KeyedIn Enterprise v8.3.2 Release

Release Summary

Version 8.3.2

November 2024

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	Nov. 12. 2024	All	All	T Raper	N/A

Document Approval

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

Document Authorization

Version Number		
1.0	Nov 19, 2024	Terry Willans – Director, Global Security

Overview of Service Changes

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

Release Summary

KeyedIn Enterprise's v8.3.2 is a monthly update release with general support fixes and minor product enhancements related to actions and reporting fields.

Customers will be notified separately via our internal Support process for any of their tickets that have been resolved in this Release.

Highlights of New Features and Improvements

Risk / Issue Context Reporting

Context reports can now be added to the Risk / Issue view/edit screen to allow more flexible reporting on the record.

Action view publishing to specific project levels.

When publishing action views, users can now select the given level for that specific view.

Exceptional Treatment Type screen label

Admins can now change the Exceptional Treatment Type name to customer desired terminology.

Custom Field Key value added to Column Chooser

When reviewing the list of Custom Fields in the Configuration pages, the Key value can be added via Column Chooser.

Risk / Issue Context Reporting

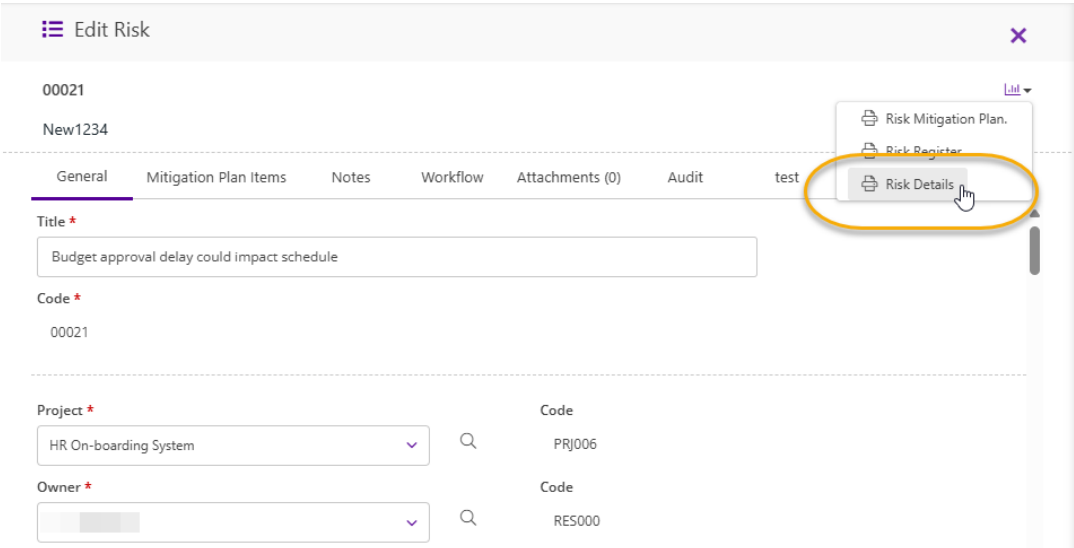
Feature Setup

Context reports can now be added to the Risk / Issue view/edit screen to allow more flexible reporting on the record. This allows customers to create their own styling and details about the record as desired.

Context reporting can be managed by all users with access to report configuration options. The setting in Login Profile | Setup | Configuration | Reports will provide the user access to reporting settings.

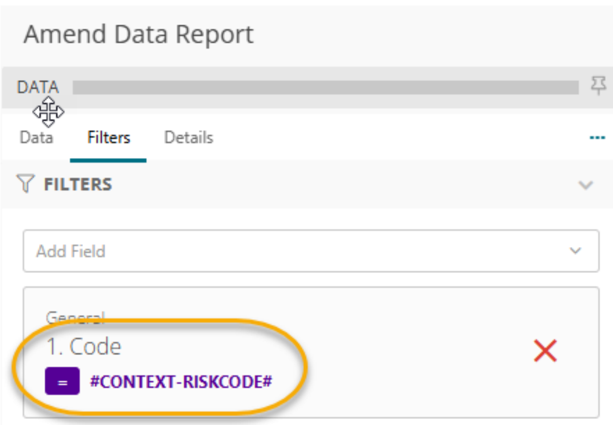
Feature Usage

Reports based on risk/issue information can be linked to the record being viewed. The context reports will be displayed as a dropdown listing on the Edit record page.

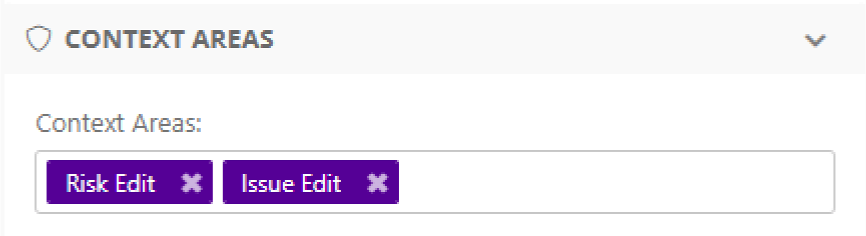


The report should be configured as follows:

1. The report should be a chart report or data report, not a widget type report. This allows report options for display on screen (standard), Excel, or PDF output.
2. The report should use a data view that allows filtering on Code=#Context-Riskcode#. NOTE: Issues will still use the same #Context-Riskcode# filter as they share the same code value.



3. The report should be configured with Context Areas defined for Risk Edit or Issue Edit depending on what you wish to link the report.



Action view publishing to specific project levels.

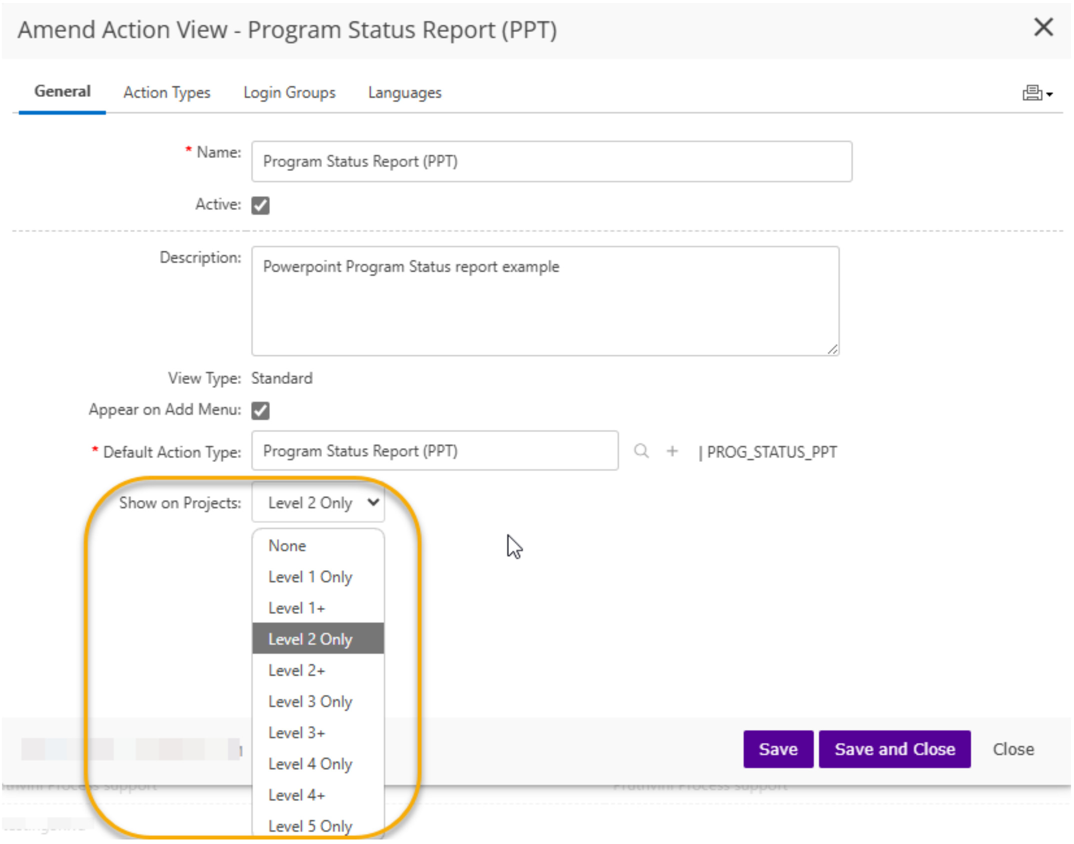
Feature Setup

When publishing action views, users can now select the given level for that specific view. This allows administrators to control which level an Action View is displayed on screen.

Action Views can be managed by all users with the setting in Login Profile | Setup | Configuration | Tools | Action View enabled.

Feature Usage

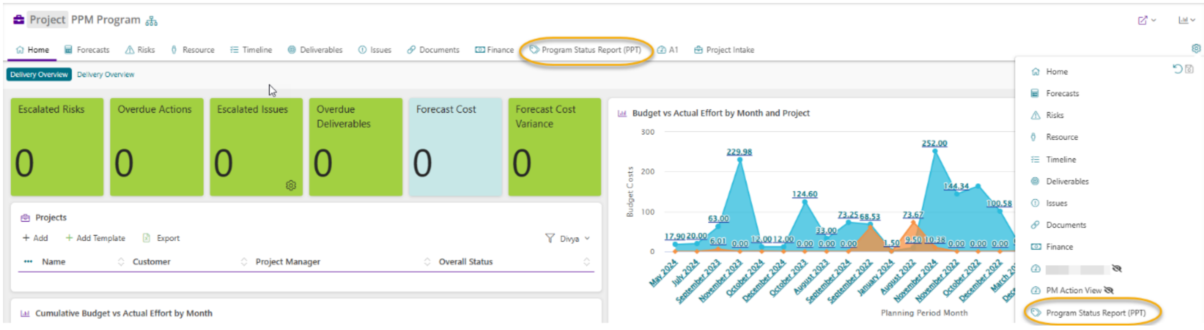
Users with rights to manage Action Views will now see options for publishing based on the number of levels defined in the system. Project levels will vary per customer based on Configuration | Project Levels. In this example the system has been defined with five levels, therefore the publishing options range from none to Level 5 only.



Previously the options were None, Level 1, or Level 2+. With new settings the user can determine if they wish to limit a view to a specific level or that level and above.

- In the above example a Program Status Report is configured to only display on Level 2. Therefore, at level 1, 3, 4, and 5 the view will not be displayed.
- If the option for Level 2+ was selected the view will be displayed on level 2, 3, 4, & 5.
- The Action View will still need to be Active to be displayed.

When configuring the tab order on the Project pane, options for items published to that level with be shown by name in the list. Those that are not published at that level will be displayed as eye icon with slash through it. The order of the tabs can still be managed by the user by dragging and dropping the tabs up or down in the listing. Only those published and available at that level will be seen on that page.



Exceptional Treatment Type Screen label

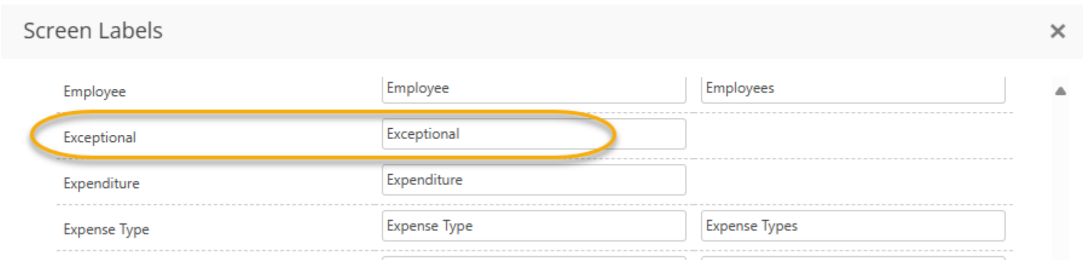
Feature Setup

Admins can now change the Exceptional Treatment Type name to customer desired terminology. This applies to customers leveraging the Enhanced Forecasting that was originally introduced in v8.0. Treatment types are used to help classify costs for demand and expenses on the forecast record. Typical classifications include Capex, Opex, and Exceptional. Customers can now rename the third category to another name that better represents an alternative such as "Other" or "Not Applicable."

To control or change this setting the user requires the Login Profile | General | Set System Defaults option to be enabled.

Feature Usage

Admins can find a new Configuration | Screen Label option that allows the label to be changed throughout the system anywhere the Treatment Type is presented in a drop-down listing, including reporting in data views.



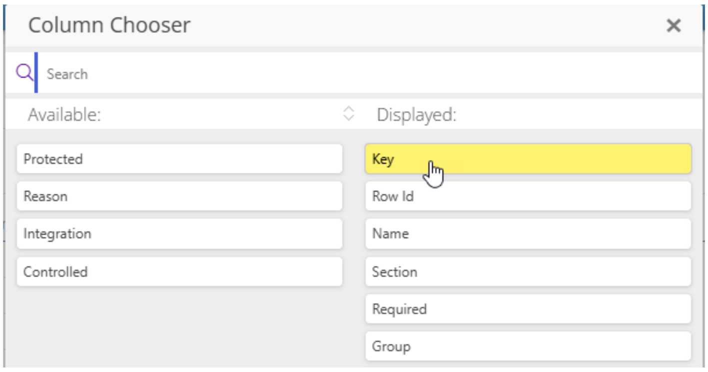
Custom Field Key value added to Column Chooser

Feature Setup

This option is available for all users that have Login Profile | General | Set System Defaults option enabled.

Feature Usage

When viewing Configuration | Custom fields each custom field has an order that represents the order the field is displayed in some screens and sections. If you wish to also review and see the Key (unique identifier) for each field, you can now add the Key value from the Column chooser listing of available fields and order as desired.



Data view Changes for v8.3.2

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

New Data views

Dataview	Description
N / A	• No new data views added in this release

Updated Data views

Dataview	New Fields
Forecast Summary V6.0.22	• Actual Effort Cost Locked Period (Target Currency) • Actual Effort Cost Open Period (Target Currency) • Actual Expenditure Cost Locked Period (Target Currency) • Actual Expenditure Cost Open Period (Target Currency) • Actual Benefit Locked Period (Target Currency) • Actual Effort Charge Open Period (Target Currency) • Actual Effort Charge Locked Period (Target Currency) • Actual Benefit Open Period (Target Currency)
Enhanced Forecast Expenditure V1.0.3	• Confidence Level • Forecast Start Date • Forecast End Date • Is Latest Baseline • Expenditure Treatment Type • UID Identifier • Agency Code • Agency Name • Cost Centre Code • Cost Centre Name • Location Code • Location Name • Any Custom Fields that appear in the Expenditure Line Row

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