KeyedIn Enterprise v8.2.1 Release

Release Summary

Version 8.2.1

July 2024

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	July 18. 2024	All	All	T Raper	N/A

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	July 18, 2024	Tom Raper – Product Manager

Document Authorization

Version Number		
1.0	July 20, 2024	Scott Brown - CIO

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 v8.2.1 is a monthly update release with general support fixes and product enhancements related to Product Supply, PowerPoint output files, publishing views, pinned timesheets, and column chooser.

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

Publishing My Work / Project Views

Publishing views for My Work and Project pages can be done directly to the desired Login Group without the requirement of putting your user in that Login Group.

Column Chooser Sort and Search Options

Finding and selecting fields from the column chooser is now easier with a field sort and search option.

PowerPoint Output File Name

Reports that are created from PowerPoint templates and output to files from the Project and Insights areas now include the name of the Project, Project Level, or Insight filter in the file name.

Productive Supply View in Supply Screen

For customers leveraging Productive Capacity attributes for resources, a new Supply calculation is available to differentiate resource availability.

Pinned Timesheet Treatment Types

Users that had pinned timesheet entries prior to upgrading to Enhanced Forecasting will now see treatment types applied to the timesheet entries.

Hide Resource Financial Details

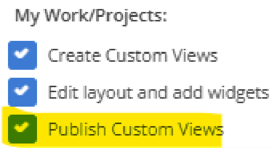
Extending on the May release feature to hide financial setup details for resources, the column chooser and data load attributes now also exclude financial fields.

Publishing My Work / Project Views

Feature Setup

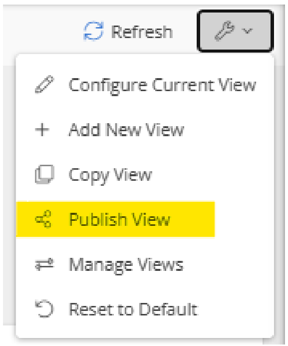
Publishing My Work and Project views now supports the ability to select any Login Group without the requirement of your user account being in that group. Prior to this release the publishing user required putting their account in the desired Login Group temporarily, publishing, and then returning to desired Login Group.

Users are still required to have the Publish rights to use this feature. The setting is found in the Login Profile | General tab | My Work/Projects section.



NOTE: In this release only My Work and Projects publishing is supported. A future release will add support for Insights and Portfolio Analysis | Analysis tab publishing.

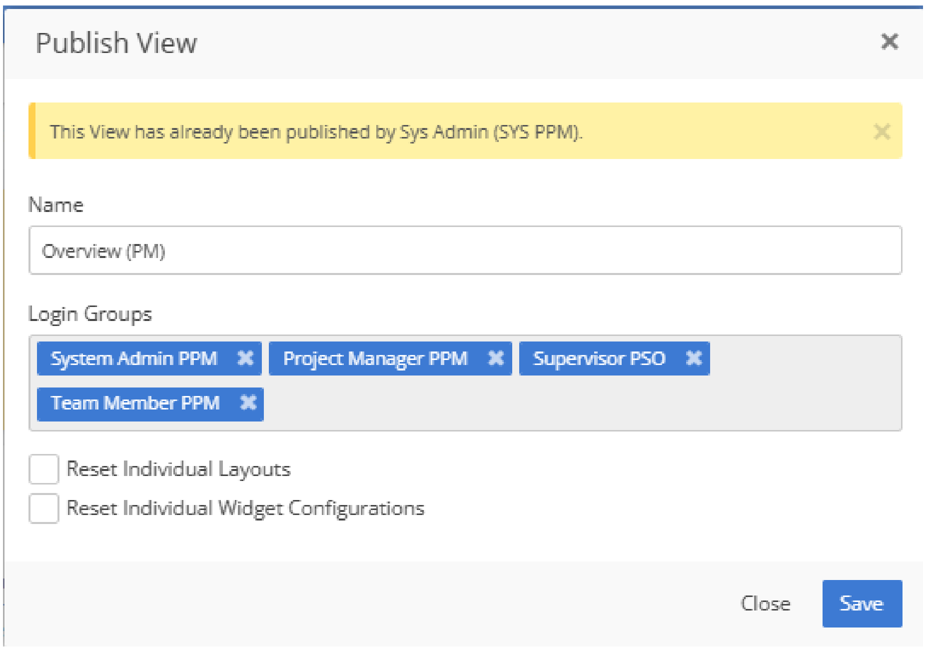
Feature Usage



Users with rights to publish can use the **Publish View** option from the screen Configuration menu (wrench icon).

Selecting option to Publish View will provide options for the Name and more than one Login Group can be selected. If the view has already been published by another Login, that referenced login will be displayed, and after publishing this view, the current user will become the primary publisher.

Standard options to Reset Individual Layouts and Reset Individual Widget Configurations will force the published view to overwrite another user's personal changes.

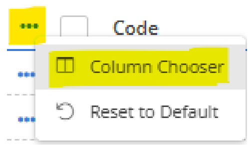


Column Chooser Sort and Search Options

Feature Setup

No administration or user configuration settings are required to use this feature. All users have access to the Column Chooser on list widgets and Search screens available to the users.

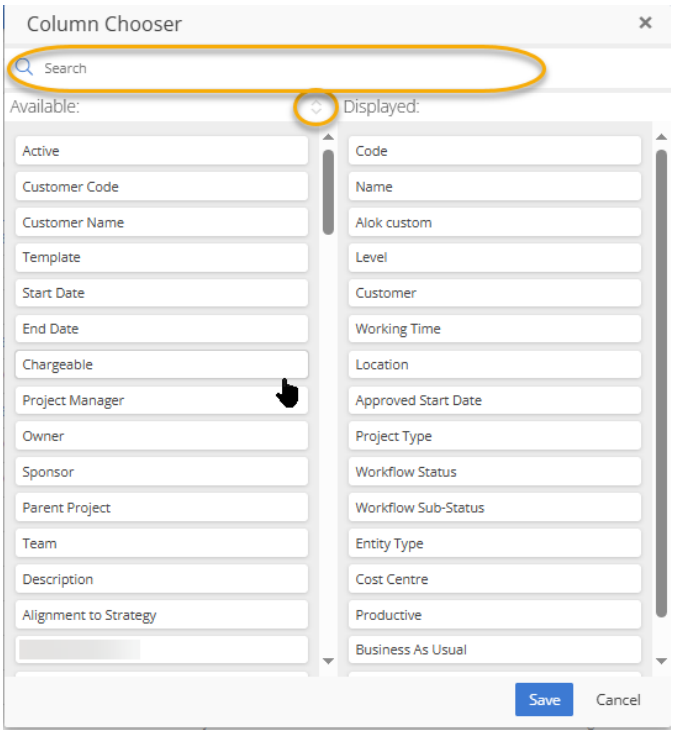
Feature Usage



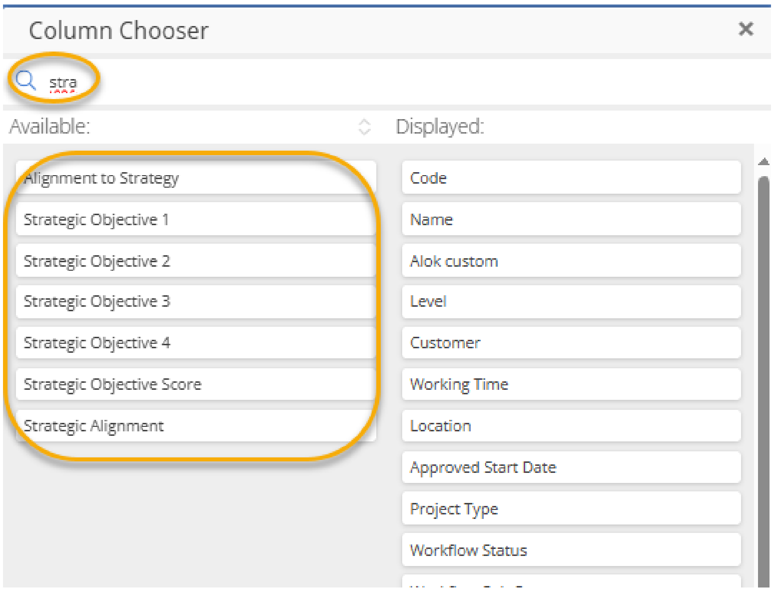
Access to the Column Chooser from the ellipsis icon provides a standard listing of fields available and notes those fields in the current display.

By default, the **Available** fields are ordered based on the record key associated to the field. The **Displayed** fields are ordered by the user based on dragging and dropping fields up or down in the listing.

Two new options are available to aid in finding the desired field to be included in the display.



1. A **Search** bar (magnifying glass icon) at the top of the screen was added and behaves as a type-ahead value and will filter the fields which contain the letters or text typed in the search box. Clearing the Search text box will display the full list of Available fields.



2. Located in the **Available** header is a sorting icon (Up and Down arrow). Clicking the icon will sort the fields in alphabetical order. Clicking the icon again will sort the available fields in reverse alphabetical order. Continuing to click the icon will sort in standard or reverse order.

NOTE: If the column chooser screen is closed and opened again, the default operations will be used (unfiltered and sorted by key). User settings are not persistent between screen openings.

After a user has filtered the listing with the search or sorted in order and found their desired field, they can drag the field from the **Available** column to desired place in the **Displayed** listing. Clicking the Save button will close the Column Chooser and return to the source list.

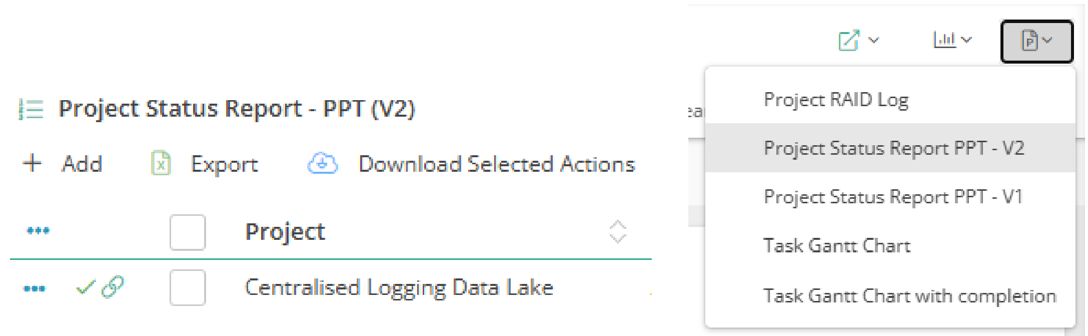
PowerPoint Output File Name

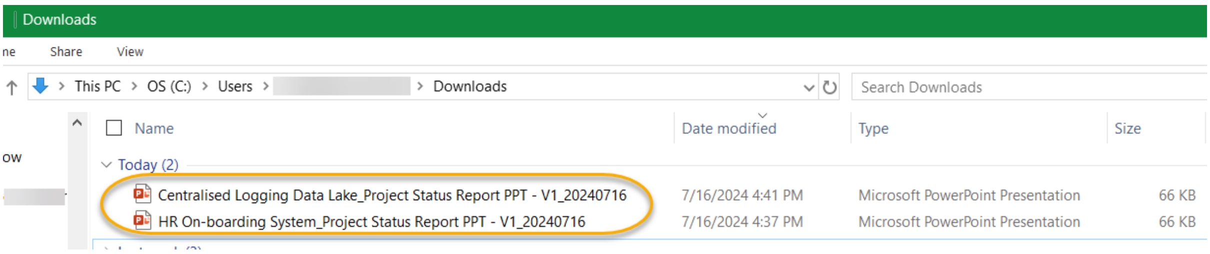
Feature Setup

Users require rights to an Action Type and Action View defined with a PowerPoint output report to use this feature.

Feature Usage

Users creating an Action that leverages a PowerPoint template for defined project level or directly create a PowerPoint output from Project or Insights menu will now see a reference in the output file name with the source **Project, Project Level, or Insight filter name**.





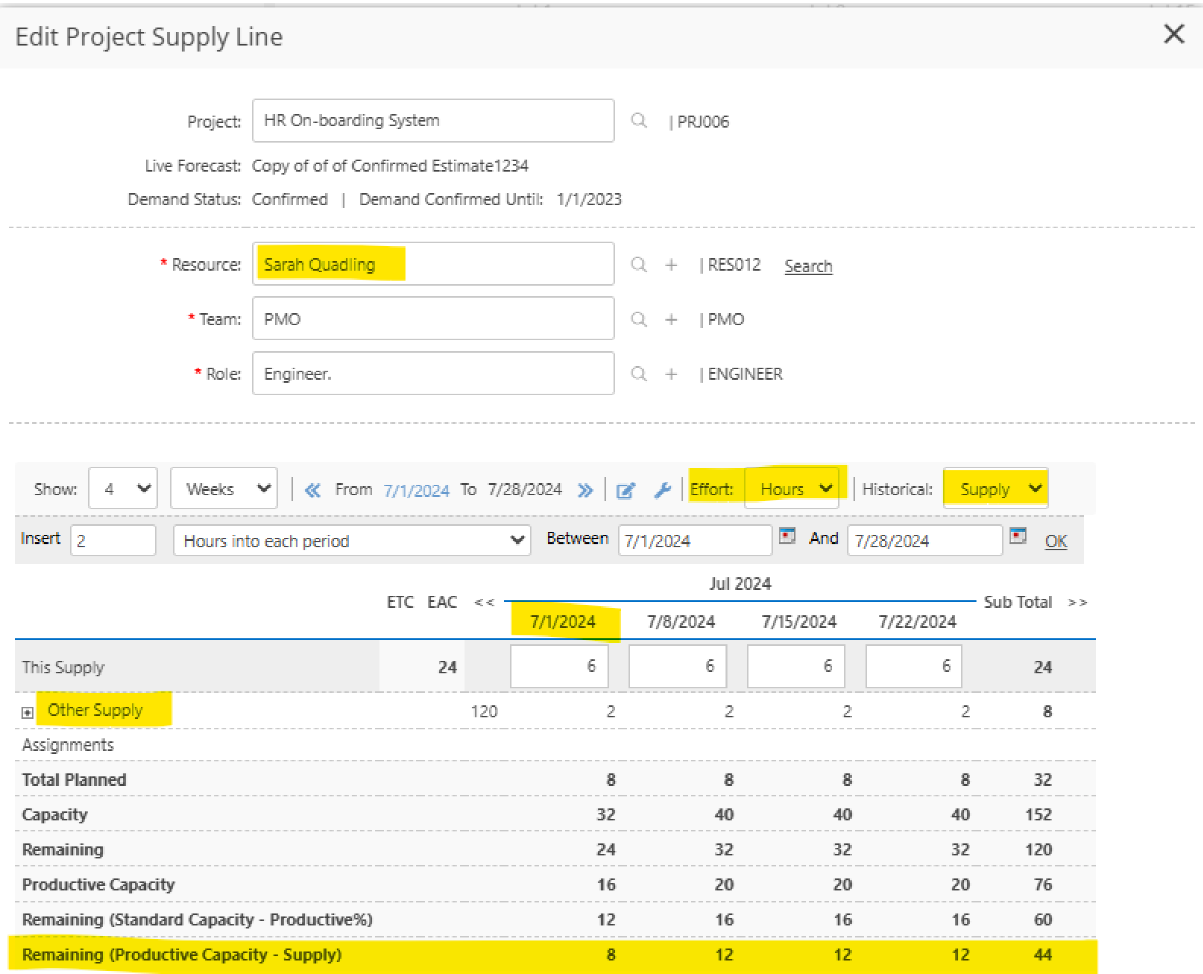
Productive Supply view in Supply Screen

Feature Setup

Companies that are leveraging the Strategic Demand features including Demand, Supply, and Productive Capacity settings on a resource record will see a new calculation when supplying a resource to a demand item.

Feature Usage

The calculation will automatically be displayed in the Edit Supply Line screen. The example below will be used for example and reference to better understand the calculations.



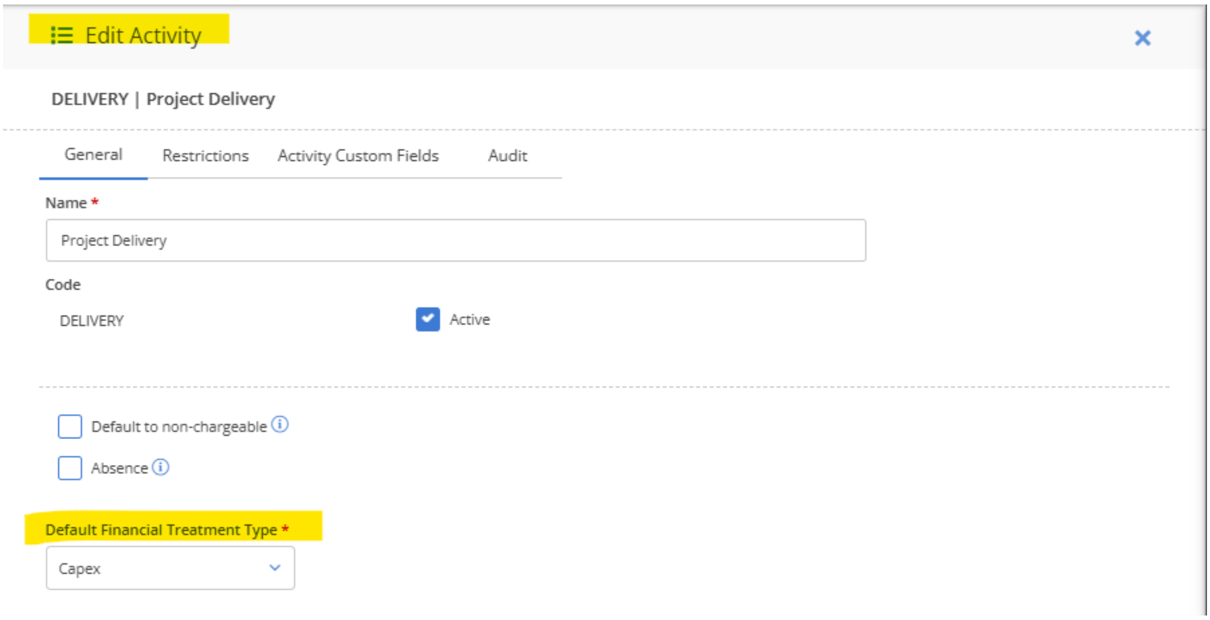
	ETC	EAC	7/1/2024	7/8/2024	7/15/2024	7/22/2024	Sub Total
This Supply		24	6	6	6	6	24
Other Supply		120	2	2	2	2	8
Assignments							
Total Planned			8	8	8	8	32
Capacity			32	40	40	40	152
Remaining			24	32	32	32	120
Productive Capacity			16	20	20	20	76
Remaining (Standard Capacity - Productive%)			12	16	16	16	60
Remaining (Productive Capacity - Supply)			8	12	12	12	44

a. The Resource (Sarah) uses a 40-hour work week working calendar.
b. Sarah's Productive Capacity is set at 50%.
c. The first week (July 1) in this example includes a holiday which decreases that work week by one day (8 hours).
d. Sarah was supplied to another project for 2 hours each week, reducing capacity by 2 hours each week.
e. The current supply for the selected project is adding 6 hours per week. The combination of 2 hours and 6 hours means one less day per week.
f. The original *Productive Remaining* has been renamed **Remaining (Standard Capacity – Productive %)**. The dash is for naming not minus. This calculation takes the remaining hours/days multiplied by productive capacity percentage. In the first week 50% of 24 hours remaining equals 12 hours. Similar in week of July 8, 50% of remaining capacity is 16 hours.
g. A new calculation has been added and labeled **Remaining (Productive Capacity – Supply)**. In our example for the first week the Productive Capacity for the resource is 16 hours minus the 8 supplied hours leaving 8 hours of productive time could be worked. Likewise, in the week of July 8 the Productive Capacity hours for Sarah are 20 hours less the 8 hours already supplied, leaving 12 hours productive available time.

Pinned Timesheet Treatment Types

Feature Setup

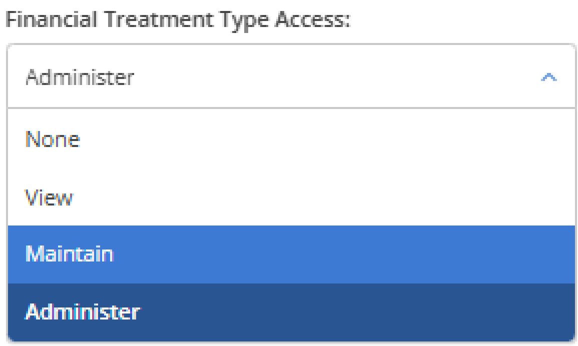
This function will automatically come into play as companies decide to enable the Enhanced Forecasting functionality. During the Enhanced Forecasting enablement process, it is necessary to define a default treatment type for Activities to aid in mapping time actuals to Forecast entries and better classify the time spent as Capex, Opex, or Exceptional.



Feature Usage

If users had time entries pinned on their timesheet the treatment types may not have been applied until a new entry was pinned. Now the behaviour is based on several conditions and the user's rights.

- Creating a new timesheet row defaults the treatment type to the system default. If the treatment type is changed by the administrator for an activity, all new time entries will use the set treatment type. Any time already entered maintains the treatment type at time of entry.
- Changing the Activity on the Timesheet sets the default Treatment Type for the Activity.
- If a user can see and edit the Treatment Type, they can override and select a different Treatment Type. This is based on Login Profile | Timesheet option.



- Pinning a Row will save the Treatment Type value as part of the pinned row values. If a user has the right to change the treatment type, and pins the row, the changed value will be part of pinned row values.
- Where a User cannot see or edit the treatment type the system or activity default is saved to the pinned row. If the default treatment type is changed, the time that has not been submitted will have the treatment type changed to a new type for the Activity.
- When an administrator changes the Activity's default Treatment Type, all pinned Rows for all Users that have the previous Activity's default Treatment Type will be updated with the new default Treatment Type. This will not impact any submitted time, even if the time has not been approved. Submitted time will include the treatment type applied at time of submission. The review of treatment type would be subject to approval and the approver may reject the submitted time to require a change to the treatment type.

Hide Resource Financial Details

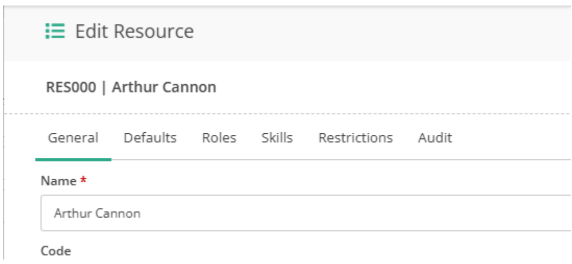
Feature Setup

Originally introduced as a new feature in the May 2024 8.2.1 release, administrators can provide Login Profile rights to edit a resource profile excluding the Financial tab and finance attributes.

A setting is available to hide the finance tab on the resource profile to avoid users seeing sensitive information. This feature is enabled from the Login Profile | Setup tab and provides the ability to maintain a resource but not the Financial tab and attributes associated to the resource. On the Setup tab after selecting Resource you are presented with a secondary option to uncheck for Resource Financial.

Feature Usage

At initial release it was possible to select financial related fields from the Column Chooser or via Export and Data Load if a user had those rights. All these feature sets now have any financial attributes removed, when Login Profile | Setup |Resource Financial is unchecked.



Data view Changes for v8.2.1

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
No data views were added	

Updated Data views

Dataview	New Fields
Forecast Expenditure Data (non-enhanced view)	• Parent Project system fields • Parent Project custom fields