KeyedIn Enterprise v8.3.0 Release

Release Summary

Version 8.3.0

October 2024

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	Sept 25. 2024	All	All	T Raper	N/A

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	Sept 25, 2024	Tom Raper – Product Manager

Document Authorization

Version Number		
1.0	Sept 26, 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

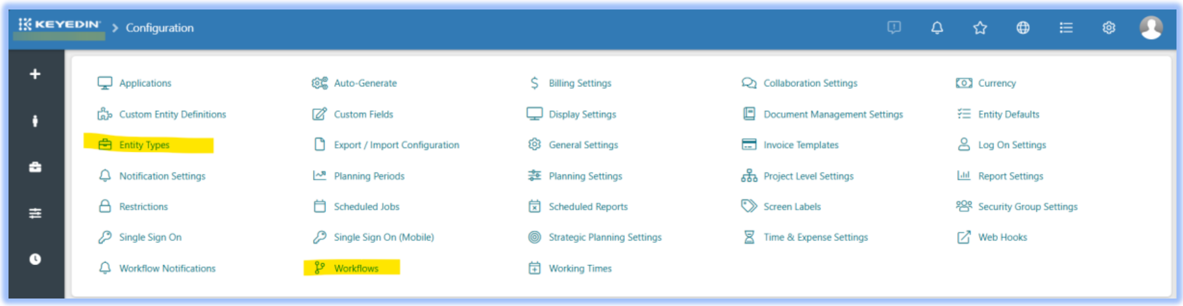
KeyedIn Enterprise v8.3.0 is a quarterly release with several new advanced features and options available to support better work management and business processes. Highlights of this release include graphical workflow support for projects, risks, and issues, workflow automation options, a new Custom Entity, Enhanced Forecasting updates, and an introduction to Sciforma's Visual Collaboration module with new Portfolio Board and Microsoft Teams integration.

The release also includes many support fixes. 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

Administrators, please note two Configuration options have moved in this release allowing for a future path of features applied across many entities. This will change the Configuration menu name for items as follows:

- **Project Types** – Will now be listed under **Entity Types** as a selected entity
- **Project Workflows** – Will now be listed under **Workflows** as a selected entity



Visual Workflow Designer / Viewer

A new visual workflow engine is available for administrators to define business processes with workflow status, sub-status, and movements via graphical drag and drop operations. The graphical workflow can be visible to users on the front-end when viewing records and via a Workflow viewer widget.

Workflow Automation Mechanisms

To aid in workflow automation two new features are available in the workflow operations including a Proceed Automatically Condition and Timer on status movements.

Risk / Issue Types and Workflows

Extending the project workflow operations to Risks and Issues allows advanced business processes to be built including permissions, conditions, and updates to those records. Risk and Issues can have distinct Types with varying workflow status, sub-status, and movements per type.

Custom Entities

Introduction of new Custom Entity functionality that allows customers to create custom records for tracking and managing data within KeyedIn that may not be part of the core system and supports integrations. Custom entities can be accessed directly from the application menu and optionally include links to Project or Customer records.

Insights - Publish views to multiple login groups

Extending on the v8.2.1 feature to allow users to publish views to other login groups without requiring your account to be in the designated Login Group, users can now publish Insights © to multiple Login Groups.

Enhanced Forecasting – View limited periods

This release reintroduces an option available in legacy forecasting to view forecast records for a defined number of periods which includes totals for prior and future periods allowing users to focus on a window of periods and their values.

Enhanced Forecasting – Data load expense charges

Extending on the recent forecast expenditure options users can now data load expense charges from the forecast data load toolbar option.

Enhanced Forecasting – Support for change in Cost / Charge Rate with no demand

Customers leveraging enhanced forecasting can now update cost and charge rates on demand lines in periods with zero/no demand.

Preview – Expressions on Risk and Issues can leverage standard and custom fields

Introducing the ability for inclusion of standard system fields in custom field calculated expressions. In this release customers can choose to evaluate the functionality with Risk and Issue records.

Preview – Visual Collaboration: Microsoft Teams support

Initial release of Sciforma Visual Collaboration module to allow customers who leverage Microsoft Teams as their collaboration platform to include MS Teams team and chat communications directly inside KeyedIn Enterprise or from Microsoft Teams.

Preview – Visual Collaboration: Portfolio Board

This represents the initial release of the Sciforma Visual Collaboration module to allow customers to have an alternate advanced board view with access to project cards displayed in a variety of user and system defined views supporting a variety of project management methodologies.

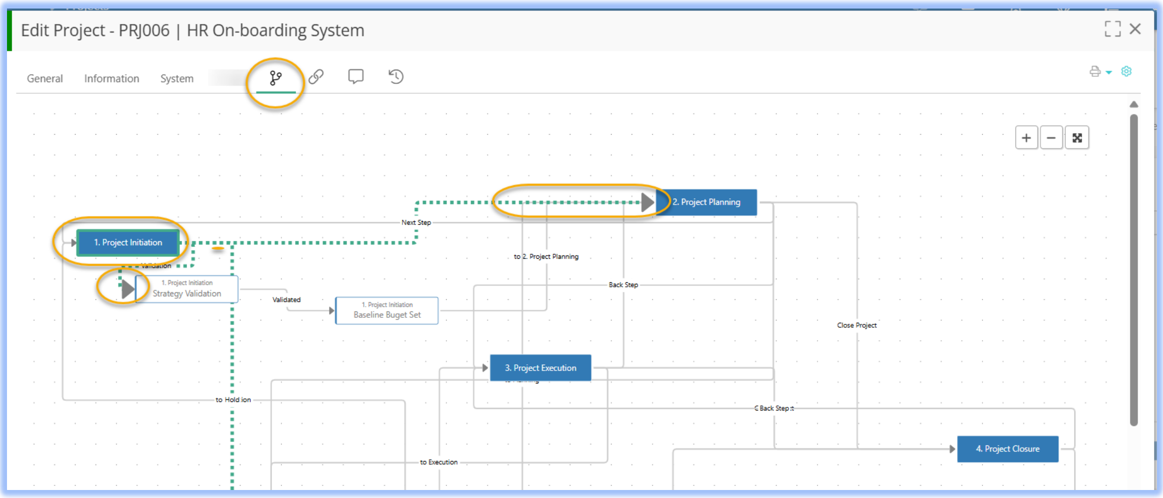
Visual Workflow Designer & Viewer

A new visual workflow engine is available for administrators to define business processes with workflow status, sub-status, and movements via graphical drag and drop operations. The graphical workflow can be visible to users on the front-end when viewing records and via a Workflow viewer widget.

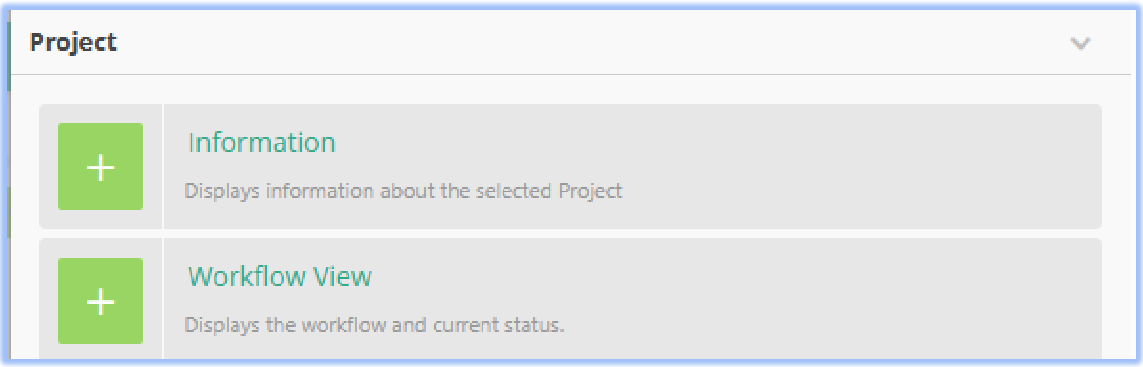
Feature Setup

Visual workflow will be available as an option for all workflow operations in addition to the traditional workflow design methods. The workflow configuration will be available for those users with access to system Configuration (Login Profile | General | Set System Defaults).

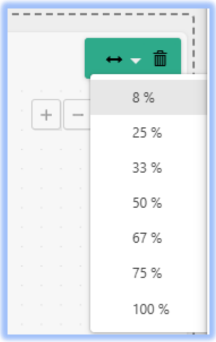
The front-end workflow viewer is accessible to all users with open(view) or edit rights on the records that contain workflow. The Workflow tab is indicated by the workflow icon and displays the complete workflow associated the record type, highlights the current status, and notates the next possible statuses or sub-statuses that may be set by workflow movements.

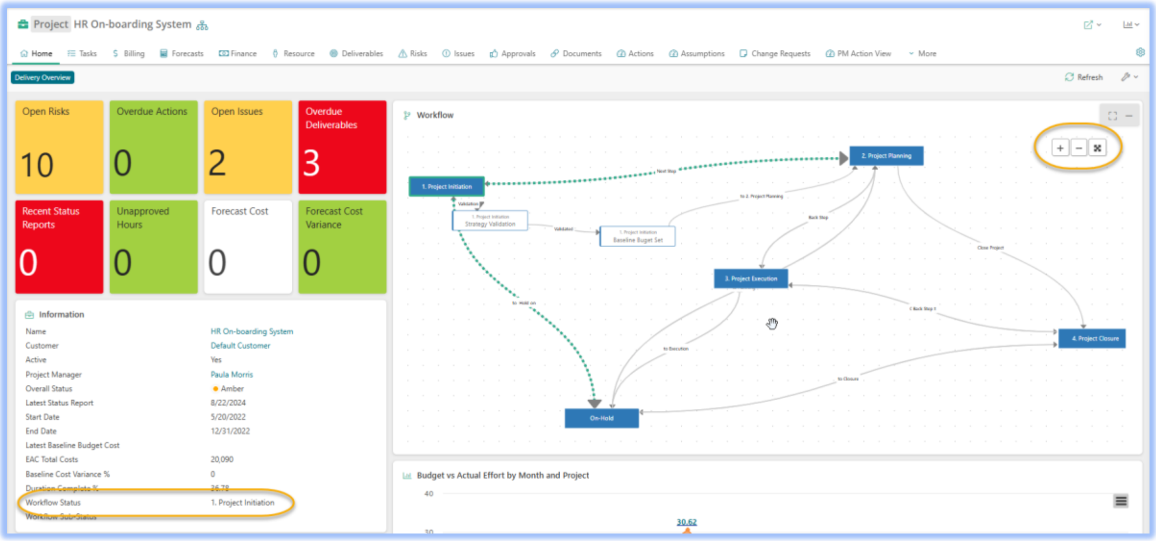


The Project record includes a new **Workflow View widget** that can be included added to your published or personal project views. This widget is only available to those users with rights to configure views and project record access.



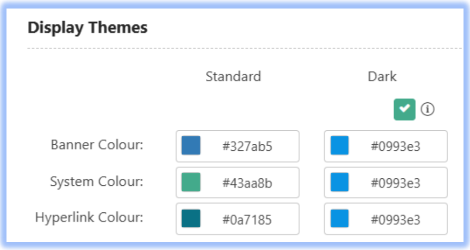
The widget will fit to the space it is provided from the view layout or percent of zone setting on the widget itself. The widget can be deleted using the trash can icon within Configure View settings. Removing the workflow view will not impact the workflow itself and simply a read-only view of the workflow.





While viewing the workflow from the widget or Open/Edit workflow tab the user can use the zoom controls or drag around the display and nodes within the workflow to possibly focus on specific objects or operations. However, the view will always revert to the saved view when the screen is refreshed, or the user navigates away and returns to the workflow view. More details about these controls are noted in the Feature Usage section.

The colour scheme of the graphical workflow is directly related to Configuration | Display Settings | Display Themes.



Banner Colour – Defines the Primary workflow node Status box color and the border colour of the sub-status nodes.

System Colour – Defines the highlighted movement path to the next status or sub-status.

Workflow operations such as advancing the status or approving/rejecting a sub-status will continue to be managed from the Edit record dialog using the Commands that are defined in the movements. Alternatively, Projects can continue to have Commands triggered by movement between lanes in the Portfolio Kanban. More details about Commands are noted in the Feature Usage section.

Feature Usage

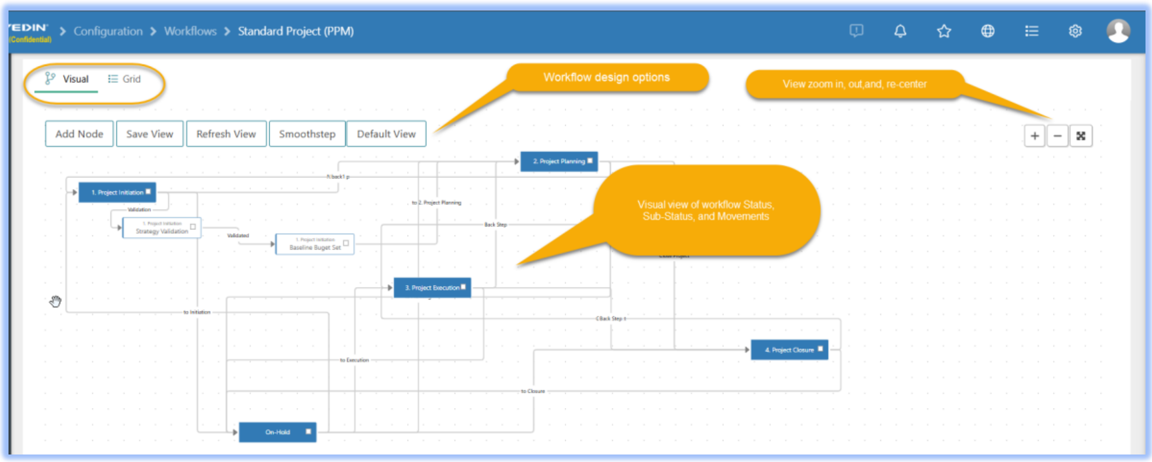
The primary concepts of workflow operations remain the same as it relates to Status, Sub-status, and Movements. New options are available to enhance the operations and make designing and viewing the workflow better for administrators and users.

Workflow Status – The status of a workflow denotes the states or possible states the record may be in throughout the record lifecycle. For example, a project may have a workflow path that includes statuses of Initiation, Planning, Execution, and Closure. A record can only be in one Status or sub-status at a time.

Workflow Sub-Status – Sub-status can be used to define the number of steps a workflow must take to move from one Status to another. The Status will remain the same (e.g. Initiation) however, there may be multiple Sub-status approvals, reviews, or actions necessary to be completed before a workflow can move the next Status.

Movement – Defines the possible path a workflow can make between Status and Sub-Status options. For example, the workflow may be able to move from New to Initiation, but not New to Execution. Another example may be that a workflow must move from Status of New to Sub-status Approval One, then Sub-status Approval Two, then can move to Status of Planning or Closure depending on the approval acceptance or rejection criteria.

By default, when opening or creating a new Workflow the designer will open to the new **Visual** view. Alternatively, users can view the original workflow design operations selecting the **Grid** view tab. This release guide will continue to focus on the Visual operations, the Grid operations are explained in existing training and online help materials and behave the same way as previously defined. All changes made from the Visual view are saved and presented logically the same way in the Grid view and vice-versa. Some administrators may find it useful to define some settings in the Grid view and lay them out graphically with the Visual view.



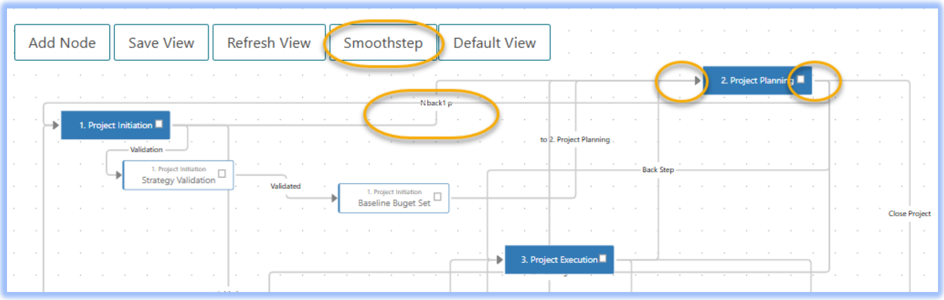
The visual workflow designer consists of a toolbar with workflow design options, view zoom controls, and the graphical layout of the workflow as laid out the by the administrator.

Toolbar options:

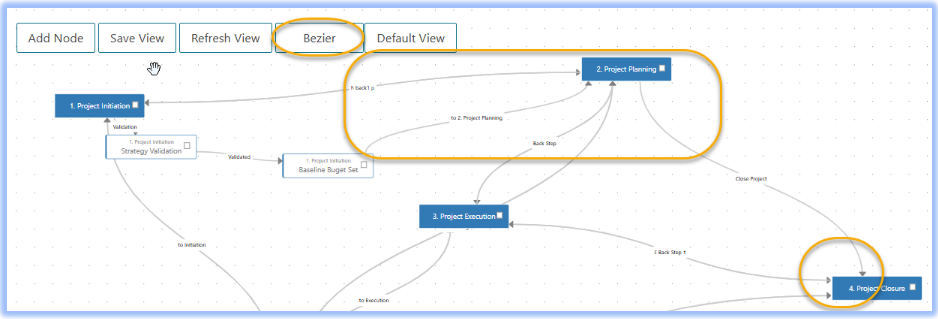
- **Add Node** – Clicking will open a dialog to add a Status box to the screen.
- **Save View** – The system will default to adding Status boxes in a vertical linear path. If the administrator drags and moves the Status or Sub-status boxes around on the screen you may wish to save their placement by clicking the Save View button. Any

change to the layout will highlight the Save View button with a red asterisk, noting a change was made and may wish to be saved.

- **Refresh View** – If the user moves boxes around on the screen but does not wish to save the changes made, you can click the Refresh View button to revert to the last saved view. This can be helpful during design as you wish to move items around for concept or possible placement, but do not remember their original placement.
- **Smoothstep / Bezier** – This button is a dynamic toggle between two different connection methods between steps. Click the button and selecting either view will display the name of the selected method. The view selected in the designer will be the same view provided on the front-end to the users and can be set per workflow.
    - o **Smoothstep** – The system will determine the best path between two nodes based on placement of the nodes and use more square lines to connect the nodes. While in Smoothstep mode the outbound connection will always be on the right side of the node and the inbound connection will always be on the left side of the node. More details about connecting nodes later.



    - o **Bezier** – The system will determine the best path between two nodes based on the placement of the nodes and use rounder floating edges between the nodes. While in Bezier mode the outbound or inbound connection are calculated by the system in an effort to avoid overlapping connections and based on placement of the other node (e.g. above, below, right side, left side, etc.).

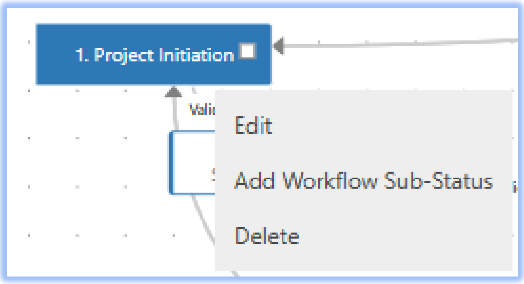


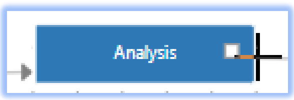
- **Default View** – This button will reset the workflow status and movement layout to a default system vertical linear path between the nodes. This can be useful if you make too many changes or have trouble viewing all the nodes and require a reset to a default view. Selecting the default view will perform a Save View at the same time. Be sure to select this option if you do not wish to return to the last saved view (see Refresh View).

Designing or Editing a Visual Workflow

The Zoom  and other screen controls allow the user to:

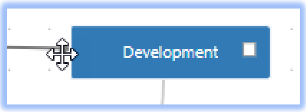
- **+ Zoom in** the workflow view in larger detail. This can be useful when making several movements between nodes and you need to distinguish between the movement edges.
- **- Zoom out** the workflow to view in smaller detail. This can be useful when your workflow has grown larger, and you need to view the entire workflow.
- **Fit to view** will resize the workflow to fit within the space available in the current resolution and window size.
- **Mouse controls** – Depending on your mouse or touchpad settings and options, the scroll bar on the mouse or finger pinch motions can be used to zoom in/out.
- **Grabbing and moving** the whole workflow around can be done by clicking and holding on your mouse or touchpad from any open space.
- **Moving a single node** – Clicking and holding in the label area of the Status or Sub-status node allows you to move the single node around the screen to another area for desired layout.
- **Moving both the Status and Sub-status together** – Click and holding on the label area of the Status node will move all related nodes together. Selecting only the sub-status will move only the sub-status item.
- **Edit an existing node** – Clicking the small square in the Status or Sub-status node will open the Edit node dialog to allow the user to change the name of the node.
- **Adding a Sub-status** - Using a right-mouse click, or similar touchpad control, on the Status node will open a menu and provide the option to **Add Workflow Sub-status**. This same menu will provide options to Edit or Delete the Status node.



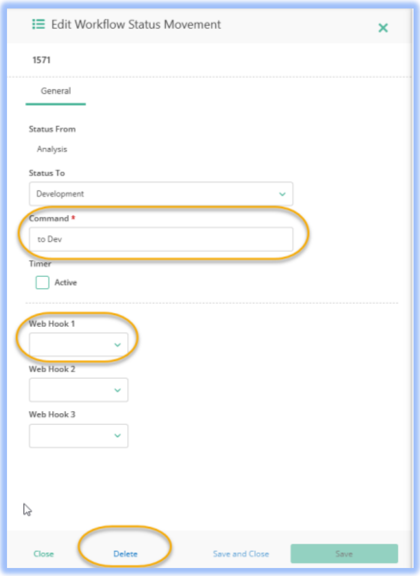
- **Right-mouse click on Sub-Status** – Performing a right-click, or similar touchpad control, on a Sub-status node will provide options to Edit or Delete the node.
- **Creating a Movement** (connection between two nodes) – To create a connection between two nodes place the mouse cursor at the **right edge** of the first node until a cross hair (plus sign) 

 is displayed, then click and drag your mouse to the **left edge** of the second node until a cross hair is displayed. Release the mouse and a movement/connection should now be available between the two nodes.
  NOTE: The first time a connection is made the edge will always be displayed in Bezier format. If your workflow is in Smoothstep view the edge will change on save.

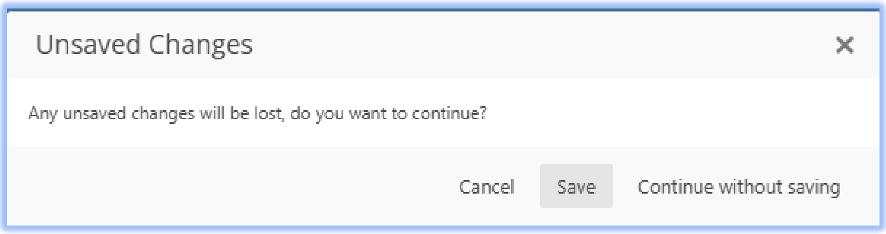
- **Deleting a Movement** – You can delete the movement from the Edit Movement dialog box using the button at the bottom of the screen or moving your mouse cursor to the node edge with an existing movement to display an open cross hair



and then clicking with left mouse / touchpad select.
- **Editing a movement** – Options for definition of a movement between two nodes is available by clicking of the line that is connecting two nodes (also referred to as the edge). This will open the traditional Edit Movement dialog box and allow definition of the **Command** (e.g. what is displayed as the workflow action or button on the front-end for the user to process the workflow), select any pre-defined Web Hooks that will trigger when the movement occurs, and provide an option to Delete the movement if desired. More details about Timer option are available later in this release guide.



- **Switching Views** – Administrators switching between Visual and Grid view is supported as needed and will not impact the visual view of workflow from the front-end. When navigating between views if changes are not saved a warning dialog will be presented to save or cancel and continue to the alternate view.



Workflow Automation Mechanisms

To aid in workflow automation two new features are available in the workflow operations including a Proceed Automatically Condition and Timer on status movements.

Feature Setup

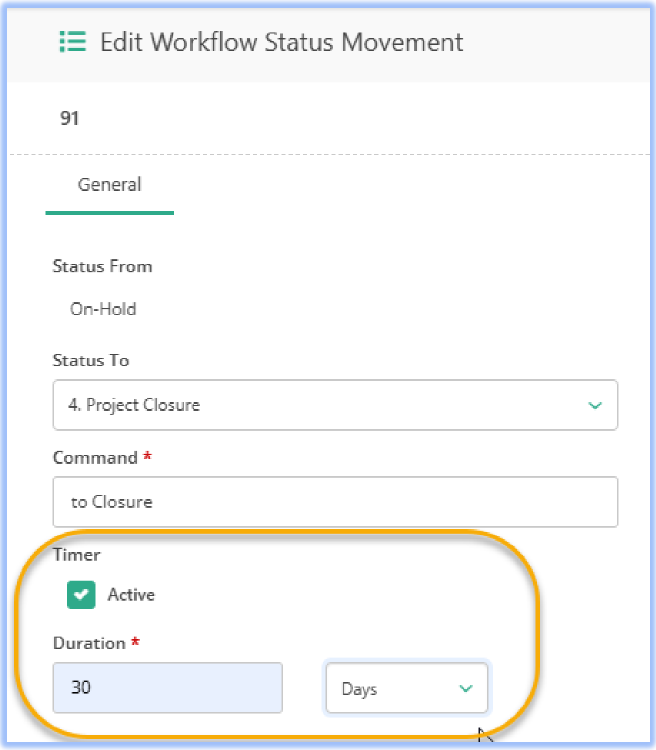
Two new workflow automation mechanisms are available to aid in workflow movements to happen automatically without user intervention. Historically a workflow movement required a user to process a workflow movement by selecting the workflow command from the edit record dialog or moving a record between lanes in the Portfolio Kanban view.

The workflow configuration will be available for those users with access to system Configuration (Login Profile | General | Set System Defaults). This setting is only required for users to define and configure the options. All users will be able to leverage the results of the settings.

Feature Usage

Two new options are available for workflow automation including movement Timer and Condition - Proceed Automatically.

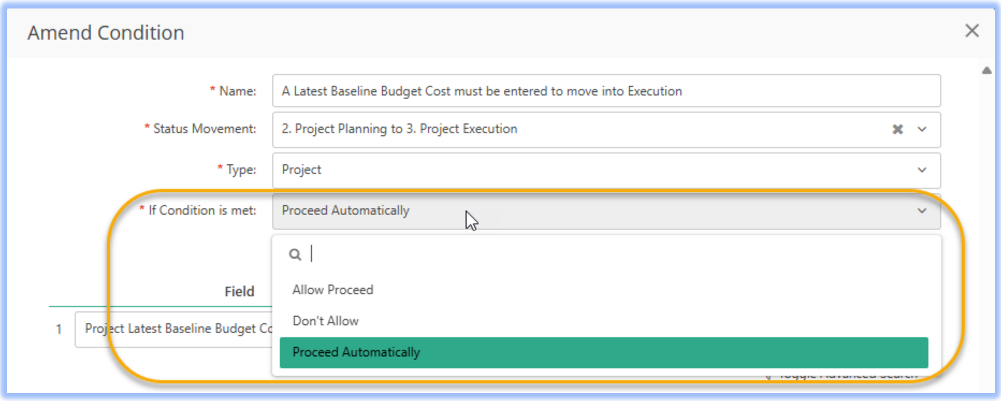
1. **Timer** – This new movement option is available on the edit movement dialog and provides the administrator to set a time period that will automatically make the movement between status or sub-status nodes.



   a. Set the Timer **Active** by selecting the checkbox and entering the desired duration in Days, Hours, or Minutes.
   b. Once active if the record is saved the Timer is triggered and entered into a background queue. For example, a project may be set to go to a Closed Status automatically after 30-days from a Project Sign-Off status or sub-status.

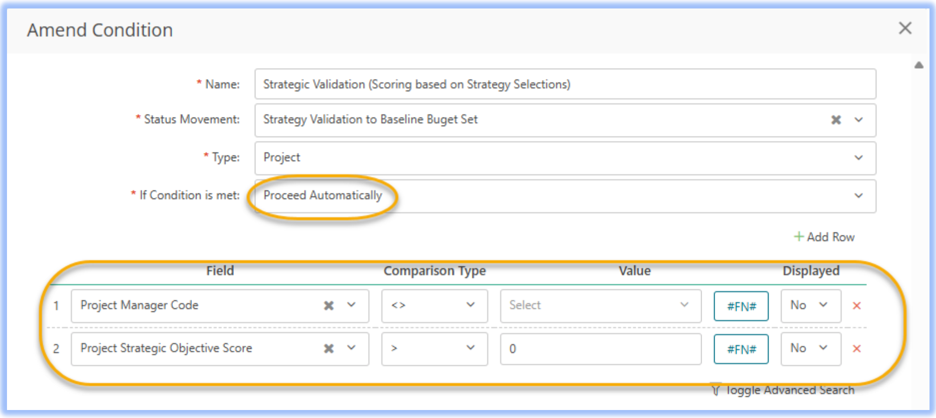
c. All workflow movement operations such as Permissions, Conditions, or Updates will be respected by the Timer. If certain permissions (approvals) are required, or conditions for the movement are not met, the timer may not be able to make the movement. Updates will take place only if the movement happens successfully, such as disabling time tracking.
d. After the timer reaches its set duration the Movement will happen automatically without user intervention, and the Status will be changed to the defined movement **Status to** value.
e. Users can still use the Command buttons on the edit record dialog to make the movement before the timer reaches its duration. Moving the status will clear the timer entry from the background queue and the record will stay in new designated status.
f. If the record changes status back to the Status with the Timer active, a new timer will be queued at the designated duration. For example, a project may be in Project Sign-Off status with a timer to Closed, but subsequently moved to On-Hold, and then back to Project Sign-Off status. Moving from On-hold to Project Sign-Off will reset the timer on record save and begin the timer again to move to Closed.
g. The background queue is used to assist with performance throttling and to ensure that timer operations do not impact front-end operations. Therefore, the queue will handle the movement at, or near, the timer duration. It is possible that timer will trigger after the precise duration based on the number of queued operations. Currently there is a not a way to view the background queue and this is being considered for a future release.

2. **Proceed Automatically Condition** – After workflows are defined, Types are created for the entity that includes settings for Permissions, Conditions, Updates, and Notifications. Historically when defining a workflow Condition the user could select Proceed or Don't Allow as options to control whether the workflow movement could take place. Starting in v8.3 the options have been adjusted with three parameters for Allow Proceed, Don't Allow, or Proceed Automatically.



a. **Allow Proceed** behaves as the Proceed option did before and allows the movement to take place without warning either from clicking the command button or moving the record on the Portfolio Kanban board (Project records only).
b. The **Don't Allow** option behaves the same way it did before and will deny the movement if the condition is met.
c. **Proceed Automatically** is a new option that evaluates the condition parameters when the record with the workflow is saved. If the condition is met, the movement will take place automatically without user interaction,

and the record will move to the status or sub-status state of the ‘to’ status.



In this example, the Project workflow will move from Strategy Validation to Budget Baseline Set automatically when the project is saved with a Project Manager set and a Project Strategic Objective Score is greater than 0. Because we are not using Advanced options, both these properties must be met (AND condition). If the project manager is not set or a strategic score has not been calculated, the project status will stay in the same status. If both conditions are met the Status will change without user intervention.

d. Proceed Automatically conditions will vary depending on the entity type being configured. For example, Projects may have conditions based on other linked or related records to the project (e.g. actions, forecasts, tasks, etc.). However, Risk and Issue will only be able to use data from that record at this time. Future enhancements will expand condition operations on other entities.

e. The Proceed Automatically condition is only evaluated when the primary record is saved, not the related records. For example, a project may have a condition that evaluates if a Forecast is approved to proceed automatically. The condition will only be evaluated when the project record is saved, not the forecast record. For this condition to proceed automatically, the forecast record would need to be approved, then the project record would need to be saved for the condition to be evaluated. After the project is saved the project workflow movement would happen without user intervention (i.e. no need to use control buttons or kanban lane movement).

f. Users may continue to manually make movements even if a Proceed Automatically Condition is defined. For example, the user may enter the condition parameters or make changes to the record that would warrant the movement on save, but instead they click the command button to perform the movement manually and then save the record.

g. Proceed automatically items use a background queue that manages the movements when the server processing is available and not impacted by other operations. This also ensures that automatic movements are not hindering other server and client operations. Therefore, an automatic movement may not happen immediately on record save and may take a few minutes depending on server processing. Currently there is not a method to view the background queue. A queue viewer is being considered for future enhancement.

Risk / Issue Types and Workflows

Extending the project workflow operations to Risks and Issues allows advanced business processes to be built including permissions, conditions, updates, and workflow notifications to those records. Risk and Issues can have distinct Types with varying workflow status, sub-status, and movements per type.

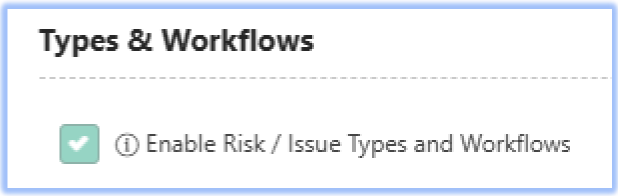
Types are used to define the variation of a record category. For example, a risk may have different operations for low, medium, and high-risk types or for Project vs Program risk types.

Workflows are the path a record may take once created. If the record requires a series of validations, checks, approval, reviews, or statuses, the workflow determines the path for those business processes. Workflow must include at least one status. A single **New** status will be created for the Default Workflow. Administrators can then determine if additional status or sub-status steps are required and the movement between those steps.

Feature Setup

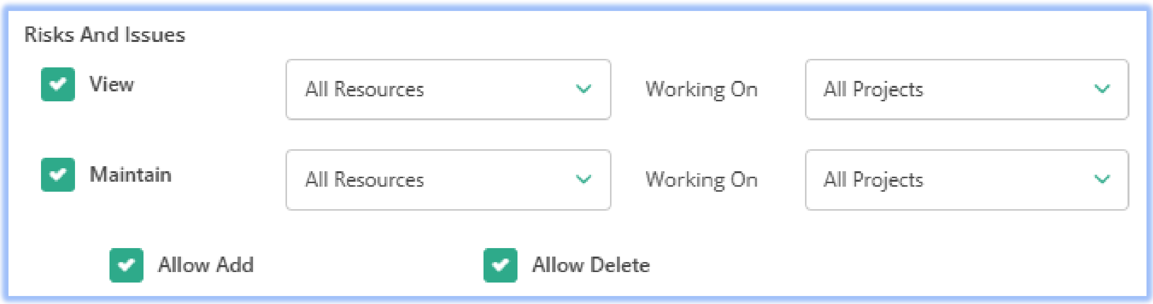
By default, these features are disabled and should be evaluated in the customer sandbox environment first before enabling in production environment. The switch to turn types and workflows is one-way switch and cannot be disabled once enabled. Please test thoroughly before enabling in your production system.

The switch to turn on types and workflows for Risks and Issues is found in Configuration | General settings | Types and Workflows section.

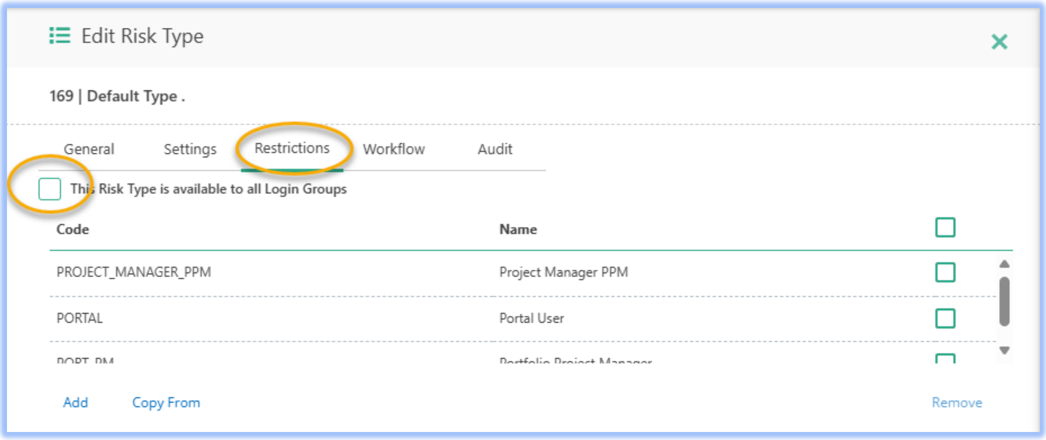


Once enabled a single default Risk and Issue Type and Workflow will be created. These defaults can be changed by the administrator as desired and additional variations can be added.

The default permissions and availability to view, create, add, edit, or delete Risk and Issues are still based on Login | Project | Risk and Issue settings.



Additional Login Group permissions are available for each Risk / Issue Type that is created using the Restrictions tab. This will limit if the user has access to a specific type of Risk / Issue.



Feature Usage

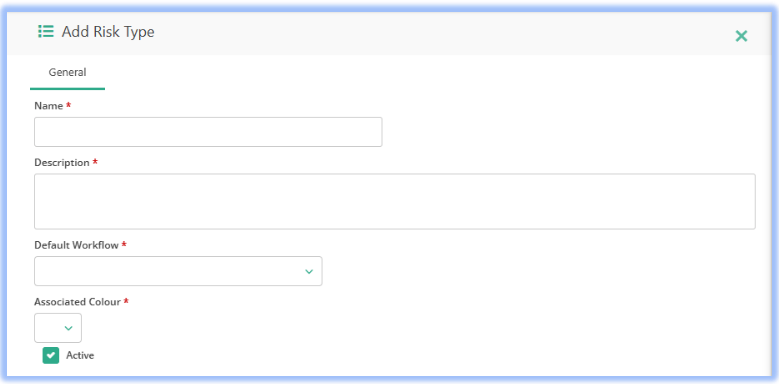
After the types and workflow are enabled, administrators can create additional types and workflows based on requirements.

Any new or adjustments to the Default Workflow should be managed first, as a workflow selection is required to create a new type.

Full details about creating a workflow are referenced in the Visual Workflow Designer and Viewer section above. Although the instructions reference Project operations the same functionality will apply to Risk and Issue workflow definitions.

Risk / Issue Type – A variation of a record that may have a different business process associated to the permissions, conditions, updates, or workflow notifications. At this time Risk / Issue types all use the same fields but may vary in workflow operations for review and approval. A future release will introduce specific field definition and layout unique to each Risk / Issue, like Project Types.

Add Type:

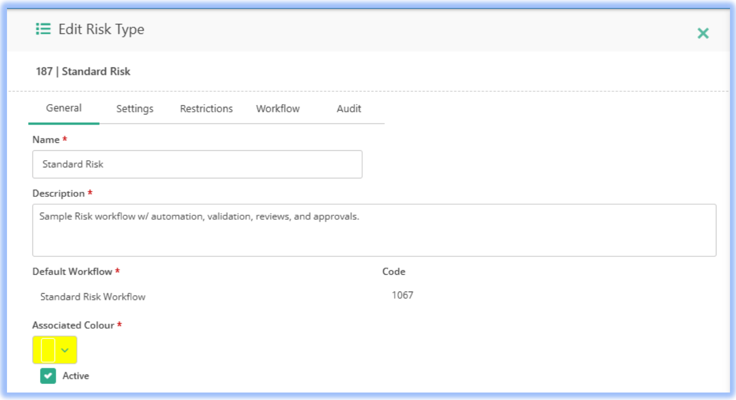


Adding a new type will require the following properties:

- **Name** – Identifying name for the type used to distinguish the type. Must be unique.
- **Description** – A more detailed description allows users to understand the purpose of the type and how it may be used.

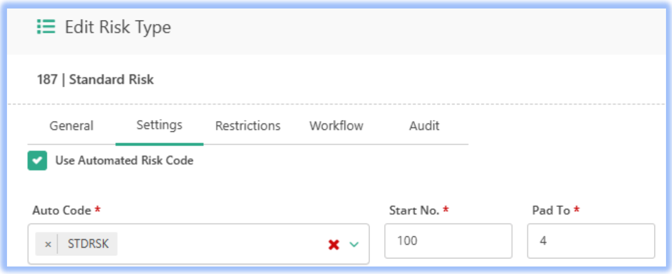
- **Default Workflow** – When first creating a new type, the user must select the Workflow that will be used with the type.
- **Associated Colour** – The colour will come into play in future board views to distinguish the type from another type visually. This will operate similar to record border colour on Project Types in the Portfolio Kanban.
- **Active** – This flag enables the type for use. When disabled the administrator still has access to the record for editing it, but users will not have access to use the type.

General tab:

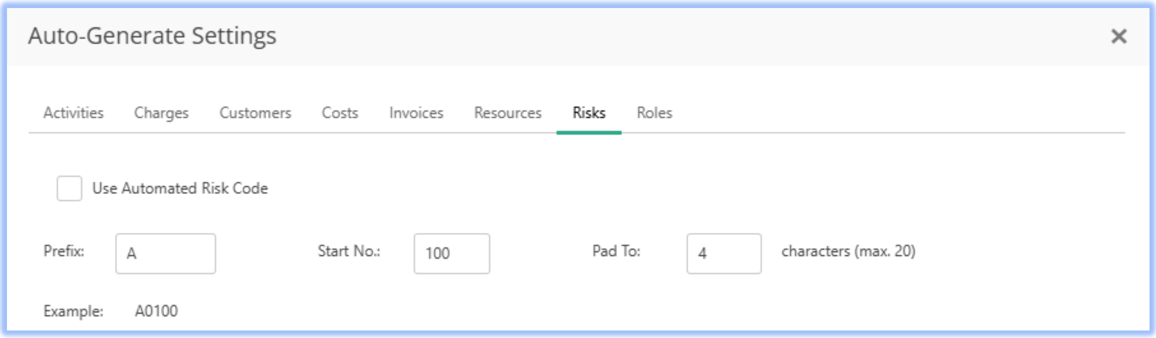


- **Name** – Identifying name for the type used to distinguish the type. Must be unique.
- **Description** – A more detailed description allows users to understand the purpose of the type and how it may be used.
- **Default Workflow** – Editing an existing type will note the selected workflow. The workflow type cannot be changed after a type has been created. If you wish to change the workflow, you must create a new type, select the desired workflow and set the properties as desired.
  NOTE: A clone of a type will leverage the same workflow.
- **Associated Colour** – The colour will come into play in future board views to distinguish the type from another type visually.
- **Active** – This flag value enables the type for use. When disabled the administrator still has access to the record for enabling it, but users will not have access to use the type.

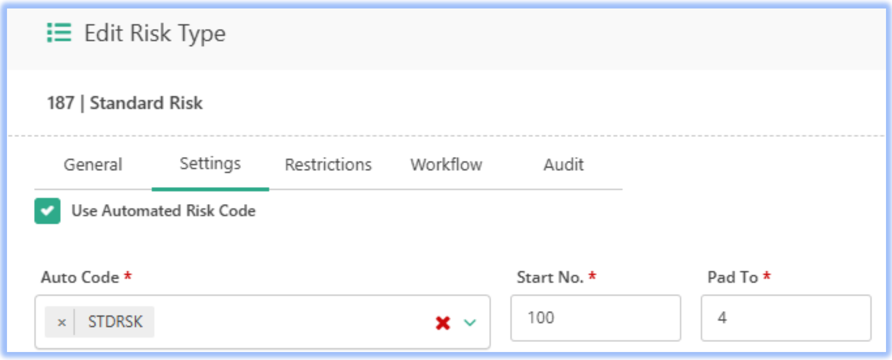
Settings tab:



The settings tab determines how records created may be associated to a unique numbering scheme using a code value. Traditionally Risks and Issues can use either system Auto-Generated codes (Configuration | Auto-Generate) or be manually entered by the user at time of entry. When first enabled the Risks and Issue default types will use the setting defined at the system level.



If desired each Type can be configured to use a unique code identifier value with a configured number scheme. When a user creates a record with automated code the system will create a code based on the values.

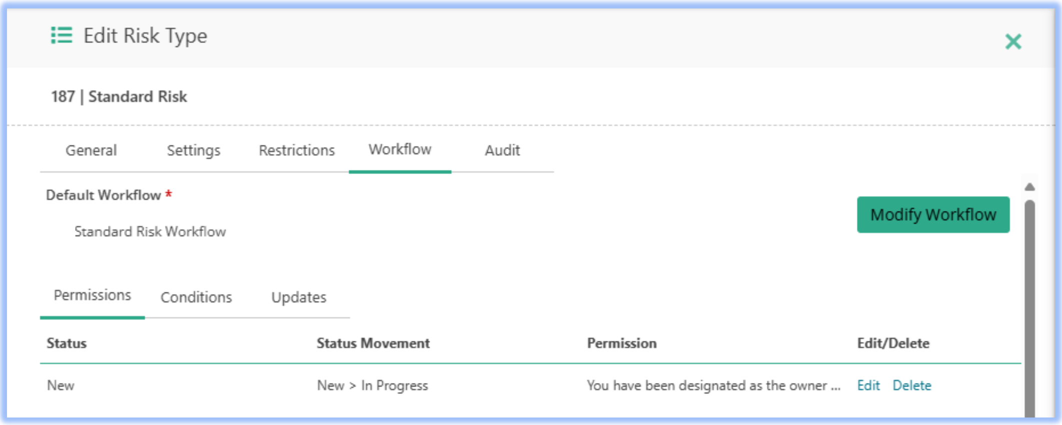


If neither Auto-Generate or Risk Type Settings have not been enabled for a generated code the user will be required to manually enter a unique code on record creation.

Restrictions tab:

The Restrictions tab operations are referenced above in the Risk / Issue Feature Setup section.

Workflow tab:

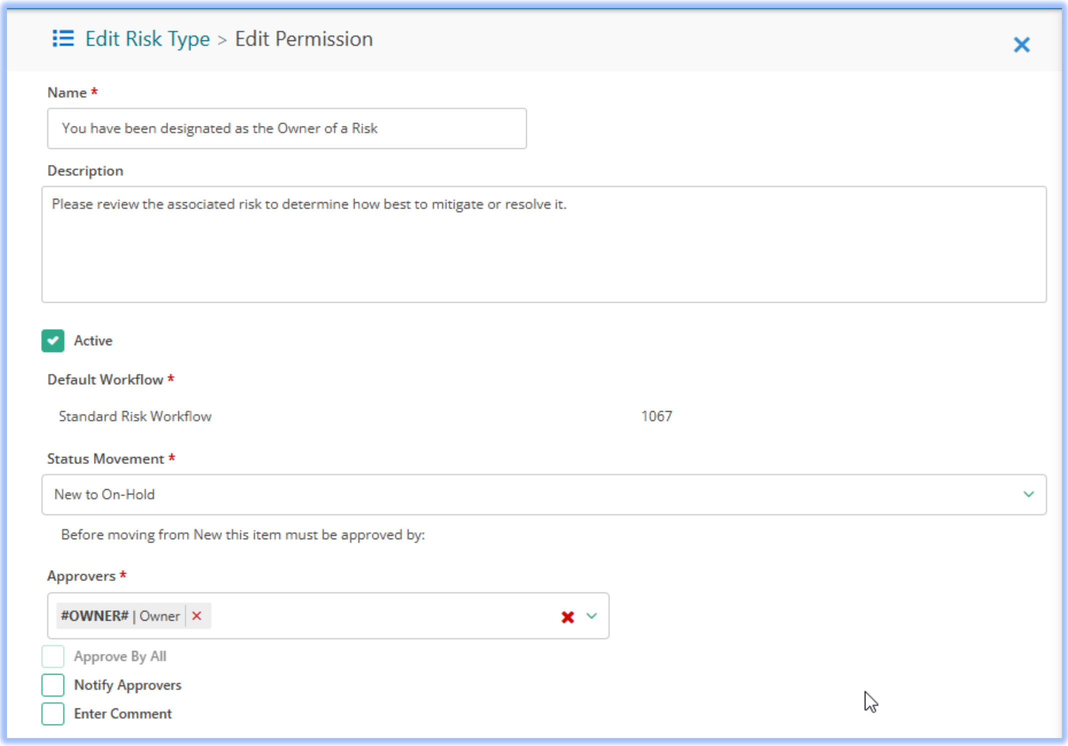


The workflow tab contains multiple features to distinguish the business process and rules associated to records created for this type. The tabs work in the same manner as Project Workflow operations and therefore a brief synopsis is provided here. Further details or more specific operations may be reviewed in the support and help files associated to project workflow functionality.

The **Modify Workflow** button will open the designated workflow associated to this entity type. This is a shortcut to view or make changes to the workflow. Once changes are made admins can use return to Entity Types and open the specific entity type again for further changes.

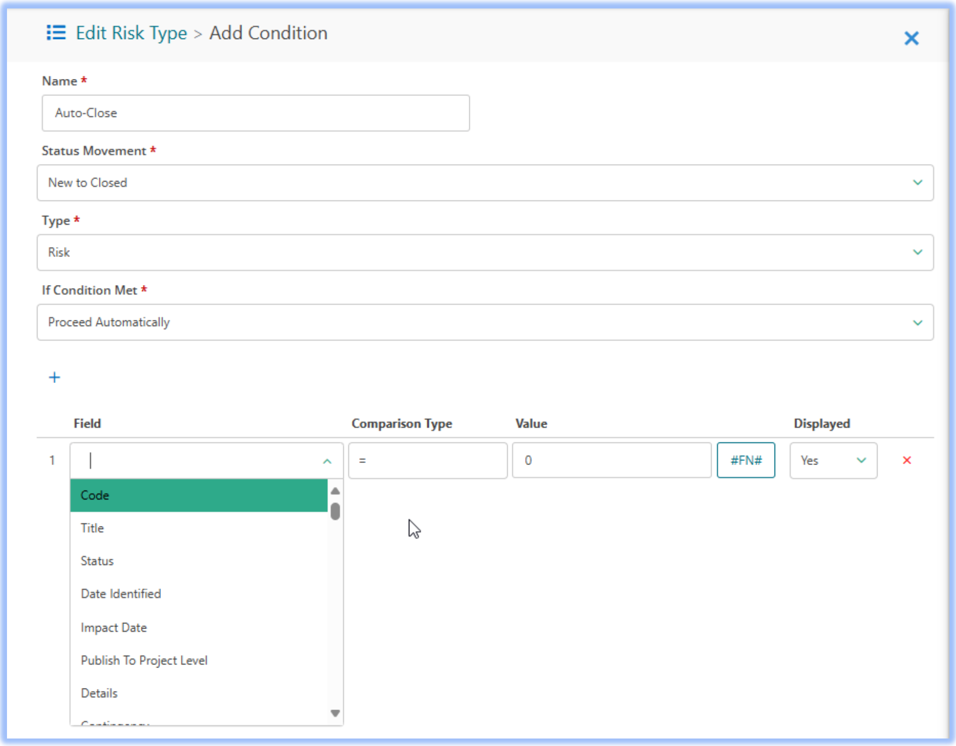
Workflow | Permissions – Properties set here determine which users may perform workflow movements between status steps. Permissions are not required and only used to limit which users can use the movement Command to advance the workflow.

- The name value will be used in notifications as message text
- Approvers can be set to specific resources or token accounts of Owner or Anyone

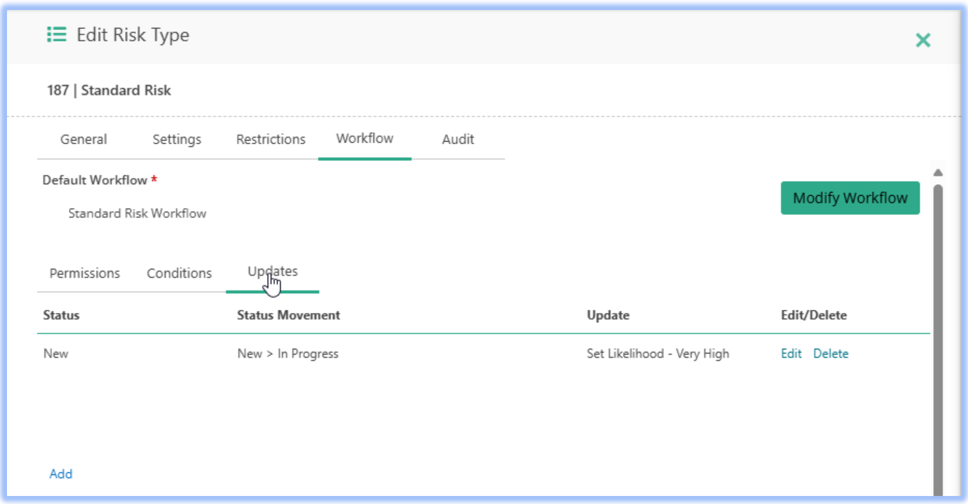


Workflow | Conditions – Conditions can be used to define rules for workflow movements. Similar to project workflow the conditions can Allow Proceed, Don't Allow, or Proceed Automatically if the condition is met. Conditions can use parameters for Risk or Issue specific fields and custom fields. In addition, a core set of Project Record values are available based on the record being linked to a project (any level). However, conditions for Risk / Issues cannot be based on project custom fields, actions, forecasts, resources, tasks, etc. because these records are one-step removed from the risk record itself.

More details about condition operations can be found in former support materials and in the Workflow Automation Mechanism section above related to Proceed Automatically.



Workflow | Updates – The updates tab allows administrators to change the data for certain fields and values when a workflow movement is processed. Updates can be made to fields and values on the current record type.



Custom Entities

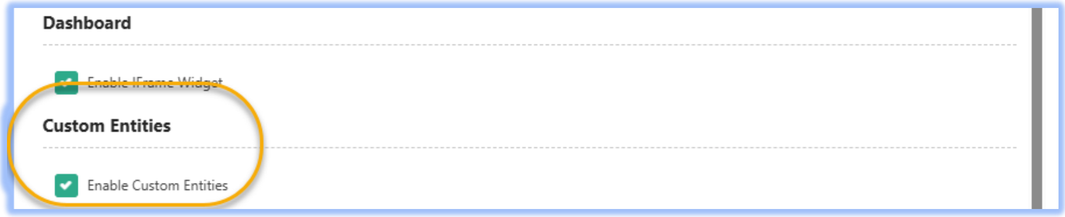
This release introduces new Custom Entity functionality that allows customers to create custom records for tracking and managing data within KeyedIn that may not be part of the core system and supporting better integrations. Custom entities can be accessed directly from the application menu and optionally include links to Project or Customer records.

With concepts similar to the existing Action records in KeyedIn, Custom Entities are based on a modern technology design that will allow for more advanced features and capabilities than Actions provide and will eventually become an Action replacement. A date has not been set for Action retirement and customers can continue to leverage them and incorporate them into their product plans.

Feature Setup

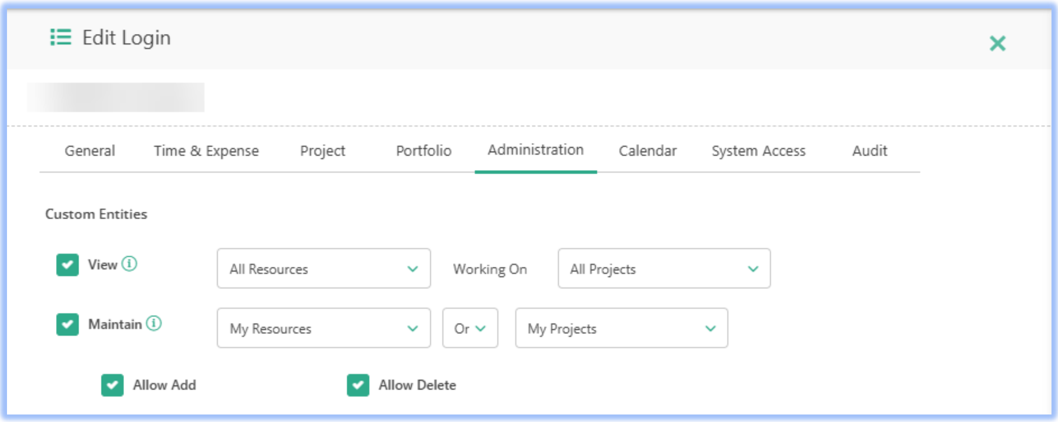
Custom Entities are not enabled by default and customers should evaluate their use in their sandbox before enabling them into their production environment. Enabling Custom Entities is not a one-way switch, and they can be disabled, hiding them from the application system and configuration menus. Disabled Custom Entities will not lose settings or records that were created when enabled, they will only be hidden and can be enabled again for later use.

Enable Custom Entities by checking the selection in Configuration | General Settings. This is a system setting that will apply to all users in the system. Although the Custom Entities may be enabled, it is not until administrators create Custom Entities that users will be able to use or see them as an entity in the system.



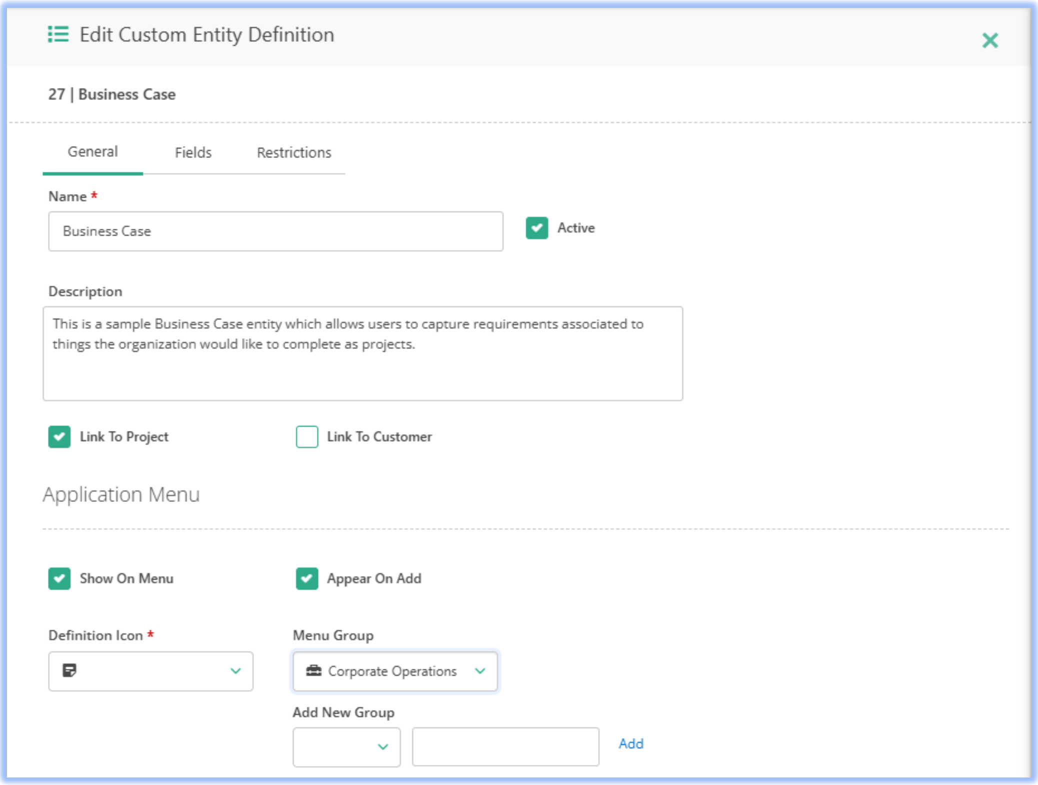
After they are enabled the permissions for users to View, Maintain, Add, or Delete custom entities are managed on the Login | Administration tab for each login. Administrators can use the Copy Permissions feature to copy settings from another login.

Resource selection is associated to the Owner of the record. Therefore, selections like My Resources will assume the owner of the record reports to the login to be viewed or maintained. Working On values only apply when the Custom Entity is linked to a Project.



Feature Usage

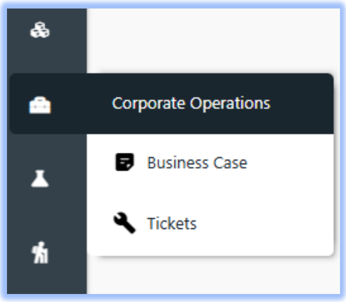
Once enabled administrators can create new Custom Entities using the Configuration | Custom Entity Definition section. By default, no custom entities are defined. They are unique record categories that allow companies the ability to capture other data not included in the core system features and entities.



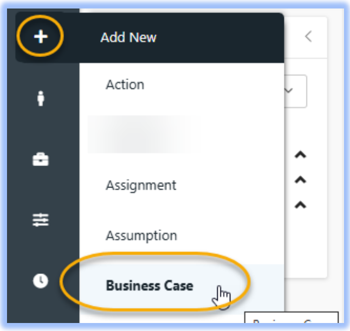
<u>Custom Entities | General tab:</u>

- **Name** – Identifying name for the type used to distinguish the entity. Must be unique.
- **Description** – A more detailed description allows users to understand the purpose of the entity and how it may be used.
- **Link to Project** – An optional switch. When enabled users will be prompted to select a project as a required field that links the custom entity to the associated project (any level). This is a distinguishing feature from Actions, as Actions are always required to be linked to projects. Custom Entities may be created and be maintained on their own.
- **Link to Client / Customer** – An optional switch. When enabled users will be prompted to select a client/customer as a required field that links the custom entity to the associated record. This will be used for future reporting or data association.

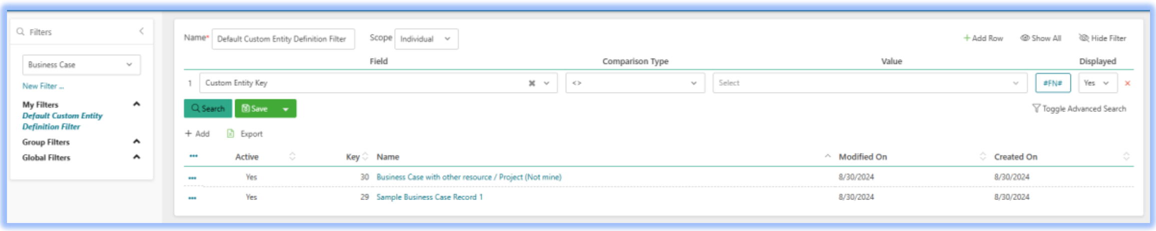
- **Show on Menu** – Provides additional choices and selections for the user to create an Application Menu shortcut to the list of custom entity records.



  - **Definition Icon** – This is an admin selected icon that will best represent the custom entity. A variety of icons are provided to support many different use cases. If only the definition icon is selected and a menu group is not defined, the Icon will show on the Application root menu and become a shortcut to the Search | Custom Entity list of records.
  - **Menu Group** – Some customer may have multiple custom entities that serve a similar purpose. A menu group will create a shortcut group in the root of the application menu that can then house multiple custom entities definitions. The Menu Group dropdown will contain a list of any pre-existing groups that were defined. If the Menu Group listing is empty a new one can be added.
  - **Add New Group** – Select an icon to represent the group of custom entities from the dropdown list. Then type a name you wish to use for the group. For example, a menu group may be created called Corporate Tools that includes menu shortcuts for custom entities created to support Tickets, Ideas, Business Cases, Objectives, etc.
    NOTE: If a group is not used by any entities, it will automatically be removed from the Group list. If you make a mistake in spelling or wish to change the menu group name, create the new group, associate the desired custom entities to it and when all entities are removed from the original group it will be removed from the list.
- **Appear on Add** – This option will show the custom entity by name on the + Add menu.

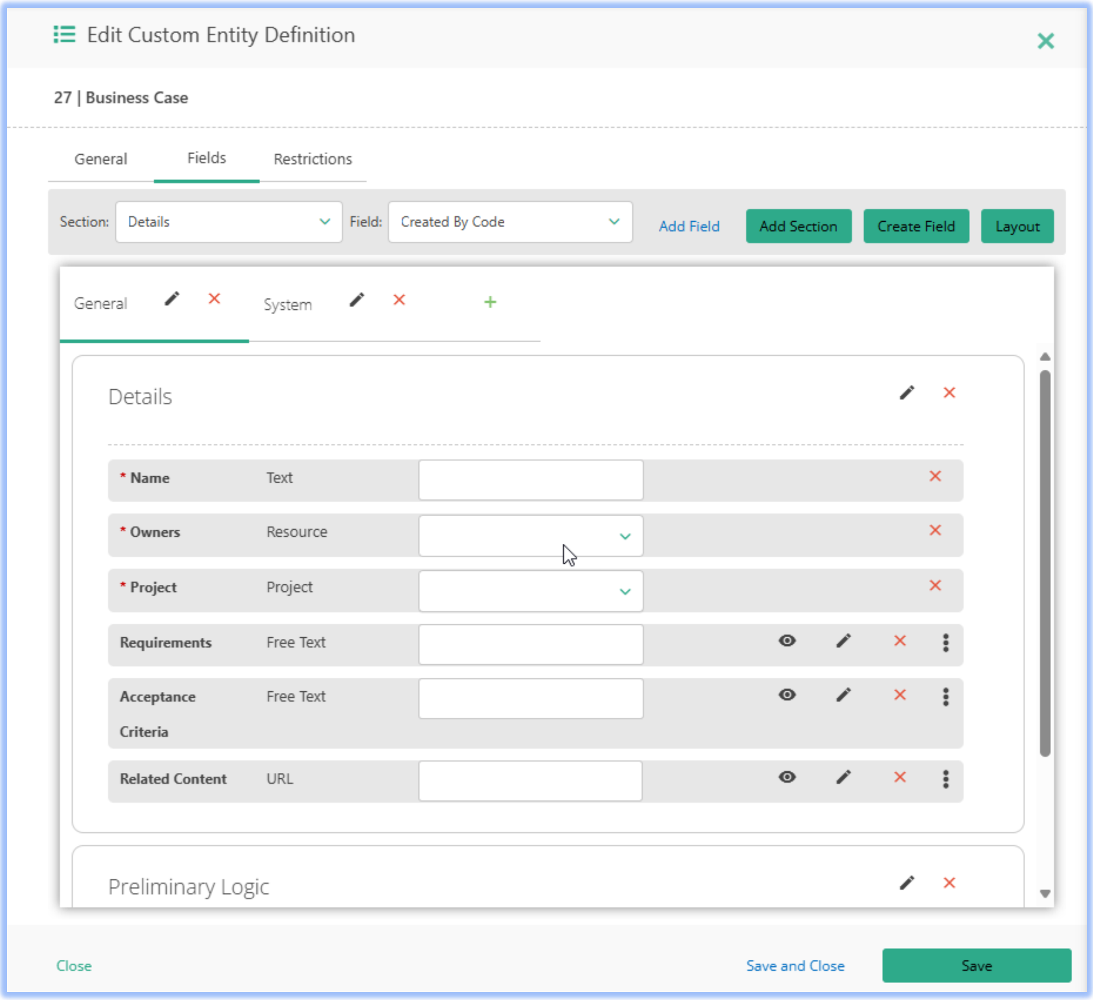


- If neither Show on Menu nor Appear on Add are selected the list of records for the entity will be available in Search by the *Custom Entity* defined name.



Custom Entities | Fields Tab:

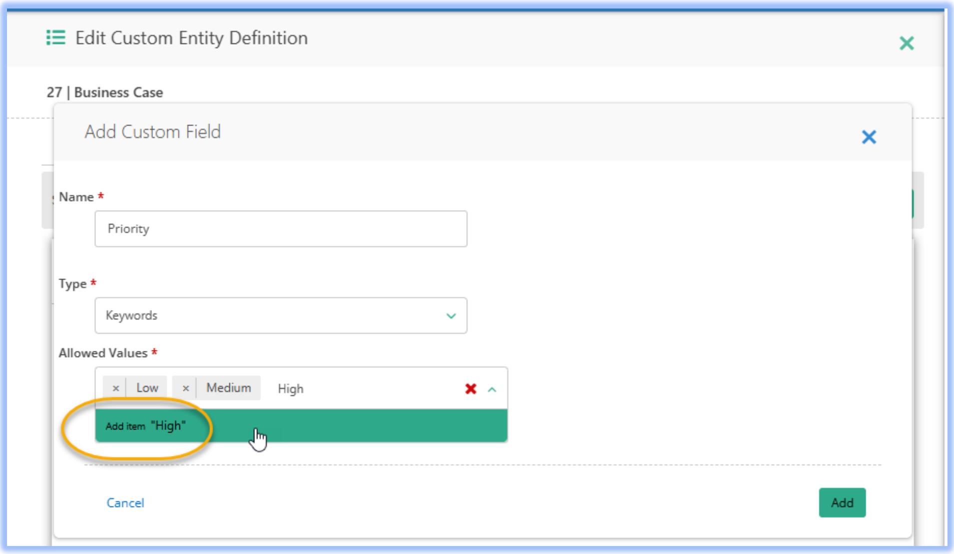
The fields tab supports general layout of the fields you wish to capture for the entity. The custom fields and their layout are unique per custom entity. Use the fields tab to add, remove, control placement, and adjust the properties of the fields.



- **Section dropdown** – Allows the user to select the section you wish to apply the Field value to with the Add Field link. If you have multiple sections on the tab, the dropdown will provide the options to other sections within the tab.
- **Field dropdown** – This represents a list of fields available for placement on the record. As fields are placed into the sections or tabs of the entity they will be removed from the dropdown list. This assists the user in knowing what other fields could still be used. Fields are only allowed to be placed one place in the record and cannot be duplicated across tabs or sections.
  If fields are removed from the tabs or sections, they will be available again for selection and placement into other tabs or sections and available in the dropdown.
- **Add Field link** – Clicking this link will place the current displayed Field into the current displayed Section. The field will be added to the last position in the selected section. Then the admin can drag and drop the field up, down, or across sections to adjust the placement of the field to the desired place.
- **Add Section button** – Sections represent a collection of fields you wish to group together for a logical reason. All records will have a default General tab and Details

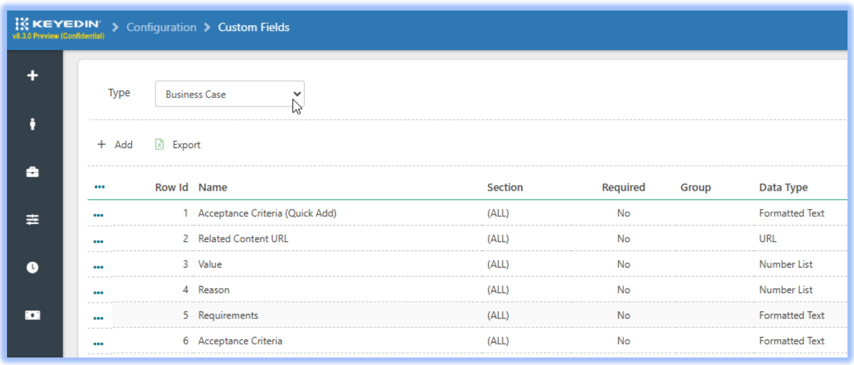
section. Sections can be renamed as desired, and you may have multiple sections with the same name. An entire section can be moved to another place on screen by dragging and dropping the header area of the section versus individual field.

- **Create Field button** – This is a new option that acts as a quick create for a field that you wish to add to the screen without having to navigate away to the Configuration | Custom Fields section.

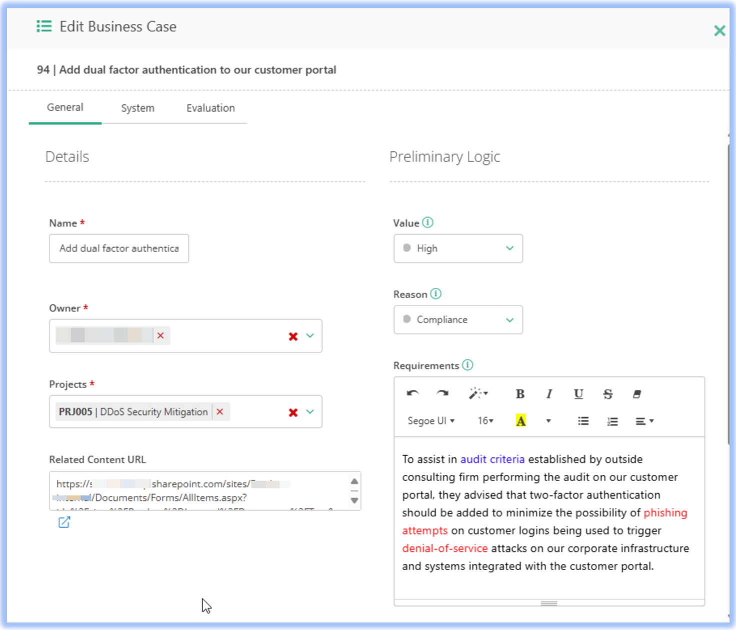


When creating a field, you provide the minimum properties to define a new field:

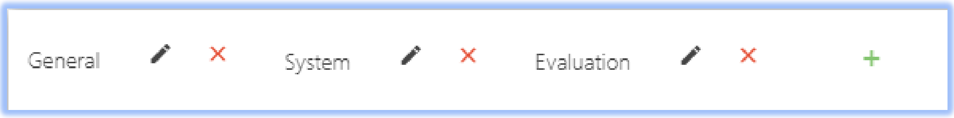
  - **Name** – What you want to call the field.
  - **Type** – Select the data type of the field.
  - **Field quick properties** – Depending on the data type you select will determine if their will be some attributes you would need to have to make use of the field. In the above example, because the data type was Keyword, I would need to have some allowed values. Rather than displaying the whole field properties, the user is asked to provide a quick list of possible Allowed values. In this case the user types the value and clicks on the Add Item bar below the values list. The user can continue to type the next value and click add item. An item can be removed using the x to the left of the value in value list. **NOTE**: Some data types will not require any properties and will assume default settings. If you wish to control other attributes such as available on filter, column chooser, size limits, character limits, display settings, calculations, etc. you can create the field here to get it into the layout and then go to the Configuration | Custom Fields section to adjust the desired properties. The fields will be listed for each Custom Entity you create as its own Type.



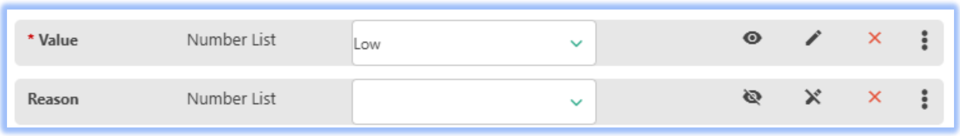
- **Layout button** – The layout toggles the section layout on the tab to be either single or multiple (two) columns. Click the button and select the alternate layout between *Single Column* or *Multiple Columns*. You may not have more than two columns based on space limitation to properly see the fields and values. Multiple columns are useful for fields that may be shorter values or can handle wrapping the data.



- **Tab name / Add / Edit** – A Default General tab will be created for each entity. The tab names can be renamed to desired titles. Tab names cannot be duplicated and must be unique names to avoid conflict in field placement.

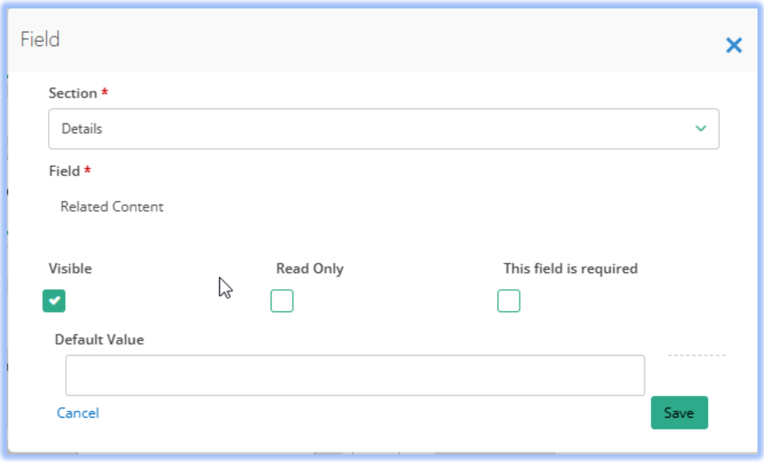


  - Use the **pencil** icon to edit the name of the tab.
  - Use the red x to remove the tab. Removing the tab will remove the sections and all fields that were included on the tab will be available in the dropdown.
  - Use the green + to add a new tab for additional sections and fields. Each tab must have at least one field.
- **Section layout** – Within the sections a new display method has been designed to assist in quickly understanding the properties defined for each field.



  - Required indicator – The red asterisk in front of the field name notes it is a required field. Required option is configured from the Full Edit menu.
  - Field Name – Name in bold represents the name of the field.
  - Data Type reference – The value helps the user understand the data that will be displayed in this position based on the data type associated to the field.
  - Default value preview – If a default value has been set for the field a preview of the value will be displayed and may be set depending on the field type. The preview may not be complete for long text or larger selections but will provide the context of the default.

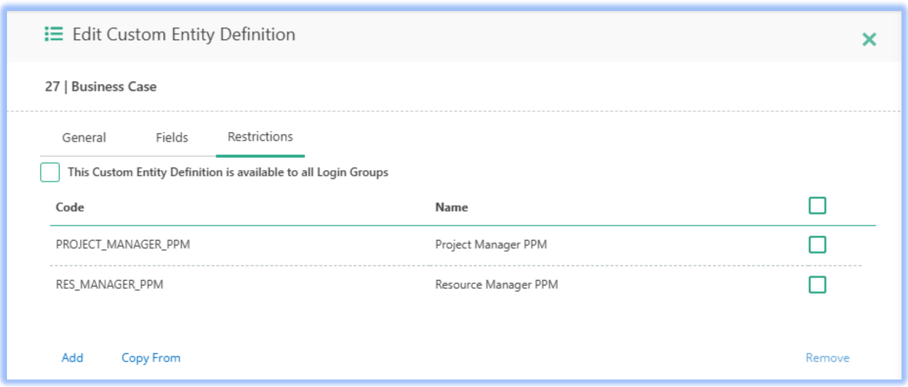
- Read only indicator – The eye icon will be displayed without a slash if the field will be visible on screen. If the icon has a slash through it the field will be included in the record but will not be displayed on the front end. Admins can toggle this setting clicking the icon.
- Edit indicator – The pencil icon will be displayed without a slash if the value is editable by the user. If the icon has a slash through it the field will be read-only on the front end by the user. Admins can toggle this setting clicking the icon.
- Delete link – The red x icon can be clicked to remove the field from the section. The field will be placed back into the Fields dropdown list at the top of the page and can be added to other tabs or sections.
- Full Edit Menu (vertical ellipsis) – The edit menu will open the larger context settings page to control the properties associated with the other icons. Admins must use this menu to set the Required property on a field.



NOTE: Custom fields on Custom Entities for this release do not support Field Type Calculations. This feature will be added in an upcoming release to support scoring, ranking, or other expressions users wish to define.

Custom Fields | Restrictions tab:

Login Group permissions are available for each Custom Entity using the Restrictions tab. This will limit if the user has access to a specific Custom Entity based on their associated login group. Admins can choose to make the Custom Entity available to all login groups or select individual groups that will be able to see the entity in the Search or application menu if configured for menu and add menu access.



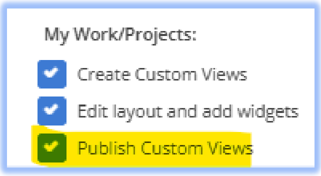
Insights – Publish views to multiple login groups

Extending on the v8.2.1 feature to allow users to publish views to other login groups without requiring your account to be in the designated Login Group, users can now publish Insights © to multiple Login Groups.

Feature Setup

Publishing Insights 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 original Login Group.

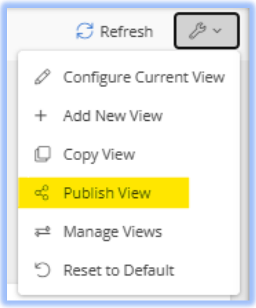
Users are still required to have the Publish rights to use this feature. The setting is found in the Login Profile | General tab | My Work/Projects section.



NOTE: A future release will add support for Portfolio Analysis | Analysis tab publishing.

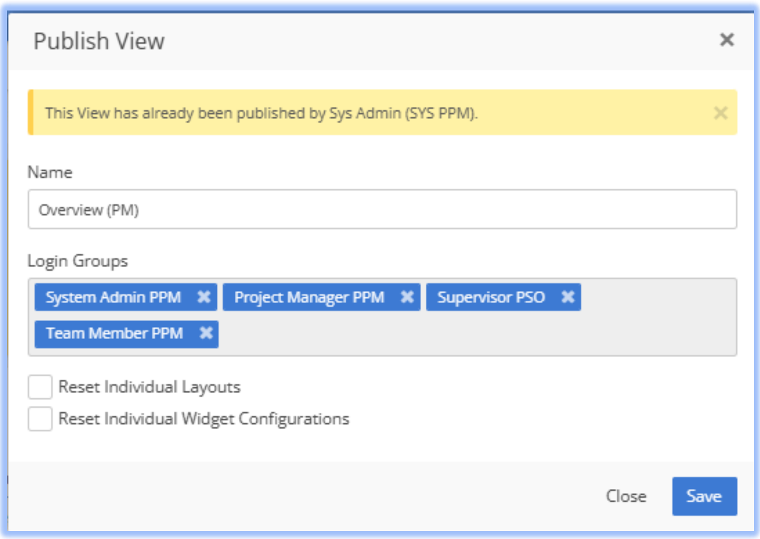
Feature Usage

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.

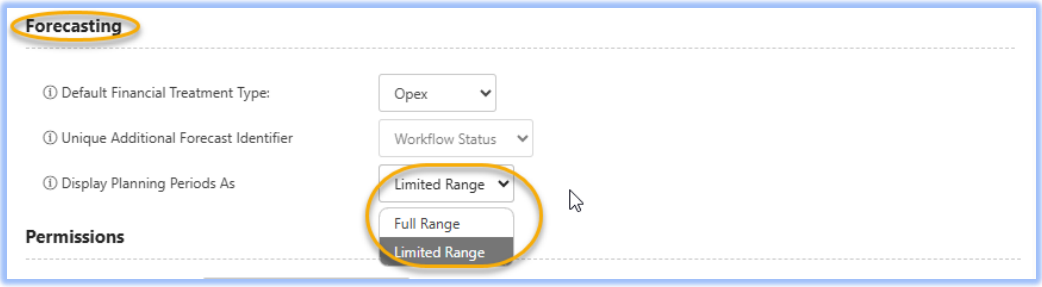


Enhanced Forecasting – View Limited Periods

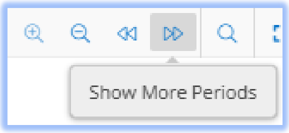
This release reintroduces an option available in legacy forecasting to view forecast records for a defined number of periods which includes totals for prior and future periods allowing users to focus on a window of periods and their values.

Feature Setup

The option to view limited Planning Periods in Enhanced Forecasting is a system setting that will impact all users of the system with access to view or edit Forecast records. Administrators with Login Profile | Set System Defaults feature enabled can change the setting found in Configuration | General Settings.



The **Display Planning Periods As** selections are:



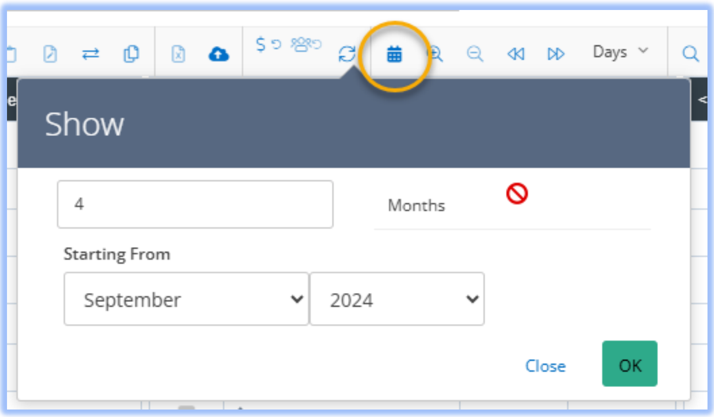
- **Full Range** – v8 Enhanced Forecasting original views which allow the user to have the complete set of periods displayed for the forecast with the option to Show More Periods using toolbar controls.
- **Limited Range** – This replicates the limited period view available before Enhanced Forecasting and provides sub-totals with before and after selected period totals.

Feature Usage

With Limited Range enabled users see a Calendar icon on the toolbar which is used to define the number of periods they wish to focus on. Show options will vary depending on the Weeks or Months level the user is currently viewing.

Months – Allowed ranges are from 3 – 36 Months

Weeks – Allowed ranges are from 4 – 30 Weeks



This view will display sub-total for the period selection with before and after selected period totals.

* Role	* Treatment Type	Posts		ETC	EAC	<<	Aug 2024	Sep 2024					Sub Total	>>
							8/26/2024	9/2/2024	9/9/2024	9/16/2024	9/23/2024	9/30/2024		
Engineer.	Opex		Forecast Days	42	72	27.5	2.5	2.4	3	3	3	.6	14.5	30
	Opex		Actual Days	36.6	43.22	6.63								
Architect	Opex		Forecast Days	58	100	39	3	3	3	3	3	3	18	43
Developer	Opex		Forecast Days	48	78	27.5	2.5	2.4	3	3	3	.6	14.5	36
	Opex		Actual Days	42.6	46.35	3.75								

In this example the demand for the Engineer is displaying 6 weeks starting from August 26 with effort value in Days. Note how the values are calculated for the columns.

- Sub-total for the show six periods is 14.5 Days. These are displayed in the columns from Aug 26 – Sep 30.
- In << prior periods the demand adds up to 27.5 Days. This represents forecasted demand from the start of the forecast up to Aug 25.
- In >> future periods the demand adds up to 30 Days. This represents forecasted demand from Oct 1 to the last defined period for this forecast.
- In this example, ETC is based on forecasted demand from Sept 2 to the last defined period for this forecast. The 2.5 Days in week Aug 26 is not included in the ETC because that period is closed. (e.g. 14.5 – 2.5 + 30 = 42 remaining forecast days).
- Actual Days ETC is based on the current period to the last defined period for this forecast. At the time this screen shot was taken the current period was September 16. Therefore 36.6 days (3 + 3 + .6 + 30 = 36.6) were forecasted that could be recorded as actuals. Actuals entered and approved up to the current period equal rounded 6.63 days.
- EAC is the sum of the actual effort to date plus Actual ETC (remaining forecasted effort). In our example 6.63 + 36.6 = 43.22

Enhanced Forecasting – Data Load Expense Charges

Extending on the recent forecast expenditure options users can now data load expense charges from the forecast data load toolbar option.

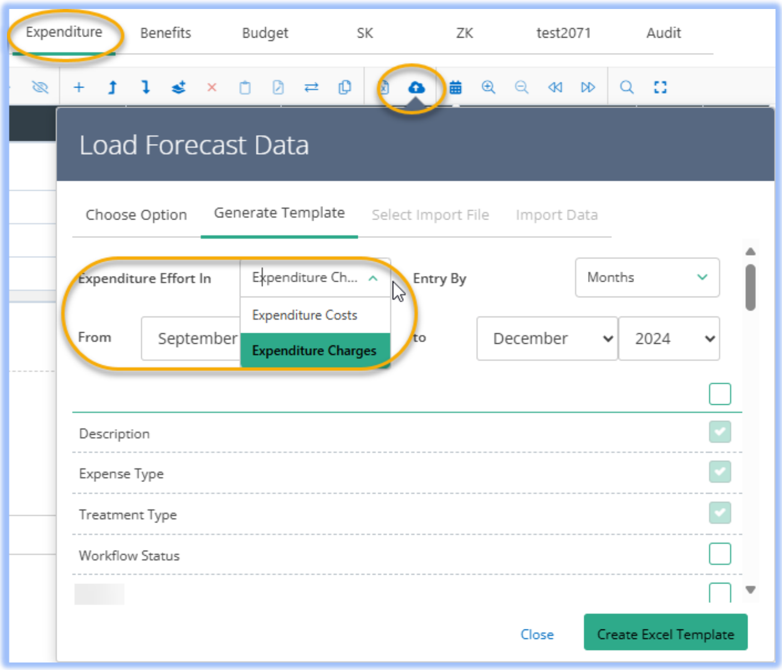
Feature Setup

Users that wish to leverage this feature will require the following application rights:

- Edit access to Forecast records (Login Profile | Portfolio tab)
- Show Expenditure Charges (Login Profile | Portfolio tab)
- Access data load feature (Login Profile | General tab)

Feature Usage

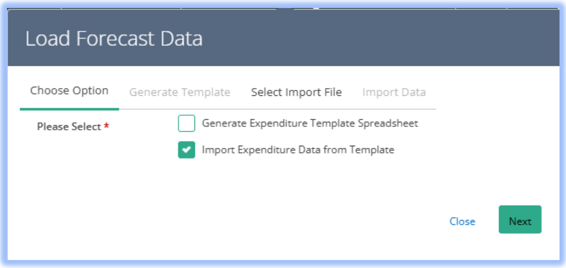
New data load options are available when you are generating the template to import values. Users can now determine whether they are importing Costs or Charges for the selected set of periods.

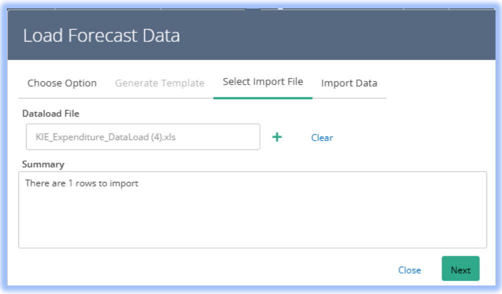


Generating the template will produce a template file which is designated for Charges vs Costs. The template file name will be generic as will the fields / columns noted in the spreadsheet. It is recommended to name the data load file to denote it is for charges vs costs. Costs and charges cannot be done together in the same file. One template must be used for costs and another for charges.

Description	Expense Type Code	Treatment Type	September 2024	October 2024	November 2024	December 2024
Expense Charg	MISC	Opex	10000	15000	20000	25000

Enter the desired values and optional fields in the template file. Then return to the application and select the option to **Import Expenditure Data from Template**.





Select your file with charge values, confirm the Summary reflects no errors or issues to correct and choose Next. The values will be imported and visible as Expenditure Charges in the expanded row.

* Description	* Expense Type	* Treatment Type		ETC	EAC	<<	Sep 2024	Oct 2024	Nov 2024	Dec 2024
Expense Charges	Miscellaneous	Opex	Forecast							
			Charge	70,000	70,000		10,000	15,000	20,000	25,000

Enhanced Forecasting – Support for change in Cost / Charge Rate with no demand

Customers leveraging enhanced forecasting can now update cost and charge rates on demand lines in periods with zero/no demand.

Feature Setup

Users that wish to leverage this functionality must have the following application rights:

- Edit access to Forecast records (Login Profile | Portfolio tab)
- Show Effort Costs (Login Profile | Portfolio tab)
- Show Effort Charges (Login Profile | Portfolio tab)

Feature Usage

Prior to this enhancement in the Enhanced Forecasting if the cost or charge rate was updated against a demand line that did not have demand the cost or charge rate would return to the standard rate on saving. Changes in rates without demand will now maintain the new cost or charge rate on saving the record.

* Team	* Role	* Treatment Type	Posts		ETC	EAC	<<	Sep 2024	Oct 2024	Nov 2024	Dec 2024	Sub Total
PMO	Project Manager	Opex		Forecast Days								
				Cost Rate				516	600	600	516	

This can be used in cases where you anticipate or plan for a change in cost or charge rates in periods where you are uncertain of the demand at this time. Then other users, possibly without visibility to the cost or charge rate, can update the demand value as needed, and the financial values will calculate appropriately.

Preview – Expressions on Risk and Issues can leverage standard and custom fields

Introducing the ability for inclusion of standard system fields in custom field calculated expressions. In this release customers can choose to evaluate the functionality with Risk and Issue records.

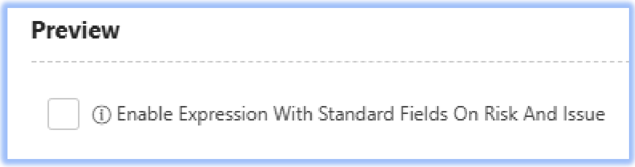
This feature is considered a **Preview Feature** based on limited use to certain entities. This is by design to minimize impact and validation of the feature before it will be enabled for other entities or areas in the product.

Feature Setup

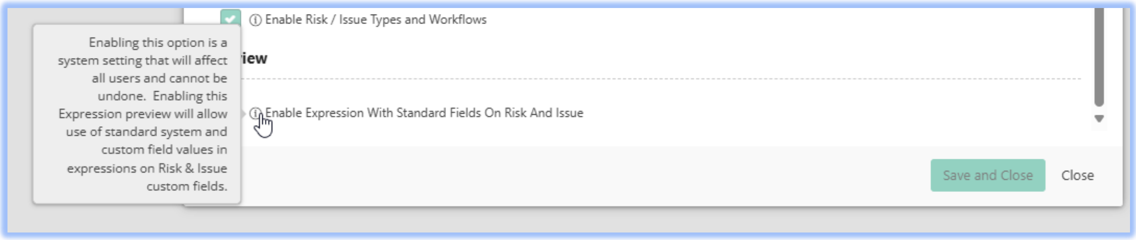
Due to database level changes when enabling this feature, it cannot be disabled once enabled. The feature should be tested and validated in your sandbox environment before production.

Users are required to have **Set System Defaults** permission in their Login Profile | General tab.

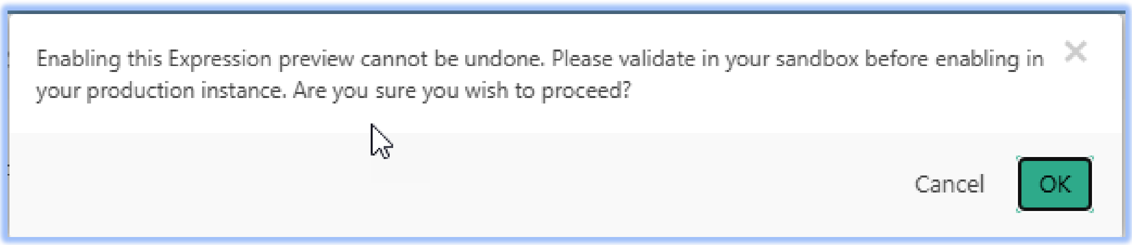
A new Preview Section is available in **Configuration | General Settings** that allows access to this and future preview options.



As noted in the enable selection the option is a one-way switch and cannot be disabled once it has been enabled.

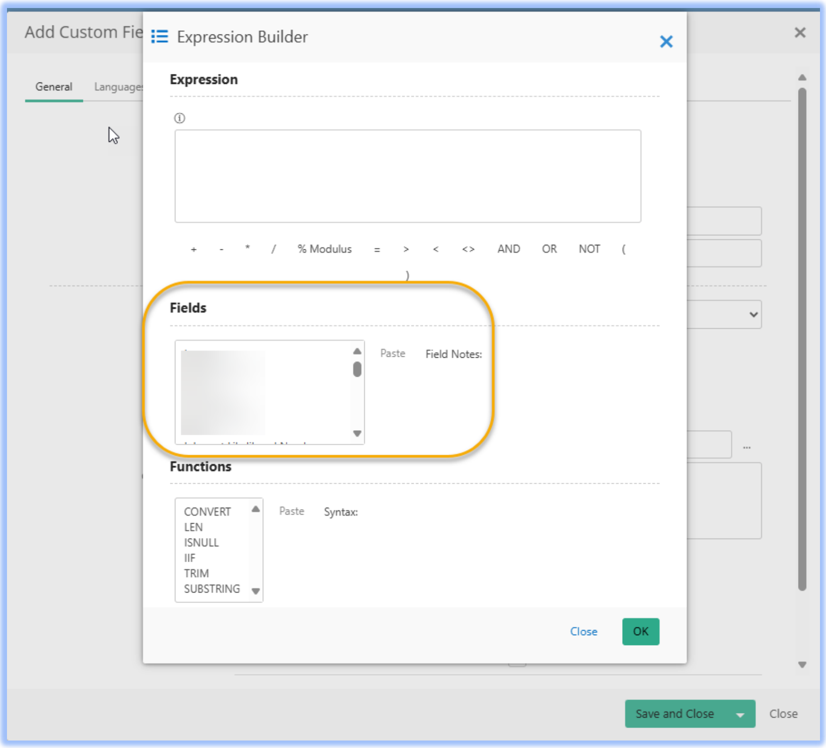


Administrators will be prompted to confirm their enable selection.



Feature Usage

Once enabled administrators can add Risk and Issue custom fields that are calculated values and leverage both custom fields and system fields in the expression.



This includes the ability to leverage Functions and fields on any data types that support Calculation Field Types.

NOTE: The field list available to the user for the expression will be based on the settings of the field as to which record it relates to Risk, Issue, or both.

- Risk only selected – All fields that only apply to Risks will be available for expression.
- Issue only selected – All fields that only apply to Issues will be available for expression.
- Both Risk / Issue selected – Only fields that can be used for both Risk and Issue will be available for expression.

Preview - Visual Collaboration – Microsoft Teams Support

This represents the initial release of the Sciforma Visual Collaboration module to allow customers who leverage Microsoft Teams as their collaboration platform to include MS Teams chat communications directly inside KeyedIn Enterprise or view and enter messages from Microsoft Teams web, desktop, and mobile applications.

This feature is considered a **Preview Feature** based on limited use in certain areas of the application. This is by design to minimize impact and validation of the feature before it will be enabled for other areas in the product.

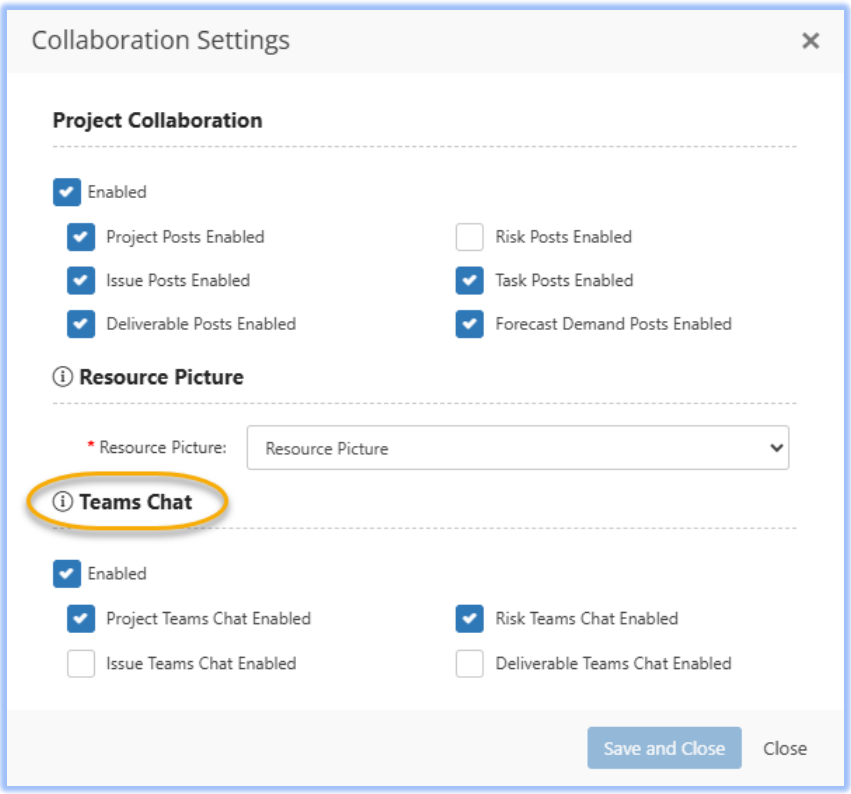
Feature Setup

The Visual Collaboration module is a licensed module that can only be activated by contacting our support team and requesting the license to be enabled in your environment. Administrators will be required to activate and test the Visual Collaboration in their sandbox environment first before it can be enabled in your production instance.

Once the Visual Collaboration module license has been activated by the Sciforma support team the administrator will require **Set System Default** rights from their Login Profile | General tab to further enable use of Teams Chat options.

It is possible to use both KeyedIn standard Collaboration Posts functionality and Teams Chat features at the same time. Please note they are separate communication operations and not linked to each other. However, companies may find different use cases for some communications to happen via one or the other method.

New options will be available in the **Configuration | Collaboration Settings** section to enable desired communication methods. New Teams Chat options will be available, only once the license has been activated by the support team.



The Teams Chat options are as follows:

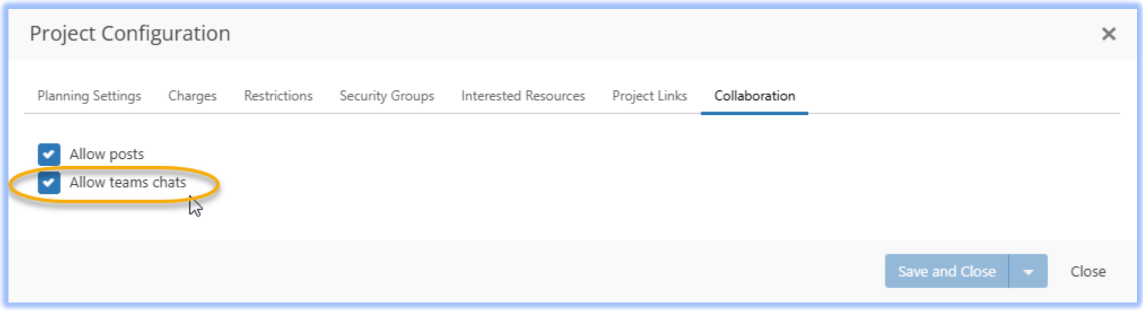
- **Enabled** – This check box will allow you to leverage Microsoft Teams chat features in the system. Further options are required to associate chat to selected project entities as part of the Project Configuration.
- **Project Teams Chat Enabled** – Selecting this option will provide an option on project records to enable project collaboration. The secondary selection on each project via Project Configuration is required and is not enabled by default.
- **Risk Teams Chat Enabled** – Selecting this option will provide a Teams Chat tab on any risk records (new and existing).
- **Issue Teams Chat Enabled** – Selecting this option will provide a Teams Chat tab on any issue records (new and existing).
- **Milestone / Deliverable Teams Chat Enabled** - Selecting this option will provide a Teams Chat tab on any milestone / deliverable records (new and existing).

NOTE: These system settings enable the option for a chat to be used on the selected entities. However, it is still required to create the chat with desired participants on each project record. Further details are noted in the following Feature Usage section.

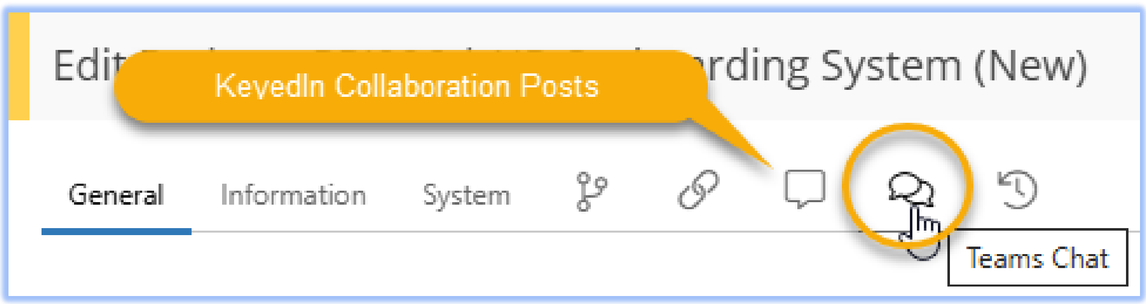
Feature Usage

After the system has been enabled for Teams Chat functionality on the given entities, users can establish a Chat communication thread in Microsoft Teams for each specific record. Chats are not automatically created for each record in the system. Users determine which records they wish to create chat channels against.

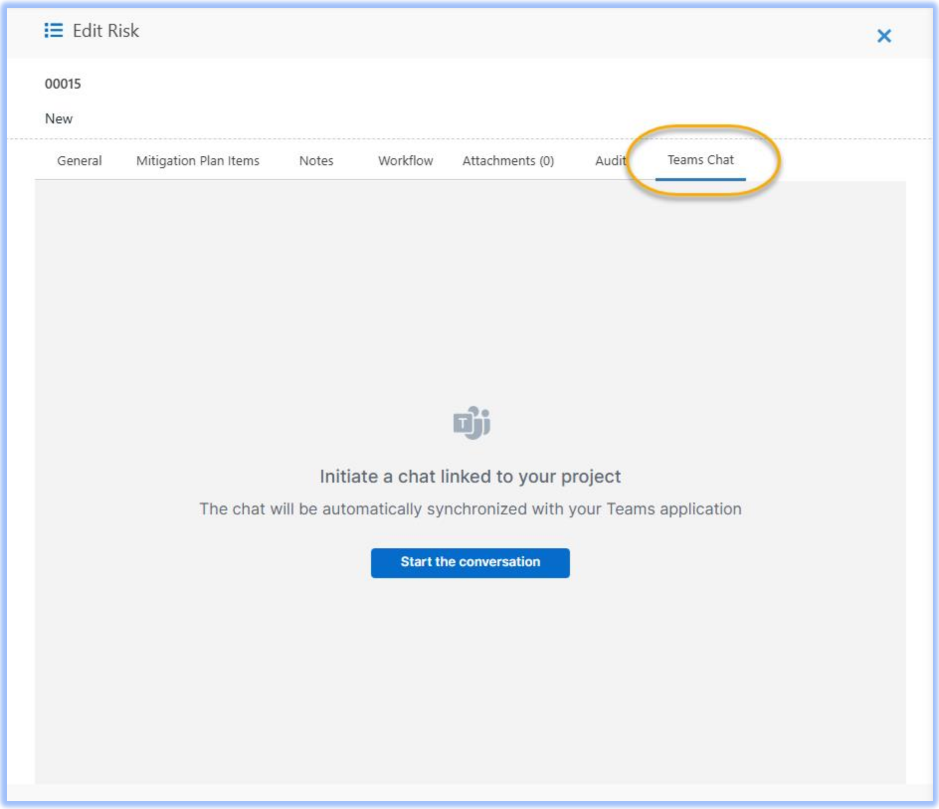
- **Project Record** users will require **Project Configuration** rights found in the Login Profile | Setup tab. Within the project configuration on any specific project the Collaboration tab will have an option to **Allow teams chats**.



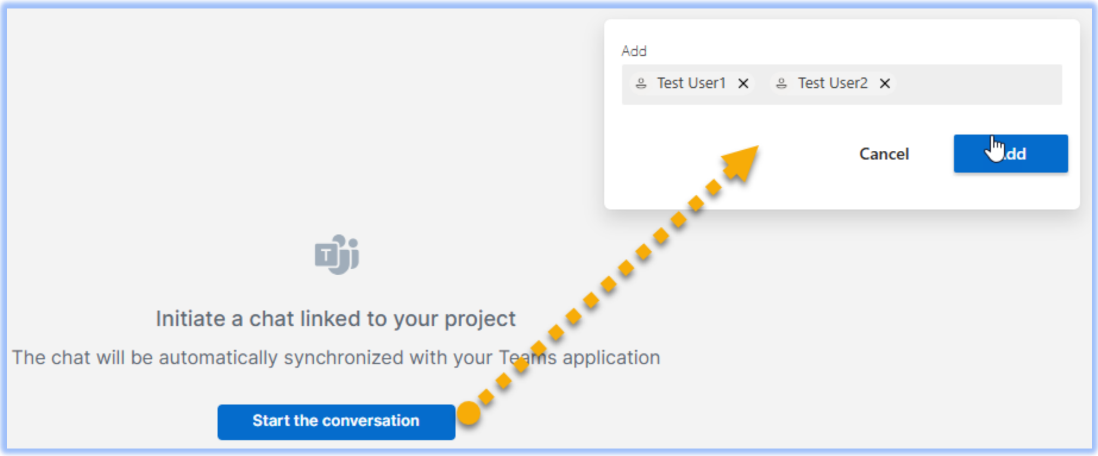
Once this option is selected a new tab will be available for Microsoft Teams chats on this specific record. KeyedIn collaboration posts may also be used on their own tab and separate thread of communications.
Note: For this release chats are available on the record tab and not within a widget.



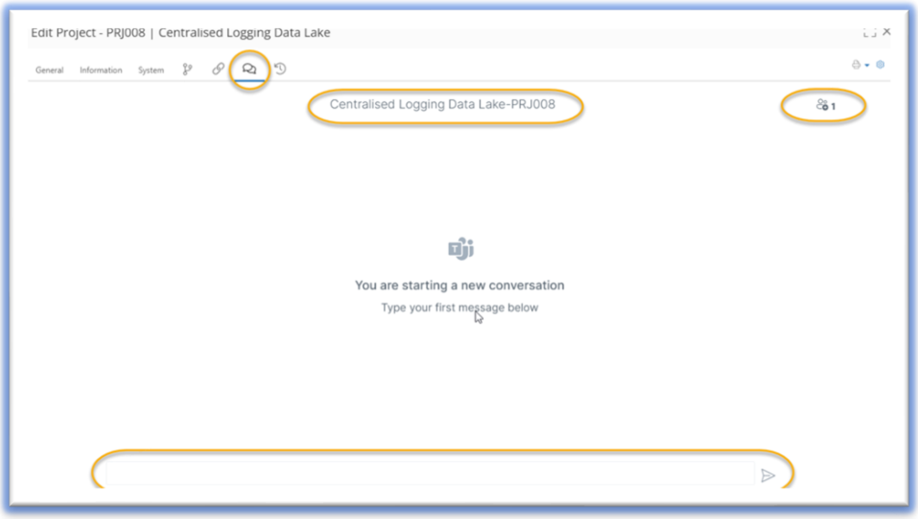
- **Risk / Issue / Milestone / Deliverable** records do not require a configuration selection and will simply have a new Teams Chat tab available for use.



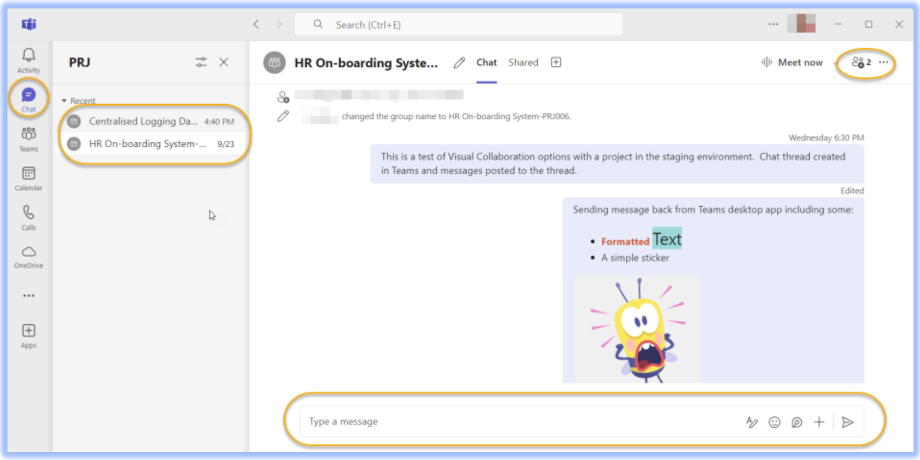
1. Accessing the Teams Chat tab for the first time the user will be prompted to authenticate their account using appropriate credentials to connect to your corporate or personal Microsoft Teams account. Credentials for this authentication are based on **your Microsoft credentials** and not your KeyedIn credentials. Companies leveraging single sign-on for Teams authentication may bypass login screens once validated on future access to the Teams Chat tabs.
2. If a chat has not been configured for this record, the **Start the conversation** button can be clicked to open the Add user dialog box. Enter names in the Add box based on your corporate naming conventions for user accounts. The naming should match how you see names displayed in MS Teams. Add any number of users and then click the Add button to create the Chat channel in Microsoft Teams.



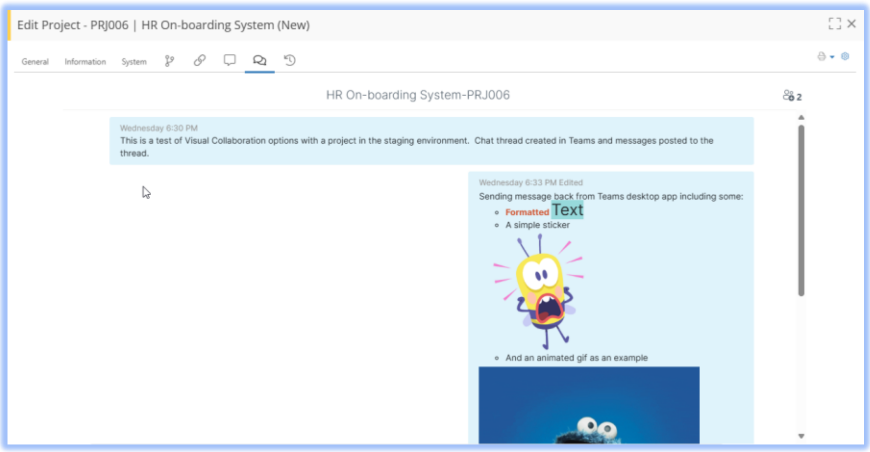
3. The process may take several seconds to have the chat created and then will be available in MS Teams as well as displayed in the KeyedIn Teams Chat tab.



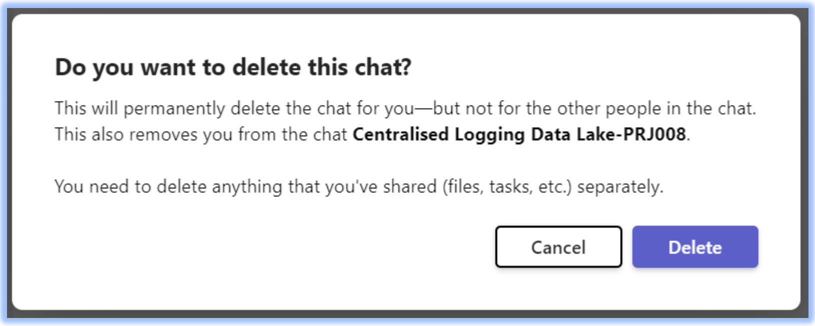
4. Once established the Chat in Microsoft Teams will be named specific to the record and include those resources the users added on setup. Additional users can be added from KeyedIn or MS Teams using the Add User link.



5. Conversations are displayed on both KeyedIn and MS Teams. Users can leverage supported data entry methods from the MS Teams message menu such as formatted text, stickers, animated gifs, etc. Options for formatting within KeyedIn will be made available when available.



6. Removing users from the chat is not supported at this time and must be managed within Microsoft teams.
7. If you no longer want the chat, Deleting the chat must be managed within MS Teams. Users will be prompted for removal impact and results of the deletion.



8. **NOTE**: If the name of the record in KeyedIn is changed after the chat was originally created and used, the Chat channel in MS Teams will maintain the original record name used on creating the conversation. It is possible to delete the channel in MS Teams and recreate the conversation from KeyedIn using the new record name. However, this is not recommended as all conversation history details on the original chat will be separated and not included when creating the new conversation. Some items are maintained in history in MS Teams, but this is managed by Teams and not by KeyedIn.
9. Files and links shared in MS Teams via conversation thread or uploaded to the chat will be displayed in the Teams Chat tab in KeyedIn. At this time, you can paste shortcuts within KeyedIn conversation thread, but document upload or pastes are not supported.

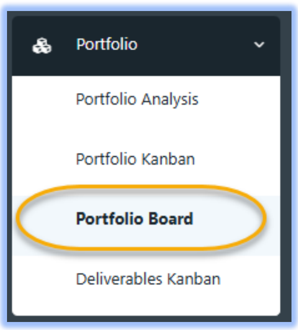
Preview – Visual Collaboration – Portfolio Board

This represents the initial release of the Sciforma Visual Collaboration module to allow customers to have an alternate advanced board view with access to project cards displayed in a variety of user and system defined views supporting a variety of project management methodologies.

This feature is considered a **Preview Feature** based on limited use in certain areas of the application. This is by design to minimize impact and validation of the feature before it will be enabled for other areas in the product.

Feature Setup

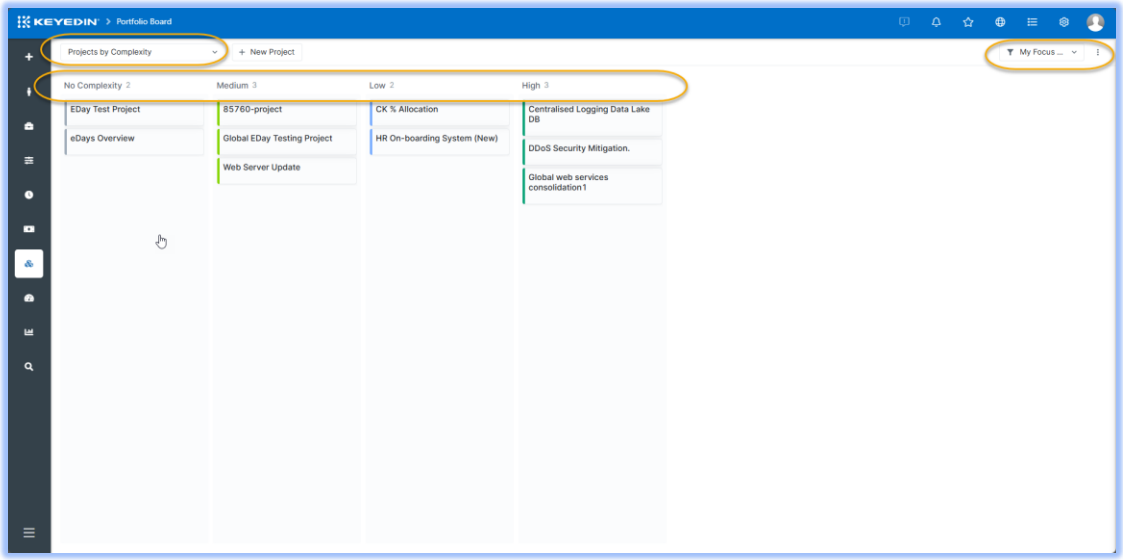
The Visual Collaboration module is a licensed module that can only be activated by contacting our support team and requesting the license to be enabled in your environment. Administrators will be required to activate and test the Visual Collaboration in their sandbox environment first before it can be enabled in your production instance.



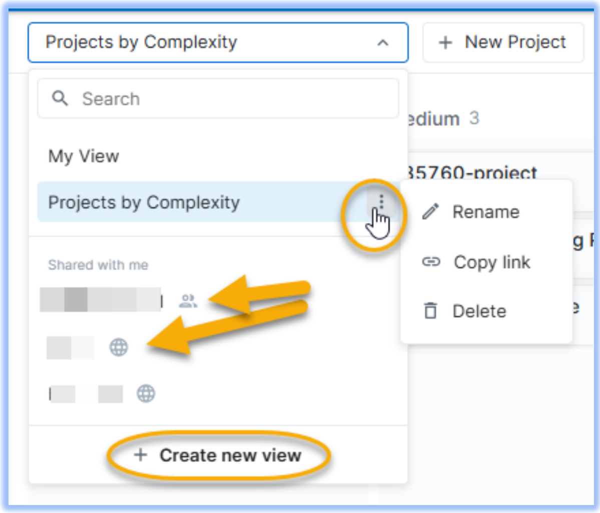
Once the Visual Collaboration module license has been activated by the Sciforma support team all users will have access to the Portfolio Board from the Portfolio application menu. No additional configuration or system setting is required.

Feature Usage

The Portfolio Board is designed to give user the flexibility to view projects based on attributes contained on those records that may be displayed as optional swim lanes (columns). Unlike KeyedIn's Portfolio Kanban board, which is solely based on project types and workflows, the Portfolio Board can be configured for views which are based on record data points.



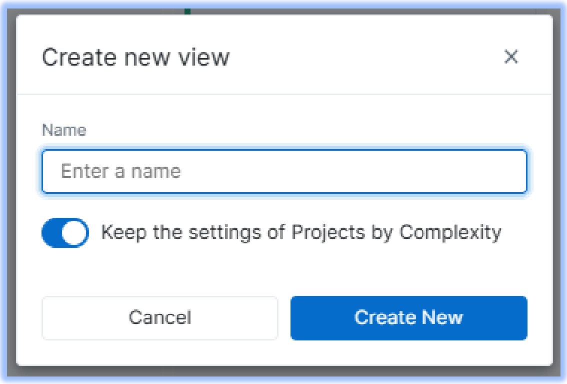
The board will open using the last view that was accessed. Users can create and manage new views from the View dropdown listing in the upper left corner.

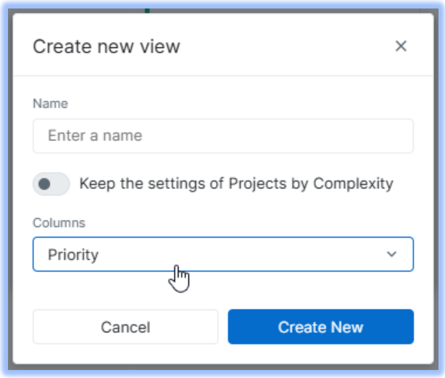


Options for views created by the user can be renamed, deleted, and shared with other users using the Copy Link shortcut. If the user did not create the view options for rename or delete will not be available.

Views will be listed at the top of the screen that are personal views. Below personal views listings will be any views that were shared via Group or Global settings. The icons to the right of the shared views represent Team (two body icon) and Global (world icon).

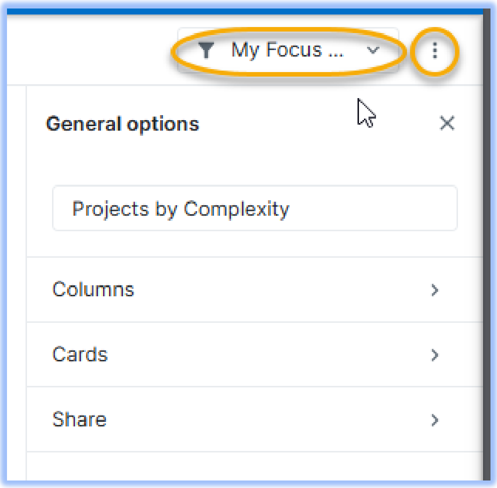
Selecting the option at the bottom of the screen allows users to create new views with alternate filter, column, and card properties. Users can toggle the option to keep the settings from the current view or define new column properties.





Selecting the option to add a record **+ New Project** will open the standard project creation dialog asking for project type and template options.

The upper right corner of the Portfolio board provides options to manage the filter of which records are displayed and adjust the settings for the view.

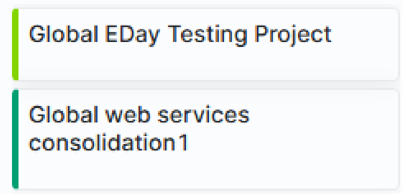


The filter listing is based on the filters defined in Search | Project listing. Filters listed will be represented from Individual, Group, and Global scope saved filters. Adjustment to those filters should be done from the Search menu.

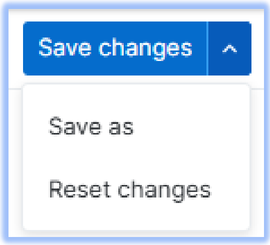
The vertical ellipsis icon will open the configuration for the view.

- General Options – Allows the user to change the name of the view.
- Columns – Provides a dropdown menu listing of any field that can be used to distinguish separate columns for the records. This includes fields that are based on Boolean (Checkbox True/False), Keyword, or Number List data types. Fields are listed in numeric order of the field ID.
- Cards – Allows the user to determine which field will be used to colour code the records on the board (left side of card). The colour selection is a system generated palette for type 1, type 2, type 3, etc. The colours cannot be selected or controlled

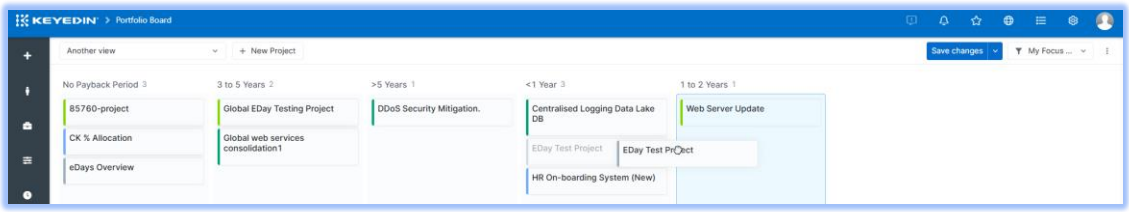
by administrators in this release.



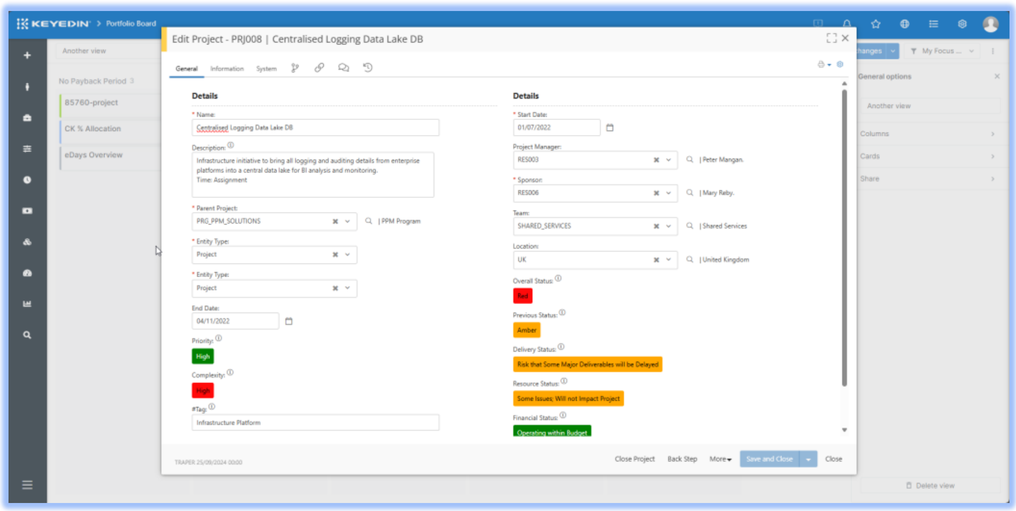
- Share – Users can share their view with other users in the system if the view is using a filter that is for Group or Global access. Views leveraging Individual filters cannot be shared.
- Save / Reset – If any changes are made to view or filter selections the new options can be saved for next visit to the view. Alternatively, the changes can be reset to the last save, as an undo function, if the changes are not working as desired.



After the views and filters have been configured the board can be used to update values based on the columns selected. Dragging and dropping a card from one column to the other will update the field for the record based on the column value or attribute.



Clicking on a Project Card will open the Edit or View of the record based on the user's permissions. Data values, attributes, or workflow commands can be managed from the project edit window. At this time drag and drop for workflow status should continue to be managed from the Portfolio Kanban board.



Data view Changes for v8.3.0

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
Demand, Supply, Scheduled, and Capacity Monthly Data	Provides details on named values by resource, role, and team for monthly periods.

Updated Data views

Dataview	New Fields
Enhanced Forecasting Demand	• Actual Charge (Demand Currency) • Actual Charge (System Currency) • Actual Charge in Locked Months (Demand Currency) • Actual Charge in Locked Months (System Currency)
Project Supply Monthly	• Project supply calculation corrected per period • Project actuals calculation corrected per period
Forecast Demand Data	• Forecast Line Key
Forecast Expenditure Data	• Forecast Line Key