KeyedIn Enterprise
v8.0 Release

Release Guide

Version 8.0

November 2023

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	04/10/2023	All	All	J Atherton	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	17-10-2023	Colin Gibbins – Principal Product Expert

Document Authorization

Version Number		
1.0	19-10-2023	Terry Willans – Director, Global Security

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 v8.0 is a major release which provides PowerPoint Report capability across a group of Insight projects, Agile Team Resourcing improvements and the ability to enable a brand-new Forecasting experience when customers are ready.

Highlights of New Features and Improvements

Insight PowerPoint Reporting

This allows flexible creation of PPT reporting packs for different purposes and with project data groupings beyond those provided by the project hierarchy.

The new function allows custom PowerPoint template reports to be run from a dynamically filtered set of projects on the Insights view.

Agile Team Resourcing Improvements

Provides improved Team Request/Supply functions to better support Agile Team resourcing. This includes the ability to select more than one team and a new '%age of Capacity' option to fully allocate teams irrespective of existing commitments.

New Forecasting Experience

This feature can be enabled as part of a jointly planned Customer/KeyedIn system conversion activity. This ensures that current system operation remains the same until each customer is ready to switch to use the new experience and features.

Once enabled, the improvements are designed to:

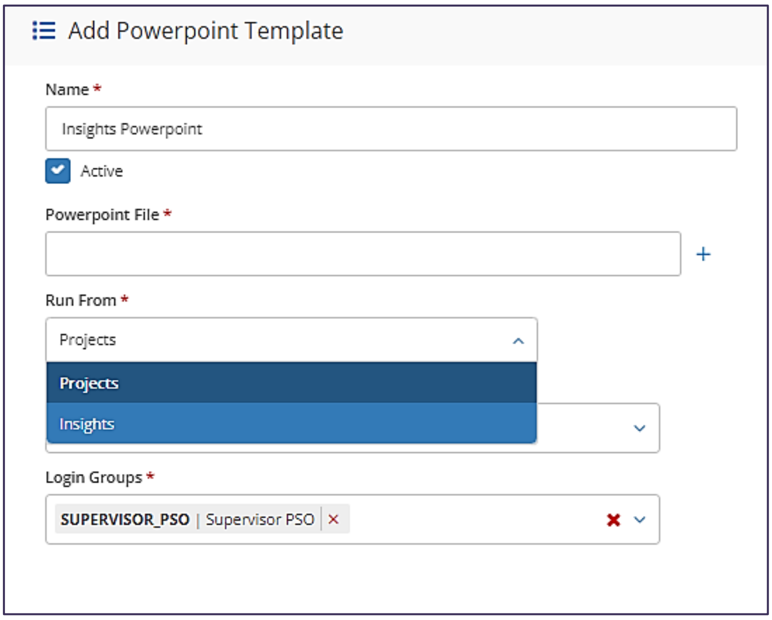
- Transform the User Experience to make forecasting much easier
- Provide "full visibility" forecasting across Demand, Availability, Supply and Actuals
- Expand financial system support and reporting by introducing Capex and Opex tracking
- Increase reporting capabilities through additional forecast, supply and actuals tracking detail
- Build on the API architecture for improved data loading, auditing & integrations

In addition to Forecasting, other system areas are also enhanced including Strategic Resourcing Demand/Supply, Time and Expense Recording, Agile Team Resourcing, Configuration permissions and Custom Fields.

Insight PowerPoint Reporting

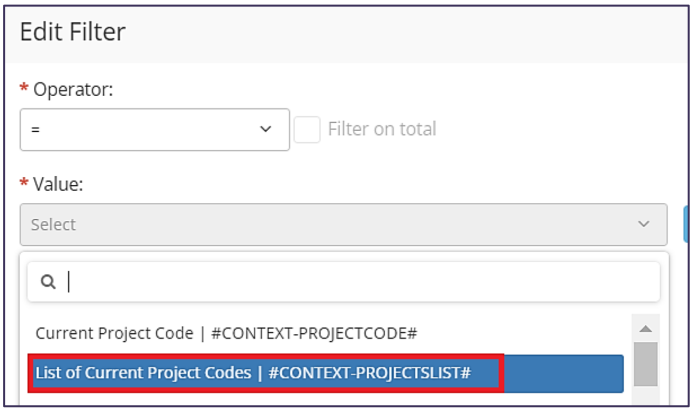
Feature Setup

During the PowerPoint Template definition, a new **Run From** option is provided. Selecting **Insights** will allow running from the Insights view instead of the Projects view.

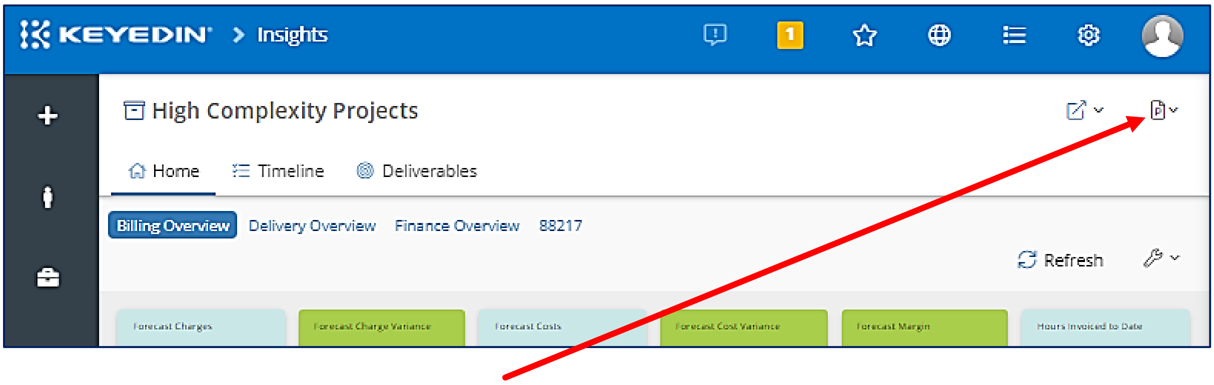


Please note that once a template has been saved, the 'Run From' selection cannot be changed.

The data reports that are referenced by the PowerPoint template will need to have their first filter set as **PROJECT CODE in #CONTEXT-PROJECTSLIST#** to return the data from the Projects contained in the Insight. (Projects related PPTs continue to use PROJECT CODE = #CONTEXT-PROJECTCODE#)



Feature Usage



Where to access any PowerPoint Template set to run from Insights.

The PPT production process is the same as when running from Projects – the template runs, gathering the data before producing a downloadable .PPT file for subsequent editing and saving.

Please note there is a limit of 30 Projects for the Insights PPT and 50 slides in total. If you need this limit increasing, please contact us to discuss your requirements.

Team Resourcing Improvements

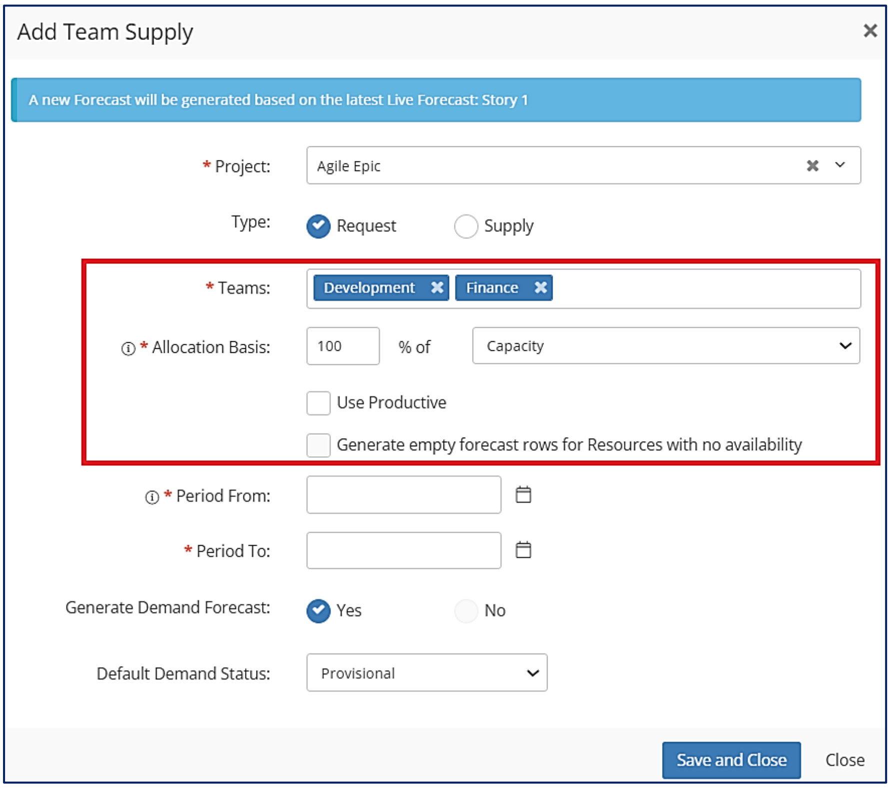
Feature Setup

There is no additional setup required for this feature, it becomes available immediately.

Feature Usage

We have added some new options when adding Team Supply (Resourcing > Resource Plan > Team Supply).

1. Multiple **Teams** can now be selected for processing
2. **Allocation Basis** has a new Capacity option, when selected this will include the Resource's full Capacity, taken from their Working Calendar.
3. Allocations can be reduced by using the '**Use Productive**' option, when enabled, to apply each Resource's Productive Capacity value.
4. When an included Resource has no availability, the ability to still **Generate Empty forecast rows** is provided.



New Forecasting Experience

Feature Setup

Please contact your KeyedIn Representative to discuss and arrange the switch-over process. This will involve data conversions and changes to system operation, as well as new settings and features that you may want to take advantage of. Any existing related integrations may also need to be reviewed to use new APIs.

A full set of user, configuration, API, and training materials are available when you are ready to switch-over and are not reproduced here.

The following is a summary of the new features and considerations.

New Features

General Enhancements	Description
New User interface	Includes new General and Audit tabs, smooth date period scrolling/zooming, field selection and screen column tailoring
Financial Treatment Type	An additional forecast row identifier related to the financial treatment of the costs – e.g., CAPEX, OPEX or Exceptional
Unique Identifier	An additional forecast row identifier means you can now split a forecast, for example, by the Workflow Phase. Other options are also available: Cost Centre, Agency, or a custom-defined set of up to 10 identifiers
Row custom fields	In addition to forecast wide custom fields, forecast row custom fields allow additional reporting data against individual rows
Additional data row visibility	Provides simultaneous visibility of Actuals, Availability, Supply, Cost or Charge rate information in addition to the forecast data
Forecast Search	The ability to search and filter Demand, Expense and Benefit rows for display and processing purposes
Excel data processing options	An Excel export and Forecast data load is now available to support initial forecast creation
Confidence Level setting	A new field allows the level of confidence in the forecast values to be specified to support better reporting and modelling
Forecast Start/End Date	New fields to show the Forecast Start/End date, and the ability to automatically update the Project Start/End date from them are provided
Visibility of Deliverables	A new panel shows the projects' key Deliverables to sense check the forecast profile against

Area	Specific Enhancement	Description
Expenses	**Expense Actual detail**	Expense Actuals are aligned against individual forecast rows instead of being included as a separate Expense Type summary. To facilitate this, Expense Actuals reference a new Expense Description field
	Provisional/ Confirmed Expenses	In addition to the existing Demand feature, Provisional/Confirmed status also now applies to Expense forecast rows
Resourcing	**Direct Demand/Supply links**	Instead of matching on Resource/Role/Team, Supply is now directly linked to Demand so that it can be more accurately aligned, tracked, and reported on
	Team Demand	Demand can be created in bulk for Resources from one or more selected Teams based on Availability or Capacity
	Skill level on Demand	The required skill level can now be specified on a demand row to help searching for Resources when Supplying
Admin	**New Status of Former Baseline**	This has been added so that forecasts that have been superseded by a more recent baseline are easily identified
	Exchange Rate processing	Exchange rate changes (multi-currency mode) now automatically update all non-baselined forecasts, without the need for corresponding planning rate changes
	New Delete permission	The ability to delete a forecast is now separate from the ability to edit forecasts to give extra control
	Audit Trail of changes	In addition to the current ability to view approved forecasts and baselines over time, changes to the forecast tab data are recorded down to the row level (period cell values are not specifically detailed)
	Expense Data load	The ability to data load the Treatment Type, Unique Identifier and Expense Description in bulk
	New Admin Utilities	New Timesheet Actual, Expenses Actual and Supply utilities are provided to maintain the Actual and Supply links

Switch over considerations

Item	Description
Project Workflows must be enabled	Systems that have not been enabled to use Project Workflows will not be able to use Enhanced Forecasting
The enhanced Task Gannt must be enabled	Systems that have not upgraded to use the new Gannt will not be able to enable the Enhanced Forecasting
Currency setting is at overall forecast level	In multi-currency systems, forecast rows are no longer able to have a different currency to the main forecast Any systems containing rows with different currencies to the forecast will not be able to use enhanced forecasting unless these forecasts are edited/removed
Resource Plan - Team Supply – Supply option is disabled	To minimize the creation and subsequent maintenance of unlinked Supply (where no Forecast demand exists for it) a new Team Request feature has been introduced on the Forecast to create the demand first The current ability to directly Supply a Team from the Resource Plan has been restricted so that only Team Requests are possible.
New data views are needed to report on enhanced forecasting features	Whilst existing data views will continue to work and handle multiple forecast rows, access to the new data fields and relationships used in Enhanced Forecasting will require new reports/widgets referencing new data views.

Extracts from the training guides showing some of the new features

New General tab for entering forecast wide information

Adding a Forecast – General tab

After clicking **Add,** the new empty Forecast opens on the General tab where forecast-wide data is captured:

Enter a unique Forecast **Name** for reference.

The **Status** defaults to Unapproved, but could be set to another unapproved status, if defined.

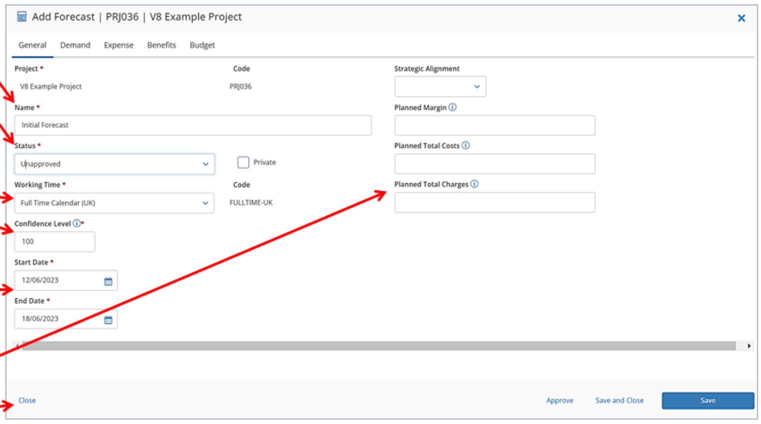
When enabled, **Private** can be used according to forecast confidentially.

Select a **Working time** to set the expected days per period and for use in FTE calculations.

Set the **Confidence levels** for use in reporting. This provides a range of possible forecast values.

Start Date and **End Date** can initially be entered to set the earliest and latest periods on the other entry tabs. Subsequently these fields are updated from the periods that have data entered for.

Any Forecast custom fields appear for entry on the right hand side of the dialog screen.



The options at the bottom apply to the entire forecast. Clicking **Close** will discard changes (after a warning). **Approve** (used after entering values on other tabs) will validate the forecast and then publish it to a Live status. **Save and Close** will add the forecast and close the dialog window. **Save** is similar to Save and Close, leaving the forecast open for further editing.

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New Demand tab for entering Role and Resource demand

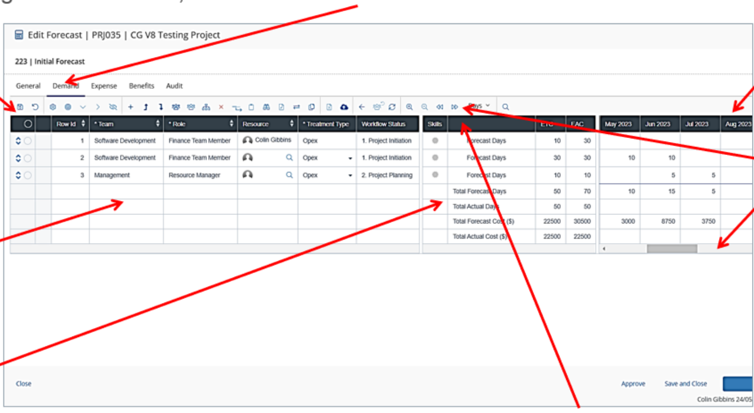
Adding Forecast Demand - Navigation

After completing the General tab, click on the Demand tab to forecast Roles and/or Resources.

The Tool Bar provides options that control the format of the display, as well as data entry functions.

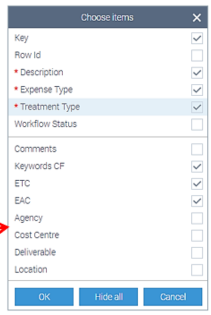
The left-hand section contains the unique row data fields.

The central section contains additional row data, totals and custom fields.



The right hand section is to display and edit data into periods.

Scroll periods using the bar and use [icons] to open more periods.



The columns visible in the left-hand and central sections are selected using the pop-out shown after "right clicking" when hovering over the column heading area. Changes to the selections are applied after clicking OK.

The column order can also be tailored using "drag and drop" to suit.

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Controlling the views of data on the Demand tab

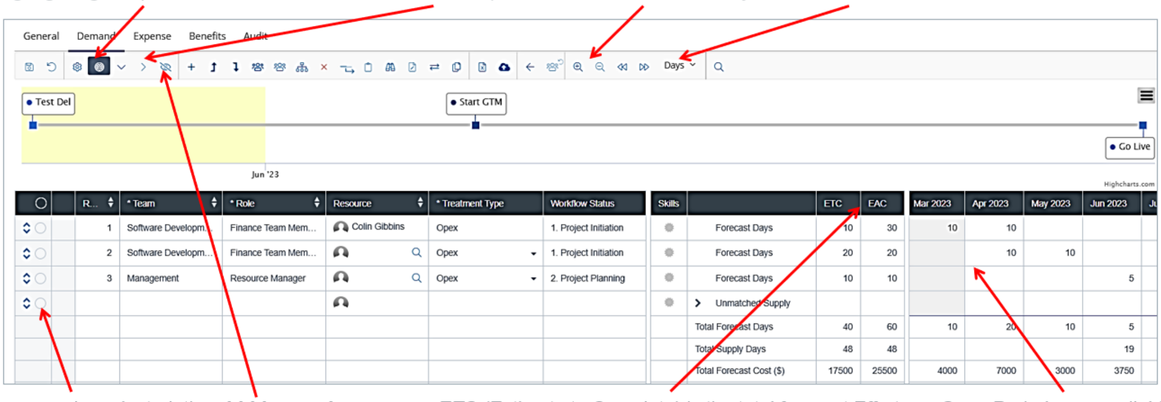
Adding Forecast Demand – Controlling views of data

Show Deliverables displays a Deliverables timeline, yellow highlighting the period in view.

Expand or Collapse any additional row (see next slide for more).

Zoom the scale **+** in or **-** out to see weeks, months or, if enabled, financial years.

Effort can be entered in Hours, Days or FTEs (using the calendar for the selected Role or Resource).



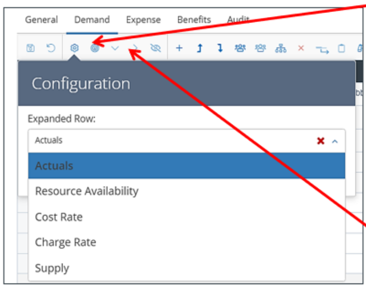
Rows can be selected, then **hidden** or **shown** (totals always include all values). Row selection is also used in other bulk functions.

ETC (Estimate to Complete) is the total forecast Effort and Cost from open periods. **EAC** (Estimate at Complete) is the total Effort and Cost for all periods.

Open Periods are available for editing. Closed periods are shaded.

Additional row visibility options for the Demand tab

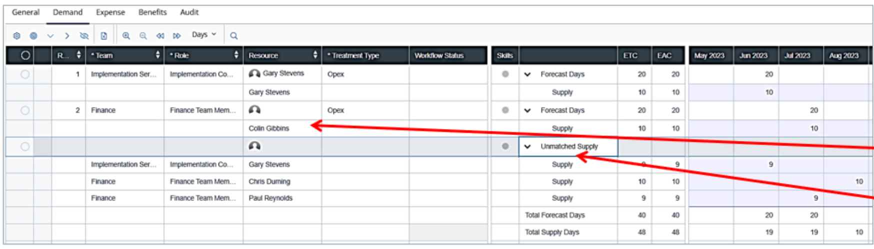
Adding Forecast Demand – Additional row visibility



In addition to Demand, **Configuration** allows an additional associated data row to be seen:

- **Actuals** – where any approved Timesheet actuals matched to the unique Demand row identifier combination can be seen. Un-matched Actuals are shown after the Demand rows.
- **Resource Availability** – where remaining availability (excluding this project) for Named Resource Demand is shown, making it easier to check before entering demand for them.
- **Cost Rate/Charge Rate** (when enabled and allowed through permissions) allows the Team/Role or Resource rates to be viewed, and potentially amended.
- **Supply** – where the Resources Supplied to the demand row are detailed, along with their level of Supply. Any unlinked Supply is shown after the demand rows

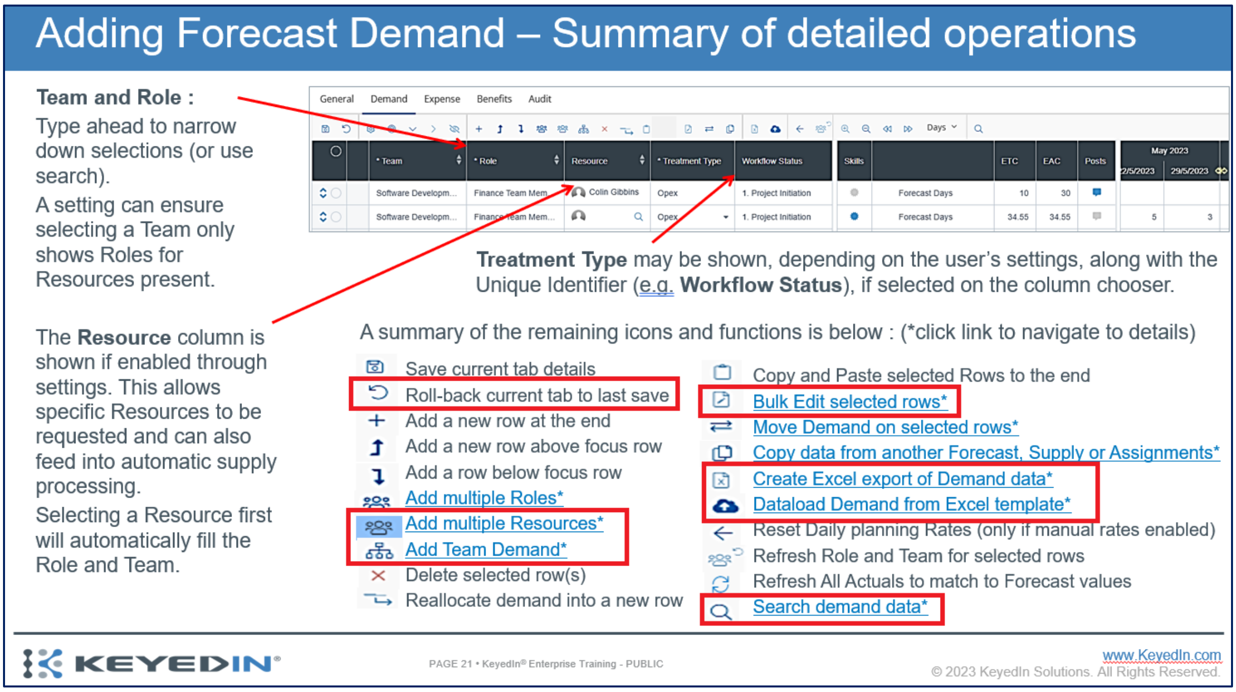
The additional row selected can be seen using **Expand All** or hidden with **Collapse All.**



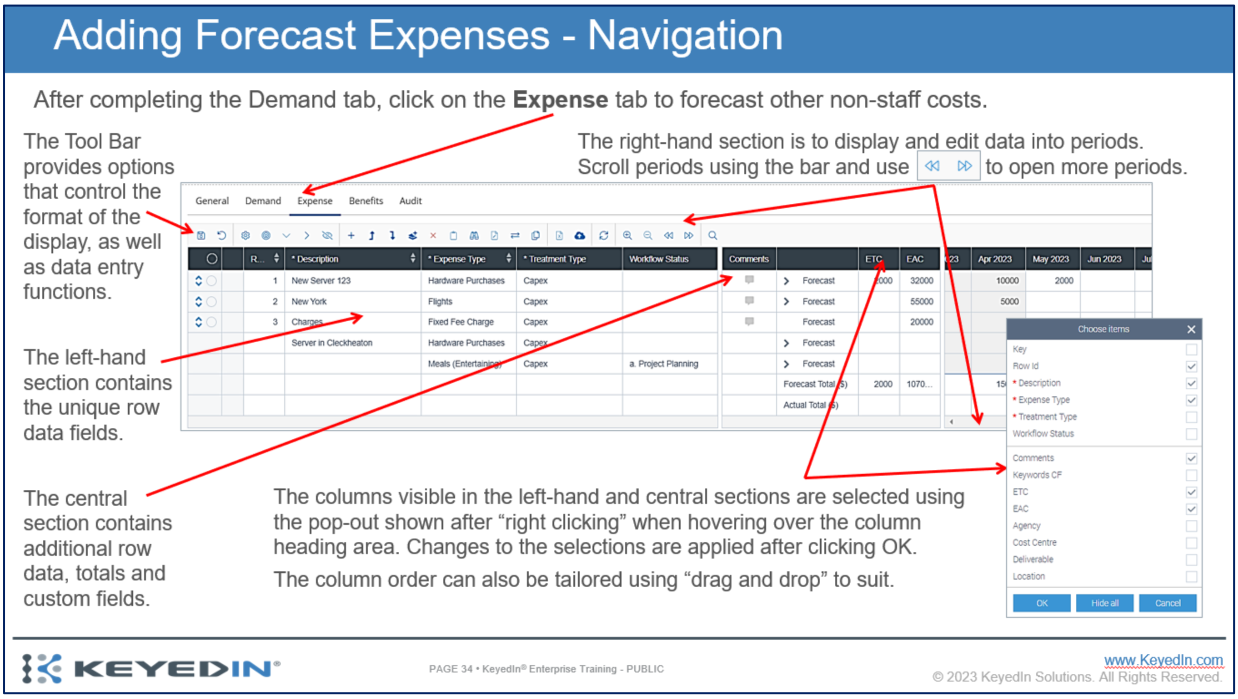
An example of how the additional rows appear is shown here (Supply example).

Supply is shown below the demand when linked, or as Unmatched towards the bottom of the table

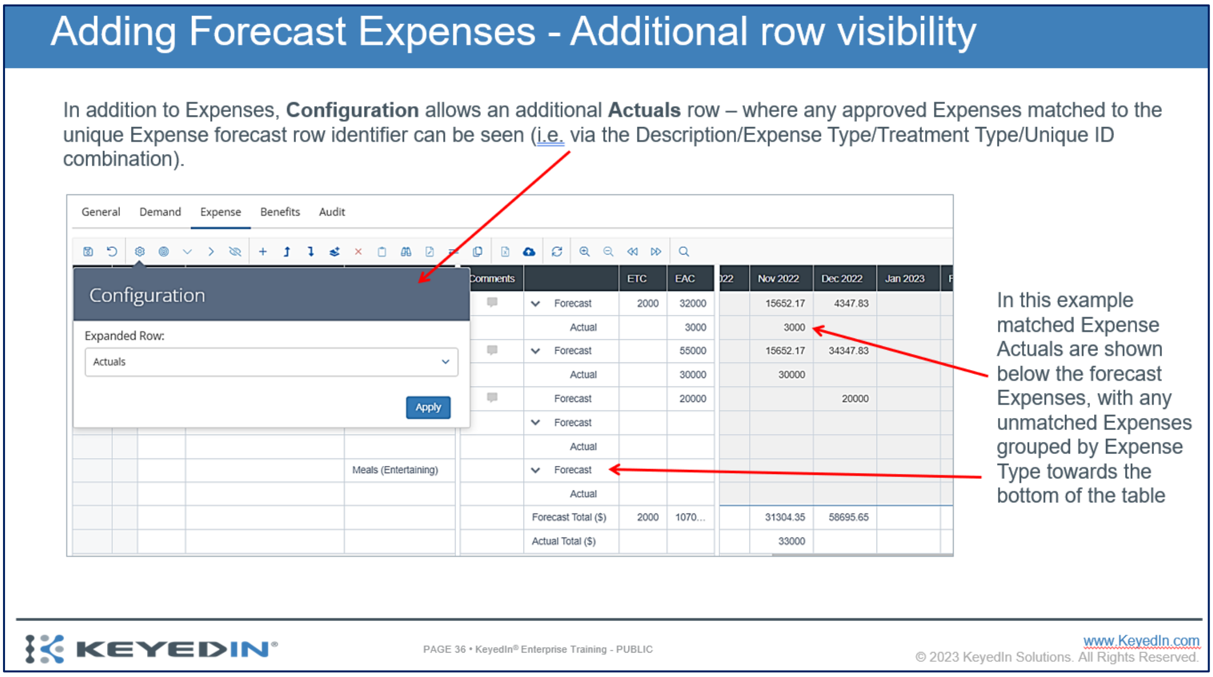
The full list of Demand tab functions, with new ones for V8 highlighted



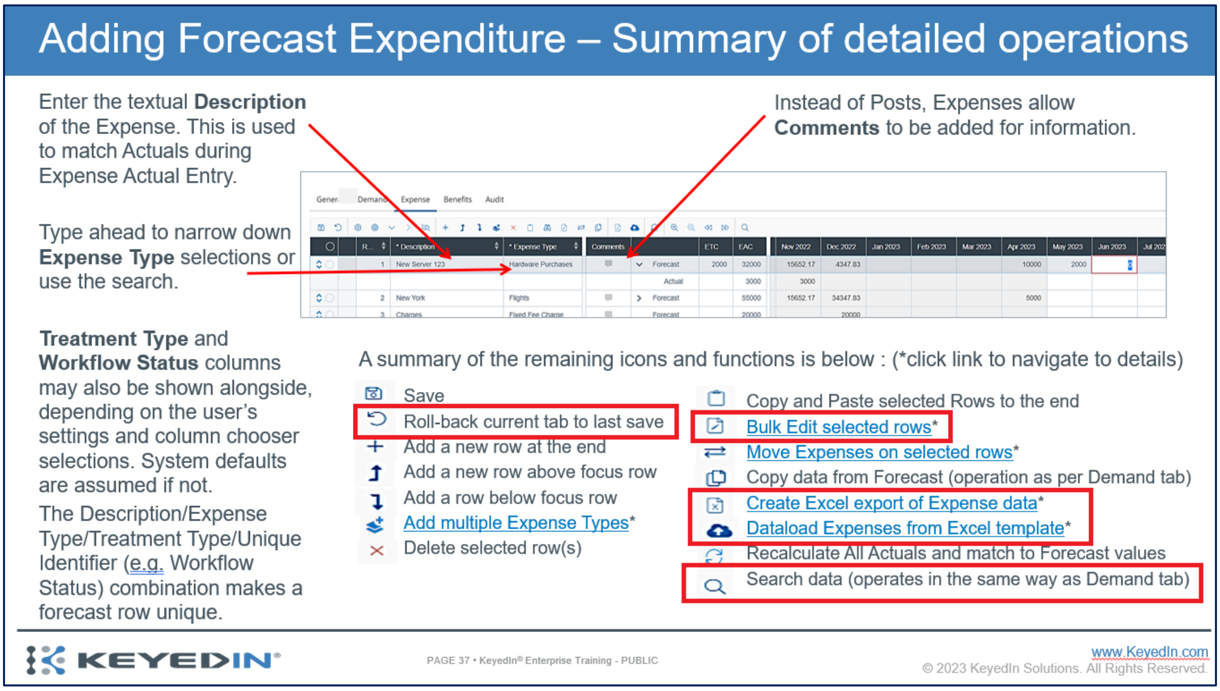
The new Expense tab



A key improvement is being able to see Expense Actuals aligned to individual forecast expense rows.



The full list of Expense tab functions, with new ones for V8 highlighted



Expense forecasting can now include Provisional/Confirmed Expenses

Advanced Forecasting – Provisional/Confirmed Expenses

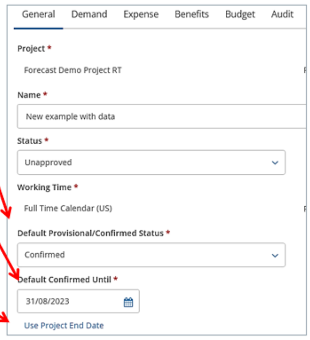
In order to allow more appropriate resourcing and reporting to be produced, forecast demand rows can already be recorded as **Provisional** (i.e. may be subject to change) or **Confirmed** (i.e. firm values). In enhanced forecasting this applies to Expenses too.

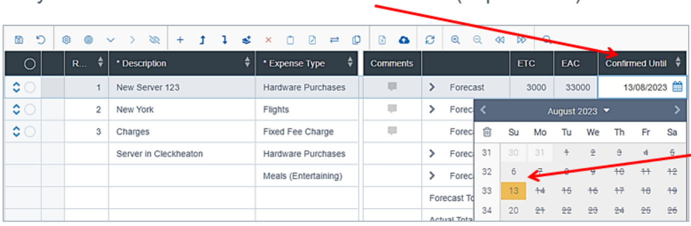
The **Default Provisional/Confirmed Status** is selected on the General tab.

When selected as **Confirmed**, the **Default confirmed until end of** date is selected. This prefills each new row created on later tabs.

The "**Use Project End Date**" hyperlink sets the default based on the End Date held on the Project record.

Entry of the **Confirmed Until** date is shown below (Expense tab)





Confirmed Until dates are based on Planning Period end dates – i.e. typically Sundays or month end if split periods are used. Non-selectable days are shown with strike-through

The Provisional/Confirmed Status of Expenses is available in reporting.

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The new Benefits tab

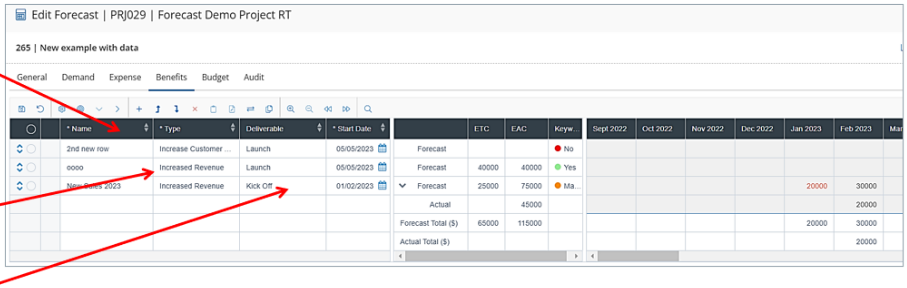
Adding Forecast Benefits – Summary of detailed operations

Enter the **Name** of the Benefit. This is used along with the **Benefit Type** to match Actuals during Benefit Actuals Entry.

Type ahead to narrow down Benefit **Type** selections or use the search.

The **Deliverable** related to the Benefit can be selected from Confirmed or Provisional Deliverables. This will set the **Start Date.**

Alternatively **Start Date** can just be manually entered



A summary of the remaining icons and functions is below :

- Save
- Roll-back current tab to last save
- Add a new row at the end
- Add a new row above focus row
- Add a row below focus row
- Delete selected row(s)
- Copy and Paste selected Rows to the end
- Bulk Edit selected rows (similar to Demand operation)
- Move Benefits on selected rows (similar to Demand)
- Copy data from Forecast (operation covered Demand tab)
- Recalculate All Actuals and match to Forecast values
- Search data (operates in the same way as Demand tab)

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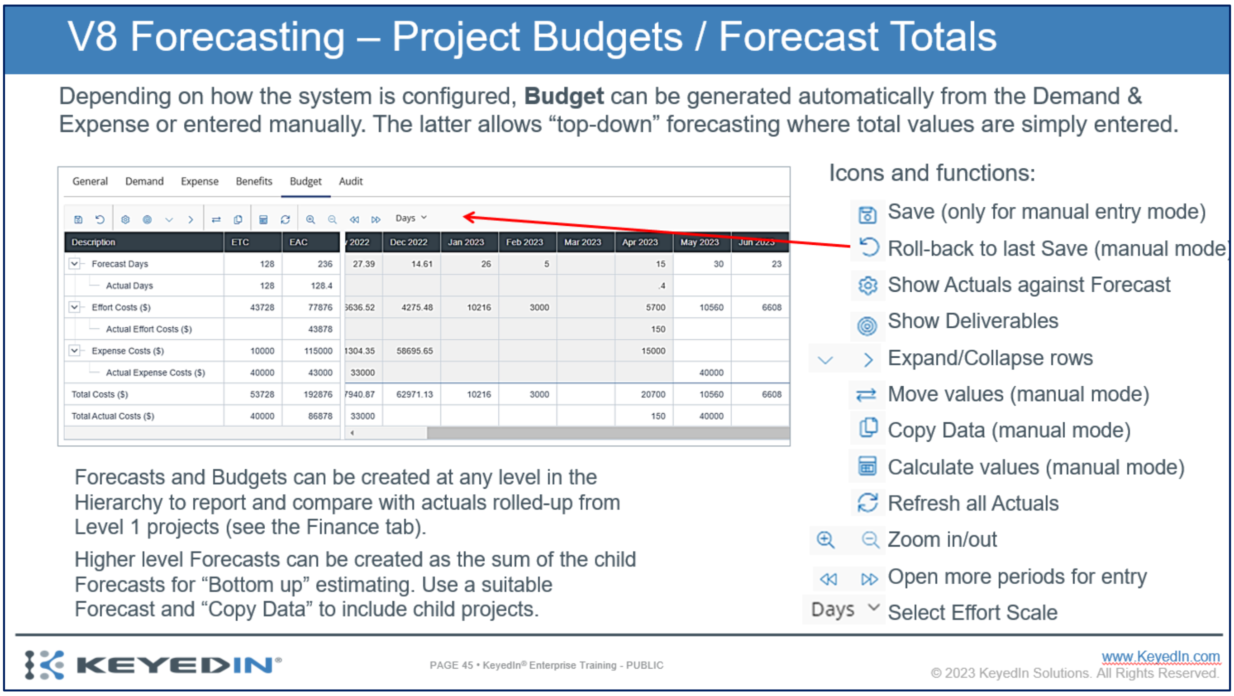
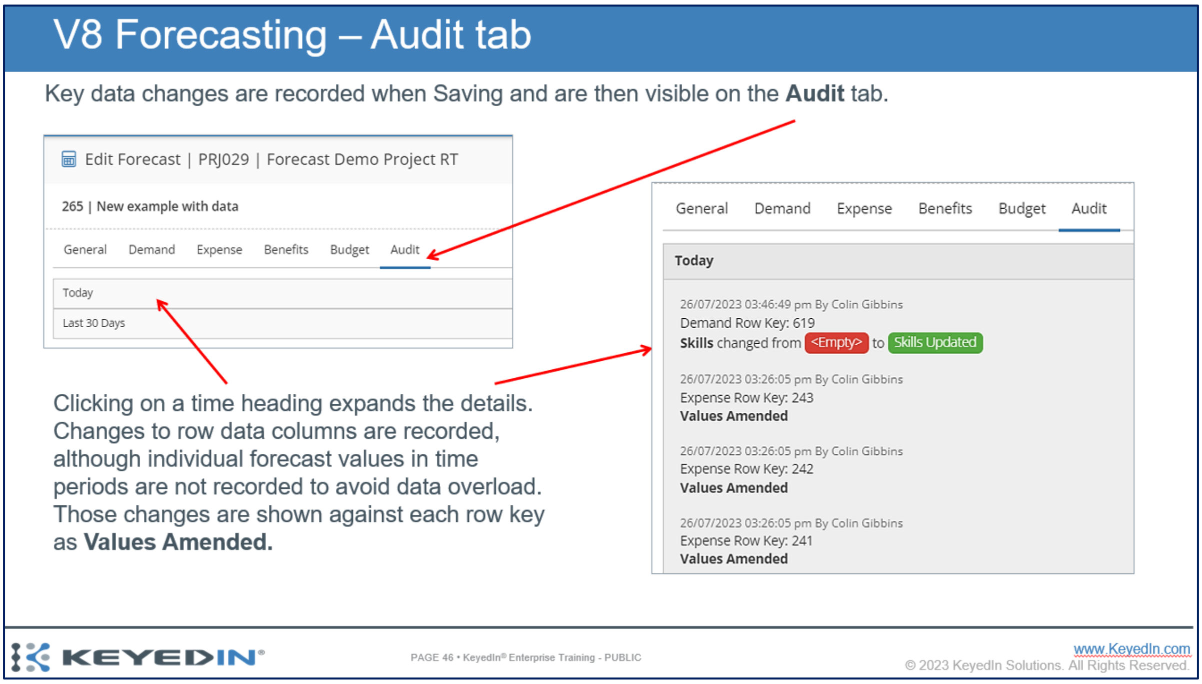
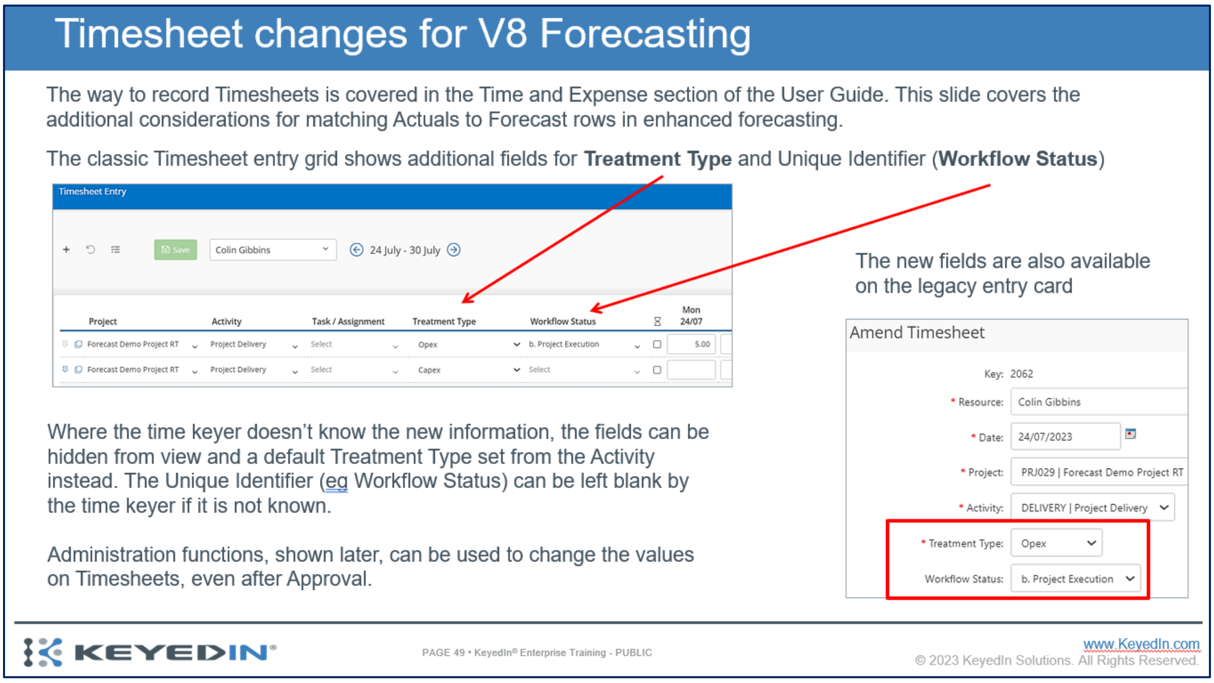
The new Forecast Total/Budget tab



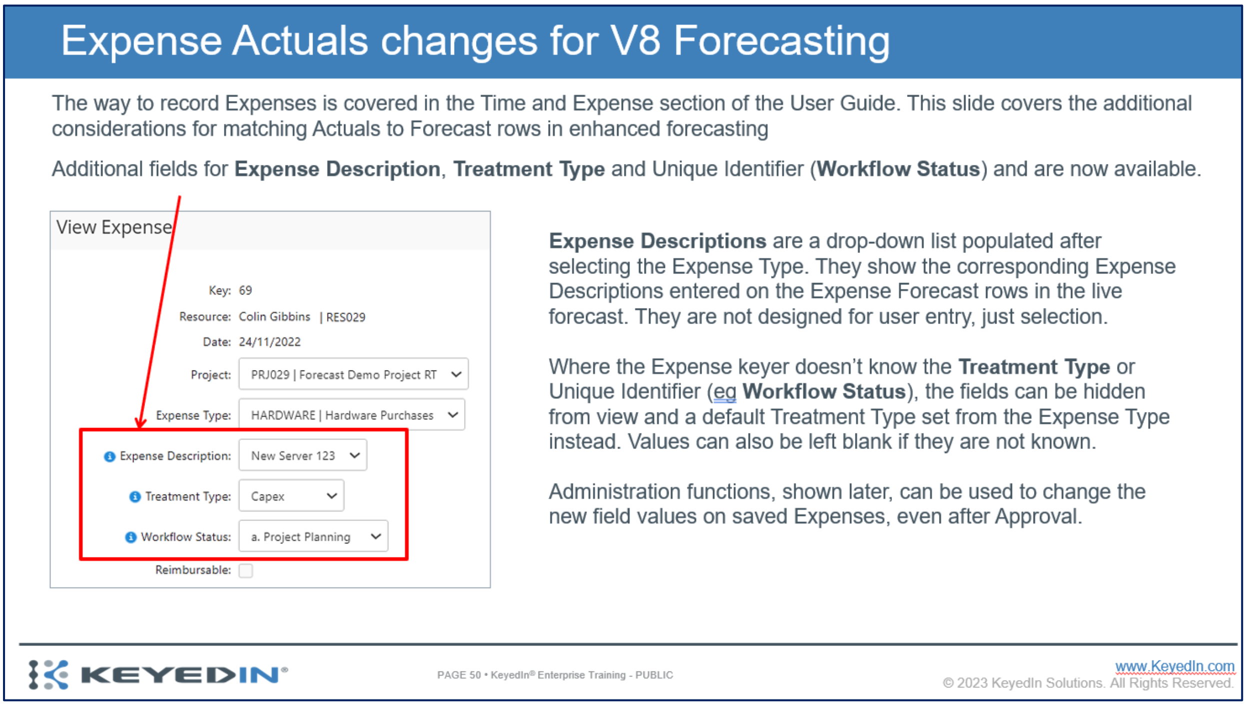
The new Audit tab that records key data changes between forecast versions



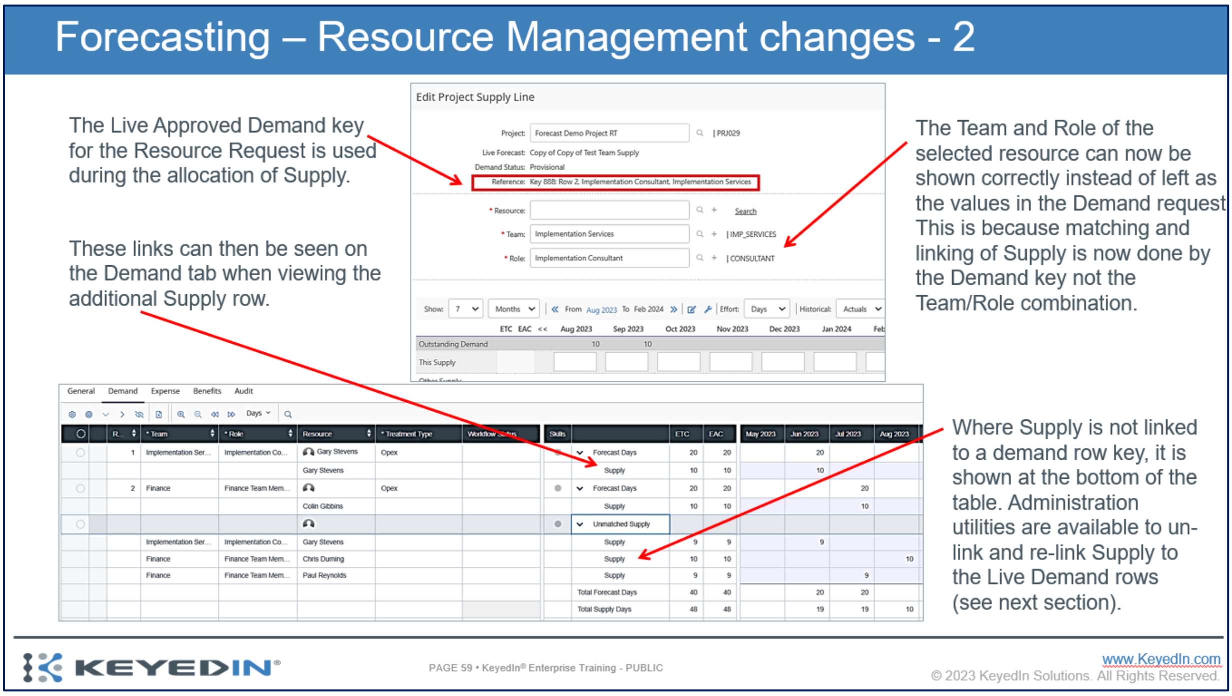
Timesheet entry changes allowing links to the new forecast rows



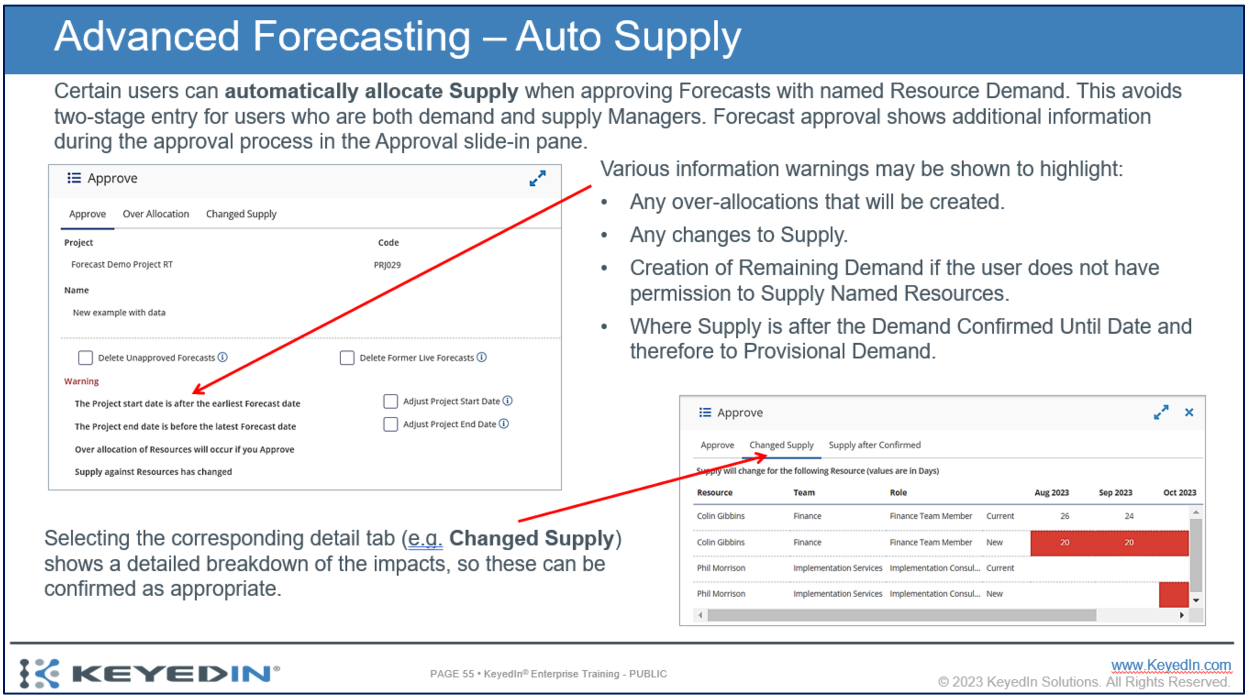
Expense entry changes showing how these are matched to forecast rows



Resource Requests/Supply process showing how demand and supply is linked



Auto-Supply dialog improvements



The above extracts provide a summary of some of the New Forecasting Experience improvements. Full user and configuration details are available when customers are ready to start the conversion process supported by the KeyedIn team.

Data View Changes for v8.0

A summary of Data View changes can be found below:

Updated Data Views

Data View	New Fields
Forecast Demand Only Data	Resource client code, Resource name, Agency

Data View changes are not applied automatically. Please contact your customer representative for installation guidance if required.

Data views to provide reporting functionality for the New Forecast Experience will be provided as part of the enablement process supported by KeyedIn. New API end point documentation will also be available at that point.