KeyedIn Enterprise v8.1 Release

Release Guide

Version 8.1

March 2024

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	March 13, 2024	All	All	T Raper	N/A

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	March 14, 2024	Tom Raper – Product Manager

Document Authorization

Version Number		
1.0	March 15, 2024	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 v8.1 is a quarterly release which provides a new PowerPoint Report custom report, Task Management enhancements, Configuration Export/Import options and the ability to create hyperlink shortcuts directly to primary entities in the application.

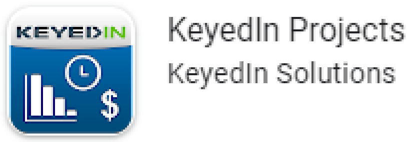
Highlights of New Features and Improvements

Project Delivery Custom PowerPoint Report

Introduced in v8.03, a custom report has been developed to produce a PowerPoint timeline-style view presentation file which includes details about the project and milestones/deliverables across level 2 and above project hierarchies.

Android Mobile App

Introduced in v8.03 the platform for the KeyedIn Mobile App was updated to the latest Android framework allowing customers on newer devices to download and install the application from the Google Play app store.



Multiple Task Assignment Enhancement

This feature allows customers leveraging the Scheduling Resourcing Mode to perform multiple task assignment to the same task on a project from a single assignment dialog.

Configuration Export/Import

This new option allows administrators to easily transfer the configuration settings, reports, views, dashboards, and custom fields from one instance to another. This can be used across systems such as Sandbox to Production to avoid duplicating configuration effort. This can also be used in the same system as a configuration backup or restore of system settings.

Application Direct Links

This option now allows users to share a URL to specific view or edit mode of specific record in the system. Links can be leveraged in notifications, emails, or collaboration systems to share a direct link to a record.

Project Delivery Custom PowerPoint Report

Feature Setup

Available by request from KeyedIn support request, your designated consultant, or via this Support Portal post, there is a new custom report that was built by our developers to generate a PowerPoint presentation file with project timelines and milestones/deliverables associated to the projects.

The report is imported as a traditional report, not as a PowerPoint template, and is designed to be run at level 2 or above in the project hierarchy.

NOTE: Upon request you will receive a .KRP report file that can be uploaded into your system as a custom enhanced report using the ***Upload Report Package File*** *option from the Report List.*

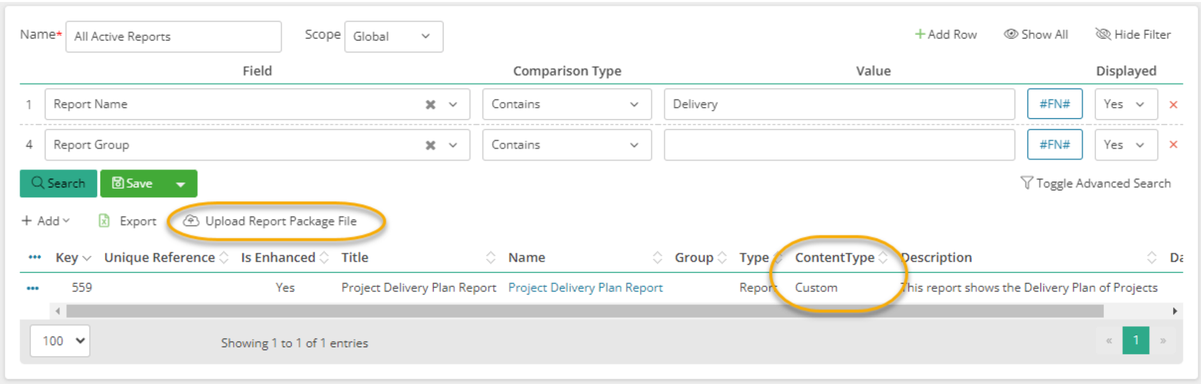


Figure 1-Reports view displaying the uploaded custom report.

After the report is imported you can define report properties such as:

- Report Name
- Title
- Group
- Description
- Log Usage, Active, and Protected settings.
- Access rights
- Context Areas where the report can be run within the application.

NOTE: Although the report is output to PowerPoint using the same technology as our PowerPoint Template functionality, this report is a custom report and cannot be modified or updated by customers due to the complications in page breaks and design requirements.

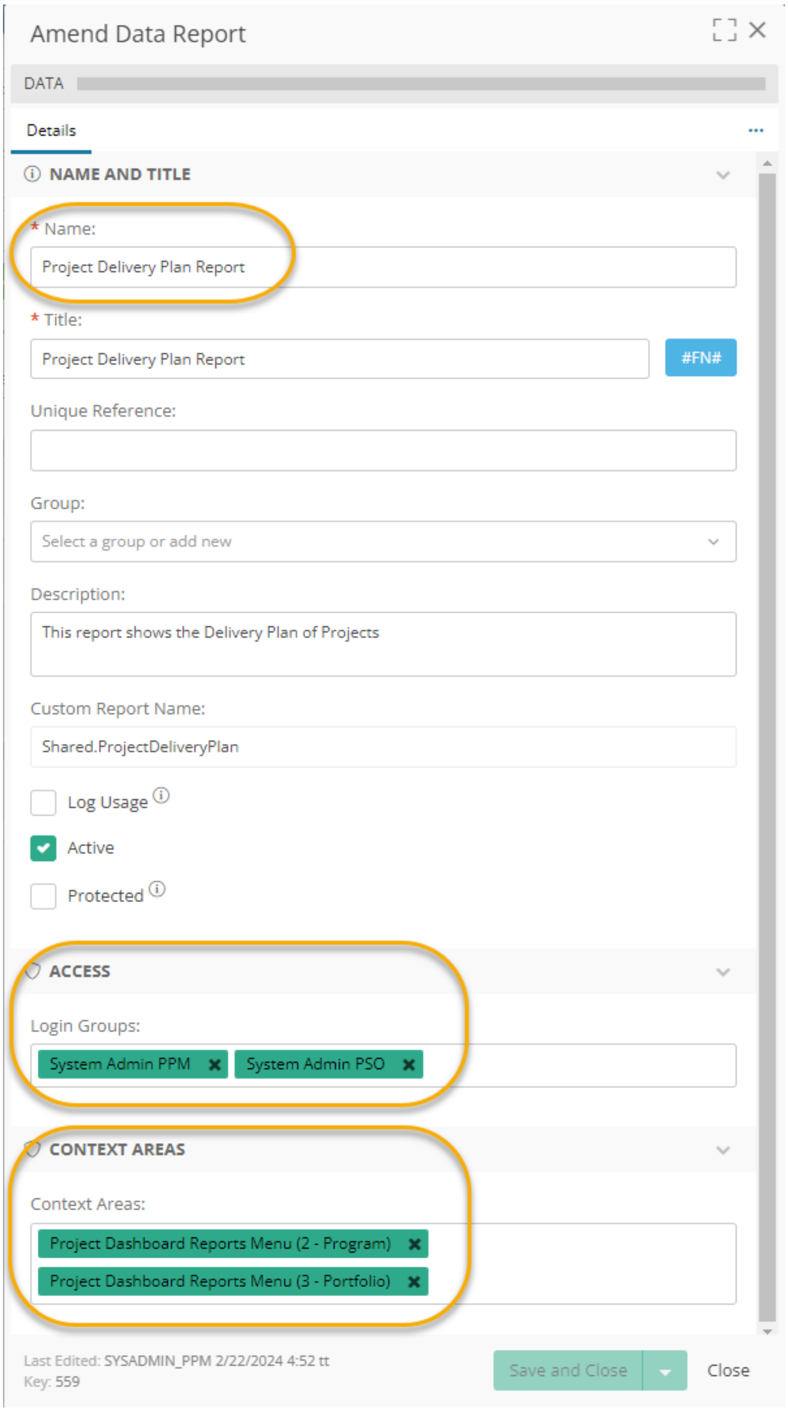


Figure 2 - Report properties that can be defined by report administrator.

Feature Usage

To run the report, navigate to the desired level 2 or above project container and select the report from the Context Area report menu.

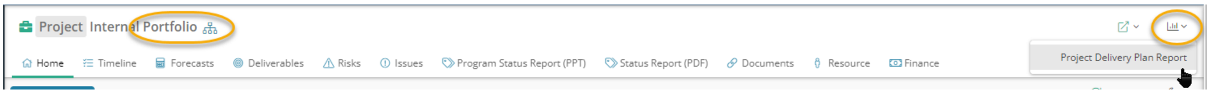
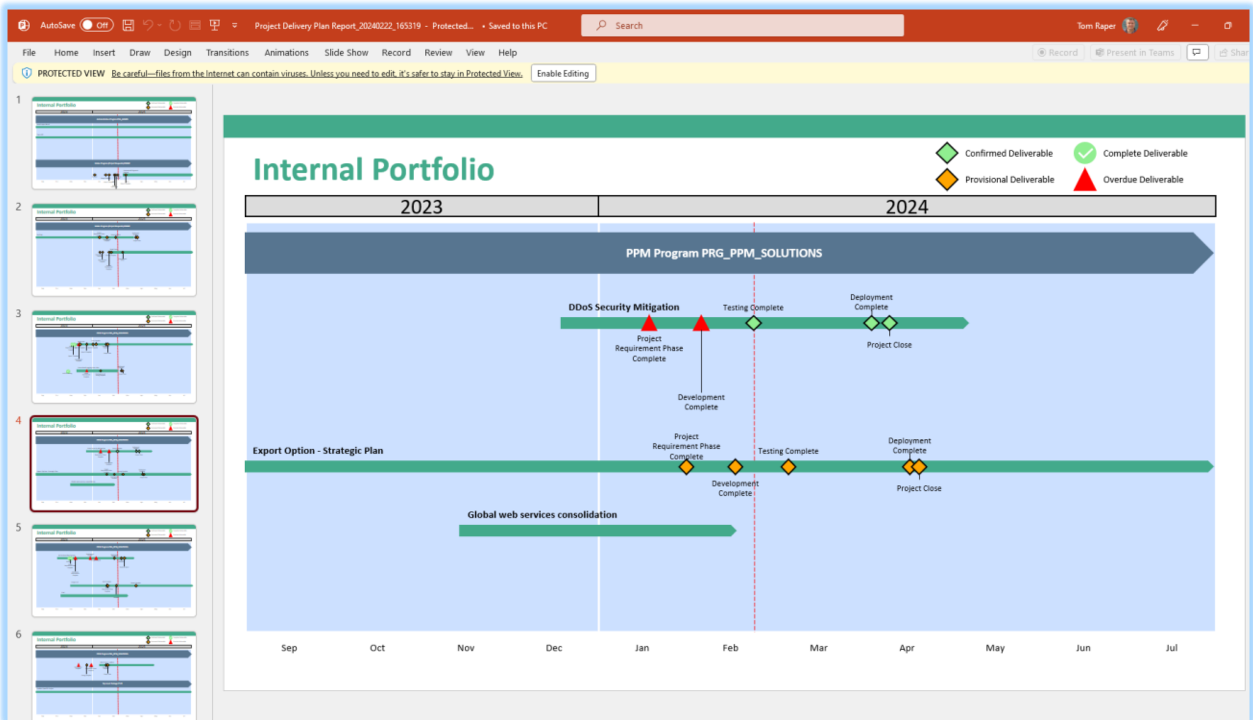


Figure 3 - Context Area Report menu for access to the report.

The report specifications include:

- Displaying the start and end dates taken from the project record as timeline Gantt style bars.
- Displays records associated to a dynamic rolling period (5 months before and after the current month of report generation)
- Calendar Year sections and marker with white space.
- Includes a marker for Today as a dotted red line.
- Larger bar timelines representing the project levels.
- Smaller bar timelines representing the Level 1 projects.
- Includes any milestones/deliverables within the reporting period displayed as Confirmed, Provisional, Complete or Overdue icons and names.
- Incorporates the system Display Settings | Display Theme designated colours for Banner and System into the header and title bars within the report.



Multiple Task Assignment Enhancement

Feature Setup

To use multiple task assignments, the Configuration | Planning Settings | Assignment option "Allow Add Multiple Assignments for Appointment Scheduling Projects" should be enabled by your system administrator.

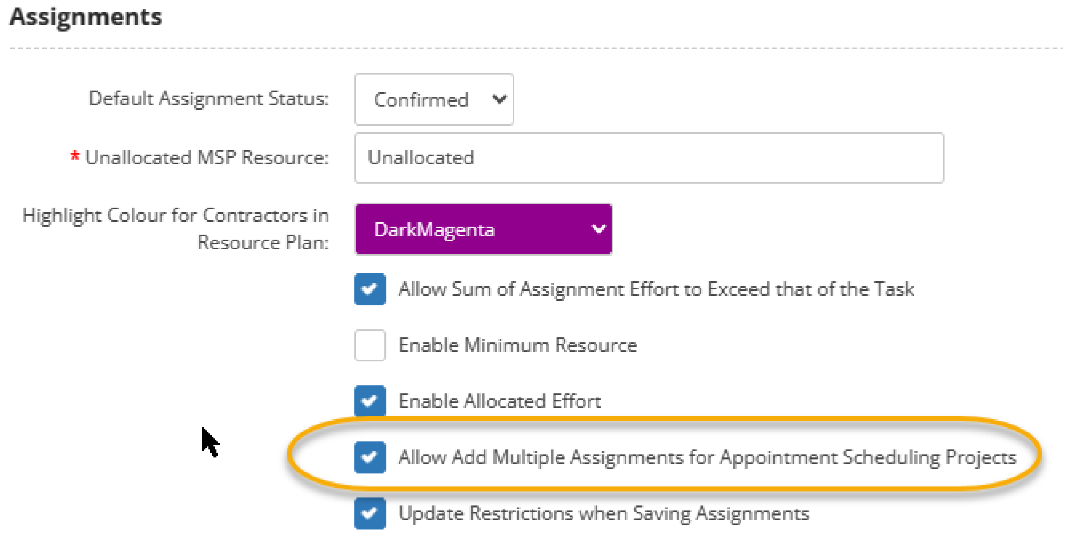


Figure 4 - Planning Settings | Assignments options.

Once enabled you should also review the Login Group associated to the users you wish to leverage the feature. The Login Group should be set to Scheduling mode.

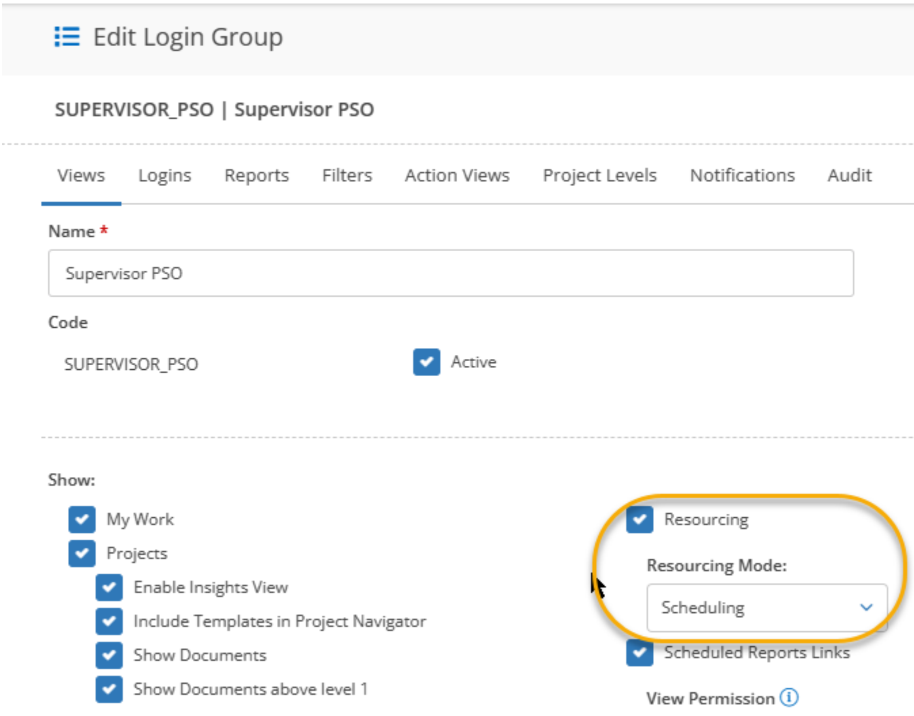


Figure 5 - Login Group Resourcing Mode

Feature Usage

The new feature allows the creation of multiple task assignments from a single task assignment creation dialog.

1. The new option is available from the Resource Plan, Search, and Add New Assignment areas of the application. Navigate to the desired area and Add Assignment

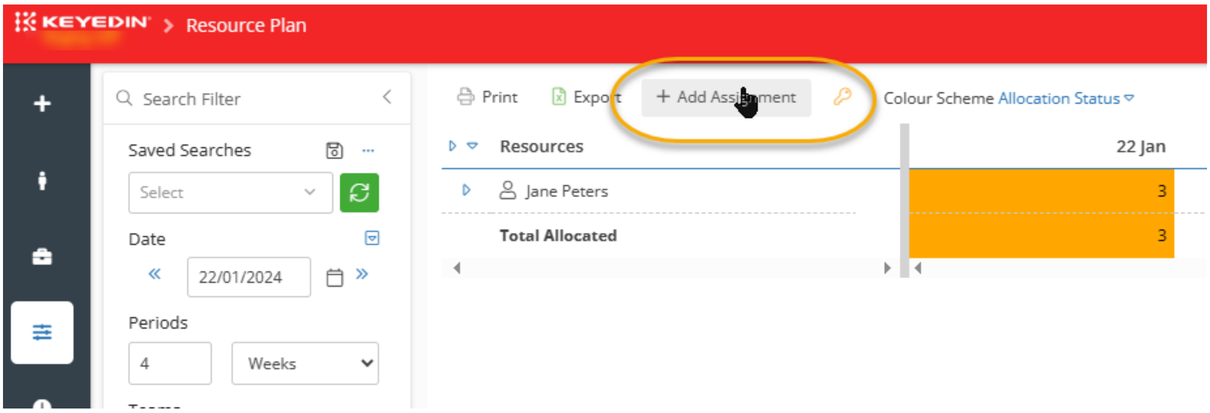


Figure 6 - Resource Plan using Scheduling Mode

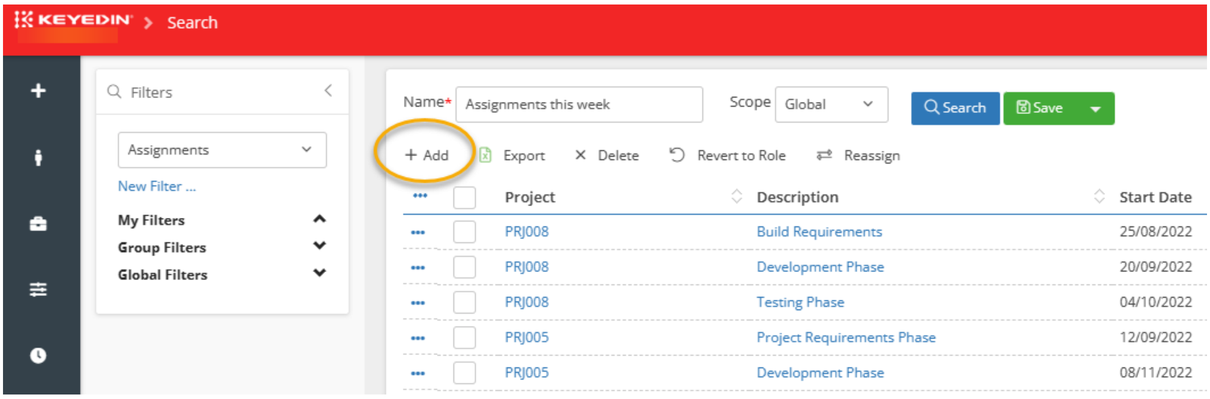


Figure 7 - Search Assignments filtered view.

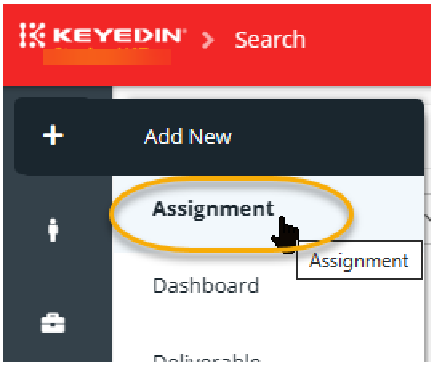


Figure 8 - + Add New menu for Adding Assignment

2. From the Add Assignment dialog box select the project, task, and set the values for dates, confirmed, effort, etc. that you wish to apply to all assignments.
3. By checking the "Add Multiple" option you will then be able to add multiple resources. You may enter by names, codes, selecting, or using the search options.

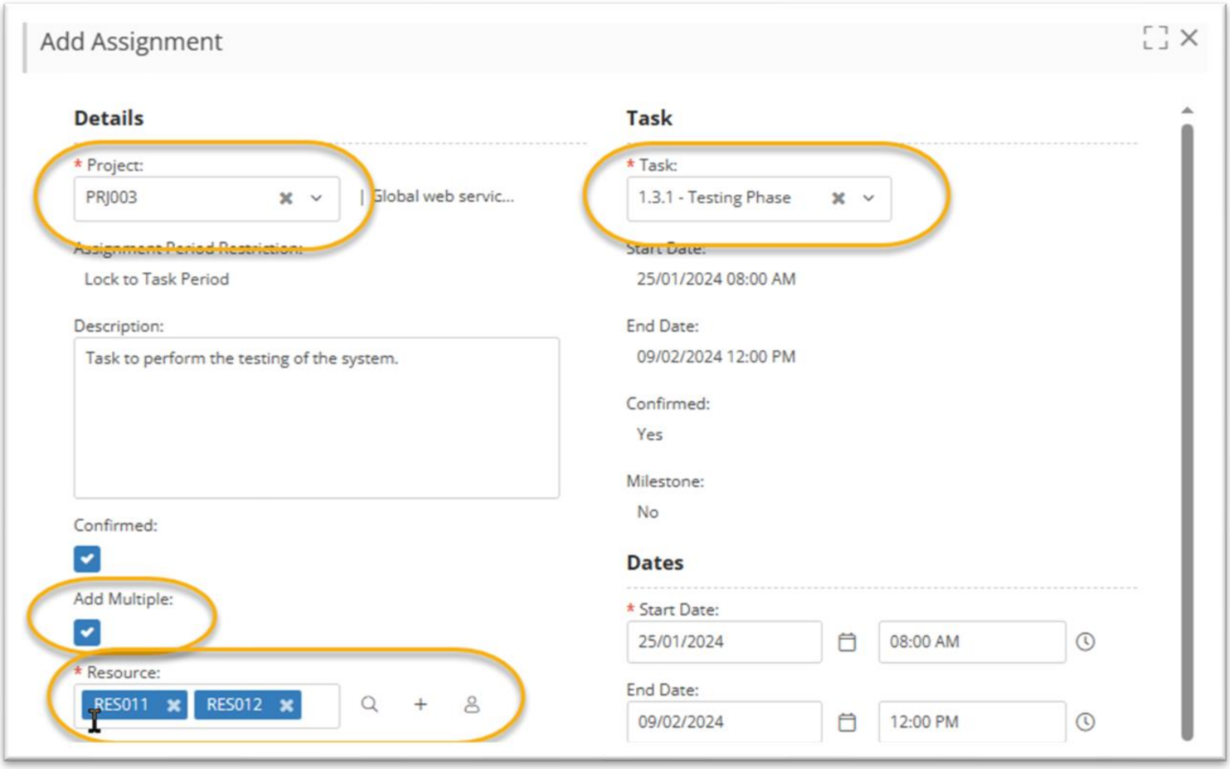


Figure 9 - Add Assignment dialog box.

4. New task assignments will be created for each designated resource using the same project, task, dates, and effort for each resource.
   Note: Although the task effort may be the same, the distribution of effort may vary depending on availability and working calendars applicable to each resource.

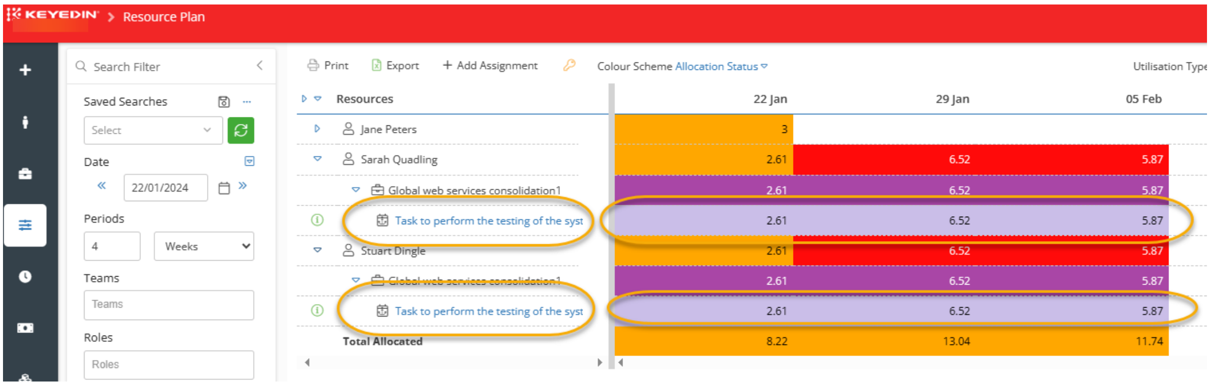
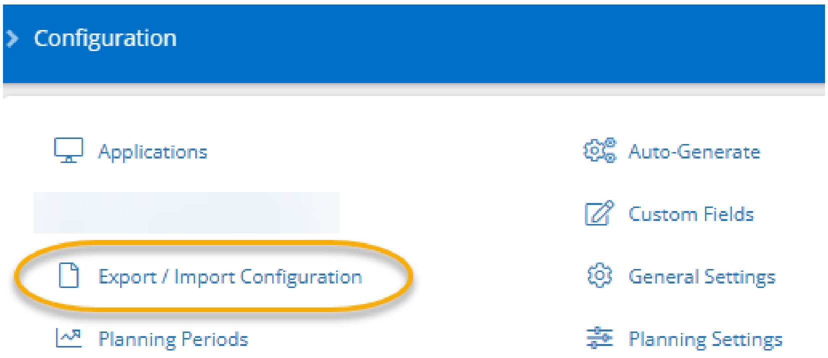


Figure 10 - Resource Plan showing task assignment across resources.

Configuration Export/Import

Feature Setup

There is no setup requirement. Following the system update a new Configuration option will be available to Administrators of your KeyedIn system.



Feature Usage

The export/import option can be used to transfer settings from one instance of KeyedIn to another. The feature is designed to minimize administrative work associated to configuration settings, reports, views, and custom fields that may be configured in one system and need to be replicated to another system.

Use cases for the Export/Import include:

- New features and settings that have been tested in your sandbox may be replicated to your production instance of KeyedIn by exporting from sandbox and importing into production.
- Customers may wish to backup their system settings before making changes in their production instance. Should they wish to return to the previous configuration, they can import the configuration as it was.
- Consultants may use the feature to transfer common setup and configuration options from one system to another based on implementation best practices, common customer requirements, or standard implementation kick-offs.
- Configuration and design settings that were tested in a trial environment may be transferred to a new production instance of KeyedIn for new customers wishing to save their trial design or POC settings.
- Solution Consultants may leverage the feature to replicate demo or trial configuration and design settings between instances for commonality.

NOTE: Some system settings that are designated as one-way switches or enablement are not supported by a restore/import. In other words, a roll-back of one-way feature enablement are not supported. This includes items such as enabling Enhanced Task Plan, Enabling Project Workflows, and Enhanced Forecasting.

Export

The Export tab has three options: Custom Fields, Dashboard & Reports, and System Configuration. Users can choose to select a single category to generate a configuration file for that category.

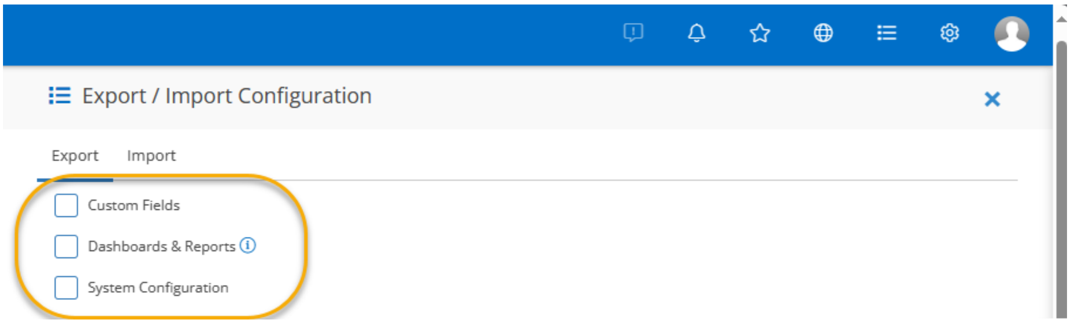


Figure 11 - Configuration | Export/Import Configuration

To Create an Export Configuration File

1. Select the desired options you wish to include in your configuration file.
2. Click the Download Configuration button at the bottom of the screen.

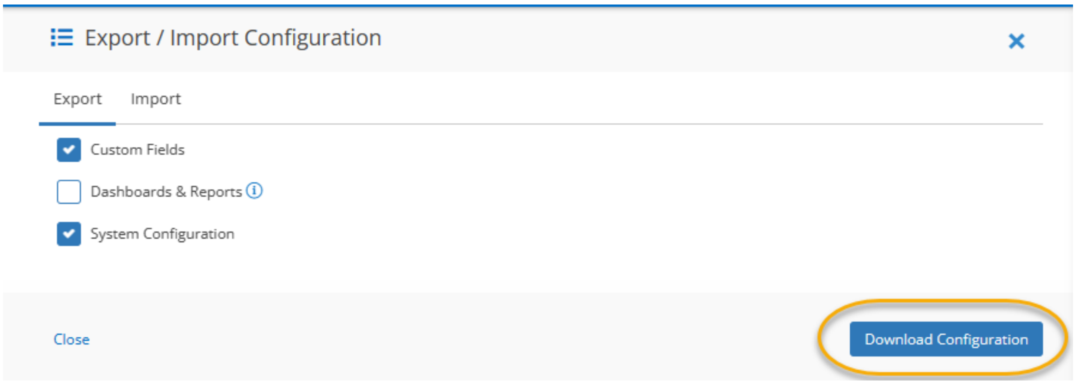


Figure 12 - Export Download Configuration

3. The system will gather the appropriate settings and create a **KIE_Configuration.config** file in your browser's download file location.
   It may take some time for the file to generate depending on the number of items being exported. Users may rename the file based on preferences for the date, file purpose, system notations, etc.

   NOTE: The configuration file should be kept private and only shared with trusted resources. Although the configuration contains no personal or customer specific record data, it does contain information related to system settings that may not be considered public information.

Export Option	Description
Custom Fields	Includes any fields displayed in the Configuration | Custom Fields associated to all entities.
Dashboard & Reports	Dashboards include views in the application such as: • My Work • Projects • Portfolio Analysis • Dashboards Reports include: • Any reports in the Report List such as Chart and Data Widgets and Chart and Data Reports • Enhanced and legacy reports • Context Area reports • PowerPoint Templates NOTE: Selecting Dashboard & Reports will automatically include the Custom Field options as well because often time reports, views, and dashboards will include and use custom fields.
System Configuration	Configuration settings from the following areas are included: • Auto-Generate • Billing Settings • Collaboration Settings • Currency • Display Settings • Document Management Settings • Entity Defaults • General Settings • Log On Settings • Notification Settings • Planning Settings • Report Settings • Restrictions • Screen Labels • Security Group Settings • Strategic Planning Settings • Time & Expense Settings

Some items within the configuration are **not** included in an export based on limitations associated to that area or will be added in a future enhancement to the export/import configuration option.

Areas Not Included	Description
Applications	May be included in future enhancement.
Invoice Templates	May be included in future enhancement.
Planning Periods	May be included in future enhancement.
Project Level Settings	Not under consideration based on setting requirements.
Project Types	May be included in future enhancement.
Project Workflows	May be included in future enhancement.
Web Hooks	May be included in future enhancement.
Workflow Notifications	May be included in future enhancement.
Scheduled Jobs	Not under consideration based on setting requirements.
Scheduled Reports	Not under consideration based on setting requirements.
Working Times	May be included in future enhancement.

Import

The Import tab allows users to select the configuration file, see reference to the details that will be imported and choose to import the configuration settings.

1. The system must be locked to perform an import of any settings. This will ensure that users are not making other changes in the system while updates are being applied. The administrator can lock the system from the Log On Settings screen while posting a message for any users trying to connect during the import period.

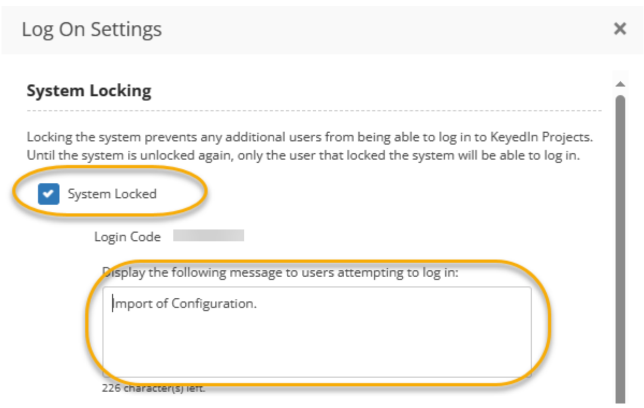


Figure 13 - Log Settings | System Locking option.

2. Once the system is locked, navigate to Export/Import Configuration and select the Import tab.
3. Use the + sign in the Configuration File field to browse and select the desired configuration file.

4. The system will inspect the configuration file and identify the applicable changes that may occur if you choose to import. Each area will notate which items will be added or deleted from the system.

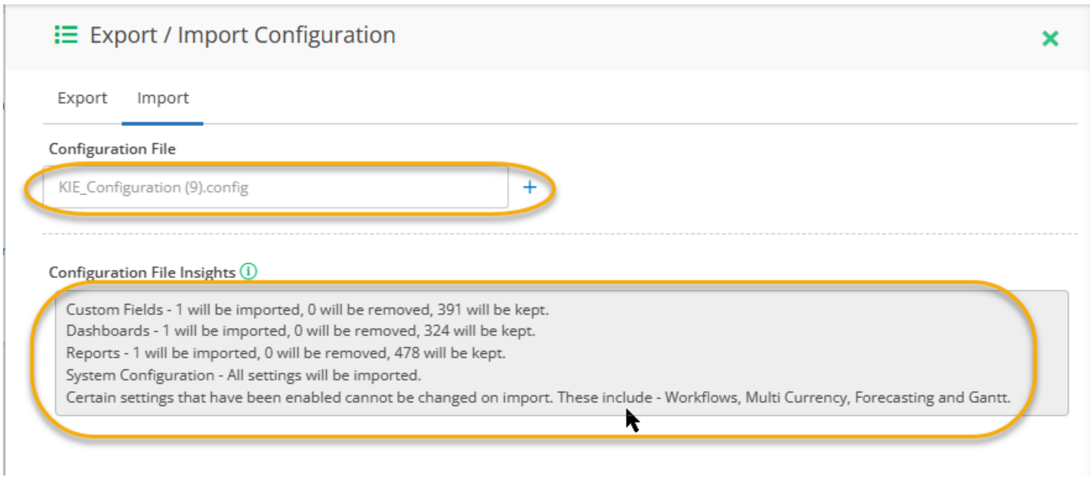
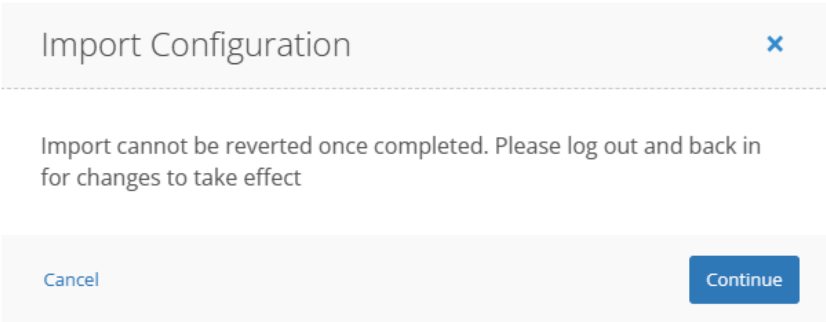


Figure 14 - Import configuration file selection and insights.

5. If you agree to the configuration changes, select the Import button to allow the system to be updated. A confirmation message will be displayed to ensure you wish to perform the import.



6. The system will begin the import process and display a message upon successful completion.
7. After a successful import, the system will automatically be unlocked and available for users to login. Any changes in settings, views, reports, etc. will be available upon logout and login.

Application Direct Links

New options are available for system administrators and users to share a link directly to specific records and locations in the application beyond the users Startup Page.

Feature Setup

No setup or configuration is necessary to leverage the Application Direct Links functionality.

Feature Usage

Direct links allow for users to share a system URL for direct access to specific areas or records within the system. Links can be used for several purposes including:

- System notifications
- Workflow notifications
- Sharing with other users in emails
- Sharing with other users in collaboration solutions such as MS Teams, Slack, etc.
- Included in reports with reference to system records.
- Leveraged via integrations or API related use cases.

System Notifications

System notifications built into the application that referenced timesheet, projects, risks, or actions have been updated to include a direct link to the appropriate record being referenced in the notification message.
An example of a system notification that has been updated includes:
A #LABEL-RESOURCE# is notified when a Task Plan has finished exporting.

<u>Original message</u>

The export of the following Task Plan has completed:

Project: <project code> - <project name>
Version: <version>
Plan Description: <plan desc>

Exported By: <exported by>

Click on the following link to log in to the system: <email login url>

<u>New message</u>

The export of the following Task Plan has completed:

Project: <project code> - <project name>
Version: <version>
Plan Description: <plan desc>

Exported By: <exported by>

You can view the Project Dashboard here: https://keyedinenterprise.com/Dashboard/Index/MVC-PRL1-OVERVIEW?codes=PRJ001

General system access is available here: <email login url>

Direct Link URL

The nomenclature that can be used for the Direct Link URL is as follows:

- https://keyedinenterprise.domain/view/EntityType/RecordUniqueIdentifier
- https://keyedinenterprise.domain/edit/EntityType/RecordUniqueIdentifier

NOTE: The Entity Type can be replaced with values in the following table. Entity types should **not** contain spaces between value words and are based on the core system table values, not the screen labels customers may have defined.

NOTE: **The URL is case sensitive for the Entity Type** value (e.g. should be Project not project). The unique id is not case sensitive (e.g. proj003 or PRJ003 will work)

Supported Entity Type Value (No spaces)	Allowed Record Identifier Value
Action	Key
Activity	Key
BillingContract	Key
BillingInvoice	Key
Client	Code
Contact	Key
Deliverable	Key
Department	Code
Issue	Code
IssueItem	Key
Expense	Key
ExpenseClaim	Key
Forecast	Key
Milestone	Key
Project	Code
Risk	Code
RiskItem	Key
Role	Code
Resource	Code
Timesheet	Key
TimesheetSubmission	Key

As an example, a Direct Link could be used in workflow notifications as follows:

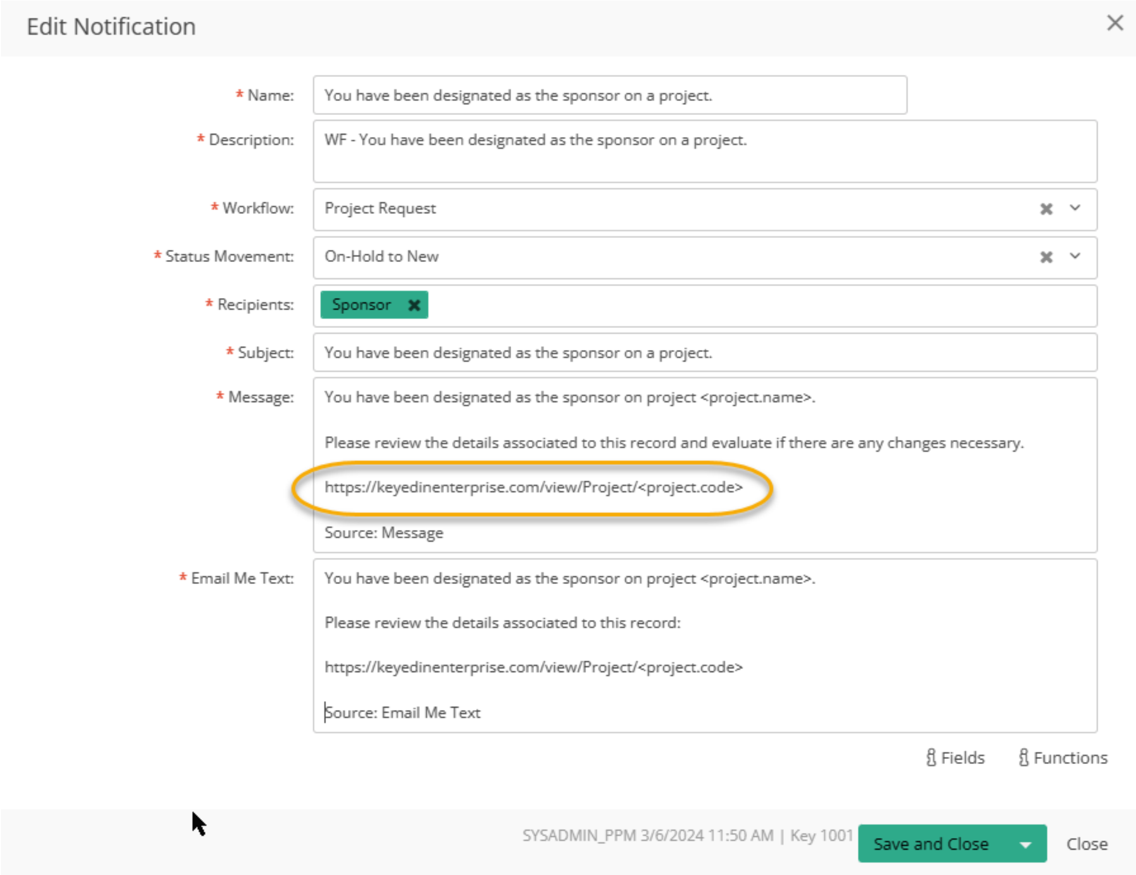


Figure 15 - Sample workflow notification with URL reference to dynamic record.

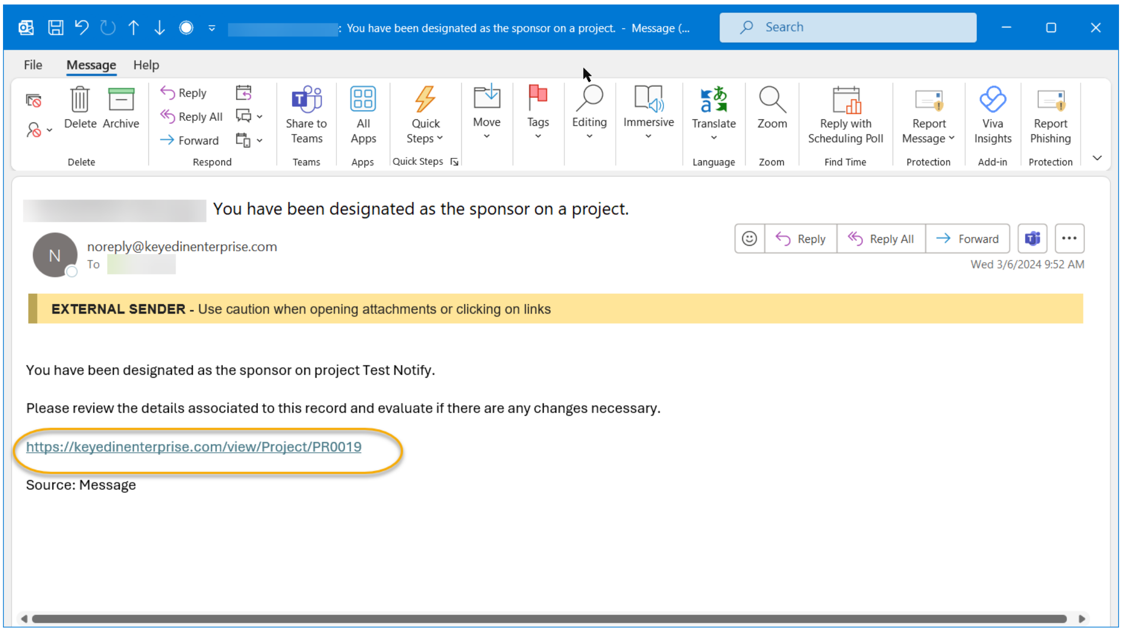


Figure 16 - Sample email message received from workflow notification with direct link to record.

Dataview Change for v8.1

A summary of Data View changes since the last major release (v8.0.3) can be found below.

New Dataviews

Dataview	**Description**
No New Dataviews	

Updated Dataviews

Dataview	**New Fields**
Project Supply and Assignment	The following additions: • Linked to Project Code • Linked to Project Name o Linked to Allocation % o Linked to Project start Date o Linked to Project End Date o Linked to Entity Type o Linked to Project Outcome o Linked to custom fields • Linked From Project Code • Linked From Project Name o Linked from Allocation % o Linked from Project start Date o Linked from Project End Date o Linked from Entity Type o Linked from Project Outcome o Linked from custom fields
Resource Demand General	Removed reference to Demand line key.