KeyedIn Enterprise v8.1.2 Release

Release Summary

Version 8.1.2

May 2024

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	May 10, 2024	All	All	T Raper	N/A

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	May 10, 2024	Tom Raper – Product Manager

Document Authorization

Version Number		
1.0	May 20, 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 (Reporting) API	✗	✗
Enterprise Planning API	✗	✗
Enterprise Time/Expense API	✗	✗
Data Views	✗	✗

Release Summary

KeyedIn Enterprise's v8.1.2 is a scheduled maintenance update release with general support fixes and small features related to skills maintenance, task-to-task inter-project dependencies, bulk supply updates, and financial details on resource profile.

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

Highlights of New Features and Improvements

Updating existing skills when data loading Resource Skills

If you associated a skill to a resource and need to adjust the skill level via data loading, this new option allows you to create a data load template, adjust the skills associated to a resource and load them for bulk updating.

Hide Financial Tab from Resource Profile

A new setting is available to hide the finance tab on the resource profile to avoid users seeing sensitive information.

Task-to-task inter-project dependencies notification for earlier start

A new notification is provided if the predecessor is changed to finish earlier so the project manager of the successor knows they could start their task earlier.

Task-to-task inter-project dependencies Duration read-only

To ensure changes to a predecessor are reflected properly between projects, the duration value on the predecessor task is read only and the user is required to change either the Start or End Date of the task.
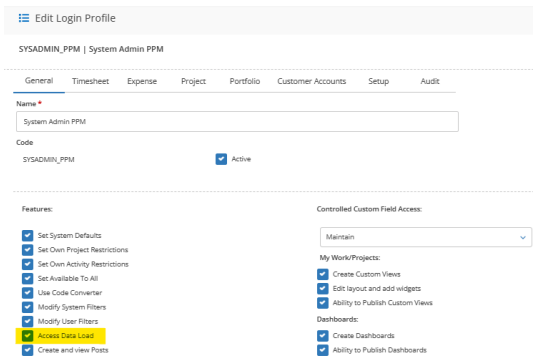
Data load Supply by Month and FTE

New options are available to data load supply values by month and effort in FTE values.

Updating existing skills when data loading Resource Skills

Feature Setup

This feature is only available to users configured to **Access Data Load** in their Login Profile.


Feature Usage

If you have existing resources defined with skills and selected a level for those skills, you can now update the skills levels via the data loading functionality. For example, if a resource had a Java Developer Skill Level of 1 and you want to update the value to 2 because of training or certification the user received. Previously you could only add new skills and skills levels for the resources or were required to delete the skill and add it again.

1. Navigate to the Search and Resource listing either via the Search menu or via the Administration | Business Entities menu.

2. From the resource listing toolbar select the Load Skills Data option


3. Ensure the Skill Level is included in your Data Template fields and click the **Create Excel Template** button to initiate the file creation.
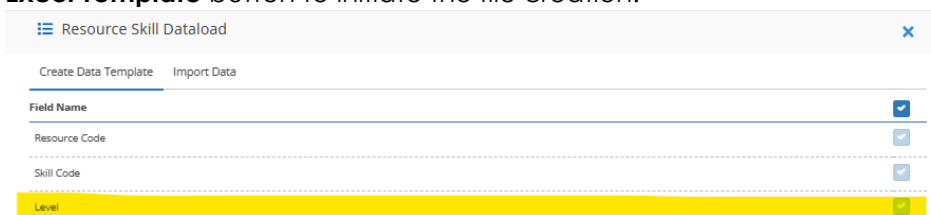

4. Open the template and add the records accordingly including the resource code, skill code, and the desired new level for the resource skill.
5. From the data load screen, select the **Import Data** tab to select the updated template file and choose the option to **Update existing Resource skill**. A summary of the number of updates will be referenced next to the file selection.
    NOTE: The update option will only update existing values on existing skills. If the user does not already have the skill the import will produce an error. New skills should be handled with the Insert option.

When ready click the Import button.
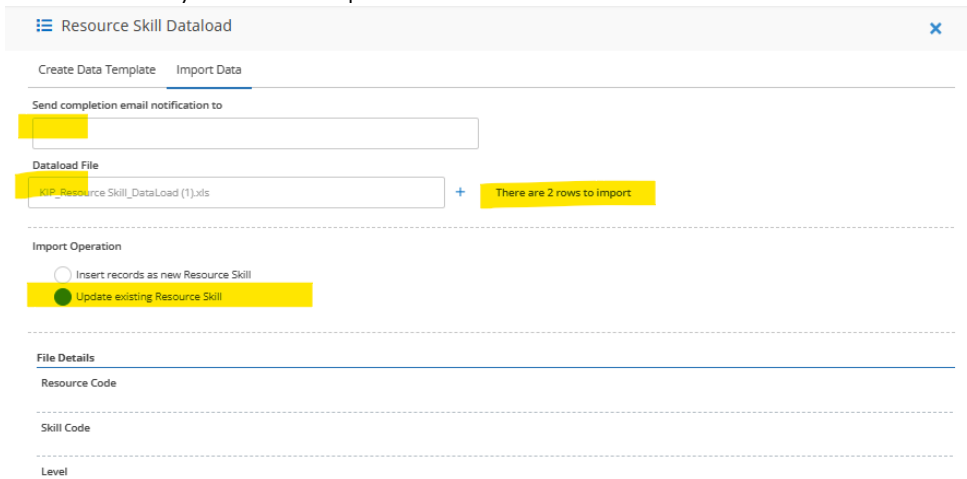
6. A message will reference the update process will begin and a message will be displayed on the top of the screen when the import is complete. If an email message was entered for the update, an email will be sent to the user upon completion (either for success or failure).
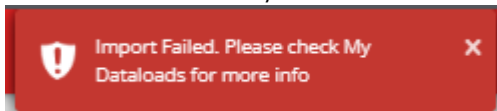
If an error occurs during the upload, details will be available in My Dataloads from your user profile on the top toolbar. Successful imports are also recorded.
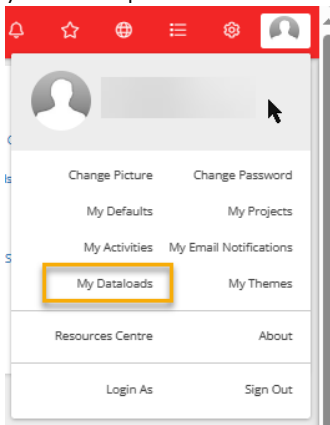
Evaluate the error message details for information how to correct the issue.

# Hide Financial Tab from Resource Profile

Feature Setup

Access to control this feature is based on rights associated to editing and managing the Login Profiles and typically an administrator level access.

Feature Usage

A new setting is available to hide the finance tab on the resource profile to avoid users seeing sensitive information. Access the Login Profile for the Login you wish to control finance visibility and on the Setup tab after selecting Resource you are presented with a secondary option of Resource Financial.
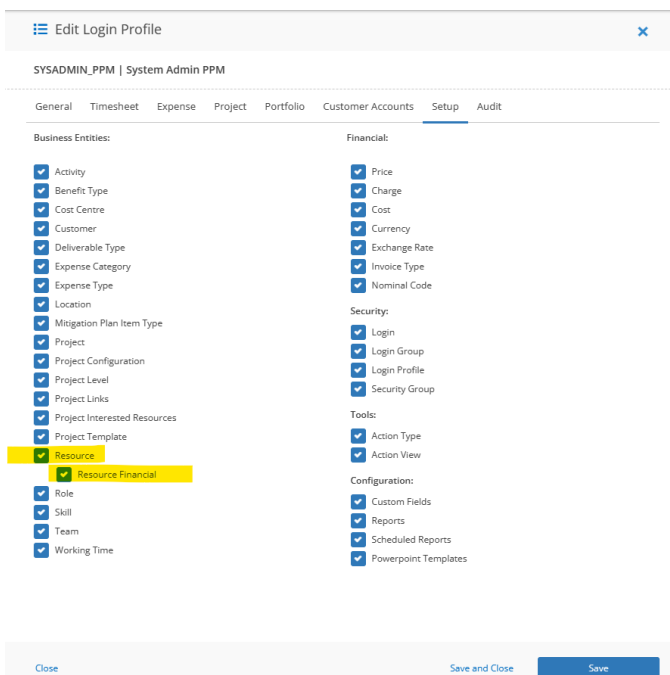
- If Resource Financial is checked, user's that are allowed to view or maintain a resource will see the Finance tab for the resource.
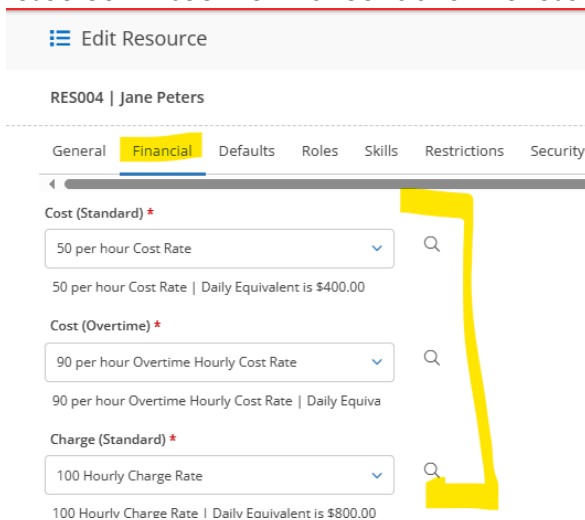
- If Resource Financial is un-checked, users allowed to view or maintain a resource will be able to all other tabs associated to the resource, but the Finance tab will be

hidden.

☰ Edit Resource

RES004 | Jane Peters

General Defaults Roles Skills Restrictions Security Groups Intere

Name *

Jane Peters

Code

RES004   ☑ Active

Resource Type:

Employee ⌄

Team *   Code

Developmenting ⌄   🔍   DEVELOPMENT

Primary Role *   Code

Developer ⌄   🔍   DEVELOPER

- Resource Setup or View and Maintain options in the Administration tab continue to manage which resources you can see or which resources you are able to make changes to their profile.

# Task-to-task inter-project dependencies notification for earlier start

Feature Setup

Task-to-task inter-project dependencies were introduced in v8.0.1 in December 2023. Further details about the setup and configuration to use this functionality are available in the release notes KeyedIn Enterprise v8.01 - Release Guide v1.0 – Sciforma Product Central (zendesk.com)

No additional configuration is required when using these dependencies.

Feature Usage

The original release provided notifications based on predecessor tasks running late and therefore warning the successor project manager of a potential delay to their task. A new notification is now provided if the predecessor is changed to finish earlier so the project manager of the successor knows they could start their task earlier.
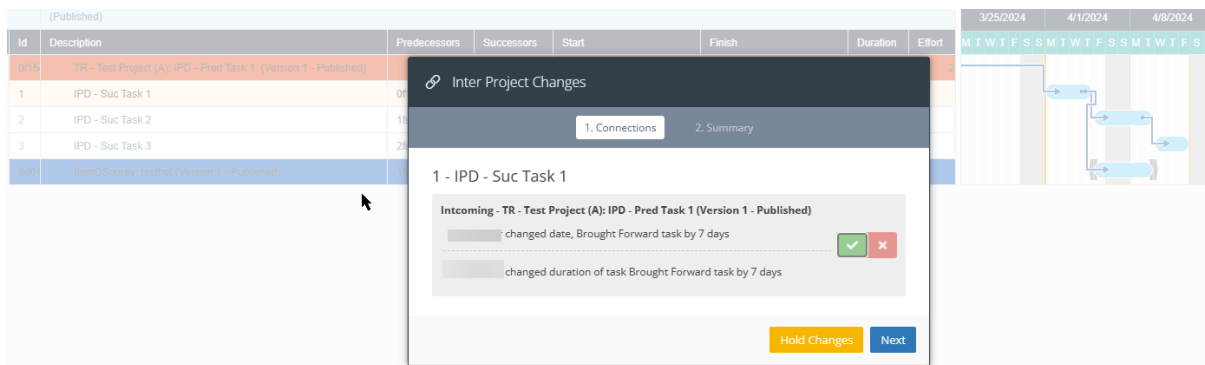
The successor project manager has three options, similar to a delayed task.

1. **Accept the change** (click the green check mark and select Next) and the resulting screen will show the adjust dates for the successor task. The task movement will obey the constraints applied to the successor task.
   NOTE: If the manager has placed any constraint on the successor task such as must-start-on, start no earlier than, etc. or the Plan Start Date is after the possible new date, the movement will be limited. All restrictions from the plan and other related tasks will be evaluated for possible allowed changes.
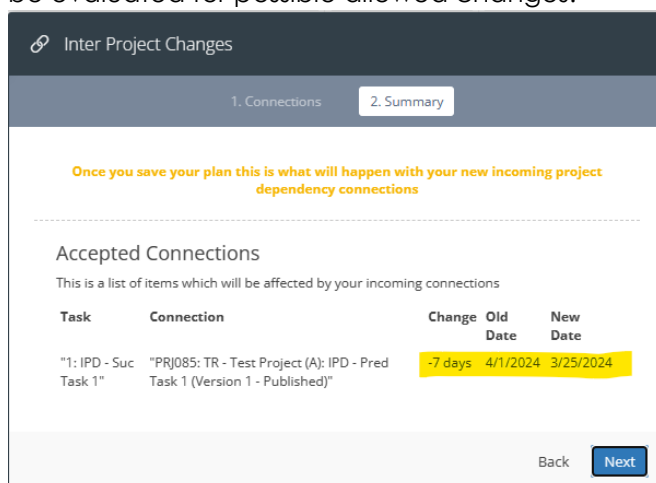
Selecting next on the Summary screen will apply the changes. Selecting back will allow the project manger to take one of the other two actions.

2. **Reject the change** (click the red X and select Next). Selecting next on the Summary screen will remove the dependency and send a notification to successor project manager, notifying them the dependency has been removed.

3. **Hold changes** (Select the Hold Changes button) which will provide the summary noting the dependency and all other project changes are on hold until a decision has been made to Accept or Reject the link.

Task-to-task inter-project dependencies Duration read-only

Feature Setup

There is no setup or configuration change required to leverage this functionality. It will be associated to projects where inter-project dependencies are in use. Further details about the setup and configuration to use this functionality are available in the release notes KeyedIn Enterprise v8.01 - Release Guide v1.0 – Sciforma Product Central (zendesk.com)

Feature Usage

To ensure changes to a predecessor are reflected properly between projects, the duration value on the predecessor task is made read only, when task-to-task inter-project dependencies are established. The user is required to change either the Start or End Date of the task to reflect a change in duration.

The reason for this change is based on the effects that will happen when the duration value is changed in the duration field when other related or linked tasks within and across projects have other constraints associated with them. The must-start-on value is leveraged between inter-project dependencies to enforce the dates. Prior to this change if the duration was changed and successor task was established as must-start-on, the duration change could bring the start date forward versus moving the end date out.

With this new feature, when the user changes the end date, instead of adding duration, the system knows the predecessor task should start-no-earlier than the start date and the end date can move out. This will create a temporary invalid dependency noted by a red line dependency link in the Gantt chart. After the project manager of the successor task accepts the changed date the successor task will then be pushed out as required. If the successor project manager rejects the change the inter-project dependency will be removed.

Data load Supply by Month and FTE

Feature Setup

This feature is only available to users configured to **Access Data Load** in their Login Profile. The new functionality is available through the standard data load process.
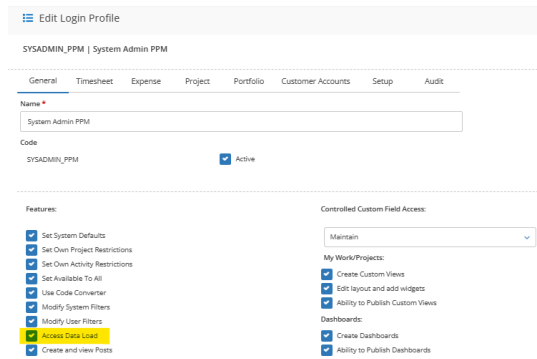
Feature Usage

Prior to this release data load options for Supply were only available using Weekly periods and Daily effort values. This new option extends data load options for month and effort in FTE values. Access to the data load is from the Search | Supply section and creation of the data load template is managed from the search results toolbar.
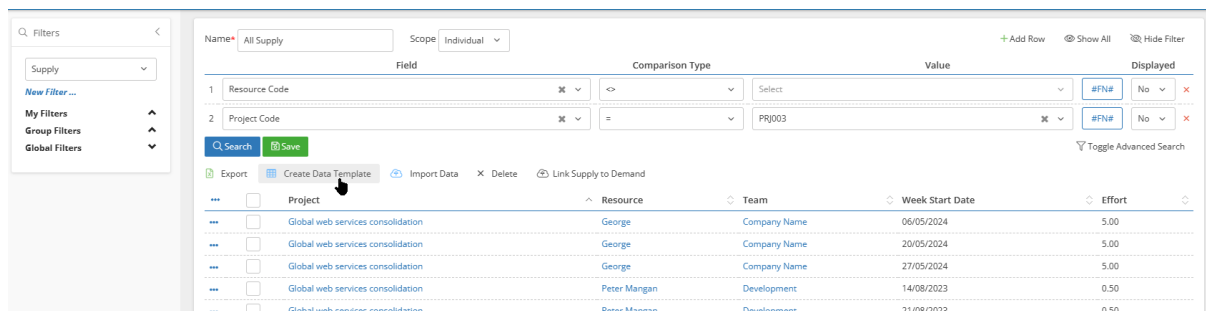
When creating the Data Template, users can select the desired Period and Effort values from the drop-down menus. Select the Generate Template Spreadsheet to create spreadsheet file which can be used to bulk edit supply details.

When ready to import, use the Import Data from the search toolbar, select the appropriate import file, and click the upload link. Any resulting success/failure results will be noted and recorded in the My Dataloads reference section.

Dataview Change for v8.1.2

A summary of Data View changes since the last release (v8.1.1) can be found below.

New Dataviews

Dataview	Description
No New Dataviews	

Updated Dataviews

Dataview	New Fields
No Updated Dataviews	