

# KeyedIn Enterprise v8.4.1 Release

## Release Summary

Version 8.4.1

January 2025

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## Document Management

### Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	Jan. 20, 2025	All	All	T Raper	N/A

### Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.0	Jan. 20, 2025	Nicolas Vibet – Product Manager

### Document Authorization

Version Number	Approval Date	Approved By (Name/Title)
1.0	Jan. 21, 2025	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 v8.4.1 is a monthly update release with general support fixes and minor product enhancements related to custom entities, task management, and reporting improvements.

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 Import/Export now supports custom fields.](#)

Custom fields are now accessible in your Task Plan export and can be imported as well within Keyedin.

### [Enhanced Custom Entity Management](#)

Admins can now edit or delete Custom Entity Menu Groups, improving flexibility and organization in menu management.

### [Task Plan Location Field](#)

A new Location field is available for tasks, enabling admins to associate task work with specific business locations and enhancing project and task tracking.

### [Expanded Saved Search Limits](#)

The maximum number of saved searches has been increased from 20 to 50 for Resource Requests, Resource Plan, and Capacity View, providing more flexibility for users managing large datasets.

### [Forecast Summary Enhancements](#)

Support for grouped reporting by Treatment Types (Demand and Expense), Workflow Status, and Custom Fields, allowing more granular and meaningful data insights.

## Task Plan Import/Export now supports custom fields

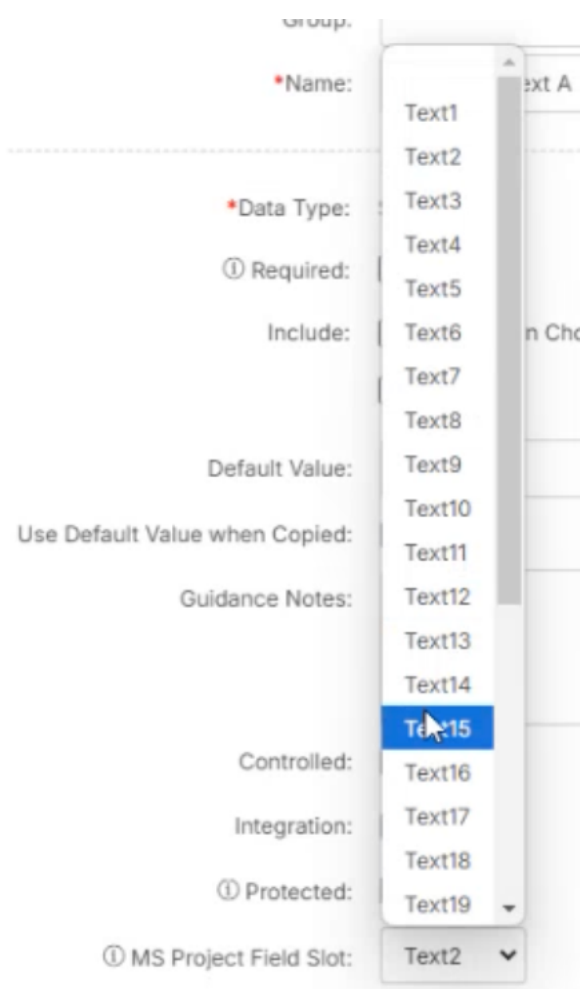
### Feature Setup

Admin must specify for each Task custom field if they want to see them in an export that can be digested by MS Project.

In the configuration screen, the admin has to select to which field they want to map their custom field in the export.

This is only available for the following custom field types:

- Text and short text custom fields, this new field will contain TextX options from 1- 30,
- Float and Integer custom fields it will display 'NumberX' and Flag options from 1-20
- Date custom fields it will show DateX options from 1- 10.
- Boolean custom fields it will show FlagX options from 1- 20.



### Feature Usage

Users can now export their custom fields when they generate a xml export from their Task Project. It will be compatible with MS Project.

User may also import a Task Project file from MS Project in which Keyedin will retrieve their custom fields mapped.

## Resource Capacity Screen - Group by Project Option

### Feature Setup

No additional administrative or user configuration is required to use this feature. All users with access to the Capacity screen will now see the new "Group by" option available by default on the Breakdown screens.

### Feature Usage

Users can now toggle between grouping capacity data by Resource (default view) or Project. This new filter option is available on the Capacity Breakdown page and applies to the following data categories:

- Allocated
- Supply
- Actuals

When "Group by Project" is selected, the data tables are reorganized to display project-level breakdowns instead of resource-level details. All existing filters (e.g., project, resource, and date filters) remain applicable to the selected grouping.

Additionally, the grouping preference is remembered throughout the user's session and applies to Excel exports and printed views of the data. This enhancement provides users with more flexibility and insights into their capacity and demand planning workflows.

# Task Work Association to Locations – New "Enable Location" Feature

## Feature Setup

This feature is optional and can be activated via a new **"Enable Location"** setting in the Planning Settings screen. By default, this setting is unticked. Once enabled, the functionality leverages the standard Location entity already defined in the system, including attributes such as **Code**, **Description**, **Parent Location**, and custom fields like **Latitude** and **Longitude**.

## Feature Usage

Task

General
Skills
Assignments
Predecessors
🔗

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**Details**

ID: 1

Outline: 1

Project: PRJ060 | Refresh Dept & Role

Confirmed:

Protected: <sup>ⓘ</sup>  
No

Description:

Milestone:

Deliverable:  🔍

Deliverable Project: Refresh Dept & Role  🔍 | PRJ060

Location:  🔍

**Dates**

\* Start Date:  12/9/2024 📅  8:00 AM ⌚

\* End Date:  12/9/2024 📅  5:00 PM ⌚

Constraint Type:

Constraint Date:  📅

Date Completed:

**Effort**

\* Effort:  1

Actual Effort:  0

% Complete:  0

When **"Enable Location"** is activated, users can associate a task with a specific location from the system-defined hierarchy of business entities.

### How It Works:

- A **Location** field will be added to the Task Edit screen, displayed below the existing **Activity** field.
- Users can select any location value from the hierarchy, including parent-level locations, using the lookup option.
- The Location field is **not mandatory** and allows selection of only one location per task.

### Task Copy and Plan Versioning Behavior:

The selected Location value for a task will be preserved in the following scenarios:

- **Copying a Plan from Another Project** (via the Gantt Toolbar).
- **Copying a Task Plan** while creating a new project from a template.
- **Creating a New Task Plan Version** (if Plan Versioning is enabled in the Gantt Toolbar).

This enhancement simplifies the process of tracking work efforts by associating tasks to predefined business locations, improving traceability and consistency across projects.

### Enhanced Visibility in Reporting

Task Location details are now included in key reports and data views, making it easier to track and analyze tasks by their associated locations across planning and performance workflows.

## Increased Saved Searches Capacity – Now Up to 50!

### Feature Setup

No additional setup is required. All users can now benefit from the increased limit for saved searches across key areas of the platform.

### Feature Usage

The maximum number of saved searches has been expanded from **20 to 50** in the following sections:

- **Resource Requests**
- **Resource Plan**
- **Resource Capacity View**

#### How It Works:

- Saved searches beyond 20 are now displayed with scrolling functionality for easy navigation.
- The type-ahead feature allows quick and seamless selection of any saved search, even those further down the list.

This improvement ensures more flexibility for users managing a larger number of frequent searches, providing quicker access to the filters and views you rely on.

## Enhanced Forecast Summary Data View – Unified Reporting for Demand and Expense

### Feature Setup

No additional configuration is required. The new Forecast Summary data view is available to all users and provides expanded reporting capabilities for forecasting operations.



## Feature Usage

This update streamlines reporting by allowing users to view totals for **ETC (Estimate to Complete)** and **EAC (Estimate at Completion)** across both **Demand** and **Expense** categories in a single report.

### What's New?

- Ability to group and analyze data by **Treatment Type**, **Workflow Status**, and **Custom Fields** for demand and expense lines.
- Summarized totals for ETC and EAC are now easier to access and review.

### Expanded Data Coverage

- Includes Demand and Expense details such as effort, costs, and actuals.
- Supports grouping by project, treatment type, custom identifier, and period for more flexibility.

This enhancement helps consolidate key forecasting data, making it easier to gain insights and manage your projects effectively.

## Enhanced Custom Entity Menu Group Management

### Feature Setup

No additional setup is required. This update is available to admins managing Custom Entities in the application menu.







### Feature Usage

Show On Menu

Appear On Add

Definition Icon \*

Menu Group

Menu Group	Definition Icon *	Appear On Add
Menu Group 1		<input checked="" type="checkbox"/>
Menu Group 2		<input type="checkbox"/>
Menu Group 3		<input type="checkbox"/>
Menu Group 4		<input type="checkbox"/>
Menu Group 5		<input type="checkbox"/>
Menu Group 6		<input type="checkbox"/>

Admins now have greater control over **Menu Groups** created for Custom Entities, with the ability to edit groups names as needed.

**What's New?**

- **Edit Menu Groups:** Admins can modify existing Menu Groups directly.

**How It Works:**

- Option to **edit** is accessible via the Menu Group drop-down list, ensuring intuitive and efficient management of Menu Groups.

This enhancement simplifies the management of Custom Entity Menu Groups, providing greater flexibility and control for administrators.

## Data view Changes for v8.4.1

A summary of Data View changes since the last release with data views changes (v8.4.1) can be found below.

**New Data views**

<b>Dataview</b>	<b>Description</b>
Enhanced Forecast Summary Data	This data view allows you to create summary reports at a Forecast level that combine demand and expenditure data including Treatment Type and Workflow status.

**Updated Data views**

<b>Dataview</b>	<b>New Fields</b>
Planning General v6.0.30	<ul style="list-style-type: none"> <li>• Task Location field</li> </ul>
Planning Assignment Effort With Resource Charge Rates v6.0.10	<ul style="list-style-type: none"> <li>• Task Location field</li> </ul>
Planning General Data, all Versions v7.0.2	<ul style="list-style-type: none"> <li>• Task Location field</li> </ul>
Task Actual and Planned Data by Resource v7.0.7	<ul style="list-style-type: none"> <li>• Task Location field</li> </ul>
Task Assigned vs Timesheet Actuals Data v1.0.1	<ul style="list-style-type: none"> <li>• Task Location field</li> </ul>
Task Weekly Assigned Cost Summary v1.0.1	<ul style="list-style-type: none"> <li>• Task Location field</li> </ul>