KeyedIn Enterprise March 2023 v7.6.4 Update Release

Release Summary

Version 7.6.4

March 2023

Contents

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.
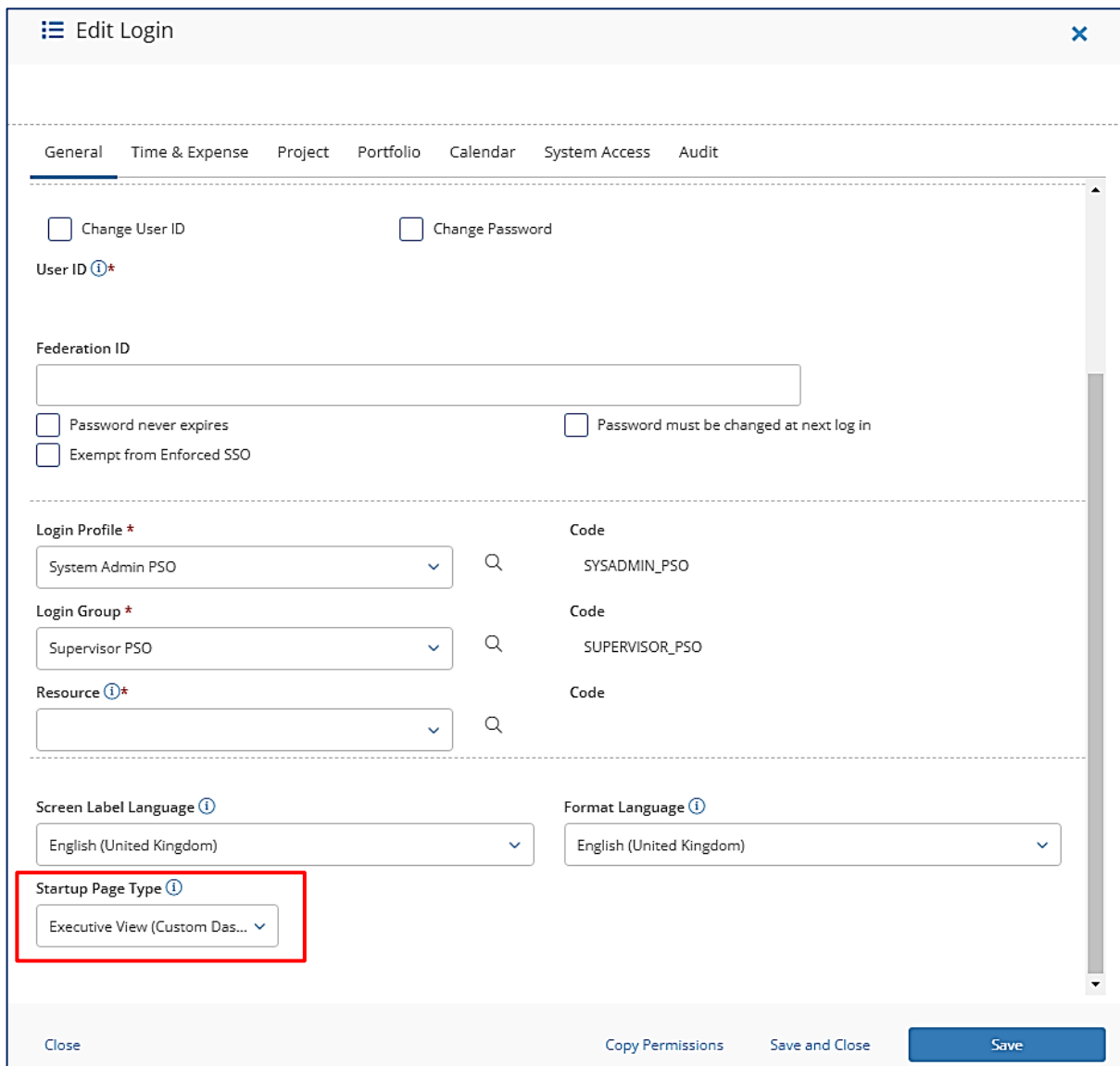
Data load Customer/Client Group

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.
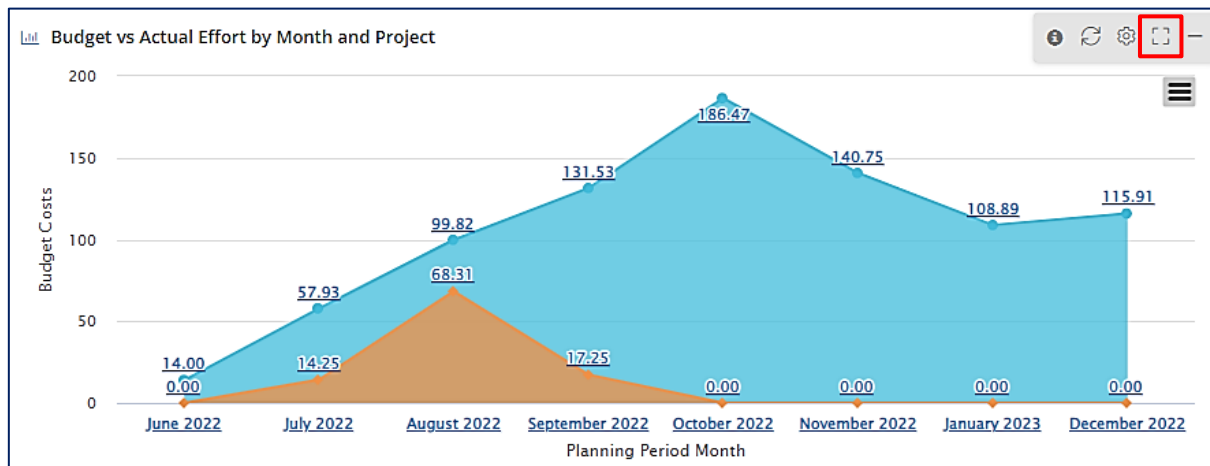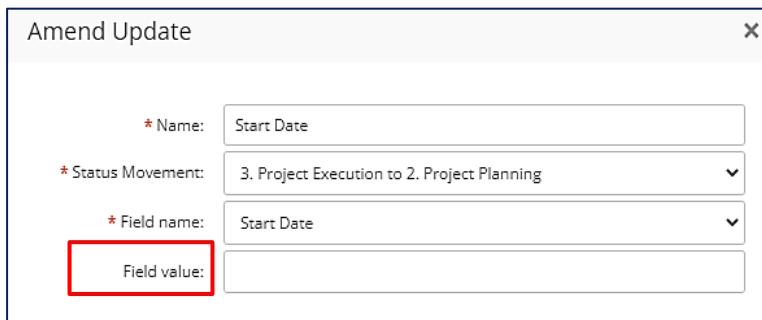
Maximise option - Report based widgets

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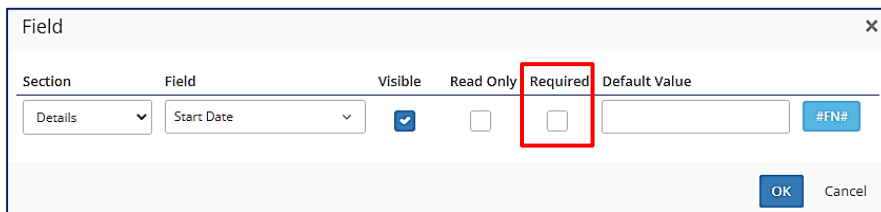
The maximise (and the subsequent minimise) option has been added to report based widgets. This is now available on all Dashboards, Insights and Project Level views.

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.

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).

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.

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.

Data View Changes

There are no data view changes associated with this release.