checkbox"/>

Data View Changes

There are no data view changes associated with this release.