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KeyedIn Enterprise v8.1.2 Release

Release Summary

Version 8.1.2

May 2024

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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	\checkmark	\checkmark
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	×	×



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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.

Edit Lo	ogin Profile						
SYSADMIN_I	PPM System	Admin PPM					
General	Timesheet	Expense	Project	Portfolio	Customer Accounts	Setup	Audit
Name *							
System Admi	in PPM						
ode							
SYSADMIN_P	PM			Active			
SYSADMIN_P	PM			 Active 	Controlled	Custom Field	Access:
Features:	PM			 Active 	Controllec		Access:
Features:	em Defaults Project Restrictic			 Active 	Maintai	n	Access:
Features:	am Defaults Project Restrictio Activity Restrictio			 Active 	Maintai My Work	n	
Features: Set Syste Set Own Set Own Set Avail	am Defaults Project Restrictic Activity Restrictic			Active	Maintai My Work Creat	n Projects:	
Features: Set Syste Set Own Set Own Set Avail Use Cod	am Defaults Project Restrictic Activity Restrictic lable To All le Converter			Active	Meintei My Work Creat Edit Is	n Projects: e Custom Views	: vidgets
Features: Set Syste Set Own Set Own Set Avail Use Cod Modify S	am Defaults Project Restrictic Activity Restrictic			 Active 	Meintei My Work Creat Edit Is	n Projects: e Custom Views iyout and add v y to Publish Cus	: vidgets
Features: Set Syste Set Own Set Own Set Avail Use Cod Modify S Modify L	am Defaults Project Restrictic Activity Restrictic lable To All le Converter lystem Filters			 Active 	Maintai My Work Creat Edit I Abilt Dashboan	n Projects: e Custom Views iyout and add v y to Publish Cus	: vidgets

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
 - + Add 🛛 Export 🛞 Load Data 🕐 Load Skills Data
- 3. Ensure the Skill Level is included in your Data Template fields and click the **Create Excel Template** button to initiate the file creation.

₩ Resource Skill Dataload	×
Create Data Template Import Data	
Field Name	
Resource Code	v
Skill Code	
Level	

- 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.

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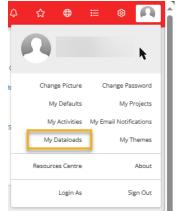
When ready click the Import button.

₩ Resource Skill Dataload	\$	¢
Create Data Template Import Data		
Send completion email notification to		
Dataload File		
KIP_Resource Skill_DataLoad (1).xls	+ There are 2 rows to import	
Import Operation		
Insert records as new Resource Skill		
Update existing Resource Skill		
File Details		_
Resource Code		
Skill Code		
Laval		

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).

Ų	Import Failed. Please check My Dataloads for more info	,

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.

☷ Edit Login Profile		×
SYSADMIN_PPM System Admin PPM		
General Timesheet Expense Project Portfolio Cus	tomer Accounts Setup Audit	
Business Entities:	Financial:	
Benefit Type Cost Centre Customer Customer Expense Category Expense Category Customic Mitigation Plan Item Type Project Project Configuration Project Livel Project Livel Project Livel Project Template Project Template Project Template Project Template Project Project Template Project Template Project Project Template Project Template Project Project Template Project Template Project Template Project Template Project Template Project Project Template Project Tem	Charge Cost Currency Currency Invoice Type Nominal Code Security: Login Group Login Profile Cost Login Profile Cost Cost Cost Cost Cost Cost Cost Cost	
Resource Financial Role Stall Version Working Time	Configuration: Custom Fields Reports Scheduled Reports Powerpoint Templates	
Close	Save and Close Save	

• If Resource Financial is checked, user's that are allowed to view or maintain a resource will see the Finance tab for the resource.

Edit Resource		
RES004 Jane Peters		
General Financial Defaults Roles Skills	Restrictions	Security
∢		
50 per hour Cost Rate 🗸	Q	
50 per hour Cost Rate Daily Equivalent is \$400.00		
Cost (Overtime) *		
90 per hour Overtime Hourly Cost Rate 🗸 🗸	Q	
90 per hour Overtime Hourly Cost Rate Daily Equiva		
Charge (Standard) *		
100 Hourly Charge Rate 🗸	9	
100 Hourly Charge Rate Daily Equivalent is \$800.00		

• 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





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idden.							
\Xi Edit	Resource	9					
RES004	Jane Peters	5					
General	Defaults	Roles	Skills	Restrictions	Securit	y Groups	Intere
Name *	r5						
Code RES004				 Active 			
Resource T Employee	ype:	~					
Team *						Code	
Developm	enting			~	Q	DEVELO	PMENT
Primary Rol	e *					Code	
Developer				~	Q	DEVELC	PER

• 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 <u>KeyedIn Enterprise v8.01 - Release Guide v1.0 - Sciforma Product Central</u> (zendesk.com)

No additional configuration is required when using these dependencies.

Feature Usage

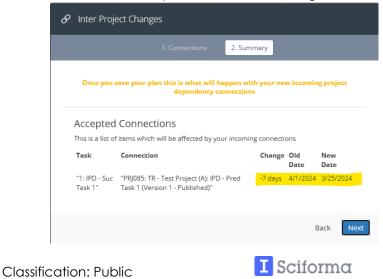
The original release provided notifications based on predecessor tasks running late and therefore warning the successor project manager of a potential delay to their task. A new notification is now provided if the predecessor is changed to finish earlier so the project manager of the successor knows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

								3/25/2024		
ld								MTWTFS		
							2			
1	IPD - Suc Task 1	on 🔗 Int	er Project Ch	anges						
	IPD - Suc Task 2	115		1. Connections					-	
	IPD - Suc Task 3	219								1
dd01	demOSourav: testhot (Version 1 - Published)	16 1 - IP	D - Suc Tasl	k 1						
	*	Intco	changed	Project (A): IPD - Pred Task 1 date, Brought Forward task by duration of task Brought Forwe	7 days	× ×				

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 muststart-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.



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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 readonly

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.

• ~	_									
0 ب	11	1	IPD - Pred Task 1		842326fs	Mon, 11 Mar 2024 🛗	Fri, 29 Mar 2024 🛗	15	2	
٥ ن		1	✓ Project Close	13fs+3		Thu, 6 Jun 2024	Thu, 6 Jun 2024	0		
٥ 0		1	Project Close				Thu, 6 Jun 2024 🋗	0		
		8				Mon, 1 Apr 2024	Thu, 4 Apr 2024	4		



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.

Edit Login Profile			
SYSADMIN_PPM System Admin PPM			
General Timesheet Expense	Project Portfolio	Eustomer Accounts Setup Audit	
Name *			
System Admin PPM			
Code			
SYSADMIN_PPM	 Active 		
Features:		Controlled Custom Field Access:	
Set System Defaults		Maintain	
Set Own Project Restrictions		My Work/Projects:	
Set Own Activity Restrictions		Create Custom Views	
Set Available To All		Edit layout and add widgets	
Use Code Converter		 Ability to Publish Custom Views 	
Modify System Filters		Dashboards	
Modify User Filters Access Data Load		Create Dashboards	
 Create and view Posts 		 Ability to Publish Dashboards 	

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.

			All Supp							
Supply	~	_		Field		Comparisor	Туре	Value		Displayed
Filter		1	Resource C	ode	ж ~	<u>ہ</u>	✓ Select		~ #FN#	No v
ilters up Filters	2	2	Project Coo	le	ж ~	=	~ PRJ003		¥ ~ #FN#	No v
al Filters										
			xport 🚺	Create Data Template 🕝 Import Data 🗙	CDelete 🛞 Link Supp	ly to Demand				
			ixport	Create Data Template 💮 Import Data X		ly to Demand Resource	🗘 Team	🛇 Week Start Date	Effor	rt
				•	^		Company Name	Week Start Date 06/05/2024	Effor 5.00	rt
				Project Global web services consolidation Global web services consolidation	~	Resource George George	Company Name Company Name	06/05/2024 20/05/2024		rt
				Project Global web services consolidation Global web services consolidation	~	Resource George George	Company Name	06/05/2024 20/05/2024	5.00	rt
				Project Global web services consolidation Global web services consolidation Global web services consolidation Global web services consolidation	~	Resource George George George Peter Mangan	Company Name Company Name Company Name Development	06/05/2024 20/05/2024 27/05/2024 14/08/2023	5.00 5.00 5.00 0.50	

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.



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upply Data Load		×
Create Data Template		
Entity Type:	Supply	
Period: Effort:	O Weekly Monthly FTE ✓	
Include Fields:	Field Name	
	Project Code	
	Resource Code	
	Team Code	
	Role Code	
	Month Date	
	Supply FTE	

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.

Supply Da	ita Load			
Import Data				
	Data Load File:	Choose File	KIP_Supply_DataLoad.xls	[Upload]
\$ ☆ ⊕	≡ 🕸 🔼			
Ω				
Change Picture	Change Password			
My Defaults	My Projects			
My Activities	My Email Notifications			
	My Dataloads			
Resources Centre	About			
	Sign Out			



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	

