KeyedIn Enterprise v8.2 Release

Release Summary

Version 8.2

June 2024

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	June 10, 2024	All	All	T Raper	N/A
1.1	June 19, 2024	Feature	Screen Label	T Raper	N/A

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	June 14, 2024	Tom Raper – Product Manager
1.1	June 19, 2024	Tom Raper – Project Manager

Document Authorization

Version Number		
1.0	June 17, 2024	Terry Willans – Director, Global Security
1.1	June 19, 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 v8.2 is a scheduled quarterly release with multiple product enhancements, new features and general support fixes related to Risks and Issues, Benefit data loading, and new Forecast Expenditure Charges. Management of resource skills, additional configuration export/import options, and web hook updates provide more administration and integration support.

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

Risk and Issue Updates

This release provides an updated view of Risk and Issue records when adding or editing records leveraging newer technology in line with other system records. The new screen will appear on the right side of the page and include audit tracking visibility.

Forecast Benefit Export and Data Load Import

Users leveraging Enhanced Forecasting can now export Forecast Benefit values to a spreadsheet and data load benefit related values and attributes.

Forecast Expenditure Charges

A new option is available to allow configured users to record Expenditure Charge values against the Expenditure Charge Cost. This supports customers with margin-related expenses. Expense charges can also be imported via data load operations and reported on with updated data views.

Configuration Export and Import Enhancements

Additional options are available in Configuration Export/Import for Applications, Invoice templates, and Working Times with improved import insights.

Resource Manager Skills-Only Management

A new option is available to limit a resource manager to only update skills and no other values on the resource profile.

Updated Web Hook options

Improved administration of web hooks provides more value and attributes for use in integrations and workflow operations.

Screen Label Workflow Status

New screen label options are available for changing or updating the Workflow Status and Workflow Sub-Status terminology.

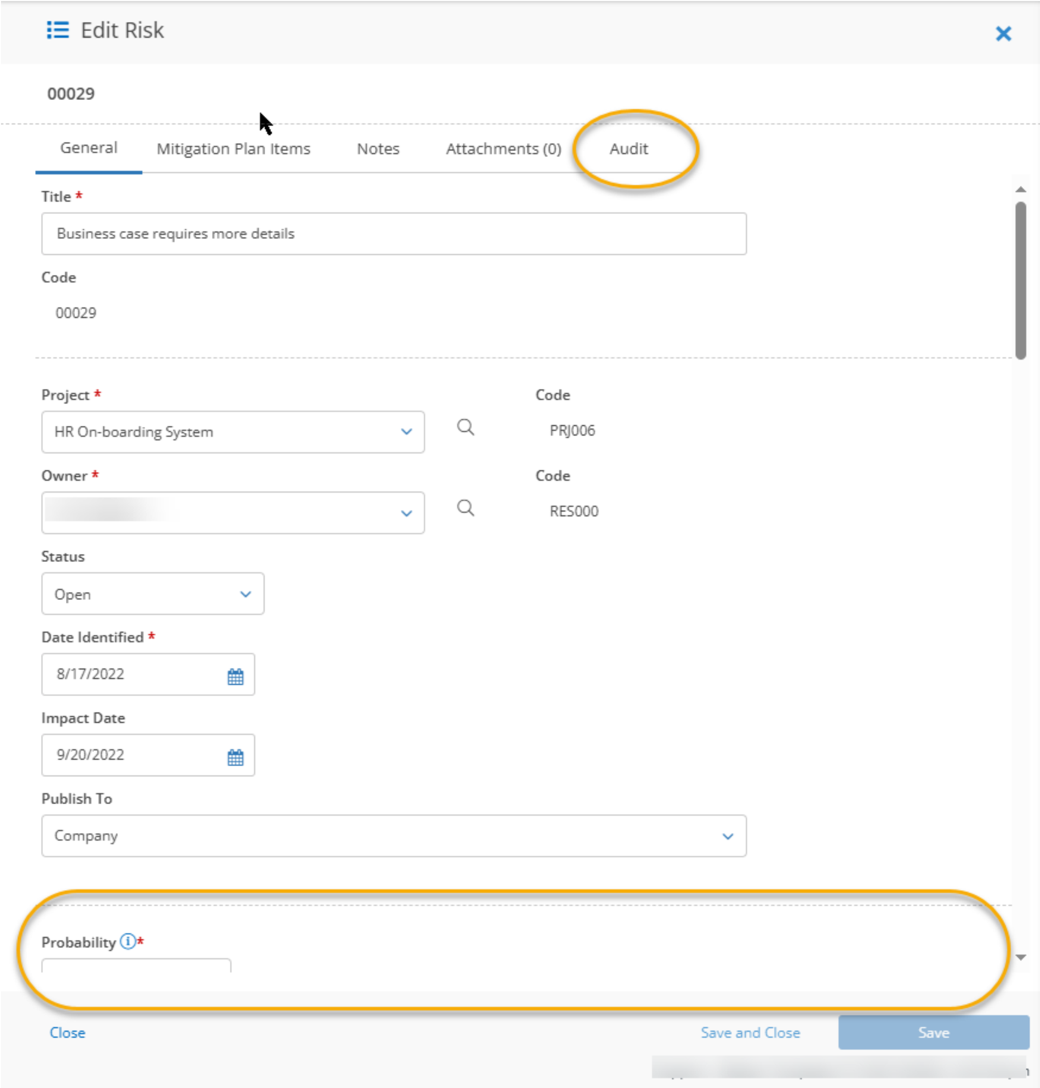
Risk and Issue Updates

Feature Setup

The Risk and Issue screens have been updated to reflect the newer common view of records displayed in the right-hand pane of the screen. There is not a specific setting associated to the changes made. The Risk and Issue screens will simply display in the new method when opened throughout the system. Access to Risks and Issues continues to be controlled by Configuration | General Settings and permissions in Logins.

Feature Usage

The updated dialog for Risks and Issues leverages the same logic and operations that relate to Risk and Issue screens prior. Core system fields are laid out at the top of the screen followed by a section of fields on the General tab for any custom fields created by customers. Order of the custom fields is based on the Row ID reference in Configuration | Custom Fields | Risks/Issue. Custom Field sections will be displayed as additional tabs.



KeyedIn's API technology is used to generate the screen and display the values. This update allows for access to audit tracking and logging of changes to the fields and is displayed in the Audit tab on the record.

Forecast Benefit Export and Data Load Import

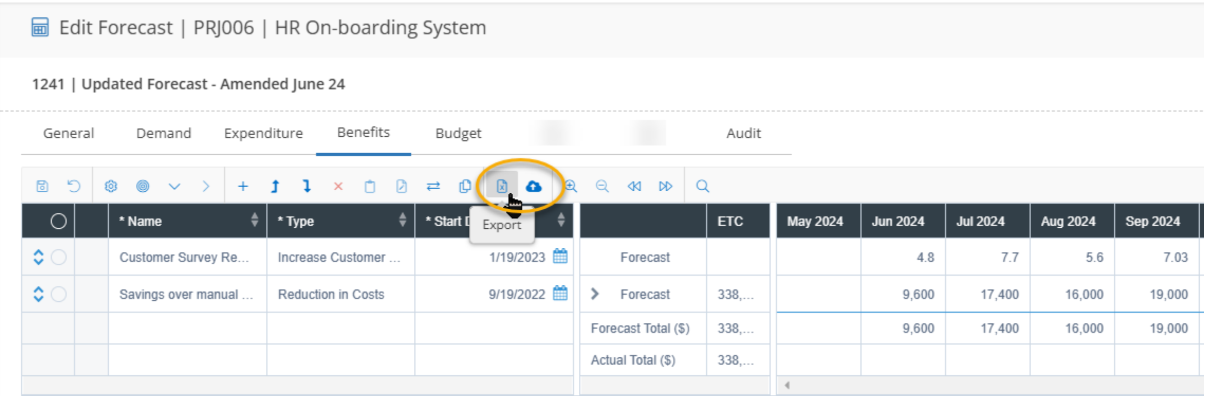
Feature Setup

Permissions to edit a Forecast record are required to perform an export and data load, based on the requirement to save values to the record. Access to Data load is a distinct permission found on the Login Profile | General tab. Edit rights can be set on the Login Profile | Portfolio tab.

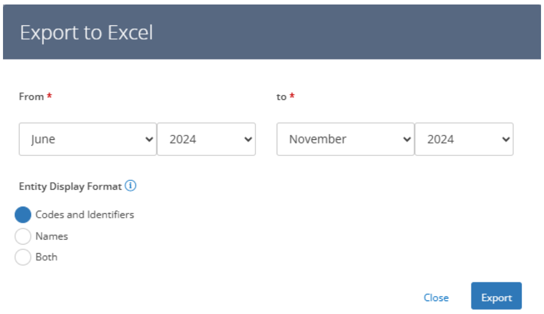
Feature Usage

Users accessing the Forecast Benefit tab will find new options for Export and Data Load on the toolbar.

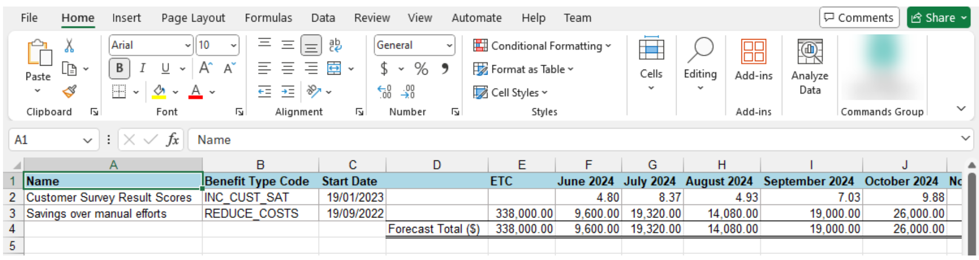
Export Benefits



Selecting the Export button will provide a screen to choose what periods from the forecast the use wishes to export. The dialog box will change based on the level of visibility of the forecast. Monthly view will provide monthly periods and weekly view will provide days associated to start/end of period weeks.



Users can select whether to include the line item codes and IDs, names, or both options for desired identification in the export file that is created. Clicking Export will generate a spreadsheet with selected output.

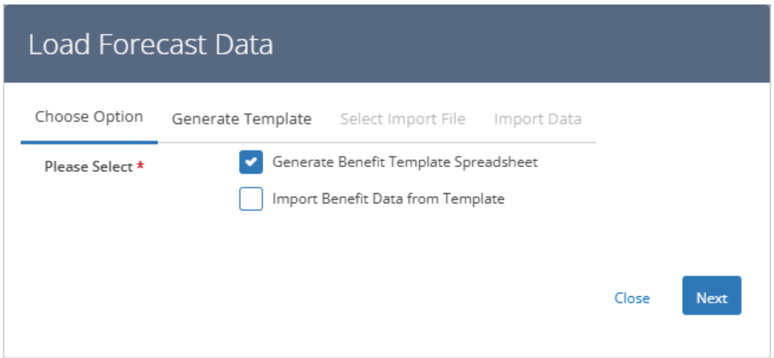


Data Load Benefits

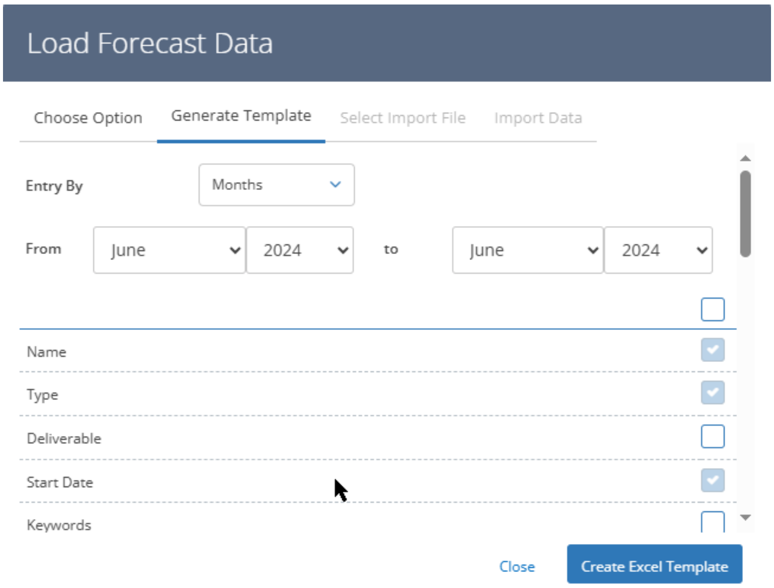
Although export data can be used to copy into a data load spreadsheet, the data load operation is designed to allow users to perform bulk inserts of records into the system from a properly formatted spreadsheet the system will recognize.

As all data load functions in KeyedIn, data loading benefits requires two steps. First to Generate the template spreadsheet and second to import values from the template.

Selecting the Data Load icon from the toolbar will provide the dialog box to perform the required actions. From the Generate Template tab select the Generate option and click **Next** button.



The user can then select the desired number of periods and data entry fields that are to be inserted into the forecast. Date values will change based monthly or weekly view of the forecast before opening the Data load dialog. Some fields are automatically checked as they are required for proper data entry, other optional fields can be chosen by the user.

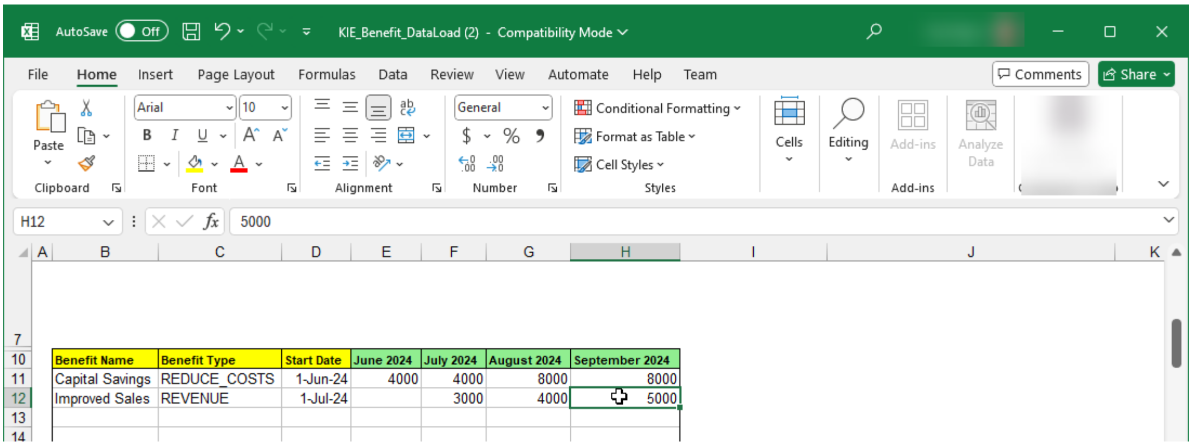


Selecting the **Create Excel Template** will generate the file and be made available in the browsers download folder depending on the browser's settings for handling downloads. After export the data load dialog will remain open and available for importing the data entered spreadsheet back into the Forecast Benefits tab. If the user needs to navigate away and check other system values and settings, they can return to import from the same data load toolbar button and select Import… versus Generate….

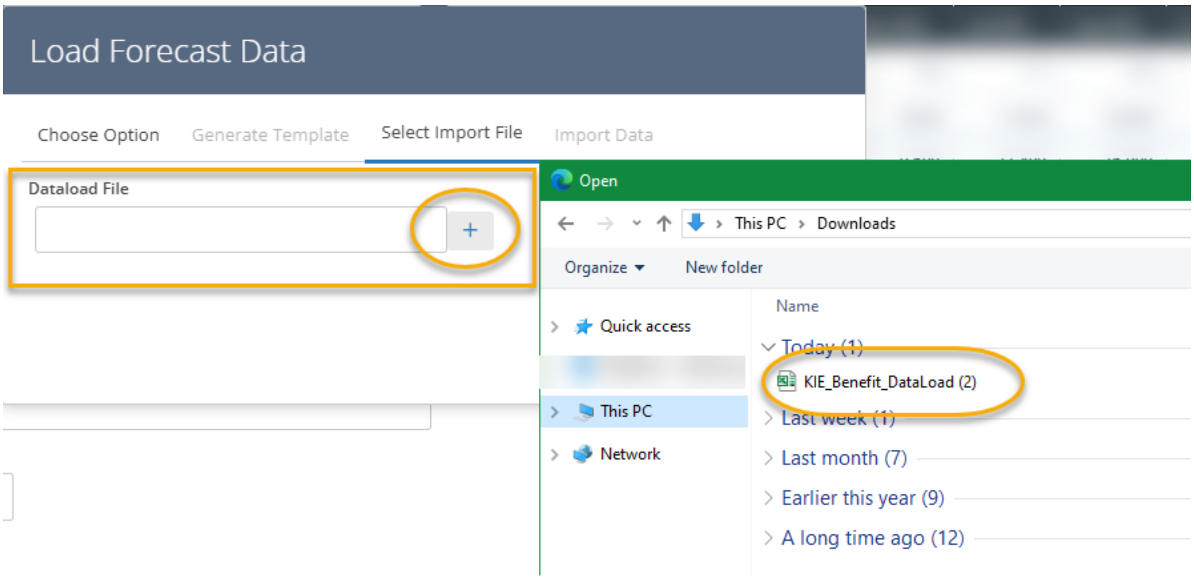
After entering the desired data content into the spreadsheet, the users can import those values as new lines into a forecast.

NOTE: At this time, lines will always be added as new lines. Updating existing forecast lines is not allowed currently and will be addressed in a future release.

More details about required data entry and formatting are referenced in the template spreadsheet on the general and benefits tab. The notes tab can be used to provide user comments about the purpose of the import and related content.

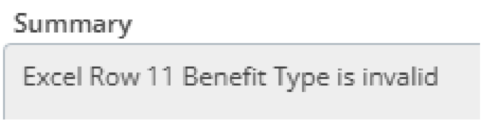


From the import dialog, select the desired file that includes new values.

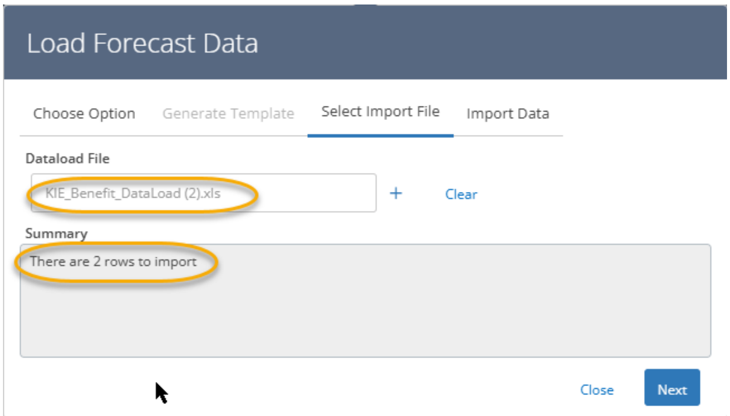


The file is evaluated for proper recognized content and details. If the system identifies key missing criteria, error messages will be presented and required to be addressed in the spreadsheet and repeating these steps until all issues are resolved.

In this example a benefit type code was entered improperly and didn't match the system defined option. The spreadsheet can be corrected, the user can clear the file and reselect the file again with saved changes and evaluated for proper data.

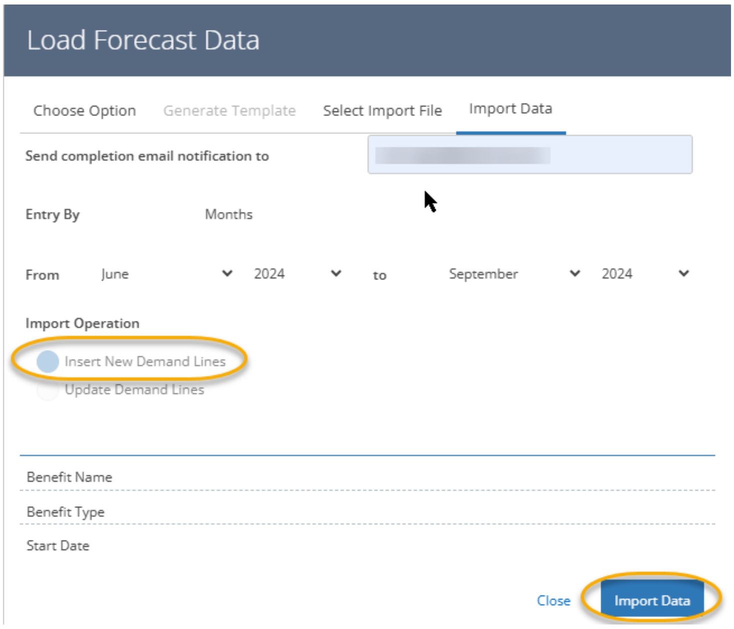


If system values are proper, the number of rows to import will be referenced and the user can click the Next button to proceed with the import operations.

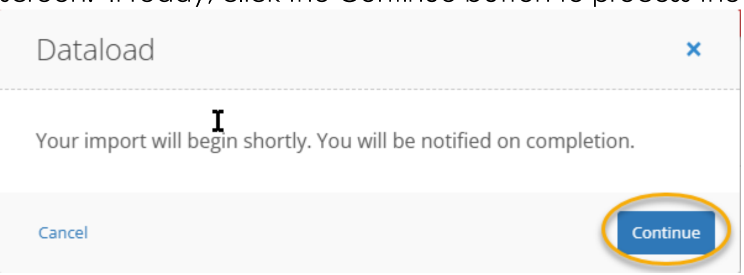


The Import Data tab will show the number of periods being imported and related fields. The import operations are designed to be a background process that does not require the user to wait for the import to complete before moving onto other work items. The user can optionally enter an email address to receive a system email message based on the success or failure of the import.

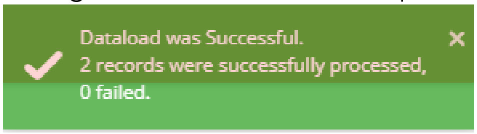
NOTE: At this time Insert is the only option and Update Demand Lines will be a future feature.



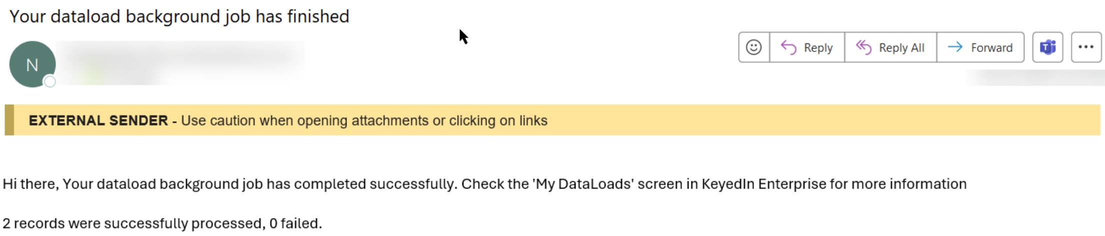
Clicking Import Data will provide a secondary confirmation screen and reference. If the user needs to cancel the import, they can select the X to close the dialog and return to import screen. If ready, click the Continue button to process the import.



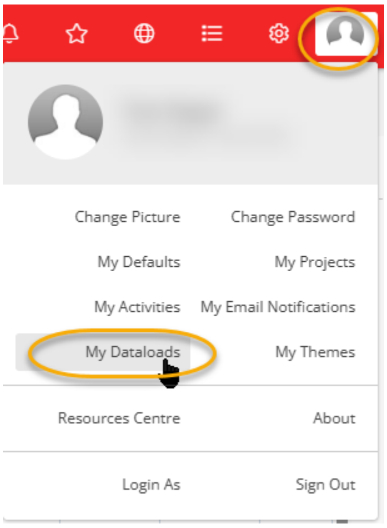
After processing the import file, a popup dialog will appear in the top center of the screen noting the import results. Errors may be identified with values and data entry resulting in a red dialog error box. Successful imports will provide results of the import.



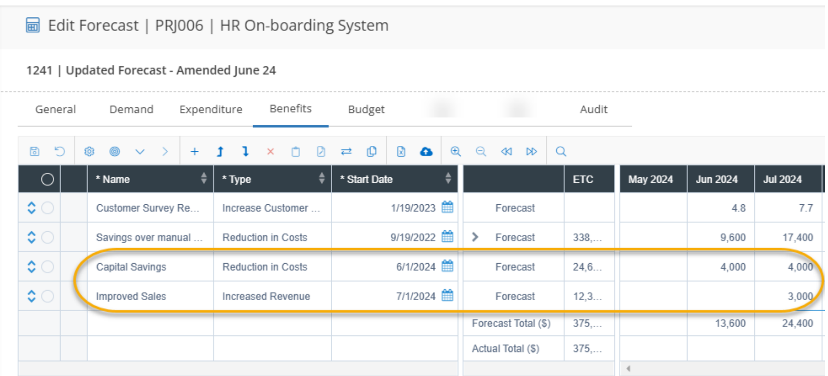
If the user selected entered an email address on import, the email address will be sent a message from the system noting the results.



If the user needs to see the results and more information about the import process after the popup message disappears off screen, details can be found in the **My Dataloads** section from the user profile section on the application top toolbar.



Following the import the user may open the Forecast or refresh the Benefits tab to see the imported values and continue with additional operations as required from the Forecast record.

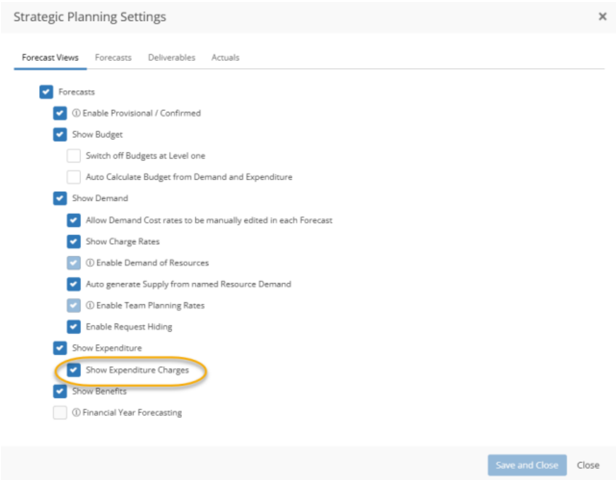


Forecast Expenditure Charges

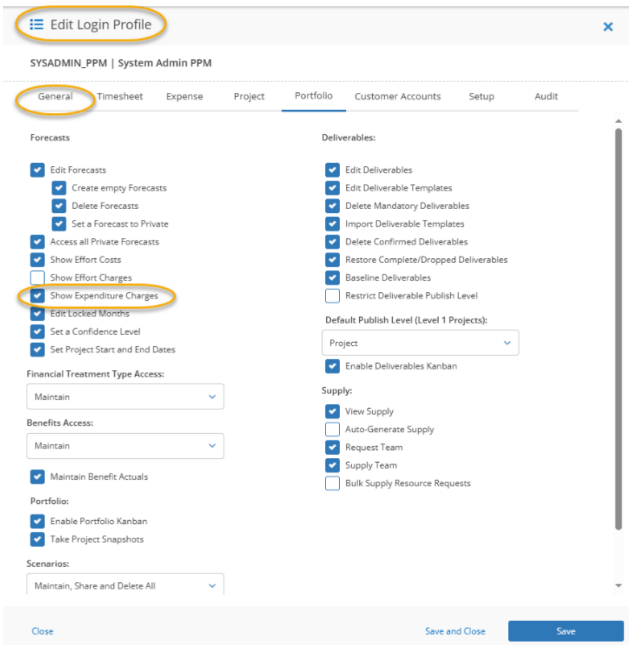
Feature Setup

Forecast Expenditure Charges are a new option to record not only the cost but also a charge amount against expenses. This option is only available with Enhanced Forecasting enabled and will not apply to legacy forecasting. There is both a system setting to enable the feature system wide and a Login Profile setting to control whether a specific user can use the feature.

The system setting can be found in the Configuration | Strategic Planning Settings | General tab | Forecast section. Check the Show Expenditure Charges to enable the option. The feature can be disabled if unused by unchecking the option. You must Show Expenditures before you can Show Expenditure Charges. You cannot show charges without expenses.



In addition to the system setting, it is required for the necessary Logins to have the option enabled on their Login Profile. The user setting can be found on the Login Profile | General | Forecast section. This option will provide visibility and the Maintain settings in Login | Portfolio | Forecast will determine if the user can edit the values or only view them.

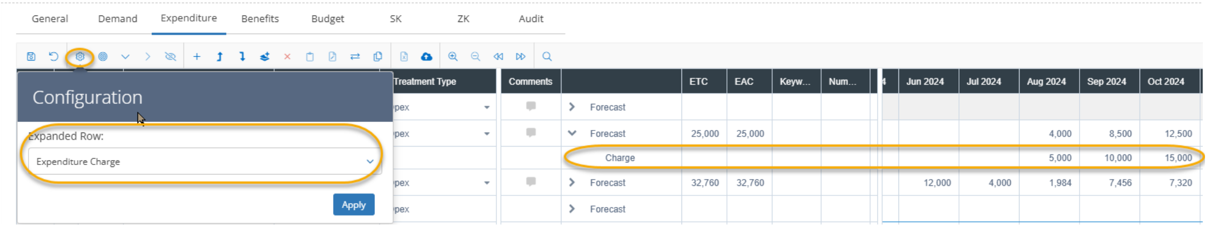


Feature Usage

The primary use case of Expenditure Charges is for companies that pass on costs to customers or internal departments as cross-charges. If the costs are supposed to also provide additional revenue or margin, the charge amount may be greater than the cost amount. For companies that may only pass on a portion of the expense to customer or departments the charge amount may negative margin and be lower than the cost amount.

Once enabled users can now enter a charge value for each forecast expense line. The core requirement for entering an expense line item remain the same, as they require a description, expense type, and treatment type. The Forecast primary data entry line will always represent the cost of the expense. These values can be entered as required to represent the forecasted cost of the expense line.

A new Configuration | Expanded Row option is available to provide a data entry line for Expenditure Charge. Once selected the expanded row allows data entry for the desired charge amount associated to the expense in the selected period.



After entering the costs and charges for all the related lines, saving the record will ensure all summary details are calculated for **Total Forecast Charges**. The **Expenditure Margin** is calculated from Charge minus Forecast (Cost) amount. This can result in positive or negative margin.

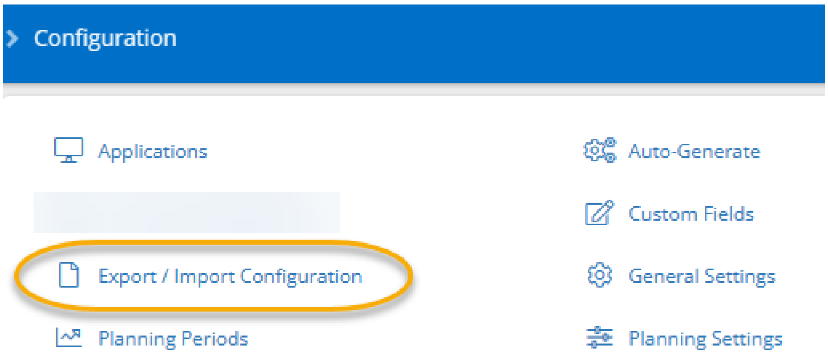
	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024
> Forecast						
⌄ Forecast				4,000	8,500	12,500
Charge				5,000	10,000	15,000
⌄ Forecast		12,000	4,000	1,984	7,456	7,320
Charge				2,500	10,000	12,000
> Forecast						
Total Forecast Cost ($)		12,000	4,000	5,984	15,956	19,820
Total Forecast Charge ($)				7,500	20,000	27,000
Expenditure Margins ($)		-12,000	-4,000	1,516	4,044	7,180

For the initial release, the totals and margins are only calculated on the Expenditure tab. The Budgets tab will only reflect costs. Charges and margins will be added to the budget tab in a future release. Additional reporting is possible with the release using the data view Enhanced Forecast Expenditure Data. See Data view changes section for more information.

Configuration Export and Import Enhancements

Feature Setup

There is no setup requirement. Configuration Export/Import options are available to Administrators of your KeyedIn system. The feature was first introduced in version 8.1 and more details, use cases, and references are available within that release guide.



Feature Usage

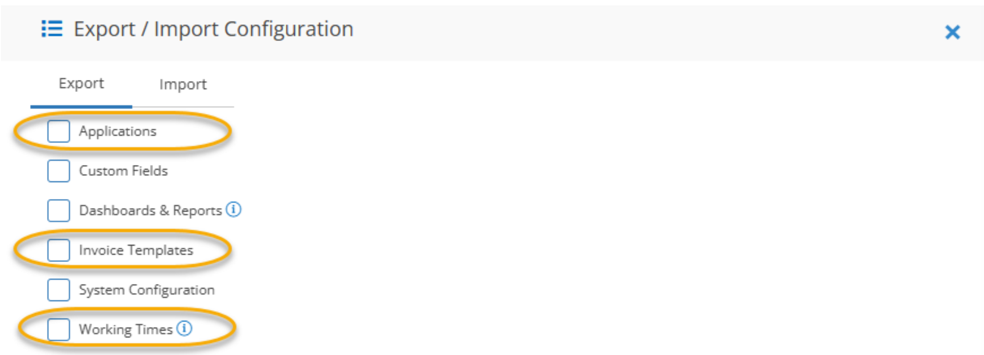
This 8.2 release extends the options available to export and import or included as a backup of the configuration of your system prior to making any changes, as a method of restoring settings if necessary.

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.

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 migrating to Enhanced Forecasting.

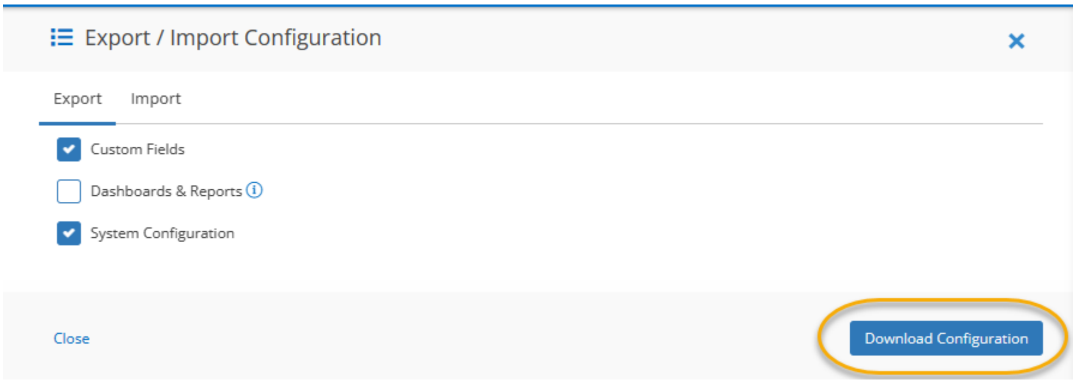
Export

The Export tab now has options for Applications, Invoice Templates, and Working Times. Users can choose to select a single or multiple categories to generate a configuration file including those section settings. Working Times will include Planning Period details as they are required to properly define Working Times.



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.



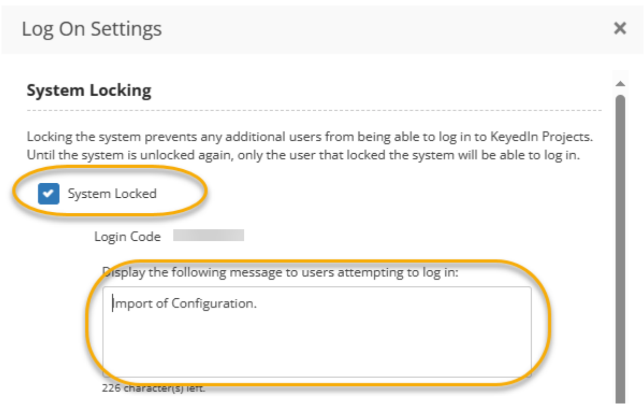
3. The system will gather the appropriate settings and create a **KIE_Configuration.config** file in your browser's download file location.
   It may take some time for the file to generate depending on the number of items being exported. Users may rename the file based on preferences for the date, file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

Import

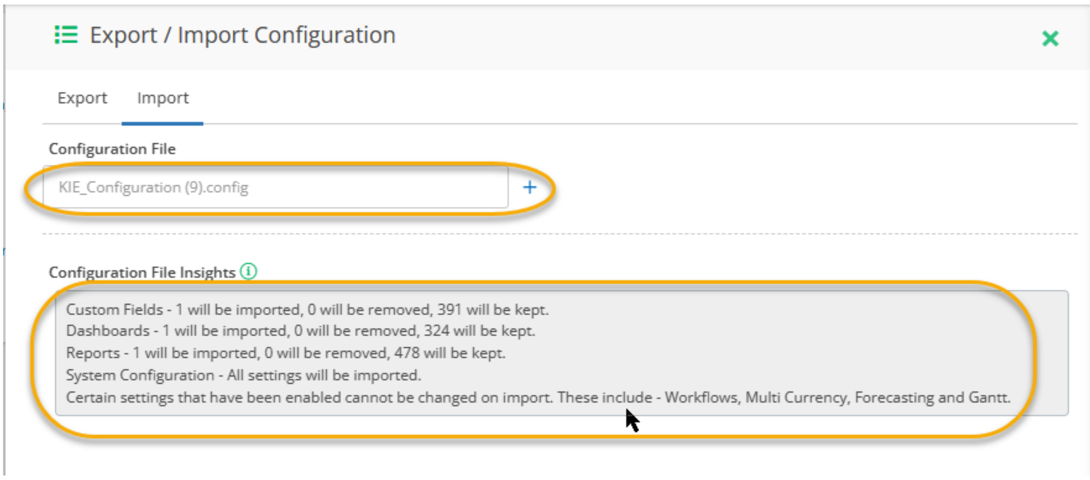
The Import tab allows users to select the configuration file, see reference to the details that will be imported and choose to import the configuration settings.

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.

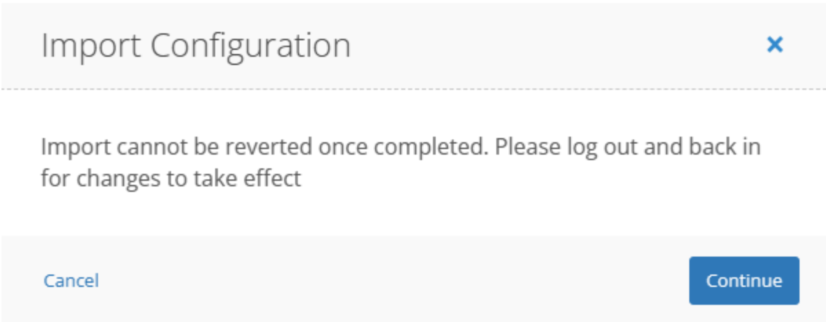


2. Once the system is locked, navigate to Export/Import Configuration, and select the Import tab.
3. Use the + sign in the Configuration File field to browse and select the desired configuration file.

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.



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



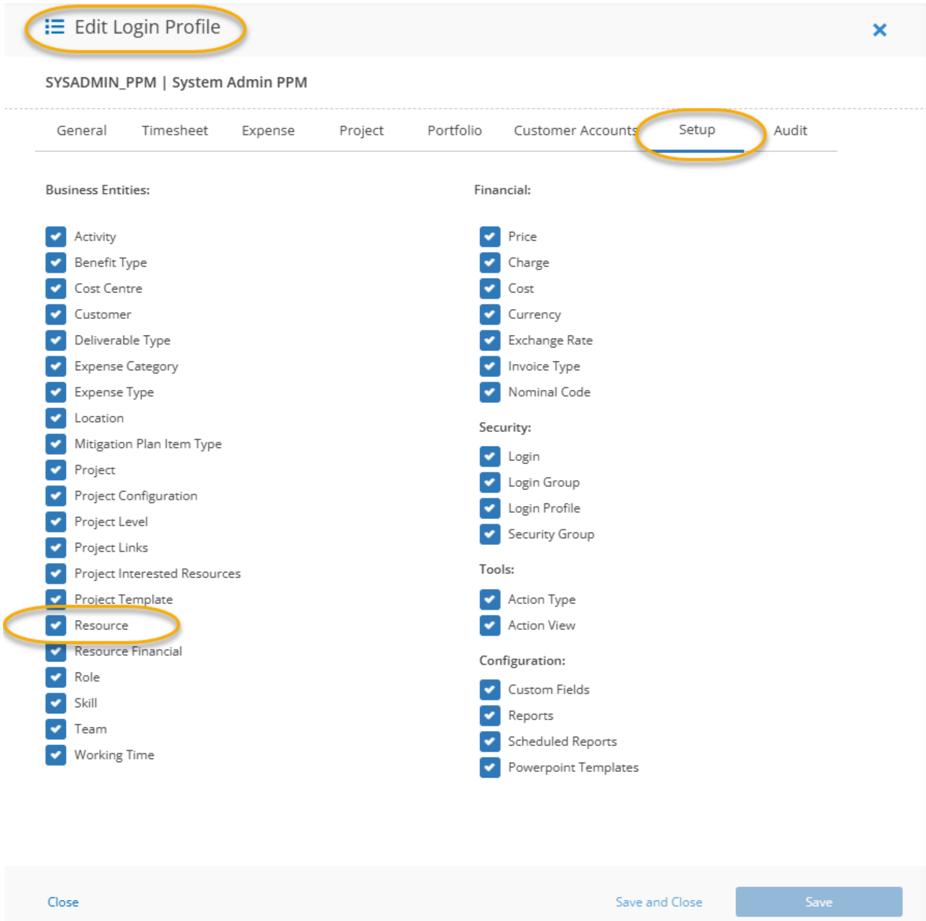
6. The system will begin the import process and display a message upon successful completion.
7. After a successful import, the system will automatically be unlocked and available for users to login. Any changes in settings, views, reports, etc. will be available upon logout and login.

Resource Manager Skills-Only Management

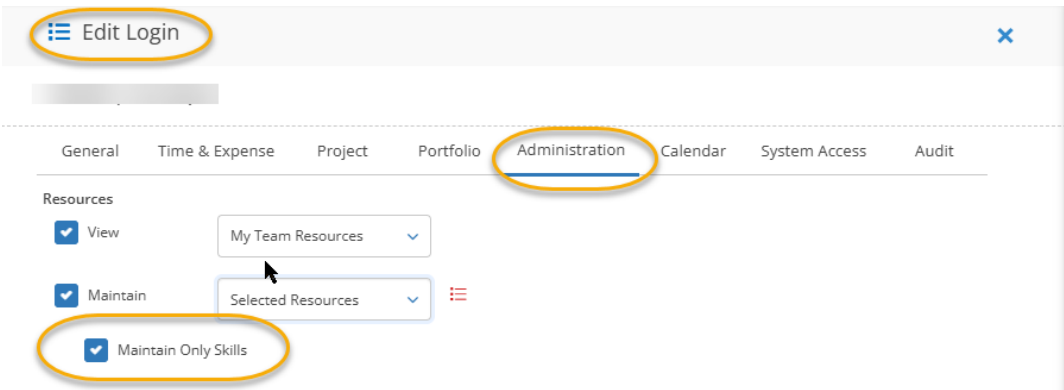
Feature Setup

A new option is available for companies working with managers who are allowed to maintain the skills for resources but are not allowed to maintain other properties associated to the resource found on the other resource profile tabs.

By default, if the Login Profile associated to a Login has the Resource option checked on the Setup tab, this login has the rights to edit and maintain all settings associated to a resource. This is a general administration setting for resource management.



However, if the Setup | Resource option is unchecked more granular control is made available on the Login | Administration tab.



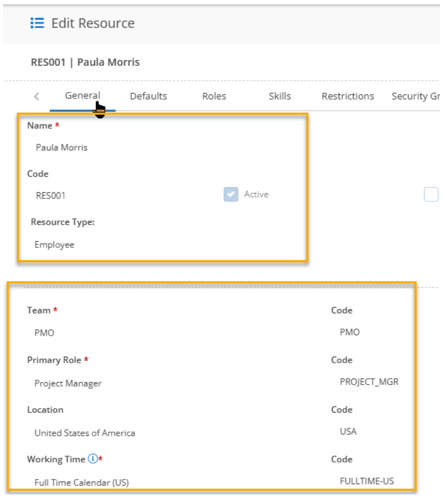
Using the Administration settings the Login can be limited to view and maintain a certain set of resources.

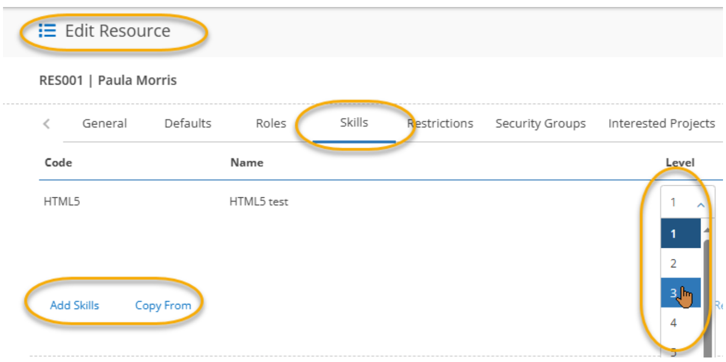
- View provides the ability to open and view information on the resource record in a variety of places in the application.
- Maintain provides the ability to edit attributes associated to the selected resource records.
- Options exist for both view and maintain to select All, Own, Security Group (if enabled in the system), My, Selected, and My Team.

- A different selection can be made on view versus maintain. In our example above the login has the option to see all team resources (e.g. resources in the same department/team), but only maintain some specific selected resources (selected on sub-screen).
- Maintain includes the rights to view. For example, if view is unchecked and maintain is set for a group of users, the login will be able to view and maintain those resources.

Feature Usage

The new option for this release as a sub-set of Maintain is **Maintain Only Skills**. When selected the login will be able to view the selected resources, but only the Skills tab will be available for editing or updating from the related Login. Skills can be added, removed, copied from other resources the user can view, or skill levels changed. Other tab settings will be view only.





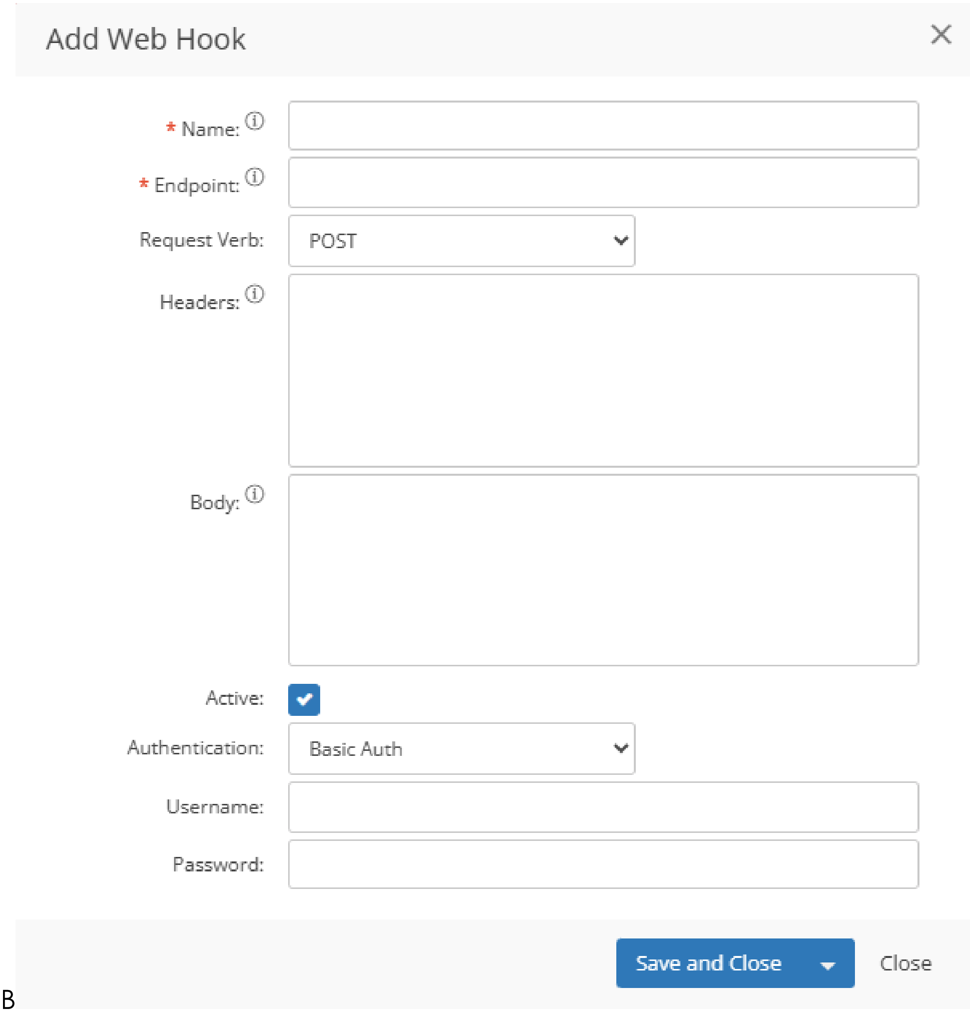
Updated Web Hook options

Feature Setup

The settings and operators available for web hooks have been enhanced in this release to make integrations with other system and use of web hooks easier to manage and more advanced operations available via the API.

Access to define Web Hooks is available for users with Administration and Configuration rights in the system. Administrators can define web hook properties without Login | System Access |System or API Roles as the definition of the web hook by itself cannot perform the function. The Login performing the API function should have the API roles and appropriate keys, where applicable.

Feature Usage



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Properties associated Web Hooks include:

Definition Item	Description / Functions
Name	The name of the web hook displayed inside KeyedIn and used to make selection from drop-down lists associated to workflow or workflow movements.
Endpoint	The URI that will be sent a HTTP request. The endpoint can contain the following tokens that will be parsed before making the request. #CONTEXT-ID# #CONTEXT-ENTITY#
Request Verb	Either POST or GET
Headers	HTTP header keys and values separated by a colon with each key-value-pair appearing on its own line of text. (e.g. Key1:value 1)
Body	Enter a body to overwrite the default body for the entity. Tokens may be used.
Active	Enables or disables the web hook for use.
Authentication	Options for Basic, API Key, or None depending on the connection requirement. • Basic requires username and password • API Key requires API Key, API Value, and Add To options for Header or Query Parameters • None will pass details as noted

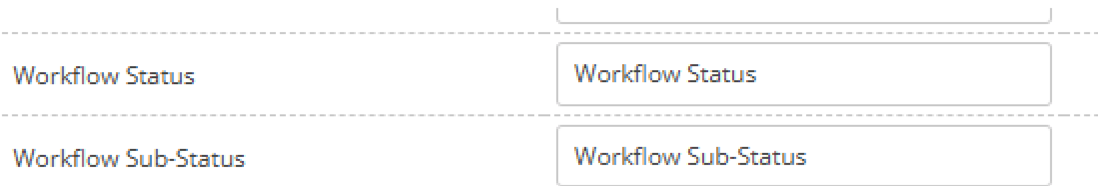
Screen Label Workflow Status

Feature Setup

Access to control screen labels is available to users with administrative rights and the Set System Defaults option from the Login Profile | General tab.

Feature Usage

New screen label options are available for changing or updating the Workflow Status and Workflow Sub-Status terminology. This changes aids in making a distinction between Project Status reported via status reports and the status of the project as it relates to workflow operations (e.g. gates, phases, or steps a project goes through in workflow operations). Changes in the labels here will be reflected in Project and Information Widget column choosers, Search | Project filters, and updated data views.



Data view Changes for v8.2

A summary of Data View changes since the last release with data views changes (v8.1.2) can be found below.

New Data views

Dataview	Description
Project Supply Monthly General Data	A new version based on the Project Supply Data data view with new fields for: • Supply FTE • Scheduled FTE • Actuals FTE
Project Supply and Assignment Monthly Data	A new version based on the Project Supply and Assignment Data data view with new fields for: • Supply FTE • Scheduled FTE • Actuals FTE

Updated Data views

Dataview	New Fields
Forecast Benefit Data	The following additions: • Custom fields associated to benefit forecast rows
Forecast Project Benefit Summary	The following additions: • Custom fields associated to benefit forecast rows
Enhanced Forecast Expenditure Data	The following additions: • Planned Charge (Expenditure Currency) • Planned Charge (System Currency) • Margin (Expenditure Currency) • Margin (System Currency) • Actual Charge (Expenditure Currency) • Actual Charge (System Currency) • Actual Charge in Locked Months (Expenditure Currency) • Actual Charge in Locked Months (System Currency) • Forecast Charge (Expenditure Currency) • Forecast Charge (System Currency) • Expenditure Charge (Target Currency) • Actual Charge (Target Currency) • Forecast Charge (Target Currency) • Forecast Planned Total Charges • Forecast Planned Margin