KeyedIn Enterprise v8.4.0 Release

Release Summary

Version 8.4.0

January 2025

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	Dec 17. 2024	All	All	T Raper	N/A

Document Approval

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

Document Authorization

Version Number		
1.0	Dec 19, 2024	Scott Brown – CIO Cloud

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 v8.4.0 is a quarterly release with features and options available to support work management and business processes. Highlights of this release include Task Plan and GANTT enhancements, graphical workflow support for custom entities, Enhanced Forecasting updates, and an introduction to Sciforma's user interface theme.

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

Task Plan – Schedule from end

A new option to set the end date of the project plan and work backwards to automatically calculate the start date of the plan.

Task Plan – Calculate percent complete

New option to calculate percentage complete for a task based on the planned effort compared to actual approved hours.

Task Plan – Display options

Additional display options to improve project visibility and make task management easier in the GANTT.

Custom Entities – Option to enable types and workflows

A system configuration option to enable types and workflows for custom entities allowing for business processes and variations in operations associated with custom entities.

User Interface – New Sciforma Themes

A new set of themes are available to introduce a common look and feel between Sciforma's suite of applications and Vantage platform support.

Portfolio Analysis – Analysis tab views publishing to multiple login groups

Following the operations of My Work, Project, and Insights, users can publish Portfolio Analysis views to multiple login groups.

Enhanced Forecast – Data load demand for multiple forecasts

A new data load is available on the Search pane to bulk load and data load demand related to multiple projects and forecasts at the same time.

Project Finance Tab – Benefits available for analysis

The inclusion of benefits on the Finance tab allows companies to evaluate and perform analytics on project related benefits.

Project Finance Tab – Extended period view to 60 periods

Additional support for more period selections is available on the Finance tab to further evaluate and review a larger number of periods related to the projects, up to 60 periods.

Preview – New custom field Cascading field data type

Introduction of a new Cascading field data type that allows for parent/child keywords for use as a drop-down selection for user to select any value in the hierarchy.

Task Plan – Schedule from end

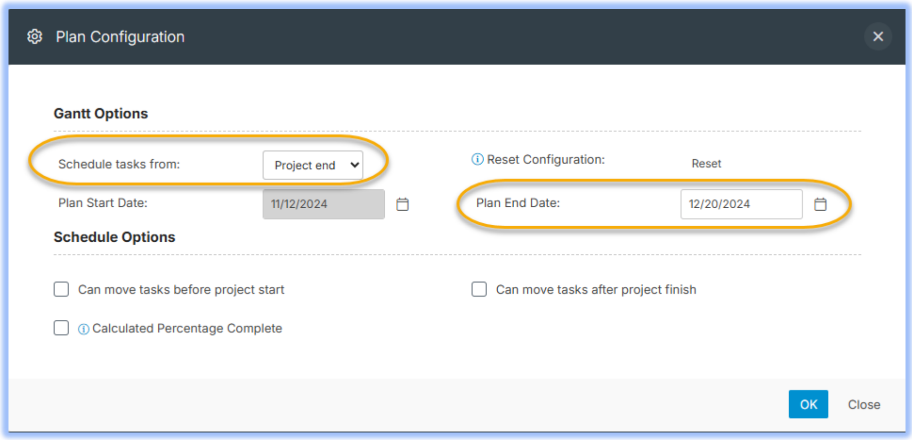
A new option to set the end date of the project plan and work backwards to automatically calculate the start date of the plan.

Feature Setup

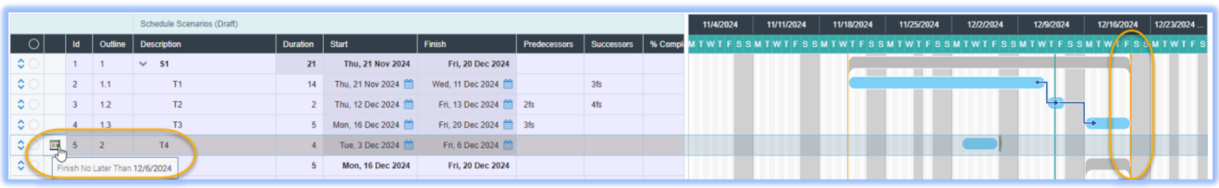
Users will require rights to manage the project to make changes to the Project Configuration (Login Profile | Setup | Project Configuration).

Feature Usage

If the project manager has a targeted end date for the project and would like to schedule the tasks and activities to determine the possible start date required for the project, they can choose to Schedule task from Project End. Within the Plan Configuration settings, choose the Project End option and set the Plan End Date entering the date or using the date selector.



This mode works the opposite of Project Start, in that the end date will become the threshold date by which all other tasks will be calculated from the end date and working back in time to establish start dates for the tasks. This means setting a task end date and duration for a task will subtract working days to determine the start date.



In this example the end date was set to Dec 20. This means that all tasks will initially be set to end on the end date, until dependencies or constraints are set otherwise.

- Tasks 2, 3, and 4 have finish to start dependencies which create linked tasks backward to note a necessary start date of Nov 21, to finish by the end date.
- Task 5 uses a Finish-no-later-than constraint to bring the task forward to start on Dec 3 with a duration of 4 days.

Task Plan – Calculate percent complete

New option to calculate percentage complete for a task based on the planned effort compared to actual approved hours.

Feature Setup

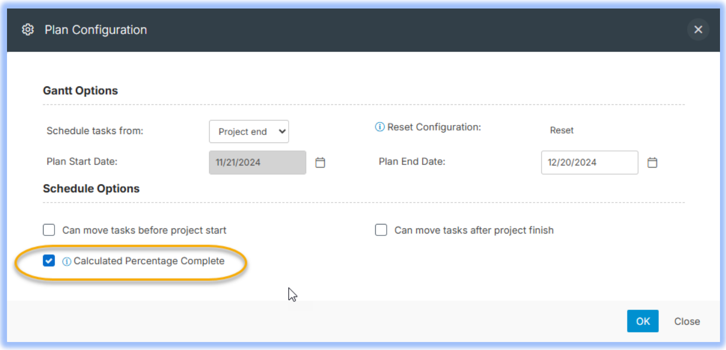
Users will require rights to manage the project to make changes to the Project Configuration (Login Profile | Setup | Project Configuration).

Feature Usage

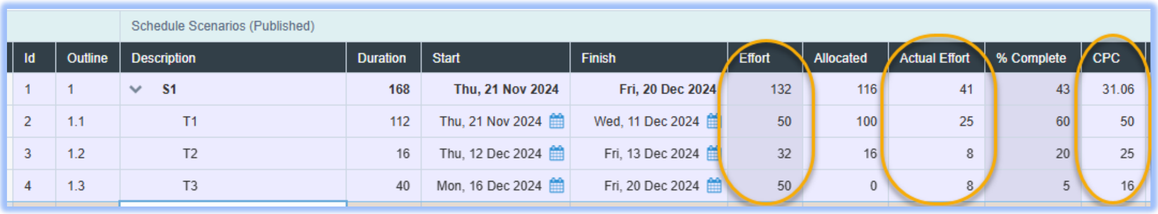
Historically the Percent Complete value on a task is a subjective value entered by the resource the task has been assigned to or by the project manager. The value is the opinion of the resource to denote how much of the task they feel is complete. This may differ from the actual effort spent, for example the resource may have spent 4 out of 8 days of effort, performing 50% of planned effort, but still say they are only 25% complete.

This new option now provides a method for the system to calculate a percent complete, similar to Microsoft Project, based on the actual approved effort compared to the planned effort for the task.

- The project manager can choose to have this calculation enabled by selecting the option in the Plan Configuration settings.



- The setting is disabled by default to ensure optimum performance of the task plan. Enabling the option will cause some calculations and could impact larger plans for all calculations to complete based on changes. The setting can be enabled and disabled as needed.
- Once enabled a new column will become available on the task pane to include in project evaluation and help the project manager or resource determine if they wish to adjust the Percent Complete to the calculated value.



Schedule Scenarios (Published)

Id	Outline	Description	Duration	Start	Finish	Effort	Allocated	Actual Effort	% Complete	CPC
1	1	S1	168	Thu, 21 Nov 2024	Fri, 20 Dec 2024	132	116	41	43	31.06
2	1.1	T1	112	Thu, 21 Nov 2024	Wed, 11 Dec 2024	50	100	25	60	50
3	1.2	T2	16	Thu, 12 Dec 2024	Fri, 13 Dec 2024	32	16	8	20	25
4	1.3	T3	40	Mon, 16 Dec 2024	Fri, 20 Dec 2024	50	0	8	5	16

Task T1 is planned for 50 hours, actual of 25 (50% CPC) but user estimate of 60%
Task T2 is planned for 32 hours, actual of 8 (25% CPC) but user estimate of 20%
Task T3 is planned for 50 hours, actual of 8 (16% CPC), but user estimate of 5%
Summary S1 sums 132 planned hours, actual of 41 (31% CPC), but user estimate of 43%

Task Plan – Display options

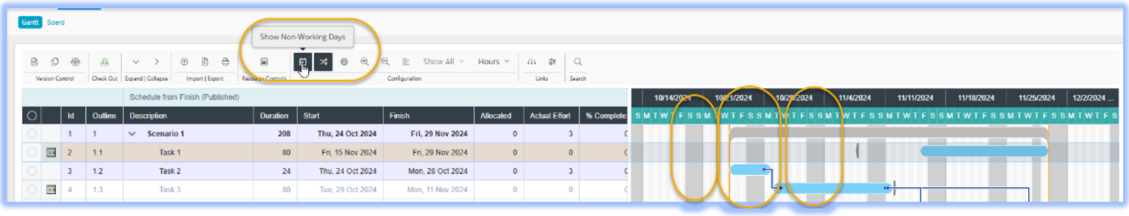
Additional display options to improve project visibility and make task management easier in the GANTT.

Feature Setup

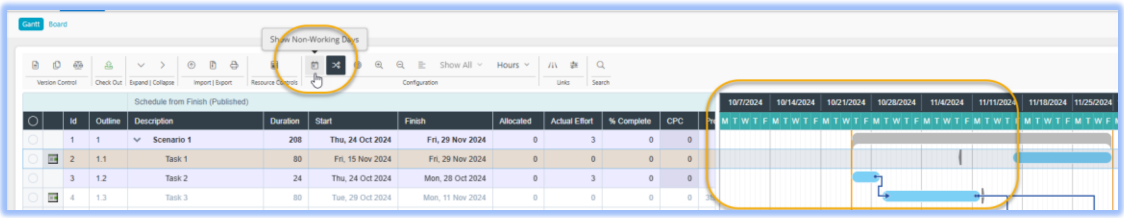
Users with rights to display a project now have options to make the GANTT display easier to view the tasks graphically on screen. The plan does not have to be checked out to take advantage of these new viewing options.

Feature Usage

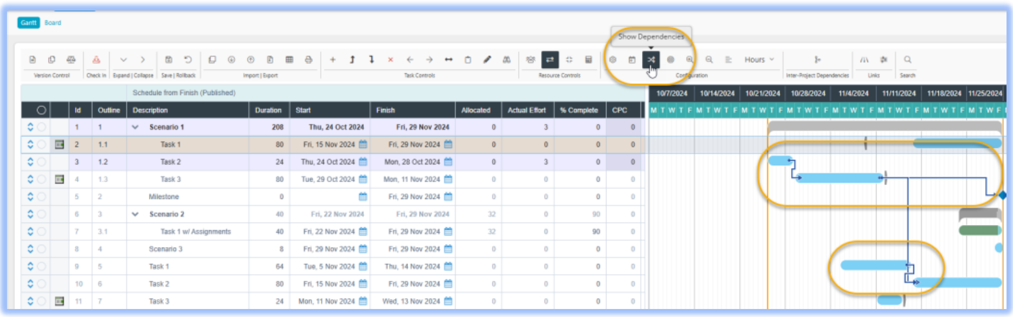
1. Show/Hide Non-Working days – The project Working Calendar may have non-working days which represent corporate days off, holidays, etc. By default, these days are displayed with a darker shade of grey in the GANTT view. When zooming out these columns can make other columns harder to view. Now users can disable the display of non-working days to isolate to only working days. Clicking the icon on the toolbar will hide the non-working days and the icon will to be darkened/highlighted.
   a. Enabled by default non-working days are displayed



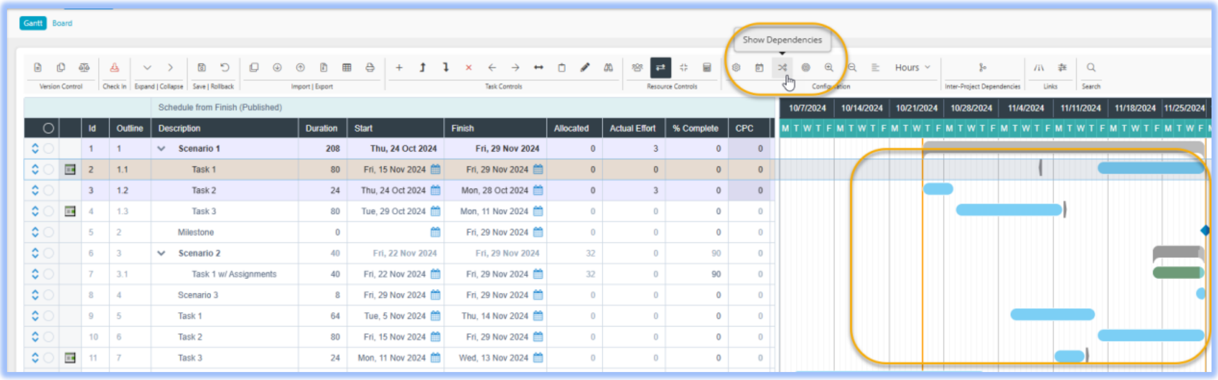
   b. Disabled view will hide non-working days



2. Show/Hide Dependencies – If tasks have dependencies the GANTT view will display the lines between tasks with arrows and relationship references connecting tasks. As tasks are zoomed out or for easier task management, the user may wish to hide the dependencies to focus on the tasks themselves. By default, the Task Dependencies will be displayed for reference. The user can choose to show/hide them as required.
   a. Enabled by default the dependencies are displayed



b. Disable view will hide dependencies



Custom Entities – Option to enable types and workflows

A system configuration option to enable types and workflows for custom entities allowing for business processes and variations in operations associated with custom entities.

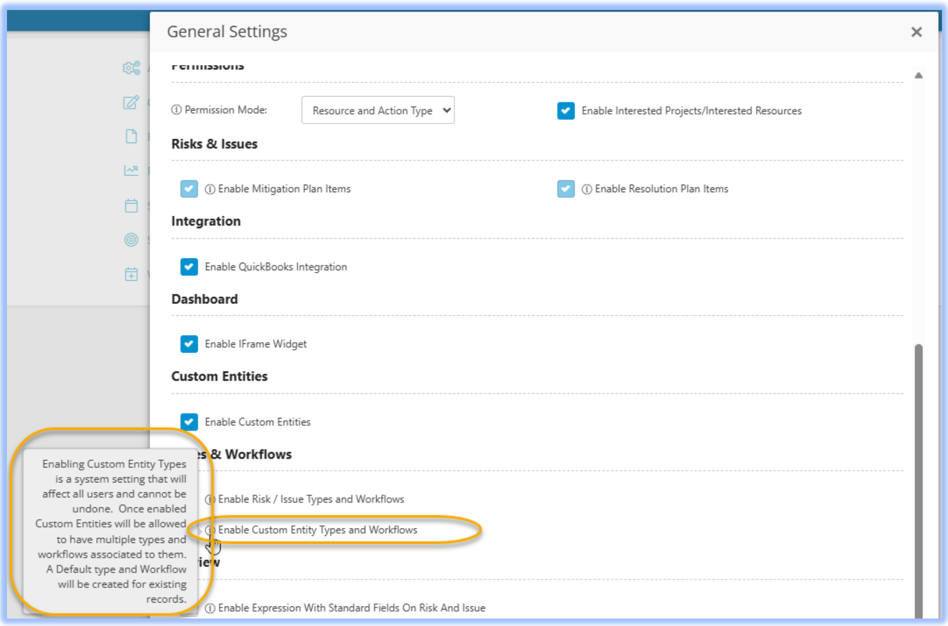
Feature Setup

This feature requires administration permission and is only available to those users with rights to Set System Default (Login Profile | General | Set System Defaults).

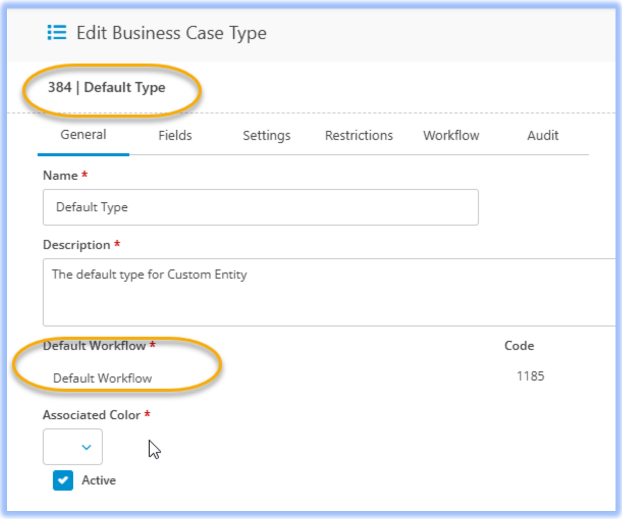
Feature Usage

After the types and workflow are enabled, administrators can create additional types and workflows based on requirements. This follows the similar operations that are available on Projects and made available to Risks / Issues in v8.3.

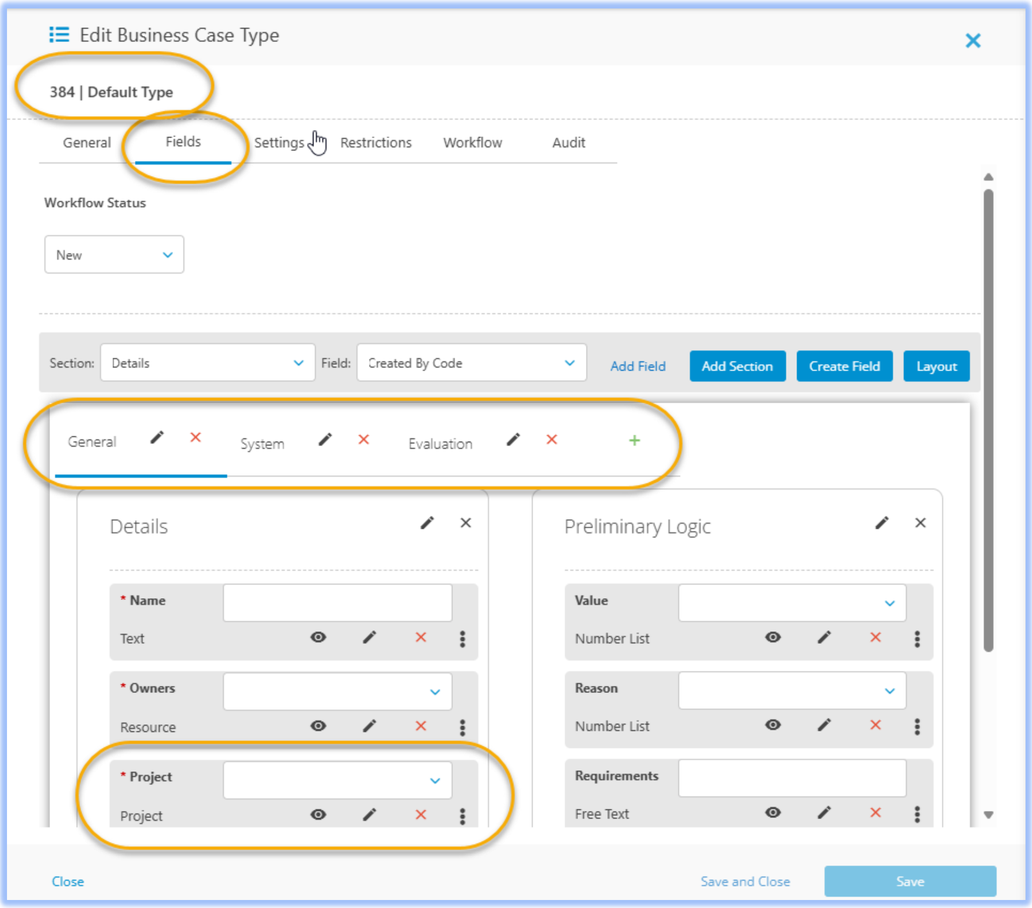
NOTE: The option to enable Custom Entity Types and Workflows is a one-way switch and cannot be disabled or undone after enabled. It is recommended you first try the setting and operations in your sandbox/test environment before enabling in your production instance.



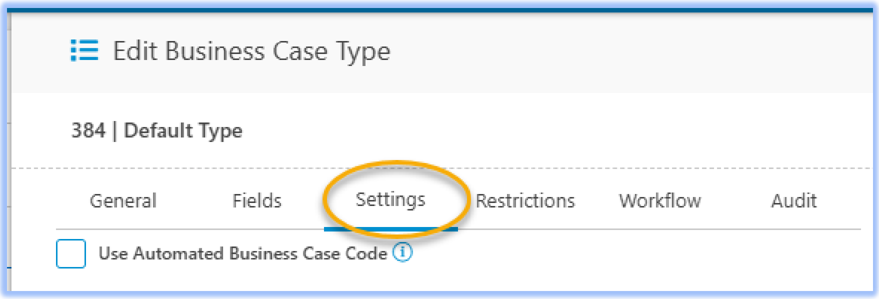
- After enabling the setting, a new Default Type and Workflow will be created for each Custom Entity.
- **Configuration | Entity Types |Custom Entity | General tab** represents the core definition and purpose of the Custom Entity type.



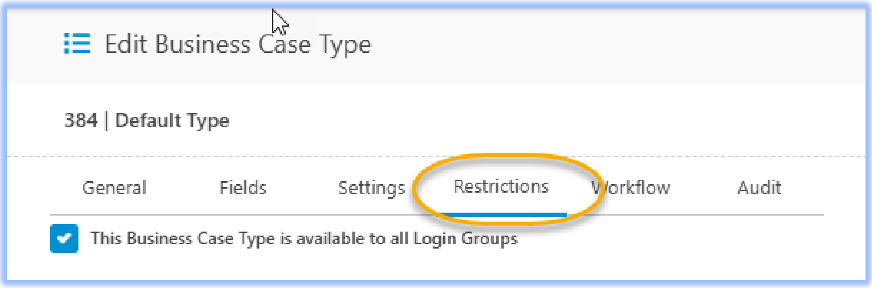
- **Configuration | Entity Types | Custom Entity |Fields tab -** The default type will leverage any required fields based on the configuration of the entity. If the entity was linked to Project or Client/Customer, the code and name fields for those related records will be required and must be included on the fields tab. They can be included and moved to any tab but will be required for the user to create a record for the custom entity.



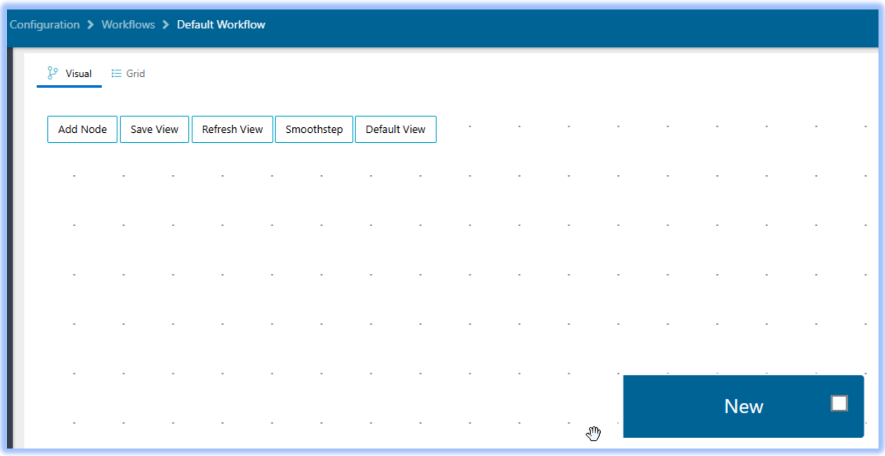
- **Configuration | Entity Types | Custom Entity | Settings tab** manages how a code will be generated for the entity. Each custom entity will always have a key unique identifier that is generated automatically by the system. Customers can choose to also create a code for the record if they wish to have more control on a numbering scheme that means something for internal or integration purposes. By default, the custom entity will use the settings that have been defined in Configuration | Custom Entity definition settings. If types are enabled, then each type may have its own numbering scheme as desired by the administrator.



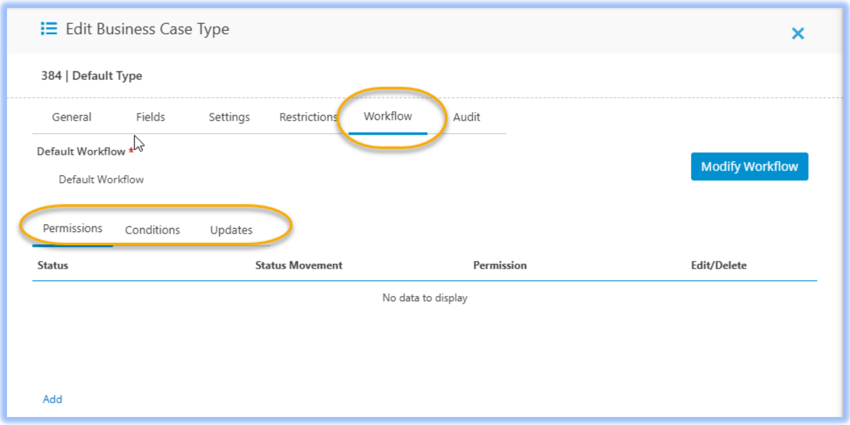
- **Configuration | Entity Type | Custom Entity | Restrictions tab** manages whether the entity type is available to only certain login groups. This can be used as a mechanism to limit access that only certain types can be created, viewed, or updated by specific login groups.



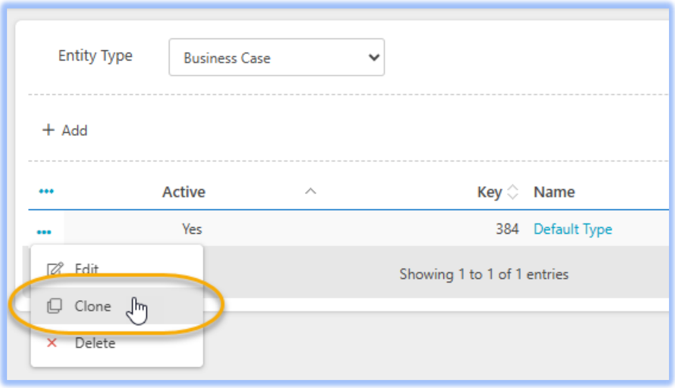
- A default workflow will be created and available for the Custom Entity with a single New status. The default workflow can be updated and additional status or sub-status steps added to the workflow.



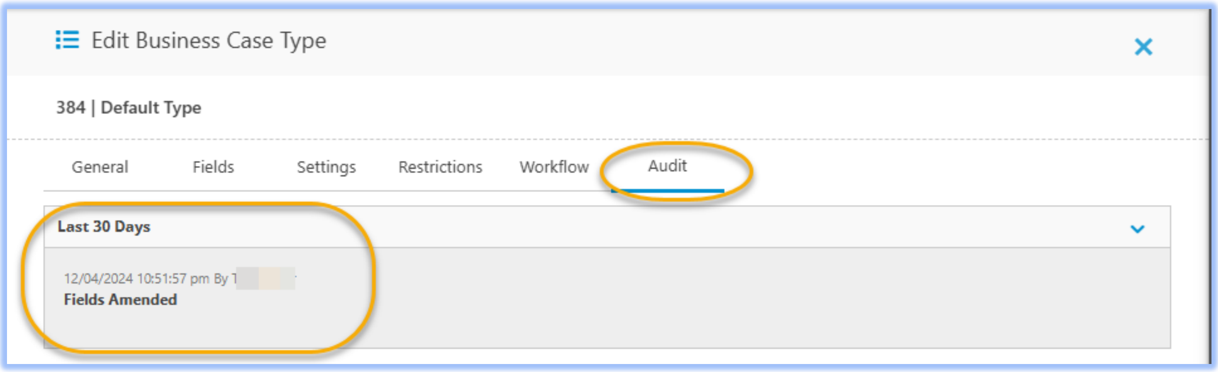
- **Configuration | Entity Type | Custom Entity | Workflow tab** allows the administrator to define specific *Permissions, Conditions, or Updates* as the record moves through the workflow status and sub-status movements. These operations behave the same way as Projects and Risks/Issues and further details about their specific use cases can be referenced in materials related to those entities.



- Additional Workflows can be made to associate a different process to different types of the Custom Entity. If administrators wish to update the workflow used, they can clone the type from Configuration | Entity Types | selecting the core Custom Entity in the listing. During a clone the workflow option will be available for selection until saved. Once saved the Entity Type will be linked to that workflow and cannot be changed. Administrators may delete unused types using the delete option.
  NOTE: Types cannot be deleted if any records exist that have leveraged the type. In which case the records must be deleted before the type can be deleted. This is by design to ensure data is available for any records created unless the administrator determines the records are no longer necessary and can be permanently deleted.



- **Configuration | Entity Type | Custom Entity | Audit tab** provides the administrator with a reference to changes made to the configuration and settings on the entity type. The audit will provide details about which login made the change and reference to the change or type of change that was made.



User Interface – New Sciforma Themes

A new set of themes are available to introduce a common look and feel between Sciforma's suite of applications and Vantage platform support.

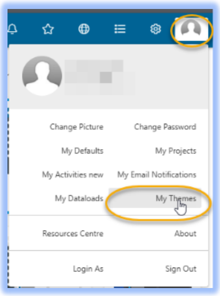
Feature Setup

This feature requires administration permission to enable the Dark theme and available to those users with rights to Set System Default (Login Profile | General | Set System Defaults).

After the Dark theme is enabled, individual users do not require any specific permission and will find the Theme settings available in their profile settings.

Feature Usage

- The themes show up in the profile for the user. Each user can control which theme is their preference and their choice will not impact selections made by other users.



- Two new themes represent KeyedIn being incorporated into the Sciforma Vantage platform. The changes reflected in the new themes incorporate changes to the Navigation menu, menu icons, screen font styles, display pattern in system widgets, and fonts available in the system widget headers. The new themes are named Standard and Dark, and the historical KeyedIn Standard and Dark modes are also available for those users who wish to maintain the current look and feel. A refresh after save is necessary to update icons to the Vantage or KeyedIn set of icons.

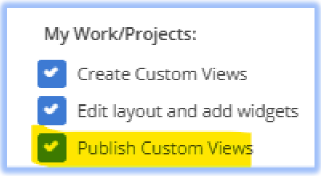
NOTE: Chart and Table Widget reports will still leverage the defined font that was used in the definition of the widget using the report designer.

Portfolio Analysis – Analysis tab views publishing to multiple login groups

Following the operations of My Work, Project, and Insights, users can publish Portfolio Analysis views to multiple login groups. This is 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 the Analysis tab to multiple Login Groups.

Feature Setup

Publishing Portfolio Analysis | Analysis tab 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



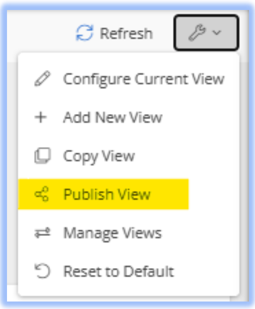
NOTE: A future release will add support for Portfolio Analysis | Analysis tab publishing.

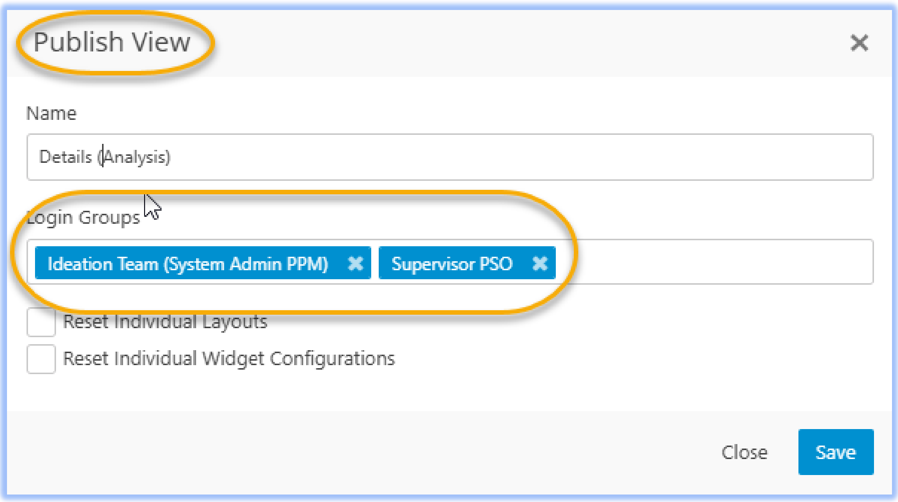
Feature Usage

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 Forecast – Data load demand for multiple forecasts

A new data load is available on the Search pane to bulk load and data load demand related to multiple projects and forecasts at the same time.

Feature Setup

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

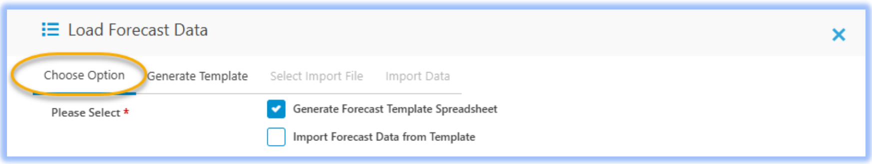
- Edit access to Forecast records (Login Profile | Portfolio tab)
- Access data load feature (Login Profile | General tab)

NOTE: This feature is only available for customers leveraging the Enhanced Forecast mode introduced in v8.0. Check with your consultant or support team before enabling enhanced forecasting to ensure the switch happens as desire and in line with required operations.

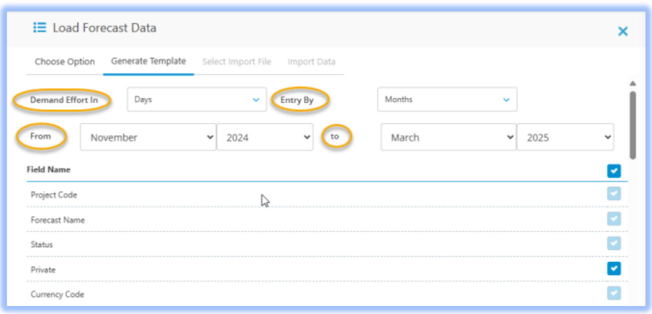
Feature Usage

Users with appropriate rights can navigate to Search | Forecasts and choose the Load Data option from the center-pane toolbar. This will provide the common data load options to generate a template, fill out the template and import in the desired values. This data load operation allows creating multiple forecasts across multiple projects and is only related to demand-based data at this time.

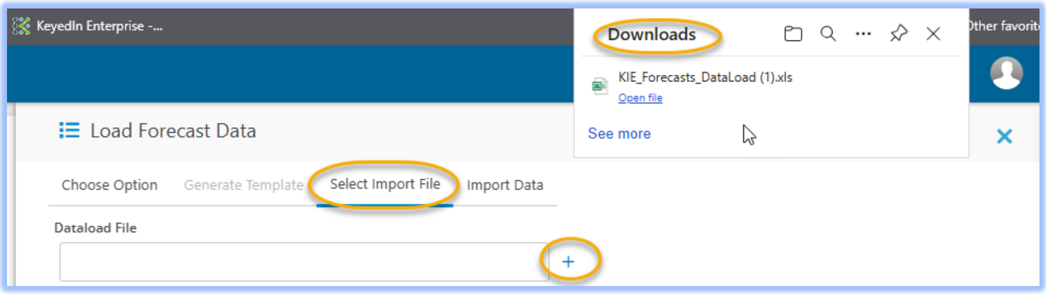
1. After selecting Load Data, choose to Generate a template.



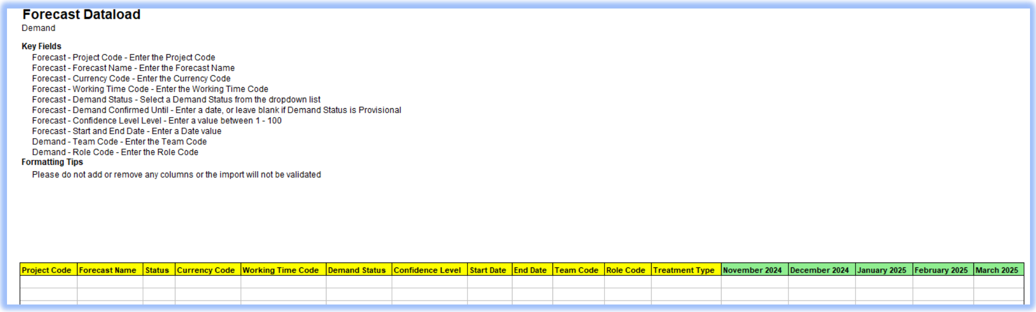
2. On the Generate Template tab make the desired selection to set how you wish to enter data into the template.
   a. Effort can be entered in Hours, Days, or FTE
   b. Entry by includes Weeks or Months
   c. From and To dates represent the periods available in the spreadsheet for data entry. This is necessary to establish the proper number of columns in the spreadsheet that match allowed periods. Each forecast does not require an amount in each period and the period range should represent the periods required for any of the forecasts you intend to data load.
   d. Required fields cannot be deselected, but other optional fields can be included in the template for data entry.



3. Clicking the Create Excel Template button will generate a template spreadsheet with the appropriate columns and allowance for values based on effort and period selections. The template file will be downloaded based on the browsers download option settings.



4. Edit the spreadsheet and create a row for each line you wish to be added to a forecast. This will create a new forecast where each project and forecast name are unique, but additional lines per forecast name will be added to the same new forecast. Fields in yellow require some entry and those in green are optional per row. The required fields are as follows:


Forecast Dataload
Demand

Key Fields
Forecast - Project Code - Enter the Project Code
Forecast - Forecast Name - Enter the Forecast Name
Forecast - Currency Code - Enter the Currency Code
Forecast - Working Time Code - Enter the Working Time Code
Forecast - Demand Status - Select a Demand Status from the dropdown list
Forecast - Demand Confirmed Until - Enter a date, or leave blank if Demand Status is Provisional
Forecast - Confidence Level Level - Enter a value between 1 - 100
Forecast - Start and End Date - Enter a Date value
Demand - Team Code - Enter the Team Code
Demand - Role Code - Enter the Role Code

Formatting Tips
Please do not add or remove any columns or the import will not be validated

Project Code	Forecast Name	Status	Currency Code	Working Time Code	Demand Status	Confidence Level	Start Date	End Date	Team Code	Role Code	Treatment Type	November 2024	December 2024	January 2025	February 2025	March 2025

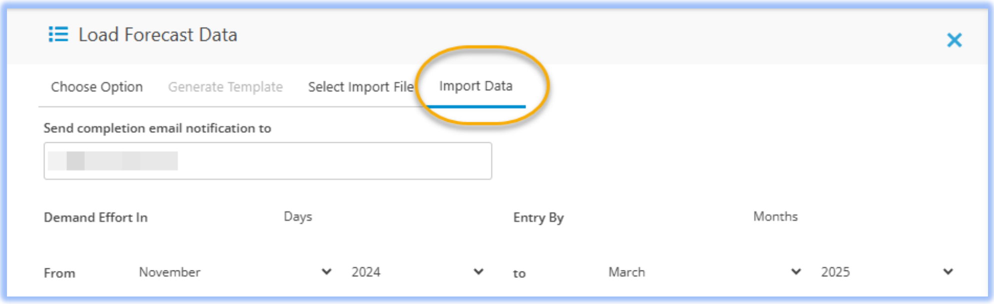
   a. **Project Code** – the unique number for the project record. Entering the same project code in multiple rows is allowed.
   b. **Forecast Name** – a name given to the forecast. You can use the same name in multiple rows. The combination of project code and forecast name will be evaluated to determine if a new forecast is created or additional data is added to the same project and same forecast. It is possible to create multiple forecasts for the same project during the same data load.
   c. **Status** – make a valid selection from the drop-down list taken from the system
   d. **Currency Code** – represent the currency associated to the demand as the forecast currency reference on the General tab. For demand data, all demand references the same currency value and cannot be unique per demand line in the same forecast. Values may differ per forecast, but not within the same forecast.
   e. **Working Time Code** – The working time associated with the forecast general tab. For demand the whole forecast is evaluated with the Forecast working time calendar. During the Supply process the working time of the role or resource will be taken into consideration.
   f. **Demand Status** – make a valid selection from the drop-down list of provisional or confirmed.
   g. **Confidence Level** – represents a percentage of confidence the forecast will be approved. This can be used in reporting to calculate a percentage of the demand by this amount.
   h. **Start Date** – Should represent the start date for the period. This value will depend on your system settings for first day of the week and period

definitions. For example, if your work week starts on Monday the Start Date should always be a Monday. The monthly periods should match your starting date for fiscal months and may vary if you are using split periods. See your Configuration | General Settings and Planning Periods for your specific settings.

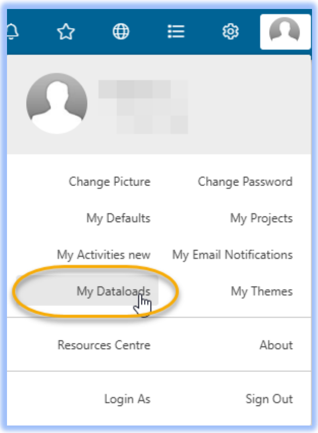
i. **End Date** – Should represent the end date for the period. Your first day of week and planning periods should be considered to determine proper ending dates. Improper dates will be rejected on import.
j. **Department / Team Code** – represents the code value for the desired role or resource.
k. **Role Code** - represents the code value for the desired role or resource
l. **Treatment Type** – determines if the value entered will be associated with a CapEx, OpEx, or Exceptional finance category.

The columns that are presented for weekly or monthly periods are available for data entry based on your selected period range. Each row does not require a value in each column. Only enter values in periods you wish to add for each demand line. The values will represent hours, days, or FTE effort depending on your selection.

5. After entering all the demand lines in the spreadsheet, you can import the file using the import option. Select the updated file, evaluate, and correct any errors that are referenced. A summary of the number of rows to import will be provided. When ready to import select next and confirm the completion email, effort, entry periods, and date range that will be imported.



6. Click the import data button when ready to import. The data load will be managed as a background process and depending on the number of entries and records being created could take some time. Information on your data load will be emailed to the address entered. You can also find details and check status on a data load you triggered from the profile My Dataloads summary page.



Project Finance Tab – Benefits available for analysis

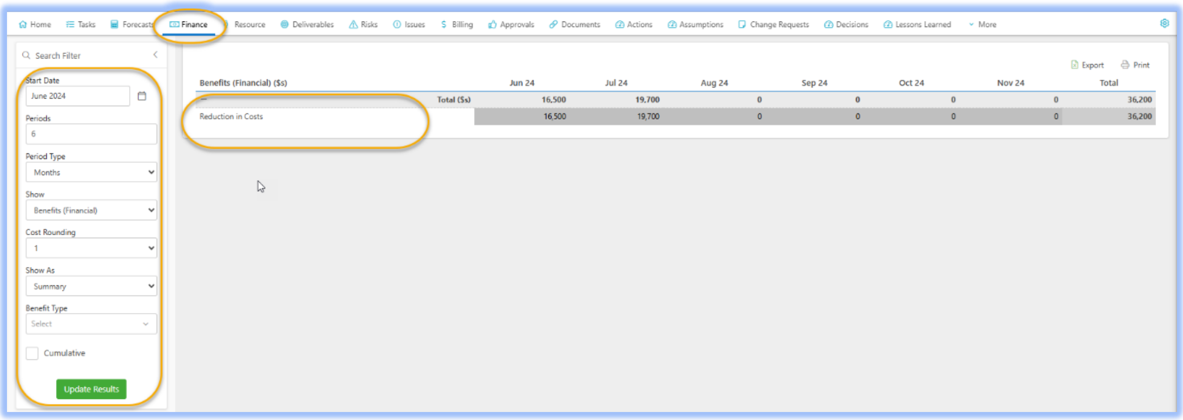
The inclusion of benefits on the Finance tab allows companies to evaluate and perform analytics on project related benefits.

Feature Setup

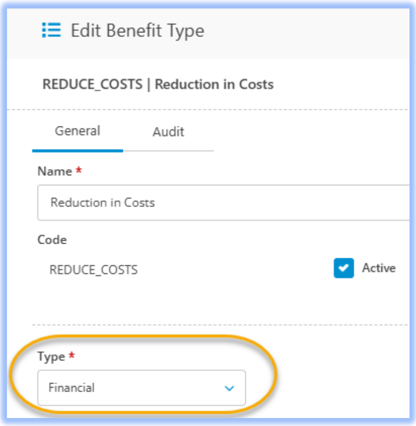
Users will require rights to view or maintain Forecast to gain access to the Finance tab on a project record. Settings and permissions can be based on settings from Login | Portfolio and Login Group | Project Navigator, and/or Login Profile | Portfolio tab. Different combinations of settings could impact visibility and access.

Feature Usage

For those users with access to financial related information on the project, a new option is available to review any financial configured benefits.



The benefits shown are only those that are configured as **Financial** type. This is to ensure that sums and math are applicable to cost or money related values versus things like scores, ratings, or other non-financial benefits.



NOTE: Because financial benefits relate to return on investment or other use cases where a benefit could be a negative number (e.g. cost savings), they will not be included in the calculation for All Costs. Likewise, sometimes a benefit is not a cost but a representation of potential revenue stream or money earned by the company and therefore would not be proper to add/subtract from other costs. Costs will only represent expense cost value.

Project Finance Tab – Extended period view to 60 periods

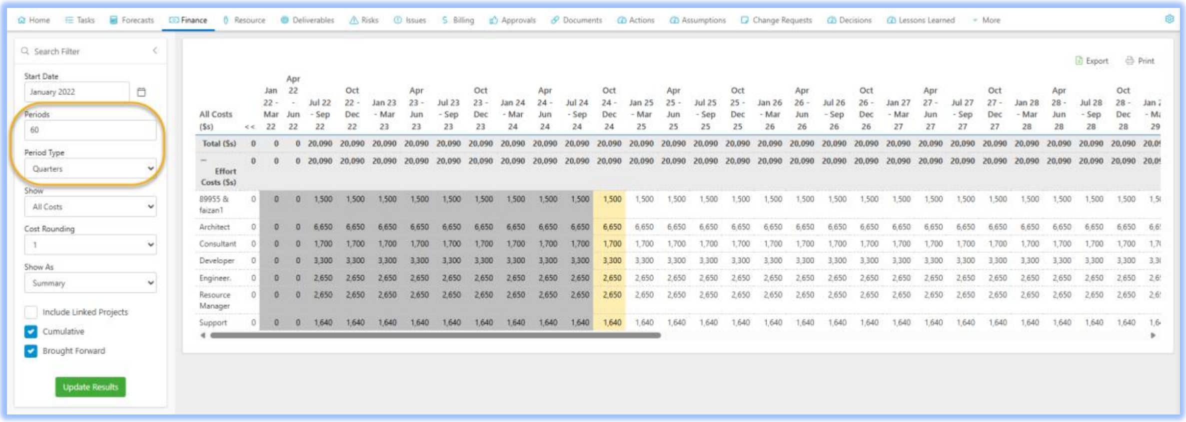
Additional support for more period selections is available on the Finance tab to further evaluate and review a larger number of periods related to the projects, up to 60 periods.

Feature Setup

Users will require rights to view or maintain Forecast to gain access to the Finance tab on a project record. Settings and permissions can be based on settings from Login | Portfolio and Login Group | Project Navigator, and/or Login Profile | Portfolio tab. Different combinations of settings could impact visibility and access.

Feature Usage

Users with rights to the finance tab can now adjust period selection up to 60 periods. Previously this was limited to 20 periods. The 60-period value can be applied to Weeks, Months, Quarters, and Years.



NOTE: The periods are still restricted and controlled overall by Configuration | Planning Periods settings. The number of periods cannot exceed those specified for the system.

Resulting values displayed on the Finance tab can be exported to a spreadsheet using the Export option for further review, analysis and reporting from solutions such as Microsoft Excel.

Preview – New custom field Cascading field data type

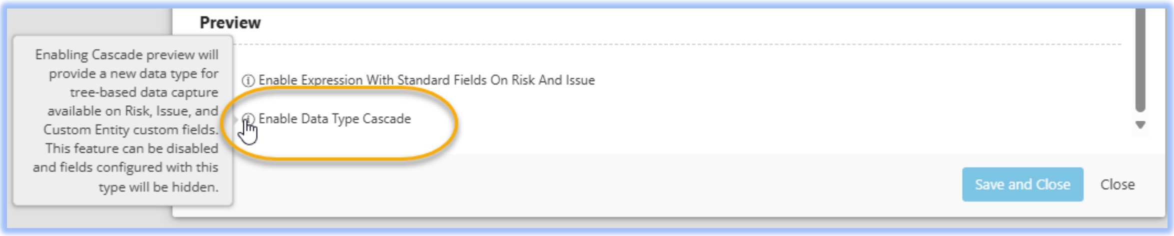
Introduction of a new Cascading field data type that allows for parent/child keywords for use as a drop-down selection for user to select any value in the hierarchy.

Feature Setup

This feature requires administration permission to configure and define new fields and is only available to those users with rights to Set System Default (Login Profile | General | Set System Defaults).

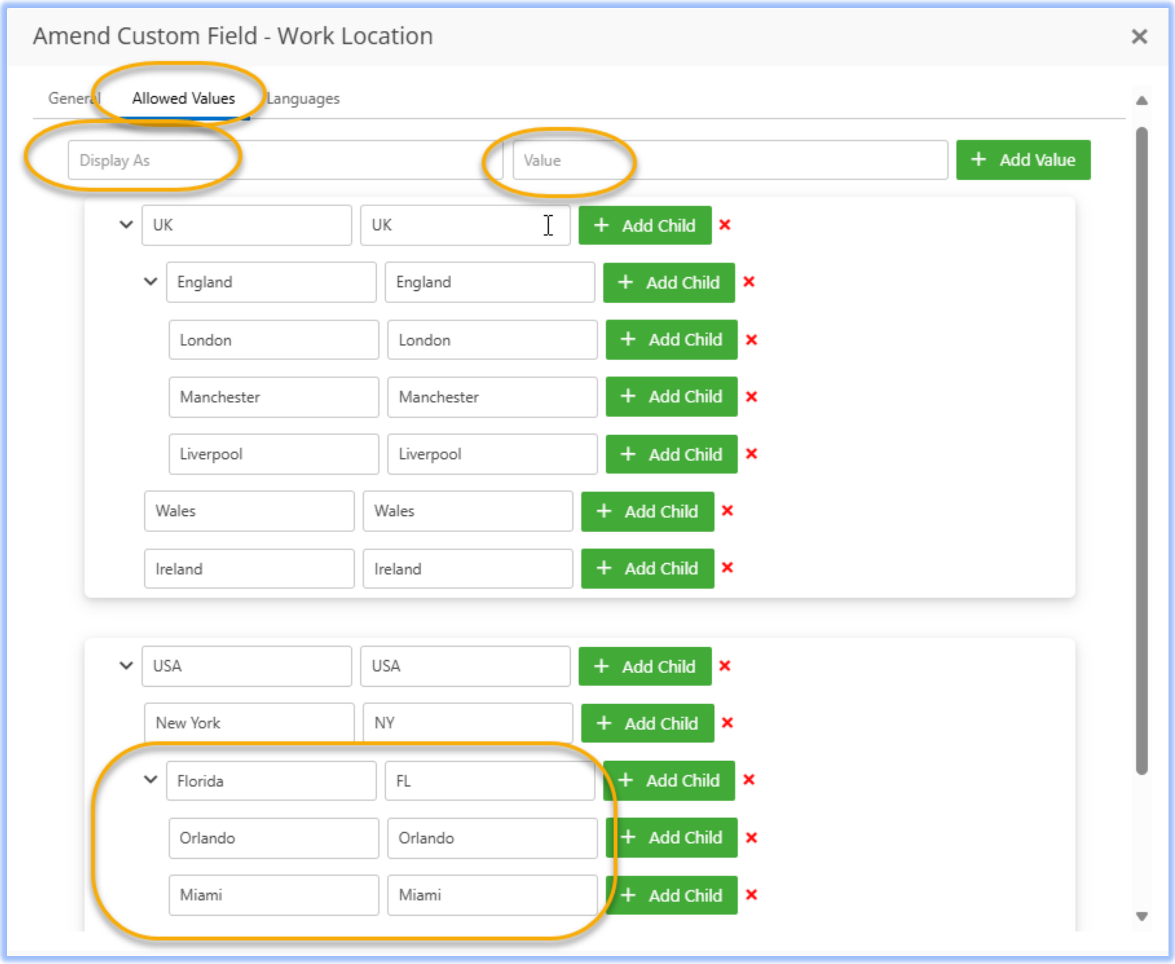
Once the field is configured for the entity, all users can gain access to the fields if the field is configured for use in the entity type and field layout. No user specific permissions are allowed per field, similar to other custom field definitions.

This feature is considered a preview as it will only be available on Risks, Issues, and Custom Entities at this time. Future enhancements and based on customer feedback, we will expand use to other entities. The feature can be enabled and disabled at will without impacting data entered and is not a one-way switch. It is still recommended customer evaluate and test the operations in their sandbox/test system before enabling in their production instance.



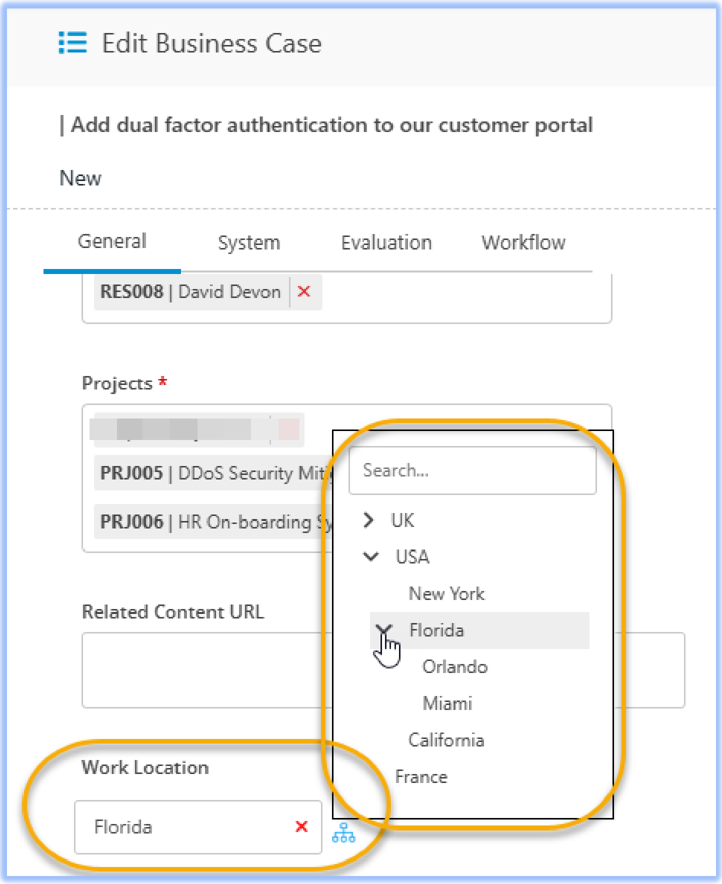
Feature Usage

After the Cascade Data Type is enabled, you can create custom fields against Risk / Issue or Custom Entities that provide a method for the user to select from a hierarchy of values. The custom field is defined in Configuration | Custom Fields along with other custom field definitions. All other settings are like a keyword field such as required, length, width, etc.

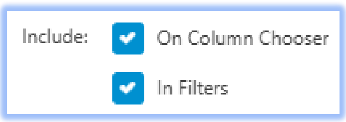


- Start by configuring display names and value for root level entries.
- Each value can then have a child entry added to provide further breakdown.
- Each parent value can have any number of children. It is not required that each parent have the same number of children.
- **Display As** represents what will be displayed to the user on the front-end.
- **Value** represents what value will be stored in the database. The value must be unique entry. You cannot duplicate values across any of the parent/child entries. Value can also be used like a number list field to capture entries that will be used in formulas or calculations based on the entry selected (e.g. 1, 2, 3, …). Lastly value can be used to represent a unique value to be used with integrations to other systems.

User Operations - From the front end, users will see the field as an expandable hierarchy to make their desired selection for the field.



- In this example a custom field was created called Work Location with a series of values that represent different locations throughout the world. Different countries may have different number of levels to the values.
- The user can select any value in the hierarchy, including a root, parent, or child value.
- Only one value can be selected at a time. Users cannot multi-select values.
- The user could change the value to any other value and save with the new value.
- For reporting and search purposes the value selected is also recording the relationship of the hierarchy tied to the value. For example, selecting Miami can be reported as find all records associated to Florida or the USA.



Data view Changes for v8.4.0

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
No data views were added	

Updated Data views

Dataview	New Fields
Login Profile Data v6.07	• Ability to adjust Financial Treatment Type values for timesheets • Ability to adjust Financial Treatment Type values for timesheets • Ability to adjust Unique Identifier values for timesheets • Ability to adjust Unique Identifier values for expenses • Ability to set Forecast Start and End Date
Activity Data v6.01	• Default Treatment Type
Task Actual and Planned Data by Resource V7.0.6	• Task Actual Resource Effort (in Hours) • Task Actual Resource Effort Rollup (in Hours)
Planning General Data V6.0.28	• Task Actual Effort (in Hours) • Task Actual Effort Rollup (in Hours)