KeyedIn Enterprise v8.3.1 Release

Release Summary

Version 8.3.1

October 2024

Contents

Document Management

Version Control

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

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	Oct. 21, 2024	Tom Raper – Product Manager

Document Authorization

Version Number		
1.0	Oct. 22, 2024	Terry Willans – Director, Global Security

Overview of Service Changes

	Fixes	Enhancement
Web Application	✓	✓
Mobile Application	×	×
Mobile Services	×	×
V3 API	✓	×
V7 Core API	×	×
V7 Data API	×	×
Enterprise Core API	✓	×
Enterprise Data (Reporting) API	×	×
Enterprise Planning API	✓	×
Enterprise Time/Expense API	✓	×
Data Views	✓	✓

Release Summary

KeyedIn Enterprise's v8.3.1 is a monthly update release with general support fixes and minor product enhancements related custom entities, reporting fields, and actions.

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

Custom Entity fields included in Search

Standard and custom fields are now available in Search as well as column chooser related to Custom Entities.

Report fields display original field name

When modifying the label for a field in a report, users will now see the original field name reference in the report definition.

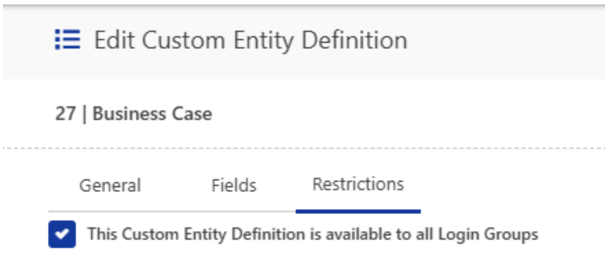
Bulk Delete Action records

An option now exists to multi-select and delete action records such as Status Reports.

Custom Entity fields included in Search

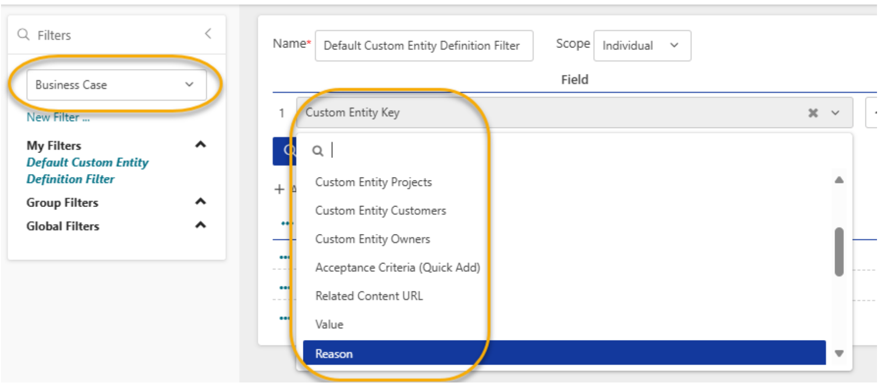
Feature Setup

No specific administration or user configuration settings are required to use this feature. All users with access to the Custom Entity, based on definition Restrictions, will have access to the Search screens and fields.

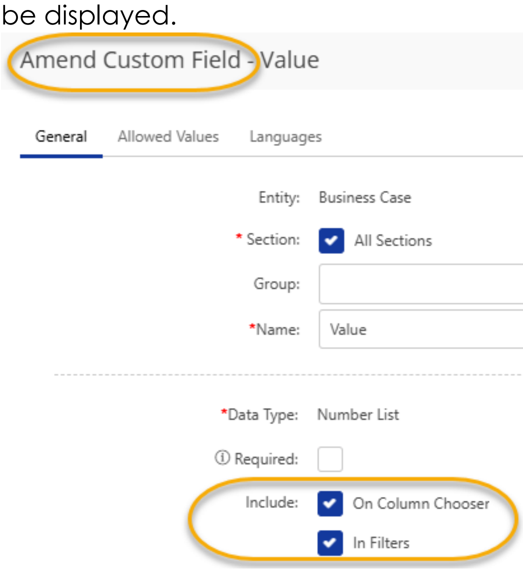


Feature Usage

Users with rights to see the custom entity will have access to the standard and custom fields defined for that entity. Search filters can be defined for individual, group, or as global filters using the set of fields.



NOTE: Custom Fields still need to be configured for availability in Filters or Column Chooser to be displayed.



Report fields display original field name

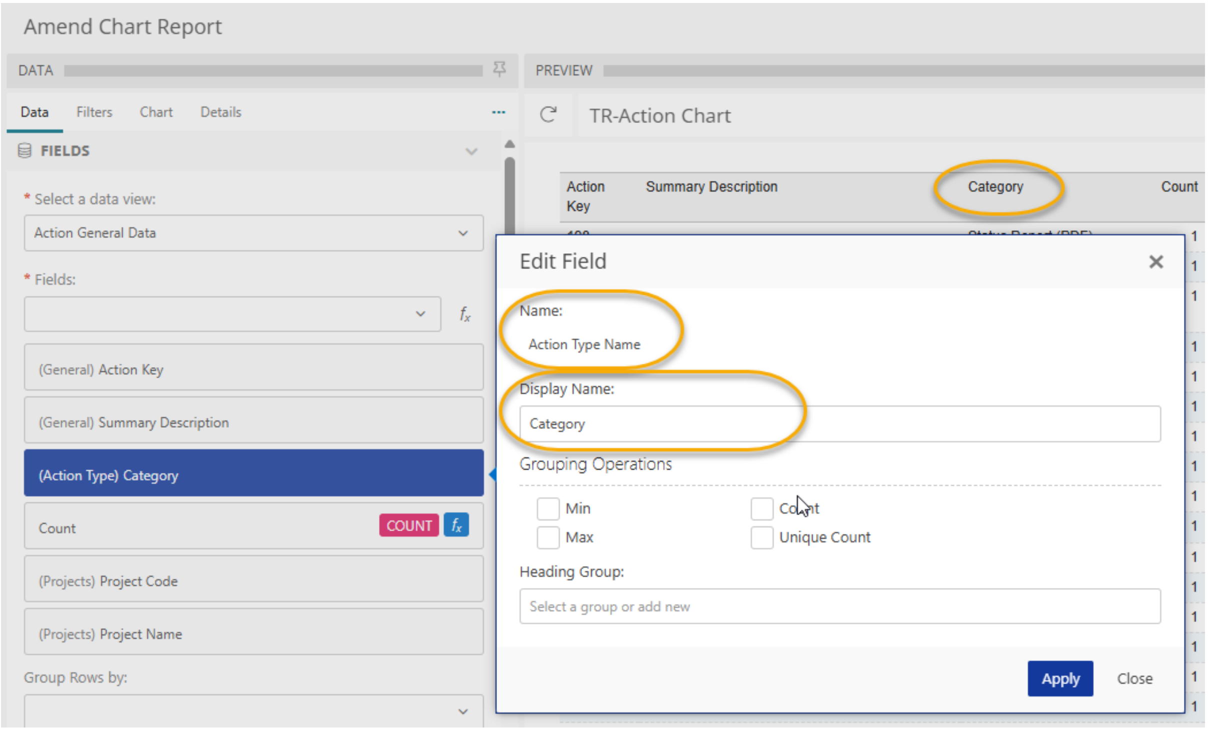
Feature Setup

No administration or user configuration settings are required to use this feature. All users with rights to the report writer will have access to this functionality.

Feature Usage

When users are creating reports, it is an option to replace the name of the field with a label that may be shorter or best represents the data in a report or widget. The original field name will always be displayed in the report **Edit Field** definition.

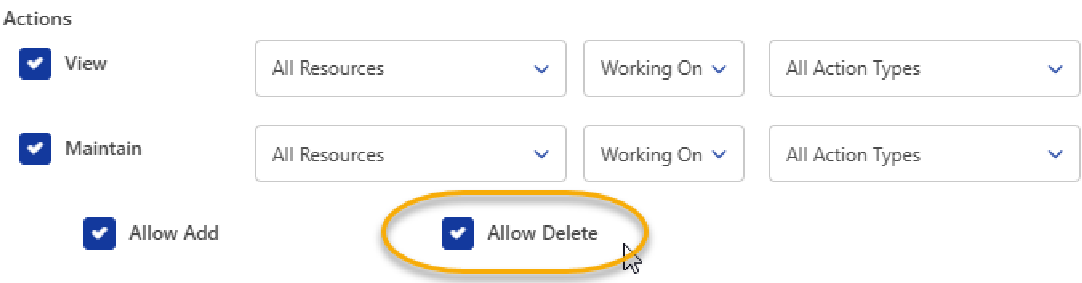
In this example, I renamed the Action Type Name system field value to Category as easier reference for users running the report. Prior to this update, it was required to remove the Display Name to know what the system field name was. Now the value is always available for reference should you need to cross reference fields in other reports or searches that use the standard system name.



Bulk Delete Action records

Feature Setup

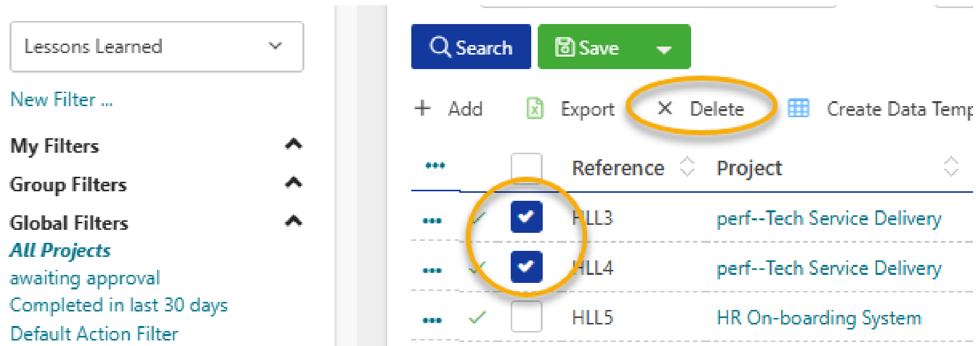
Users require rights to an Action Type and Action View and the Allow Delete permission from their Login | Projects | Actions section to use this feature.

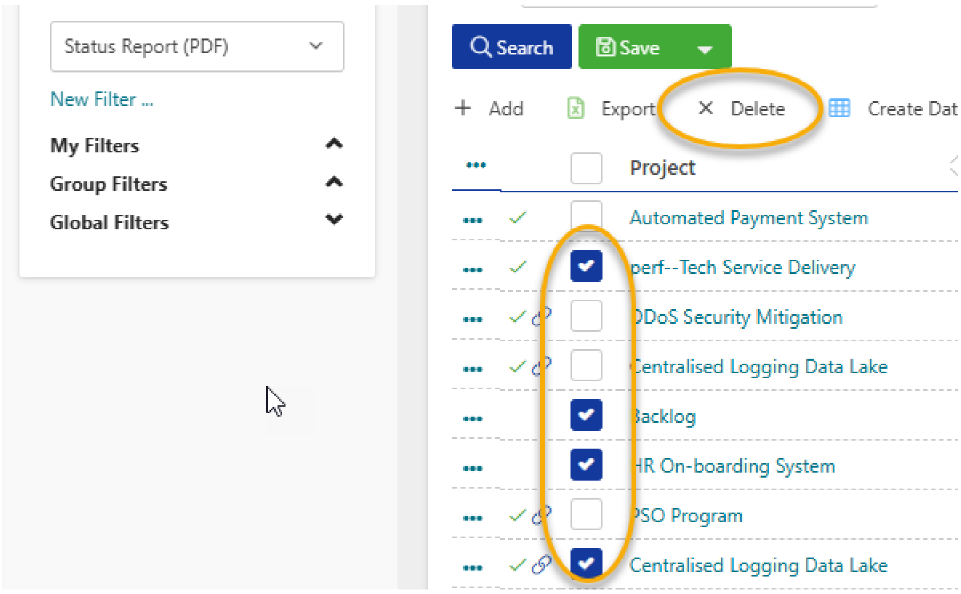


Feature Usage

If users with delete permission wish to bulk delete a group of selected actions, they can now multi-select the records they wish to delete and use the Delete option from the menu. Users will be prompted to confirm they wish to delete the records.

NOTE: Once records are deleted, they cannot be recycled or undone and will be deleted permanently.





Data view Changes for v8.3.1

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
Custom Entity Combined Links V1.0.0	This data view can be used to create a report that displays the multi-select fields of project, owner, and customer in a single field with comma separated values. The data view includes: • All standard and custom fields from all custom entities • Custom Entity Definition Key, Name, and Description for filtering or sorting. • Linked Project standard and custom fields • Linked Customer standard and custom fields • Linked Resource standard and custom fields • Drill through to the Custom Entity record
Custom Entity Drill Through V1.0.0	This data view can be used in data widgets you wish to provide a drill through to the edit page for the linked project, customer, or resource record. Each linked record will display as an individual line in the report to allow drill through. The data view includes: • All standard and custom fields from all custom entities • Custom Entity Definition Key, Name, and Description for filtering or sorting. • Linked Project standard and custom fields with drill through to Project • Linked Customer standard and custom fields with drill through to Customer • Linked Resource standard and custom fields with drill through to Resource • Drill through to the Custom Entity record

Updated Data views

Dataview	New Fields
Project Data V6.0.17	• Allow eDays Scheduling • Use Task Description for Assignment • Allow % based Task and Assignment Effort Allocation • Allow Multiple Plan Versions • Allow Inter Project Dependencies • Manager Active • Manager Login Active • Manager Login Code • Manager Login Name

Timesheet General Data V6.0.19	• Line Manager Email
Forecast Summary Data V6.0.21	• Parent Project Code • Parent Project Name (formerly name displayed the code value only)
Planning General Data V6.0.28	• Project Predecessor Task Key • Project Predecessor Task Lag • Project Predecessor Dependency Type • Project Predecessor Project Code • Project Predecessor Project Name • Project Predecessor Task ID • Project Predecessor Task Description • Project Predecessor Start Date • Project Predecessor Start Time • Project Predecessor End Date • Project Predecessor End Time • Project Predecessor Task Duration • Project Successor Task Key • Project Successor Task Lag • Project Successor Dependency Type • Project Successor Project Code • Project Successor Project Name • Project Successor Task ID • Project Successor Task Description • Project Successor Start Date • Project Successor Start Time • Project Successor End Date • Project Successor End Time • Project Successor Task Duration
Login Data V6.0.8	Provides ability to report which logins have System and API roles enabled (Yes/No). • Super User • Support Contact • Billing Contact • Integration User • Scheduled Report User • Support User • Generate API Key • Admin API • Reporting API • Planning API • Time and Expense API