KeyedIn Enterprise v7.5 July 2022 Release

Release Guide

Version 7.5.0

July 2022

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
0.1	02/03/2022	All	All	R Thompson	
1.0	21/06/2022	All – minor changes following review	All	R Thompson	
1.1	04/07/2022	Additional amendments for final Release Guide including API detail and summary of data view changes	All	R Thompson	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.1	06/07/2022	Matthew Muldoon – Chief Product Officer

Document Authorization

Version Number		
1.1	18/07/2022	Paul Gleghorn – SVP, Technology and Architecture

Overview of Service Changes

	Fixes	Enhancement
Web Application	✓	✓
Mobile Application	×	×
Mobile Services	×	×
V3 API	×	✓
V7 Core API	×	✓
V7 Data API	×	✓
Enterprise Core API	×	New
Enterprise Data API	×	New
Enterprise Time/Expense API	×	New
Data Views	✓	✓

Release Summary

KeyedIn Enterprise v7.5 for Summer 2022 is a major release which delivers a fresh, enhanced user interface and various usability and administrative improvements to benefit a wide variety of users.

Highlights of New Features and Improvements

New Look User Interface

A modernised user interface welcomes all users upon logging in after the update, delivering **improved styling** and subtle layout and behaviour changes. This offers a cleaner, more minimalist approach and is applied throughout the system.

Dark Mode

Users can individually opt to engage the **dark mode styling theme**, which has known visual ergonomic benefits including reduced eye strain in low light conditions.

Updated Project Navigator

The main **Project Navigator Hierarchy** has been greatly improved and now provides visibility and selection of a Project at any level, providing a faster, more fluid navigation experience.

Service and System Notifications

As part of the new interface, all users will be alerted to **Service Notifications** via a new pop-up when logged into the web application. This facility doubles up as a means for System Administrators to create their own **custom system announcements** to their user base, or selected groups of users.

Resourcing

- Make smarter, more confident resourcing decisions by defining a **Location Hierarchy** that readily integrates into the suite of Resourcing functionality.
- More easily search for Resources, Roles and Projects that sit within a Team or Location hierarchy.
- Minimise administration overhead by easily removing a Resource’s future allocations upon deactivation.

Project Management

- Take full control over what you see on the Kanban style Task Board with a powerful *Task tagging* feature to further simplify the management and collaboration of agile Projects.
- Multiple Task Board Column Views are configurable to allow different delivery teams to better visualise and manage progress.
- Multi-select Project Custom Fields facilitate fast selection, tracking and reporting of multiple pre-defined values within a single field, including Keywords, Number Lists and entities such as Activities, Clients and Resources.
- A new system field for Project Outcome provides a standardised, consistent approach for recording the conclusion of completed Projects and can be used in conjunction with our Artificial Intelligence services offering to predict outcomes based on historic information.

Reporting

- An increased limit of 20 Databoxes per View/Dashboard with label override/suppression.
- Databoxes can now be added to Custom Dashboards.
- Prevent accidental deletion of reports with the new *Protected* flag.
- The Report run screen has been simplified with an improved, cleaner UI that more closely mirrors the filter operation of the enhanced Report Writer.

Dataloads

- More easily import data from a template spreadsheet using the new wizard based interface for Administration entities, with background processing and improved error handling and messaging.

KeyedIn Enterprise Domain Changes

It was earlier announced on the Login Page and Support Portal that the URLs for the web portal will be changing over to the KeyedIn Enterprise domain, in parallel with the v7.5 release. Existing APIs and Mobile services will remain unaffected and unchanged, however please refer to the section that follows regarding the new Enterprise API (and corresponding URL) that should be used for any new API calls or integrations from now on.

A summary of the current and New URLs is below:

Current URL	New URL
v6.keyedinprojects.co.uk keyedinprojects.co.uk	keyedinenterprise.co.uk
v6.keyedinprojects.com keyedinprojects.com	keyedinenterprise.com
v6.keyedinprojects.net keyedinprojects.net	keyedinenterprise.net

Mobile Application Change

Contrary to our earlier announcement, no changes have been made to the mobile application for this release. A further announcement will be made in due course.

~~The mobile application has been modified to support the new Enterprise domains and mobile Single Sign On (SSO) with these new domains.~~

~~Further information about the domain change can be found on the support portal here:~~

~~https://keyedinsupport.freshdesk.com/support/solutions/articles/44002330544-keyedin-enterprise-service-domain-names~~

New Enterprise API with Time & Expense support

In-line with the new KeyedIn Enterprise domain, **a new Enterprise API is now publicly available which also provides Time and Expense support**.

Please refer to the API documentation for your region below which provides further details on how to configure and use the Enterprise API.

UK: https://keyedinenterprise.co.uk/api/docs/

US: https://keyedinenterprise.com/api/docs/

AUS: https://keyedinenterprise.net/api/docs/

Please note, clients who have previously generated an API key for the V7 API can continue to use this key with the Enterprise API.

The important difference to be aware of is requests made via the Enterprise API additionally require the client's Site ID to be specified in the API header, e.g **KIE-Instance-ID: *ClientSiteID*.** The client's Site ID can be found on the *About* page on the main KeyedIn profile menu. Please contact Support if you require further assistance.

As we progress with the rewrite of our application using a Single Web Page Architecture, API support for additional entities will be progressively made available.

The V3 and V7 APIs will continue to remain available for users to switch over at their convenience, and there will be no impact on any existing integrations using the API.

Note on Internet Explorer 11 Support

Also previously announced by us on 5th May 2022, Microsoft's support for Internet Explorer 11 (IE 11) ended on 15th June 2022. KeyedIn will cease to support IE 11 for KeyedIn Enterprise at the same time. Internet Explorer 11 Compatibility Mode in Microsoft Edge will also no longer be supported. This means that some functions may no longer operate as intended.

The desktop browsers supported by KeyedIn Enterprise editions will become the latest versions of:

- Microsoft Edge
- Firefox
- Google Chrome
- Safari

Please raise a support ticket if you have any concerns regarding this change.

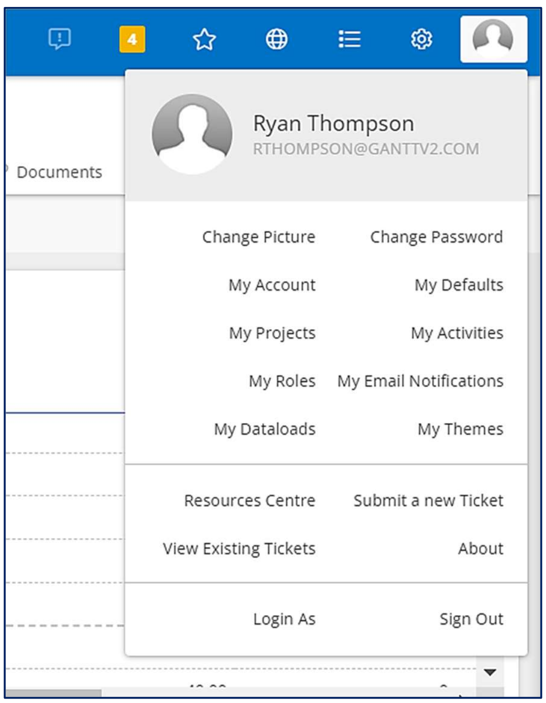
Styling and UI enhancements

UI Refresh – new styling and updated icons

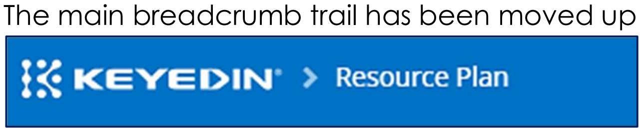
All users of KeyedIn Enterprise will benefit from the styling updates applied to all of the website screens for a more fluid and visually enhanced experience. This includes a refreshed set of icons across the majority of screens.

Highlights and general key changes to note:

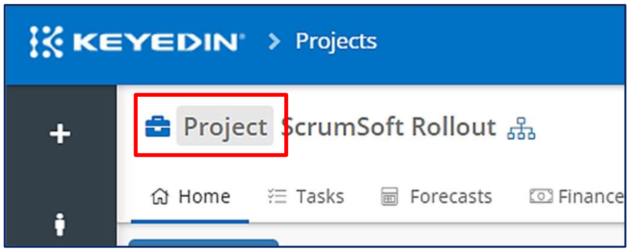
A. The personal menu has moved over to the end of the top menu bar and is now displayed over two columns.



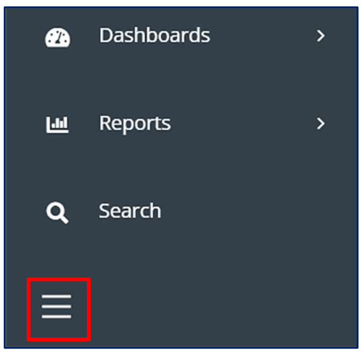
B. The main breadcrumb trail has been moved up into the top menu bar.



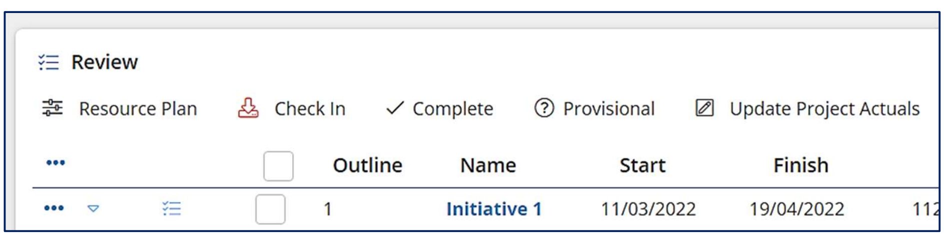
C. For clients using the Product-Portfolio management feature, the entity type (i.e. Project or Product) is more clearly highlighted with the shaded background, before the Project name.



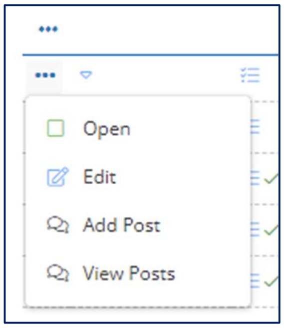
D. The button to expand the main left-hand menu has been moved from the top to the bottom of the menu panel.



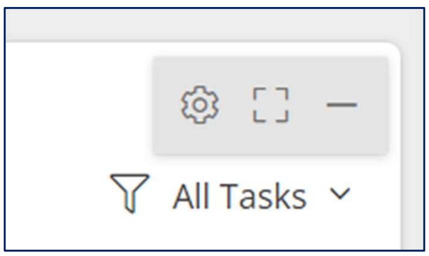
E. Removal of hard borders from most buttons, including system widgets, search screens and drop-down menus etc.



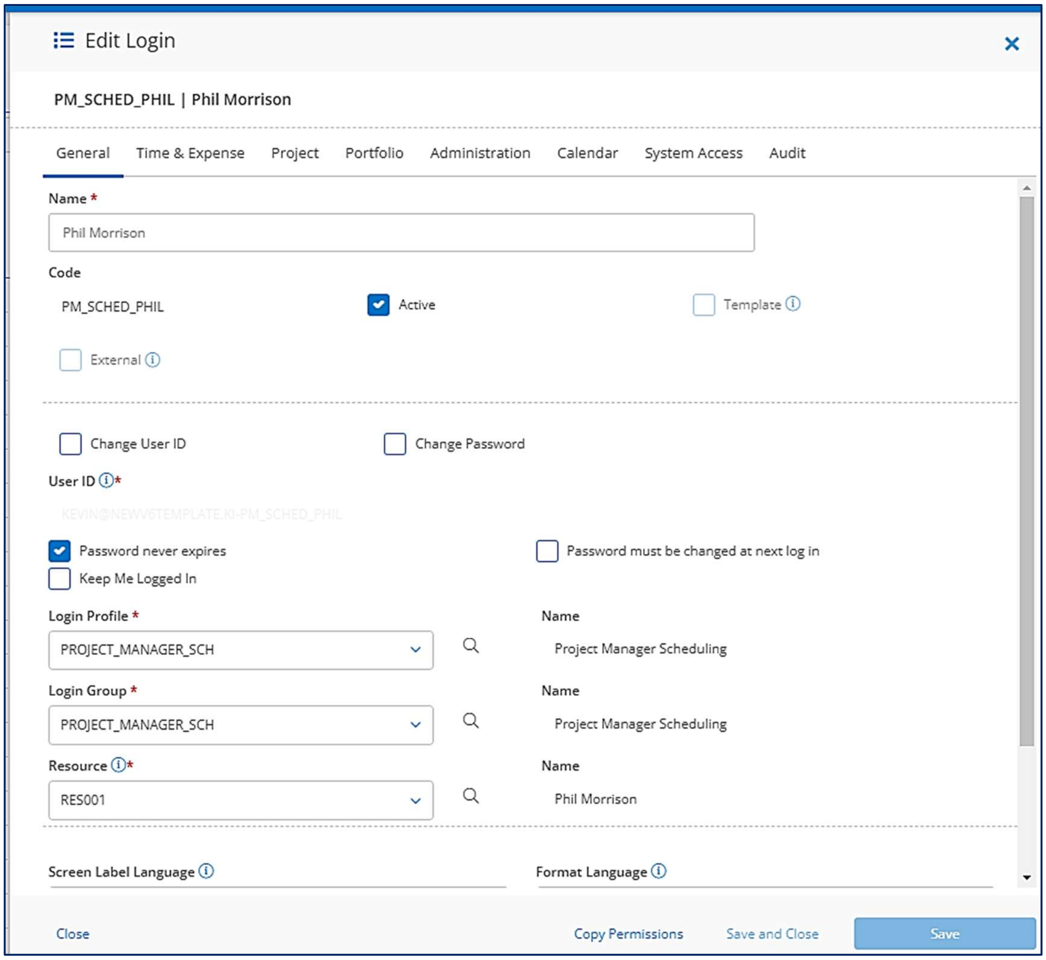
F. Context based menus (including search screens and widgets) are now represented with the ellipsis […] icon instead of the former menu icon.



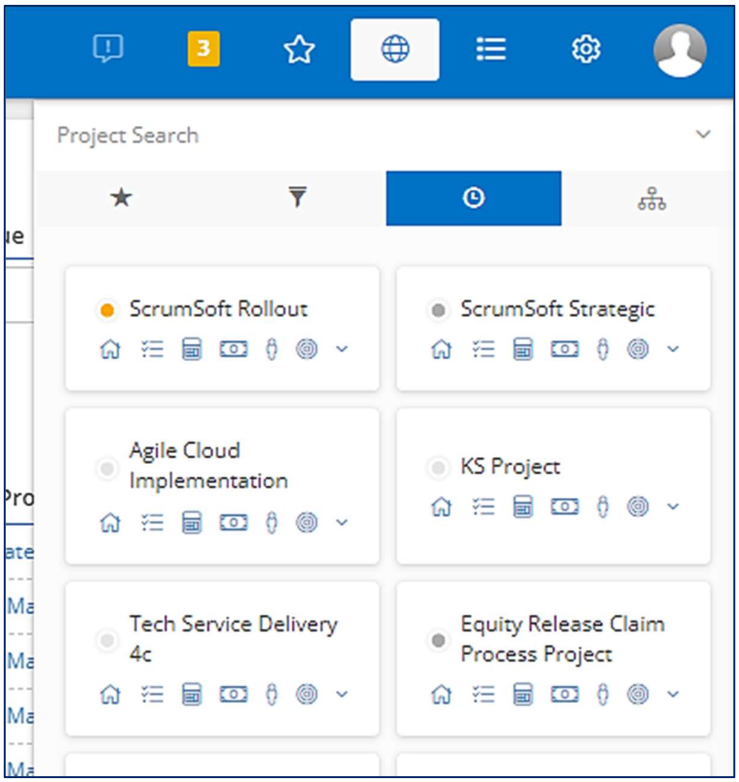
G. The configuration menu on widgets (including options to refresh and export) is now only displayed when hovering over the widget.



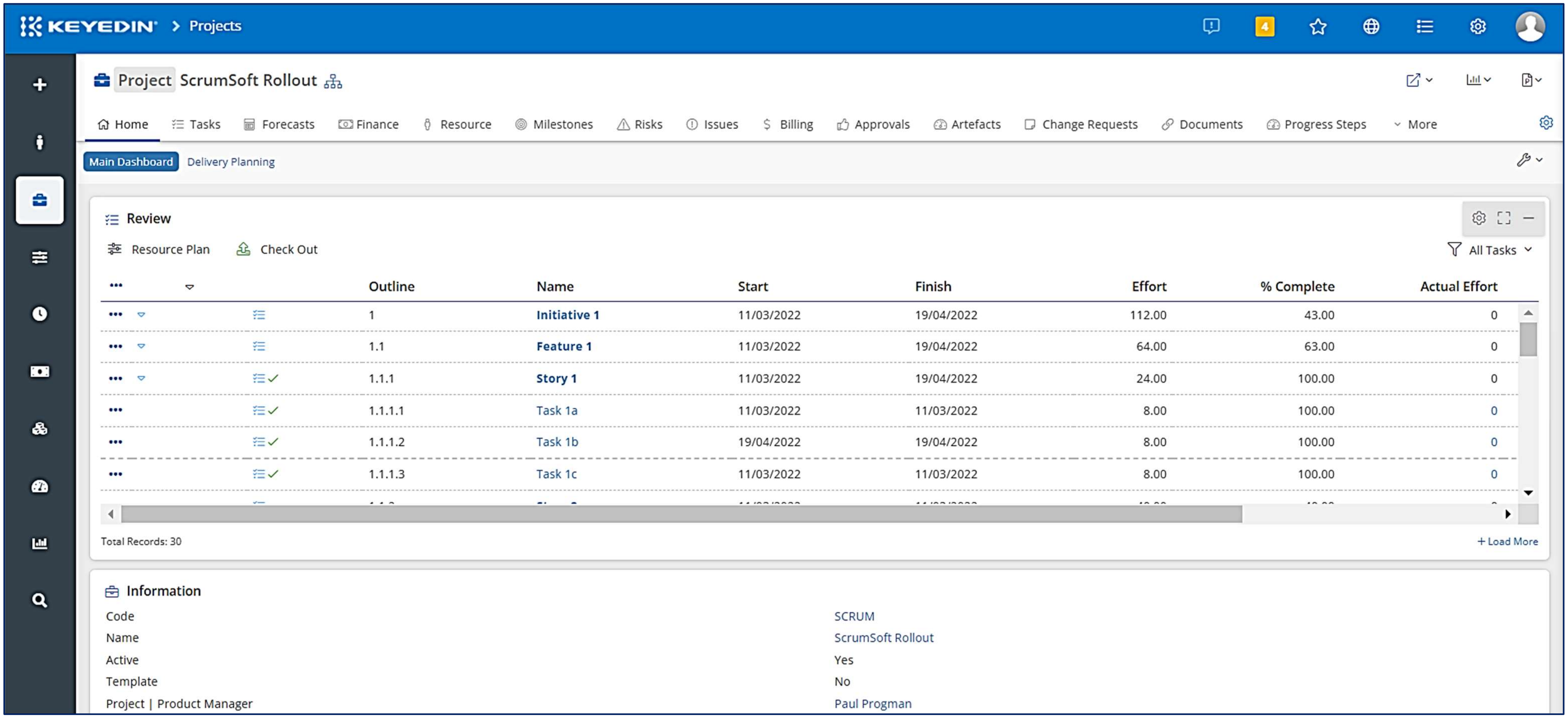
H. Display of the enhanced slide-in administration screens has been improved to accommodate more text/data within the available space, reducing the need to scroll or zoom out.



I. The Project Navigator menu now slides in and displays more information over a wider display area, when viewing Favourites, Insights, and History. This now automatically closes when clicked outside of, or after navigating to another area of the system.



General Project Dashboard view of the new styling and UI changes



Display Themes - Dark Mode

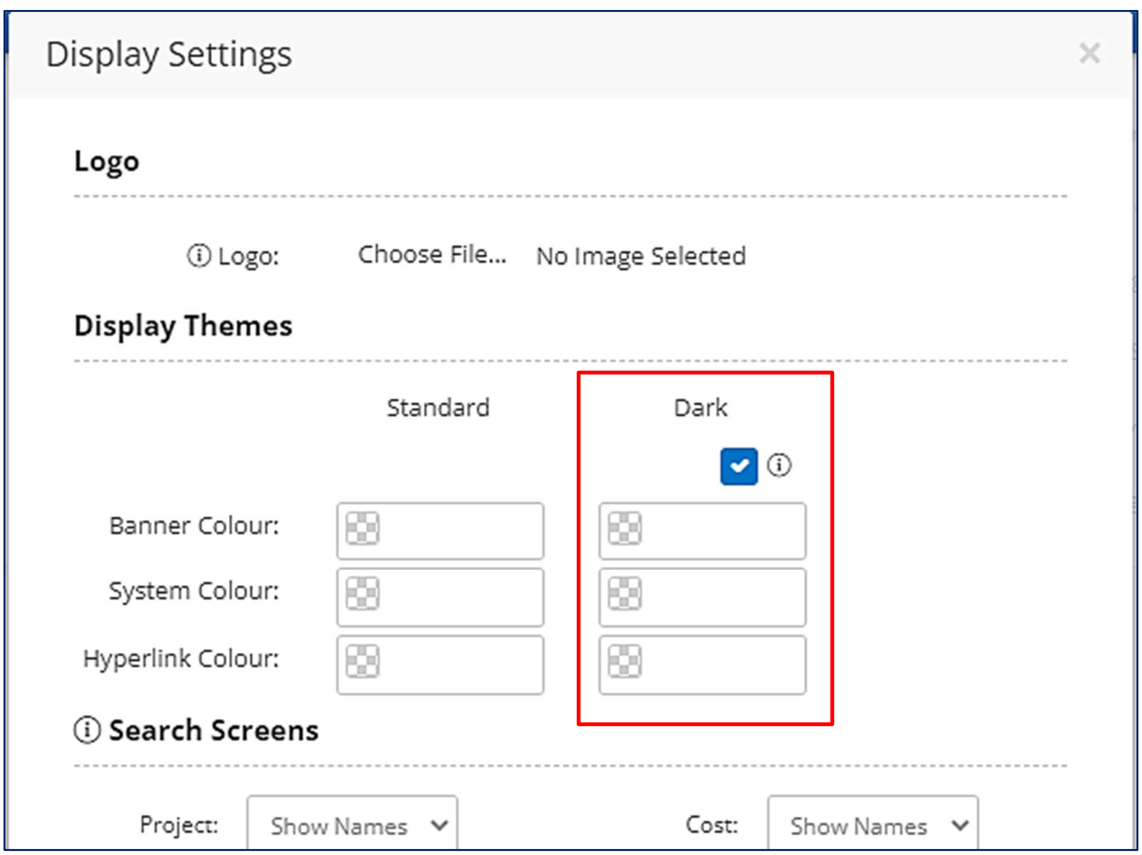
The enhanced styling changes facilitate additional display themes to be incorporated into the Product. For v7.5, the Dark display theme will be optionally available for all users once enabled within system configuration.

Use of Dark Mode is a personal preference and may be favoured by certain users over the standard theme, particularly in low light conditions.

Feature Setup

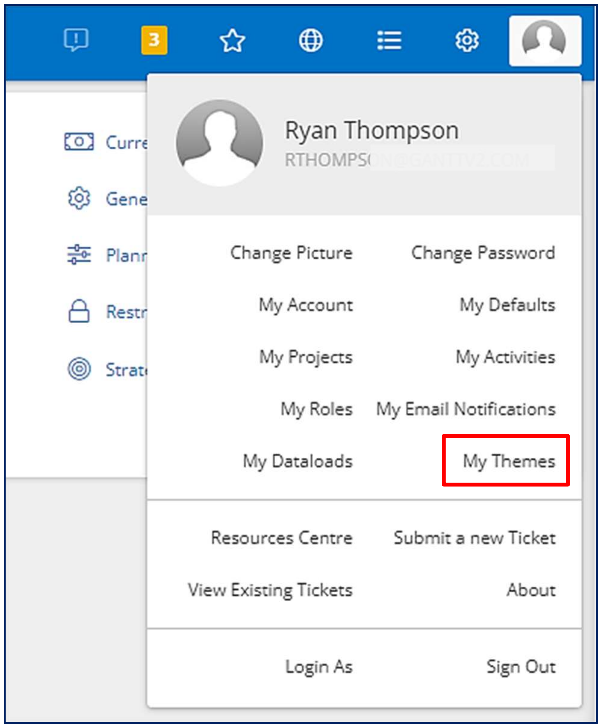
This feature must first be enabled by a System Administrator.

The D*ark* display theme must first be enabled in *Configuration > Display Settings* by checking the box in Dark section. This controls whether the Dark Mode theme is available to select by users, via their personal menu. When enabling the Dark theme, the Banner, System and Hyperlink colour can be controlled separately to the Standard theme or left blank to use system defaults.

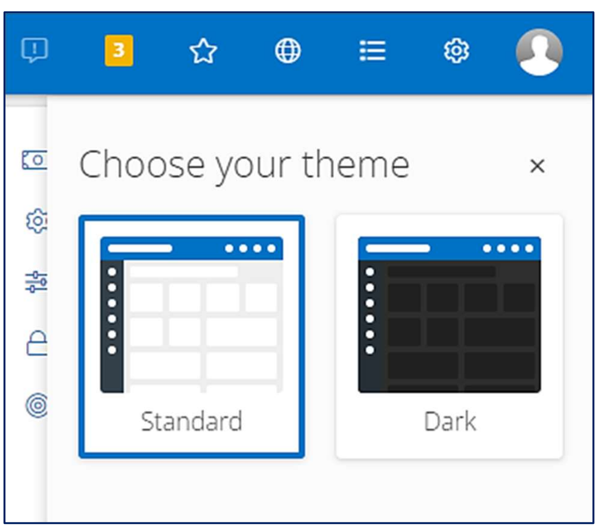


Feature Usage

If the Dark theme is enabled in *Configuration > Display Settings,* all users will now have access to this theme via the **My Themes** option on the personal menu.

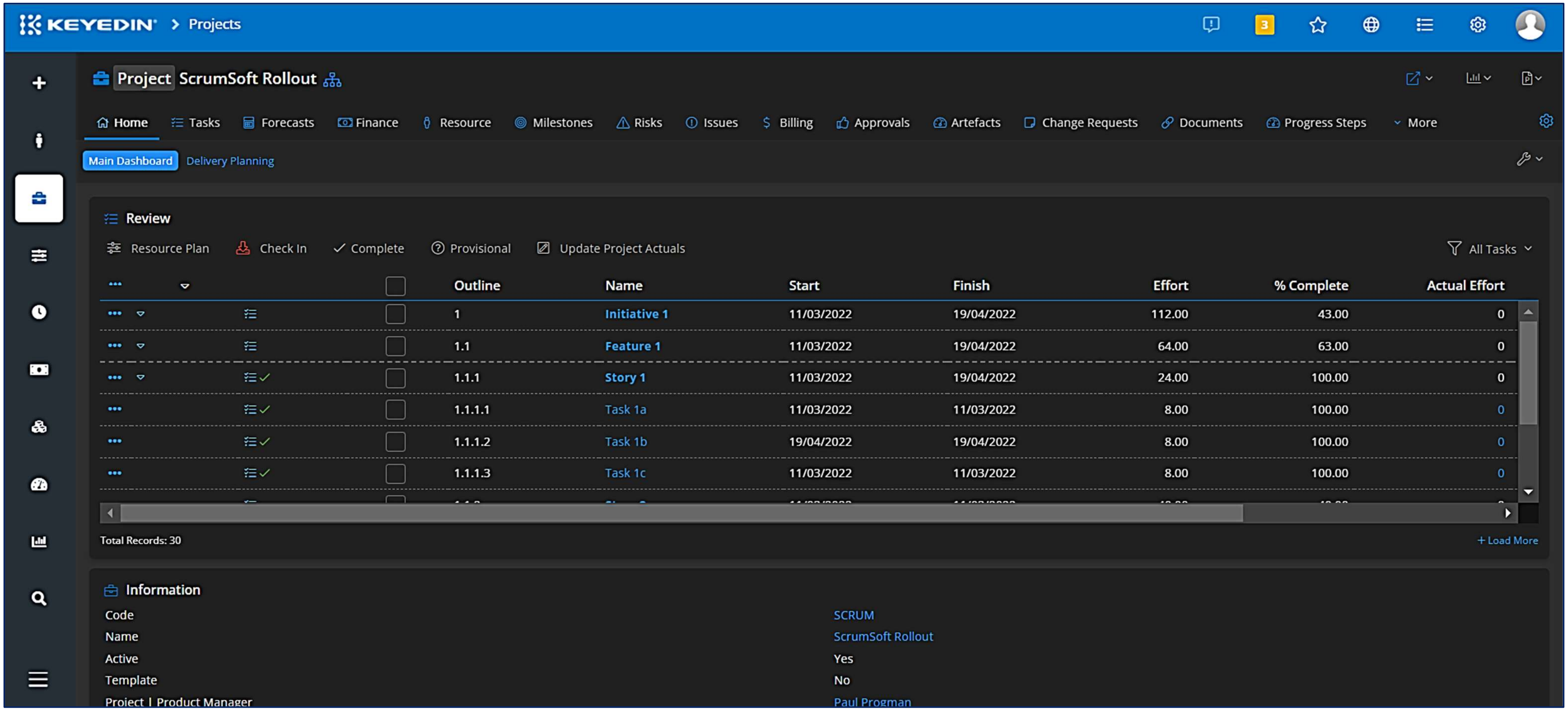


This allows selection between the **Standard** and **Dark** display themes.



Select the theme and close the pop-up with the **x** to save changes.

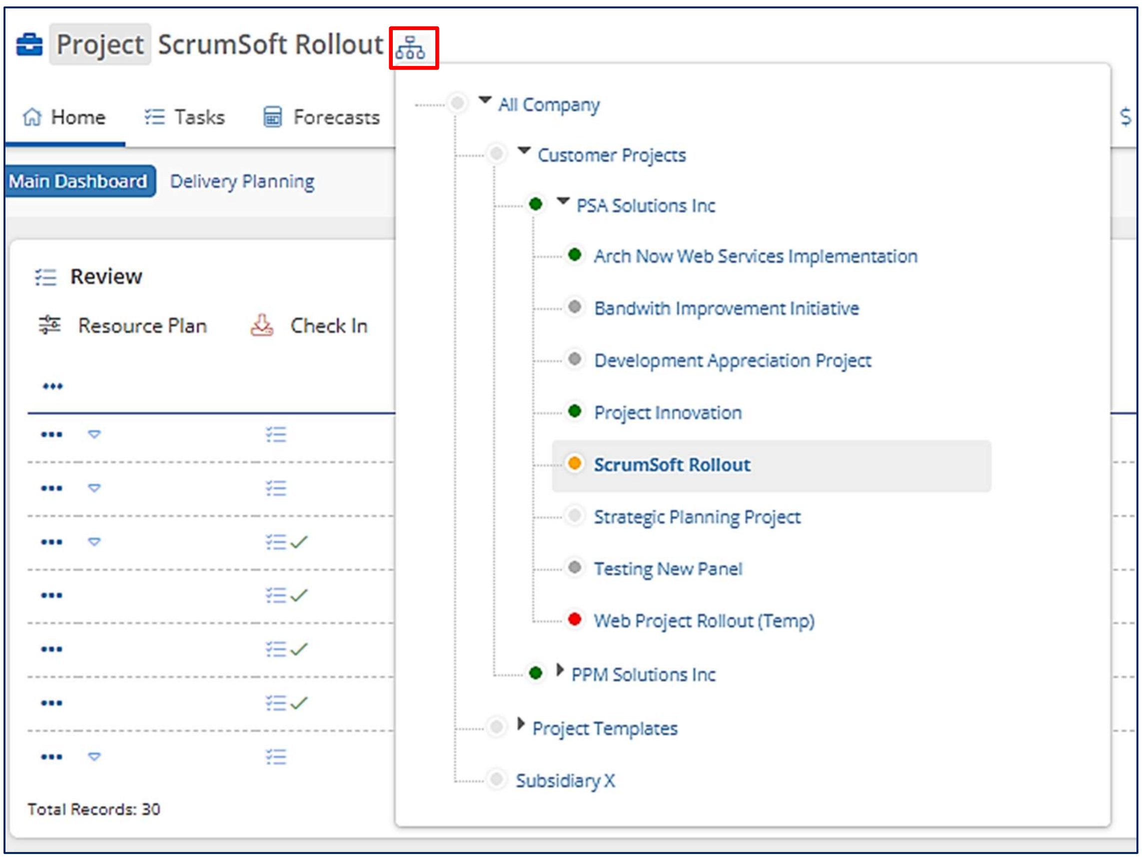
General Project Dashboard view in Dark Mode



Improved Project Hierarchy Navigator

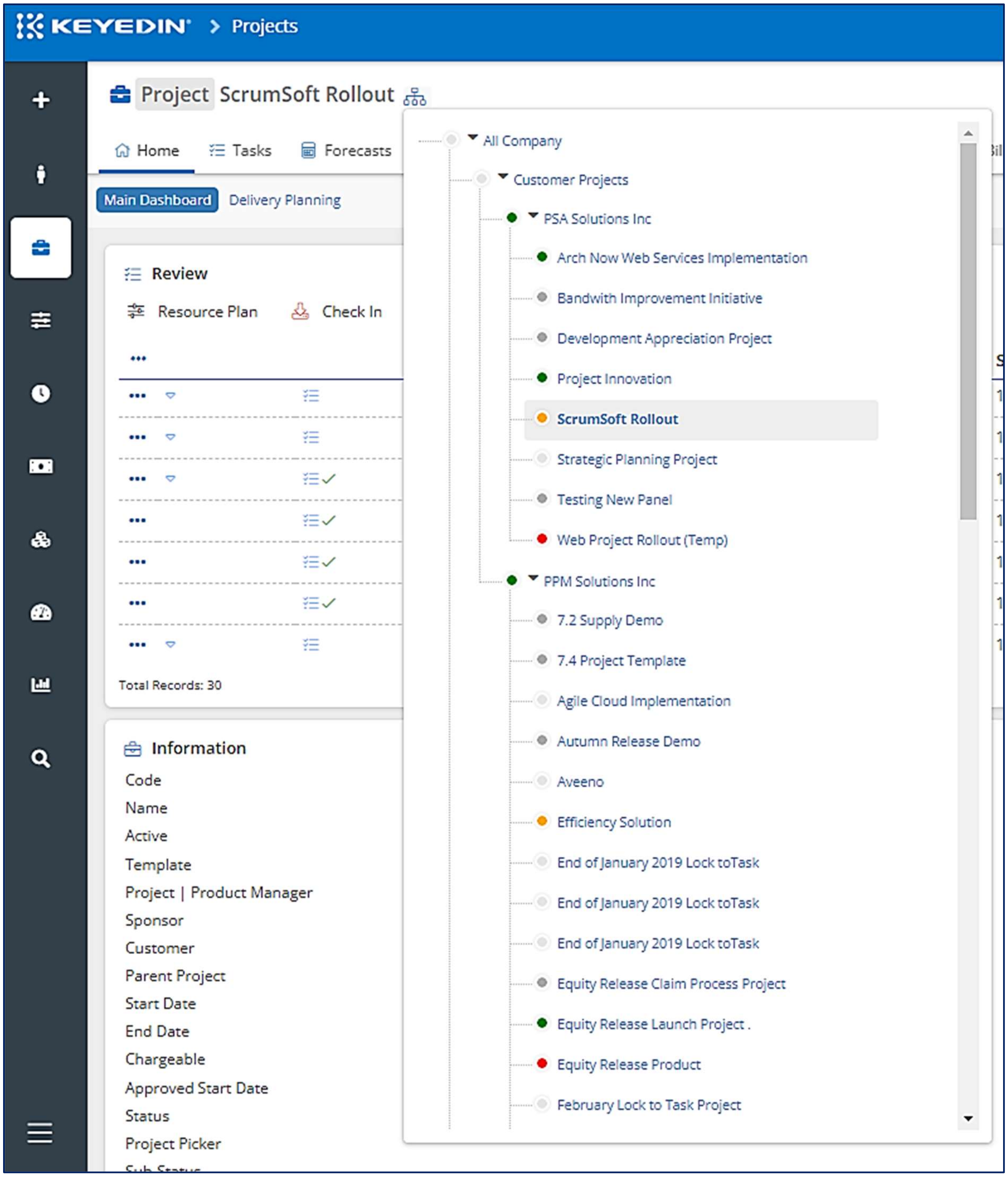
The Project Hierarchy Navigator provides considerably easier navigation between Projects across multiple Project Levels with the enhanced collapse and expand view capable of displaying all Projects without needing to be refreshed.

Select the Hierarchy icon next to the Project name to view the hierarchy pop-out which highlights the current Project and displays all others within the immediate parent Project.

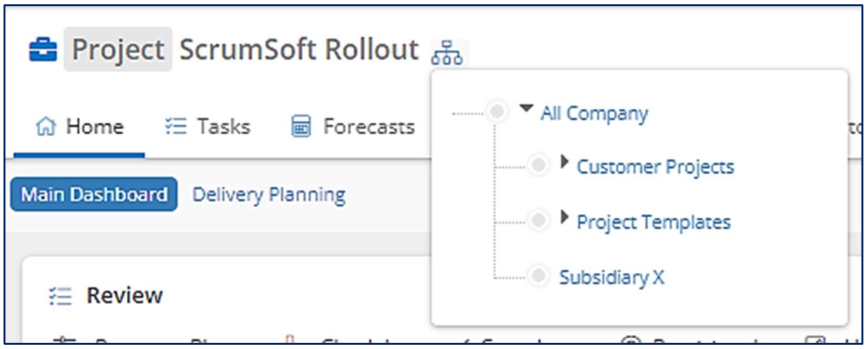


To view Projects for another Parent, simply use the expand and collapse icons as necessary to view and select, noting that the pop-out dynamically resizes based on the number of Projects.

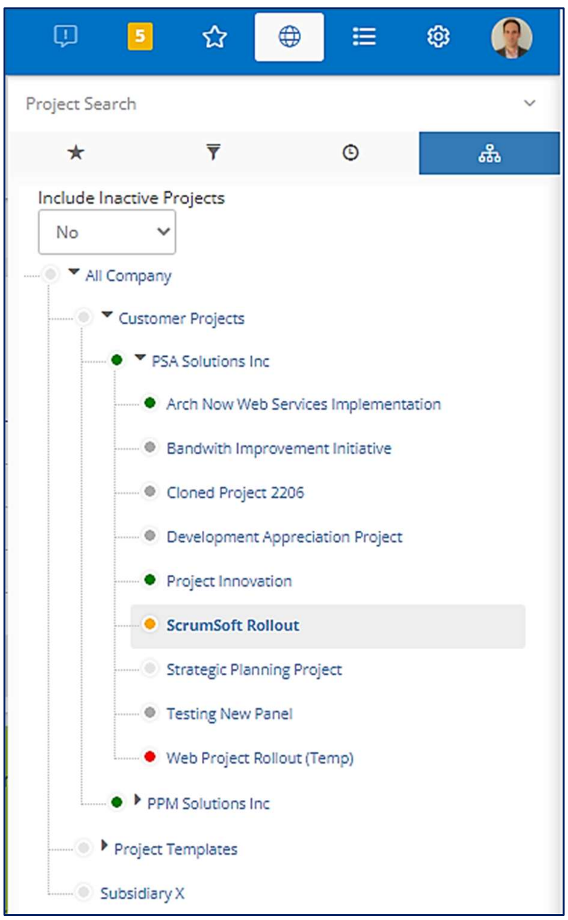
Expanding the *PPM Solutions Inc* parent Project:



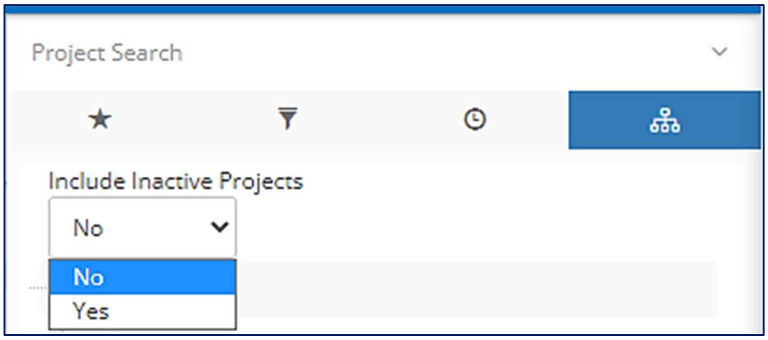
Fully Collapsed View:



This enhanced view is also replicated when viewing the hierarchy using the Project Navigator menu. The hierarchy will highlight the most recently accessed record, which is the same record that would open from the Project main menu.



Note, the dropdown for choosing to display Active, Inactive or All Projects has now been simplified with a Yes/No dropdown for **Include Inactive Projects**.



As per the existing behaviour, this selection will determine the Projects that are visible in the main hierarchy.

Important: Active child Projects with an inactive Parent Project will not be visible in the hierarchy if *Include Inactive Projects* is set to No but can still be searched on using the main Project Search.

Service Announcements and System Messaging Facility

Overview

All users will now automatically be notified of any KeyedIn Service Announcements directly within the system – these are typically messages that are currently shown on the main login screen relating to new release Announcements or planned service downtime.

Additionally, System Administrators in your organisation are able to add custom messages of their own to notify either all or specific groups of users about anything relevant. For example, this could include reminders to enter timesheets, or simply tips for best practice in line with business processes.

Service Announcements

Feature Setup

There is no specific setup required for Service Announcements, and all users will see a pop-up notification if a new KeyedIn Service Announcement has recently been published.

Feature Usage

New Service Announcements published by KeyedIn will appear as an on-screen pop-up notification, typically after logging into the system.

Simply close the pop-up to dismiss the message. If the Announcement is still active it will be visible from the System Announcements menu option, on the top menu bar and will disappear when the alert is made inactive by KeyedIn. Please note that alerts for Service Announcements cannot be opted out of.

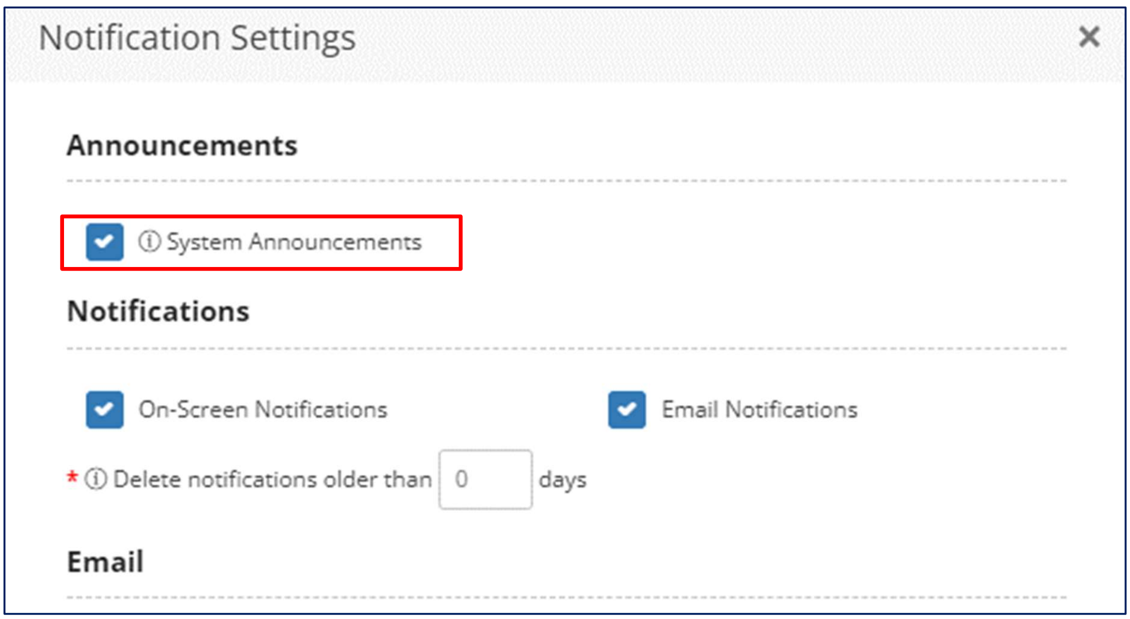
Note, if the Announcement is published while a user is logged into the system then it will appear when navigating to a different screen.

System Announcements

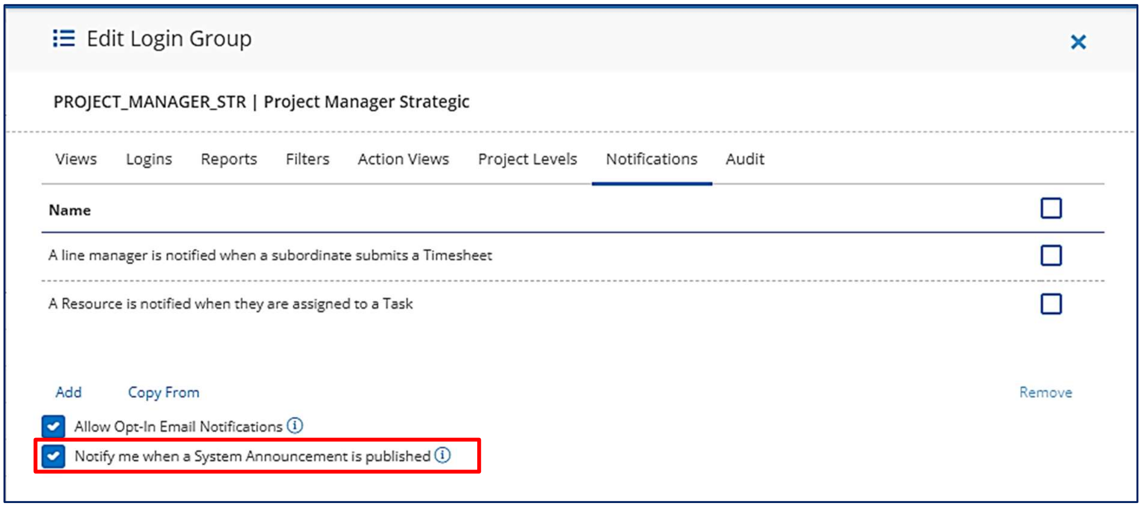
In addition to KeyedIn Service Announcements, custom on-screen messages, referred to as *System Announcements*, can be published by a System Administrator to provide ad-hoc alerts to users.

Feature Setup

Enable the **System Announcements** feature in *Configuration* > *Notification* Settings.



A new Login Group setting, **Notify me when a System Announcement is published,** is available to set when System Announcements are enabled, and controls whether members of that Login Group receive an on-screen alert when a new message is published (note this does not control KeyedIn Service Announcements, which will always be shown).



This setting is initially enabled by default when System Announcements are enabled. Administrators can disable it as desired for specific Login Groups.

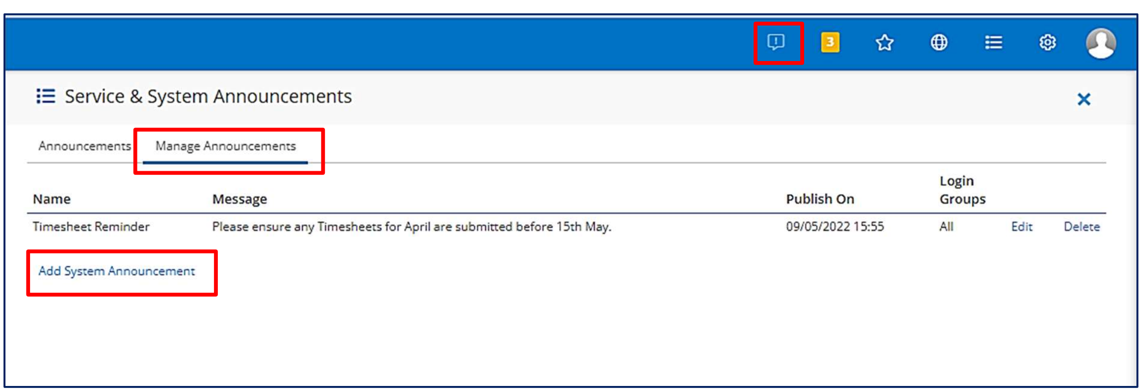
Both Service and System Announcements are only visible within the web application and cannot be emailed to users or viewed on the mobile application.

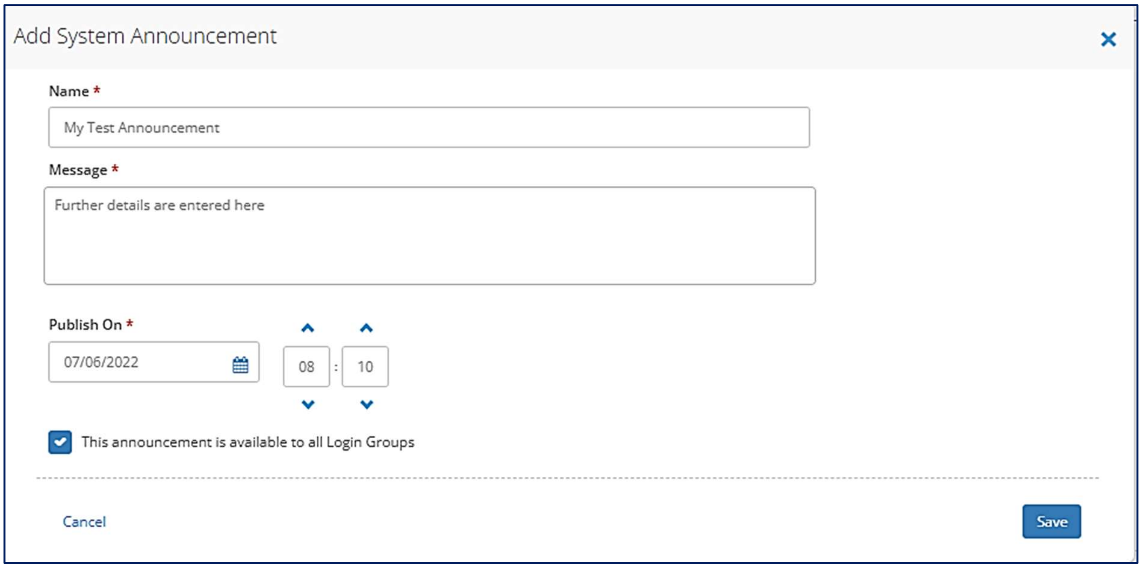
Feature Usage

Configuring a System Announcement

Users with the *Login Profile > Ability to Set System Defaults* permission have the ability to create and manage System Announcements.

Select the Service and System Announcements icon on the top menu bar and then select the **Manage Announcements** and then **Add System Announcement** to create a new Announcement and enter the details:





Name: a brief description of up to 70 characters

Message: add further details, up to 250 characters

Publish On Date and Time: the date the Announcement becomes active (defaults to the current date and Time). Please note this is based on the local time of your KeyedIn server (UK/USA/AUS).

The Announcement is defaulted to be available to all Login Groups, but untick the check box to select specific Login Groups if the message is only relevant to certain groups of users.

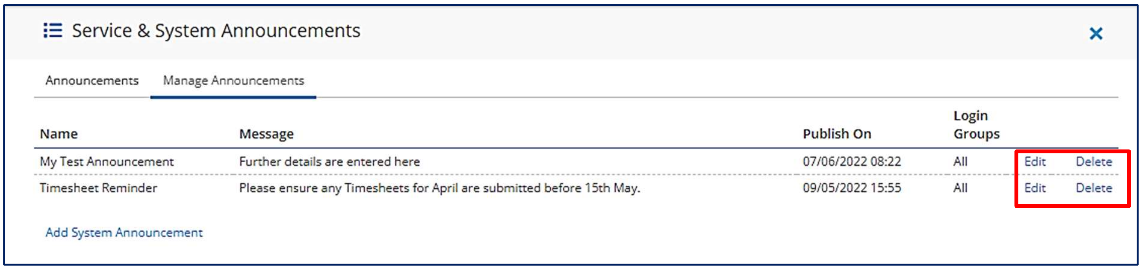
After saving, the Announcement will be listed on the Manage Announcements tab and will be available to users from the publish date and time.

Note – when adding an Announcement, please be aware that setting a publish date and time in the past (based on your server time) may not automatically trigger the pop-up alert for some users when they next log in. This is because Announcements are classed as 'seen' if the date the panel was last viewed and closed by that user is more recent than the date and publish time of any Announcements. In this case, users will still be able to view any messages by opening the panel manually.

After adding the Announcement, it will be displayed in the My Announcements list.

Up to ten Announcements can be available at any one time, and messages will remain visible to users until deleted. To add additional Announcements once the limit has been reached, one or more existing Announcements will need to be deleted.

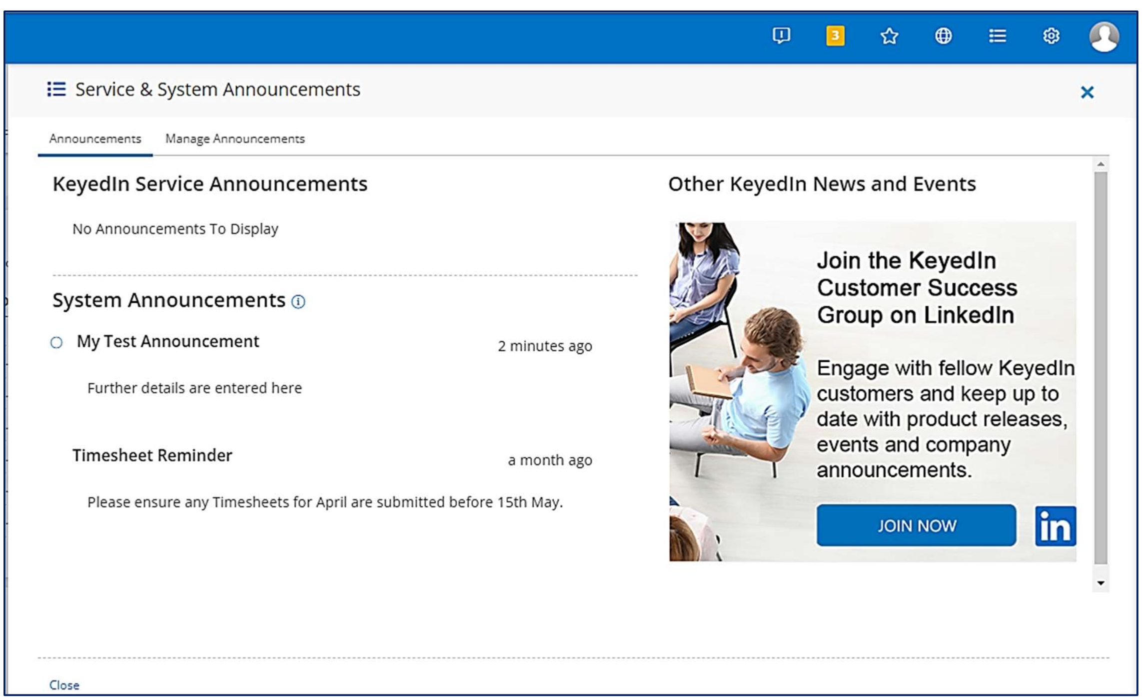
Each Announcement can be **Edit**ed or **Delete**d using the options highlighted:



Tip: Editing an Announcement a setting a new date/time in the future can be used to generate a new alert without needing to delete and create a new one.

Viewing a System Announcement

When a message is published, the Announcement will pop-up when a user logs in or refreshes the screen provided the Announcement is made available to the user's Login Group, and their Login Group setting allows notification of System Announcements.



The panel will not pop-up if:

- *Login Group > Notifications > Notify when a new system Announcement is published* is not checked, or
- The user has last viewed and closed the Announcements panel at a time and date more recent than the message publish time and date.

System Announcements can still be accessed by manually opening the panel – done by selecting the ***Service and System Announcements*** icon. Messages will remain visible to users until deleted by a System Administrator.

Resourcing Enhancements

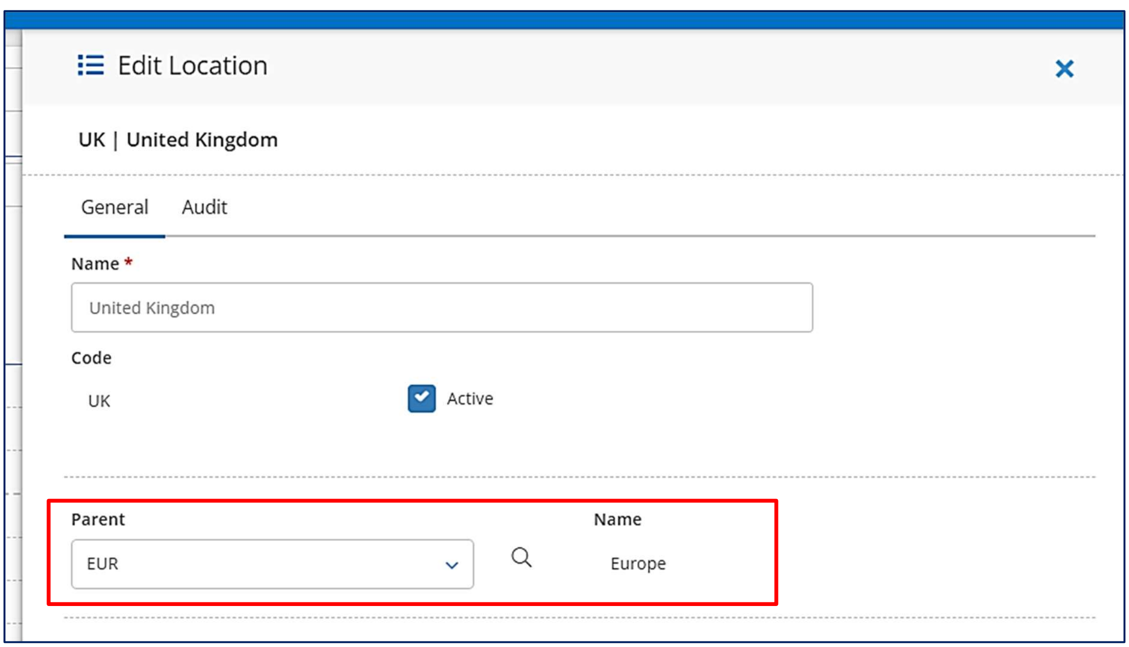
New Parent Location field to define a Location Hierarchy

The Location entity has been enhanced with the ability to define a Location hierarchy with the introduction of the *Parent Location* field, which can be configured in a similar manner to the Department (Team) entity. This is particularly beneficial in Resourcing where searching on a parent Location will automatically include any child Locations in the results without having to specify them separately.

Feature Setup

A new, optional Parent Location field has been added to the Location add/edit screen and can be set when adding a new or editing an existing Location. Please note, the parent cannot reference itself, nor select a Location that would result in a circular dependency.

Parent Location can also be set and updated using the Location dataload.

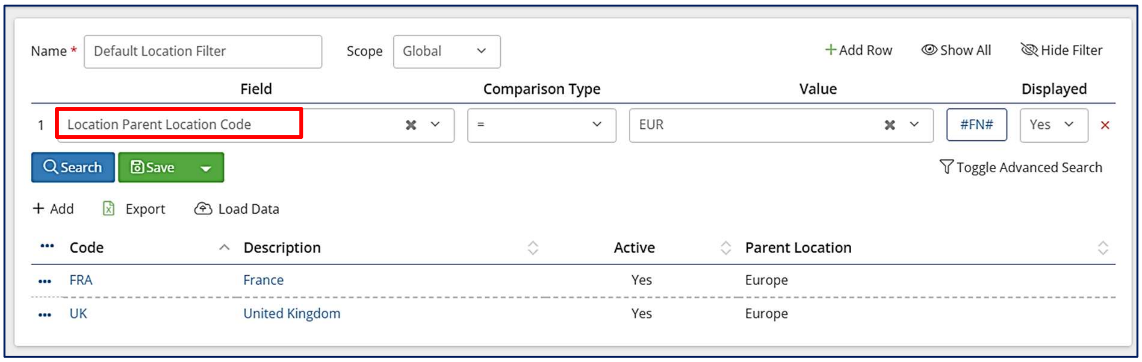


Feature Usage

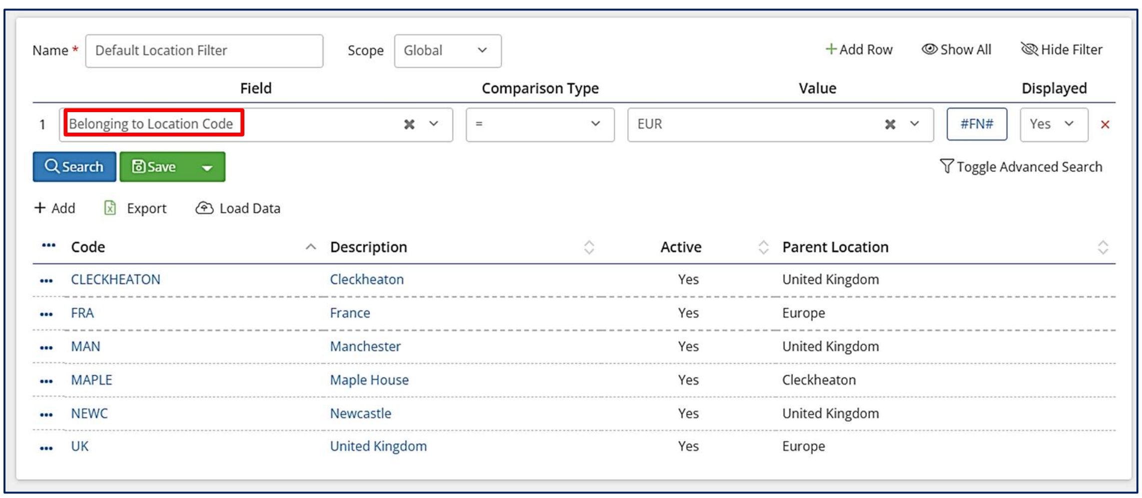
Search screen filters

New filter options of **Parent Location** and **Belonging to Location** are available on the Location Search to facilitate searching across the hierarchy. Parent Location is also available in the column chooser.

Parent Location – returns the direct child Locations of the specified Location:



Belonging to Location - returns all (direct and indirect) children of the specified Location

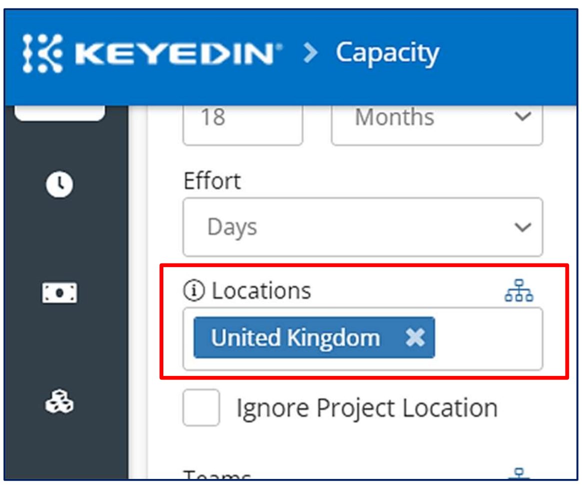


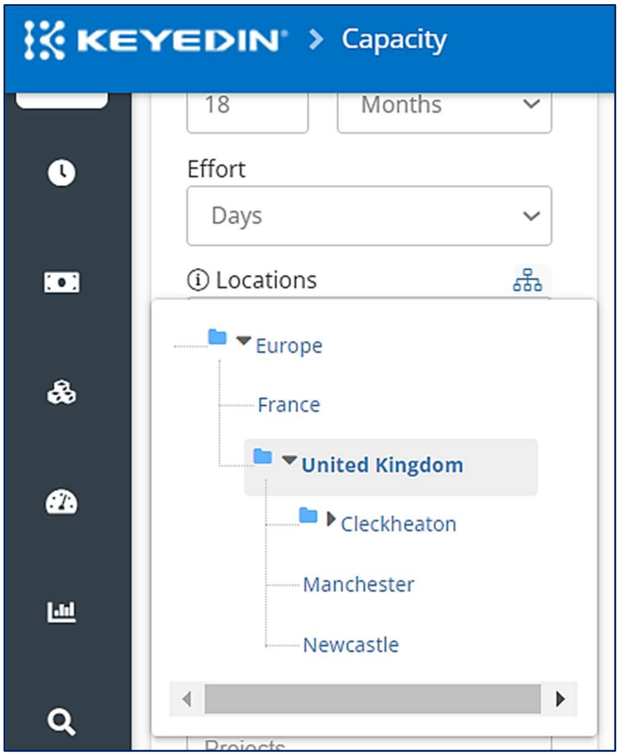
The **Belonging to Location Code** filter is additionally available on the Projects, Resources and Roles search screen to easily search for entities belonging to any direct or cascaded child Locations.

Additionally, the existing **Belonging to Department/Team** (currently available on the Department and Project search screens) is now also available on the Resources and Roles search screens. This allows Resources or Roles in any child departments (direct or cascaded) to be easily found based on the specified parent "Belonging To" Department.

Resource Plan/Capacity Plan/Requests screen filters

Filtering on a Parent Location within the Resourcing screens; for example Resource Plan, Capacity Plan or Requests Screen, will automatically include any immediate or cascaded child Locations in the results – consistent with the existing behaviour when filtering on a parent Department/Team or Project on these screens.





When filtering on a single Location, access to the Location hierarchy is provided via the pop-out.

Capacity Screen – Ignore Location Filter for Project Demand

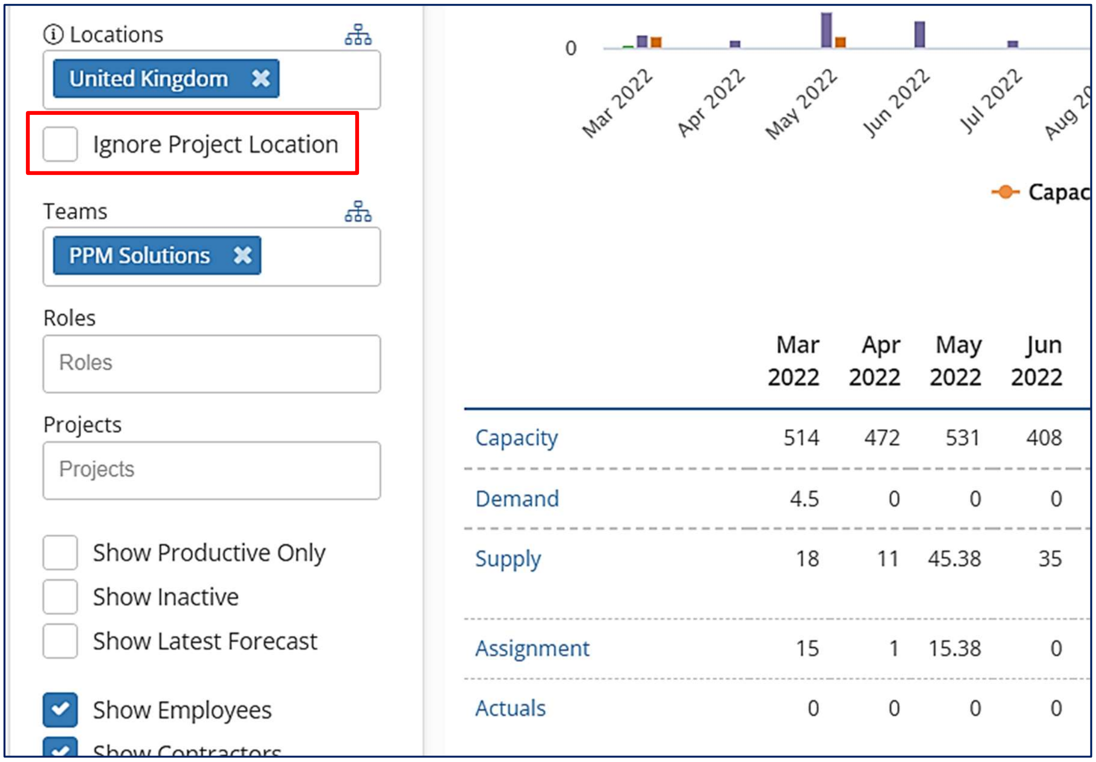
A new option to **Ignore Project Location** is available on the Capacity Screen for users of the Strategic Resourcing mode and requires no specific setup.

For reference, *Demand* uses the **Project Location**, whereas *Capacity*, *Supply/Assignments* and *Actuals* data use the **Resource Location** if specified.

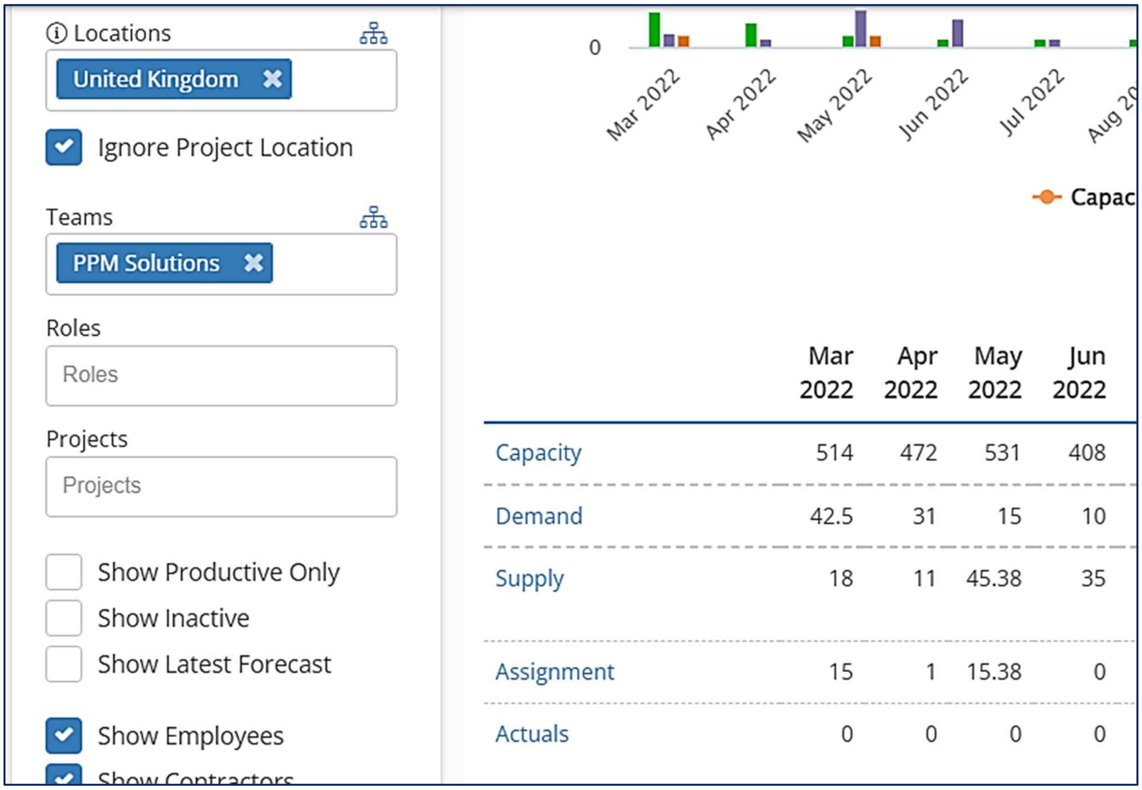
By ticking the ***Ignore Project Location*** box, Demand data is now returned from **any** Project Location, including Projects which may not have a Location set, and subject to any other filters applied.

This feature can help provide a clearer understanding of the Resourcing situation for Projects that are managed centrally but operated across multiple sites or Locations.

When **Ignore Project Location** is not checked, only Demand in the specified Locations (including any child Locations) is returned:



When **Ignore Project Location** is checked, Demand from all Locations is returned and is only constrained by the other filters. Note that Capacity, Supply, Assignment and Actuals remain unchanged.


Locations
United Kingdom
Ignore Project Location
Teams
PPM Solutions
Roles
Roles
Projects
Projects
Show Productive Only
Show Inactive
Show Latest Forecast
Show Employees
0
Mar 2022
Apr 2022
May 2022
Jun 2022
Jul 2022
Capac
Mar 2022 Apr 2022 May 2022 Jun 2022
Capacity 514 472 531 408
Demand 42.5 31 15 10
Supply 18 11 45.38 35
Assignment 15 1 15.38 0
Actuals 0 0 0 0

Remove Future Allocations when a Resource Leaves or is Inactivated

To reduce the administrative overhead when a Resource leaves, an option to remove the future Supply or Assignment allocation is now provided when inactivating or setting an end date on a Resource.

Feature Setup

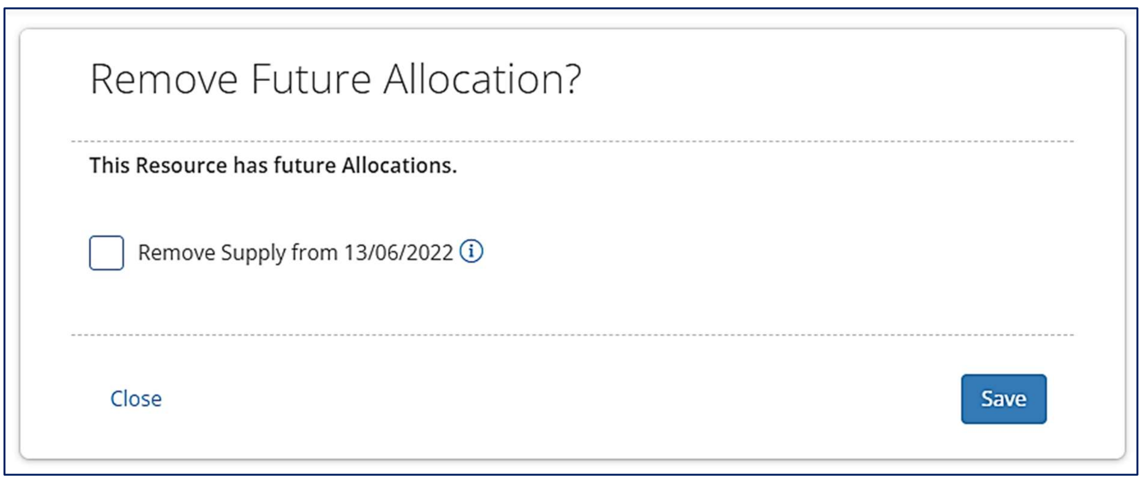
There is no specific setup for this feature and is available to all users with permission to maintain Supply and/or Assignments on Resources.

Feature Usage

The option to remove future allocations is presented on the Resource Edit screen when inactivating a Resource or entering a Leave Date.

Scenario 1 – Resource Only Has Future Supply Allocations

If a Resource has only future Supply allocations, then the prompt below will be shown when Resource is inactivated, or a Leave Date is entered.



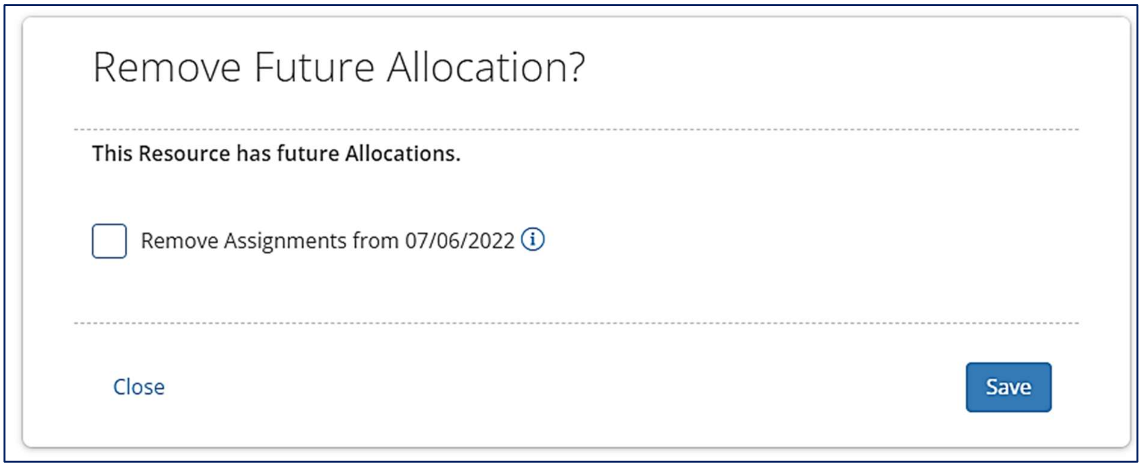
If the Resource is inactivated, future Supply will be removed from the start of the next planning period (typically start of the next week).

If a Leave Date is entered, future Supply will be removed from the start of the next planning period after the current date or Resource Leave Date (whichever is later).

Select to remove the future Supply from the start of the specified planning period.

Scenario 2 – Resource Only Has Future Assignment Allocations

If a Resource has only future Assignment allocations, then the prompt below will be shown when Resource is inactivated, or a Leave Date is entered.



If the Resource is inactivated, future not-started Assignments **will be reverted back to a Role Assignment** (of the Resource's Primary Role) from the start of the next working day.

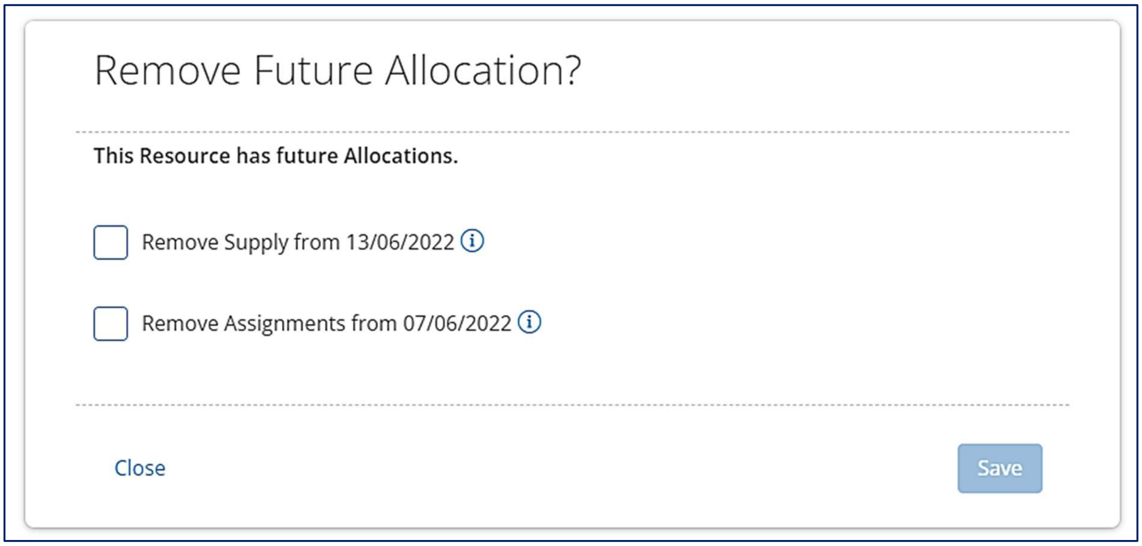
If a Leave Date is entered, future not-started Assignments **will be reverted back to a Role Assignment** (of the Resource's Primary Role) after the current date or Resource Leave Date (whichever is later).

Ongoing Assignments will not be affected.

Select to remove and revert the future Assignments from the date specified.

Scenario 3 – Resource has Future Supply and Assignment Allocations

If a Resource has both future Supply and not-started Assignments then the prompt below will be shown when Resource is inactivated, or a Leave Date is entered.



The behaviour for removing Supply and reverting Assignments remains as described in the above two scenarios.

Select to remove either the future Supply and/or Assignments from the date(s) specified.

In any scenario, no Supply or Assignment allocations before the current date will be affected, even if the Leave Date is set in the past.

Dashboard and Reporting Enhancements

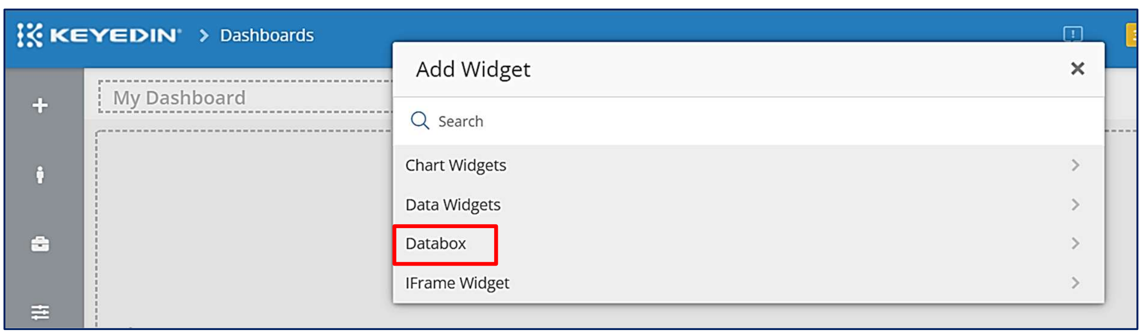
Dashboard Databox Enhancements

A number of changes have been made to the usability of Databox widgets throughout the system as described separately below.

Ability to Configure & Publish Databoxes on Custom Dashboards

Databoxes can now be added to custom dashboards, previously only available to My Work and Projects dashboards

When configuring a custom dashboard, an additional option for **Databox** is now available.



As custom dashboards can already be published to specific Logins or Login Groups; the new ability to publish these dashboards with Databoxes represents a significant step forward in simplifying the process and sharing information with other users.

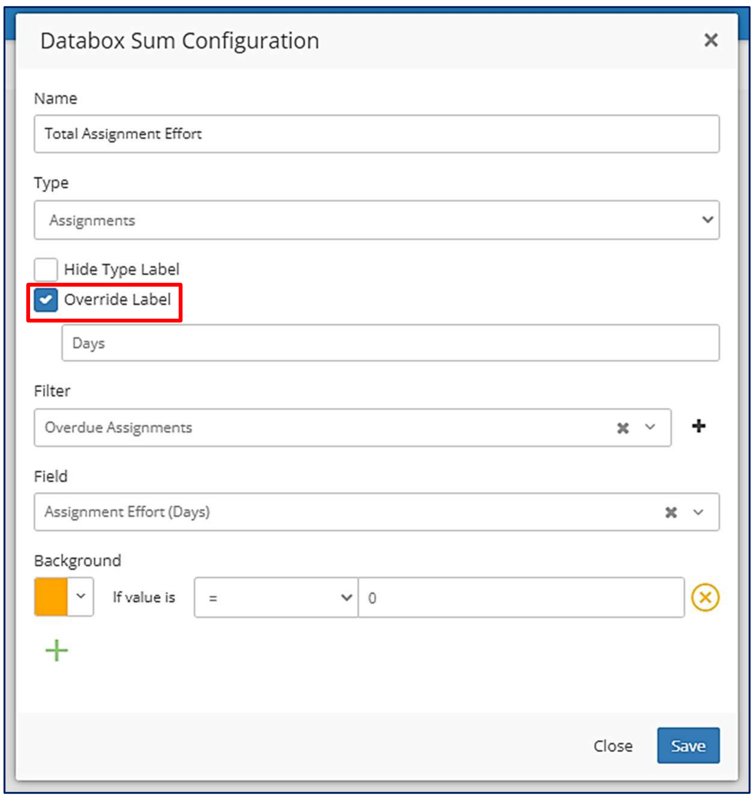
Increased Limit of 20 Databoxes per View or Dashboard

The restriction on the number of databoxes allowed on any View has been increased from 12 to 20.

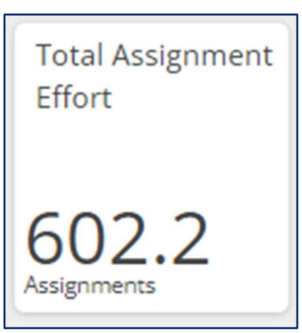
Ability to Override or Hide Databox label

The ability to override or hide the Databox label is now available to all databoxes. Previously the databox label was hardcoded to the entity name and potentially confusing if the databox was displaying a sum total effort or financial metric.

Select the **Override Label** option and enter a new name to override the default databox entity label.



Before:



After:

Similarly, the **Hide Type Label** option can be used to suppress the entity name:

Before:

After:

Enhanced Run Report Filter Parameter Screen

When running a Report an improved dialogue box for viewing and configuring report filter and output options has been introduced. This more closely reflects the styling and behaviour of the report writer.

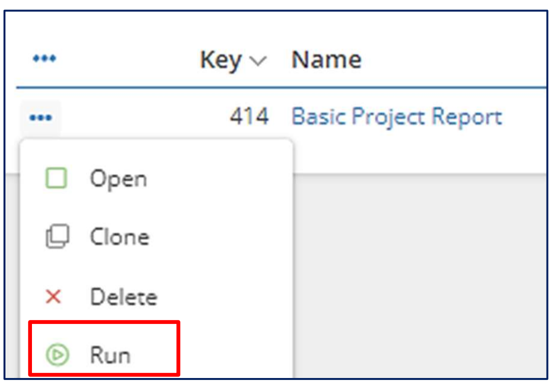
This enhancement is also carried over to the Scheduled Report screen when adding a new filter for report recipients.

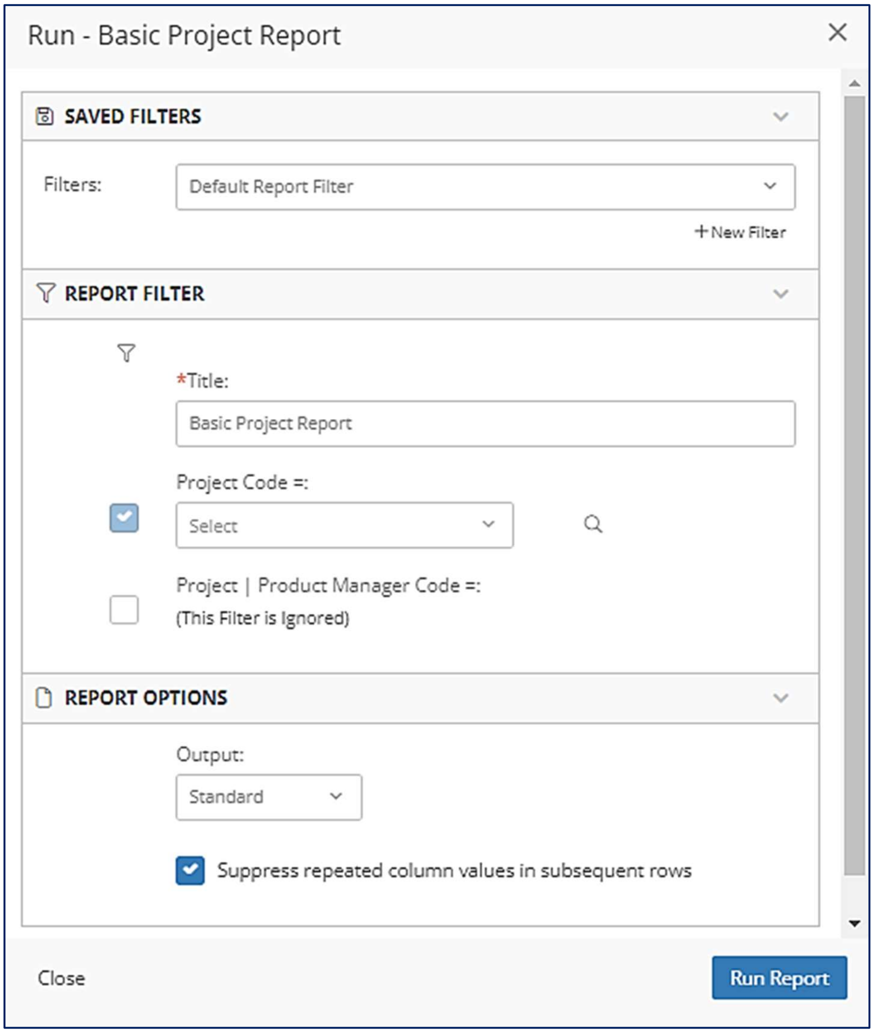
The general operation of the new screen remains unchanged but a number of visual and usability improvements including **collapsible sections** and **type ahead search** on certain filter items have been introduced.

Note, legacy reports created in the old report writer will continue to show the original filter screen.

Select a Filter and Run a Report from the Search Screen

Select the **Run** option from the Reports search screen to open the Report Run Screen.





Saved Filters

The **Default Report Filter** is selected by default but additional filters available to the user can be selected from the dropdown list. New filters can also be created, which is explained later.

Report Filter

The Report **Title** is shown by default but can be amended which will be reflected when the Report is run on this occasion.

Filter options beneath Title will be displayed depending on the report filter configuration in the report writer, with the exception of Hidden filters.

Any filter fields configured as Optional in the Report Configuration can be deselected to ignore when the report is run. Fields where the filter is required will be locked (note, this may not necessarily be fields where the ***Value*** is required).

Amend any filter values as desired - where a code field is used the typeahead search will generally return automatic results, consistent with the report writer behaviour.

The Advanced Search will be available for certain fields such as entity codes (e.g. Project Code, Resource Code).

Report Options

Output types configured on the Report will be available to select from the dropdown. Additionally, other options of **Suppress repeated column values in subsequent rows** and **Display grand totals for the report** will also be available if configured on the Report.

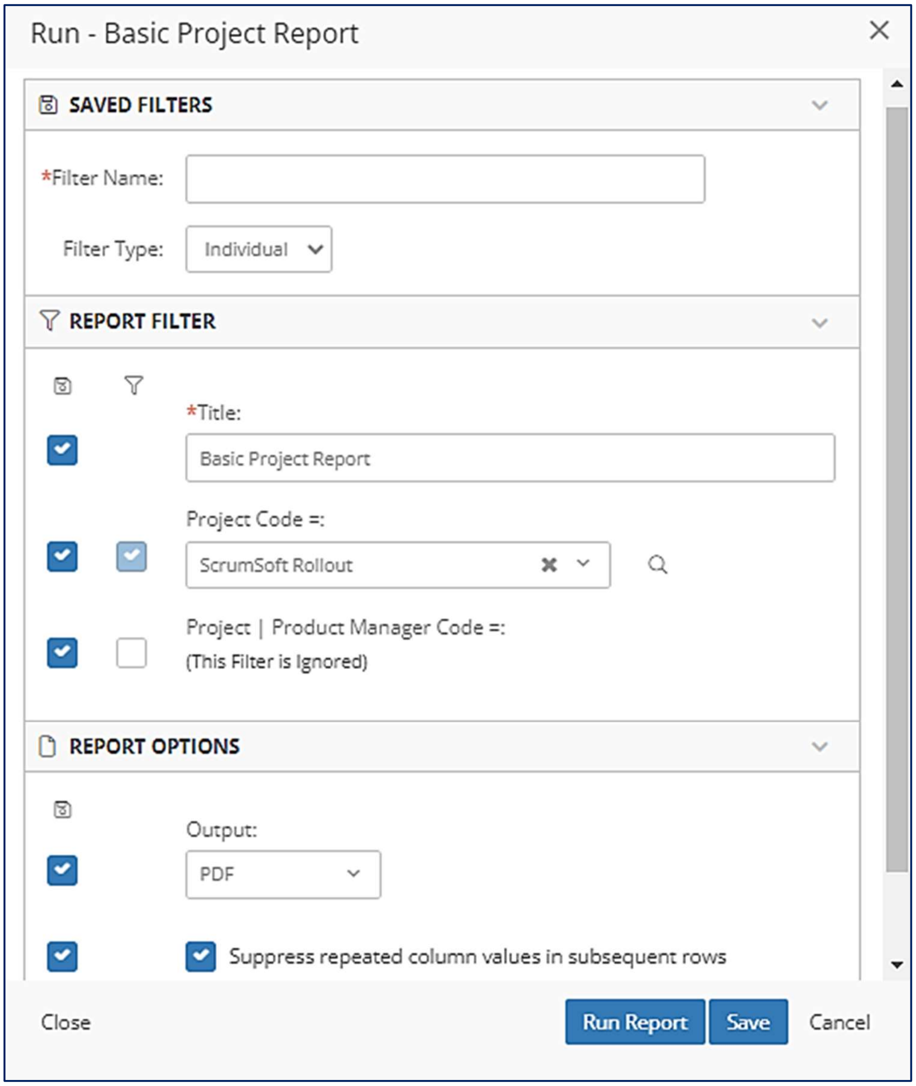
Select Run Report to run or download the report in the requested format, or **Close** to return to the search screen.

Creating a New Filter

If running this report frequently a variation of the Default filter can be created and saved for future reference.

The options when creating a new filter will be limited to and are dependent on the original filter configuration fields (as set in the report writer) and whether they are required or optional.

Select **+ New Filter** from the Saved Filters section,



- Enter a new **Name** for the Filter and specify the Type (Individual, Group or Global)
- An alternative Report **Title** can be amended and saved to the Filter for use on the output of the Report.
- The option to **Use** the filter (indicated by the Filter symbol) cannot be unchecked if the report writer filter configuration for the field is set to 'Required Filter'
- Filter parameter values can be amended and **Saved** to the new filter as necessary provided the report configuration allows values to be saved to the filter.

Editing an Existing Filter

An existing Saved Filter can be edited or deleted by first selecting it from the dropdown list and then selecting either **Edit Filter** or **Delete Filter**.

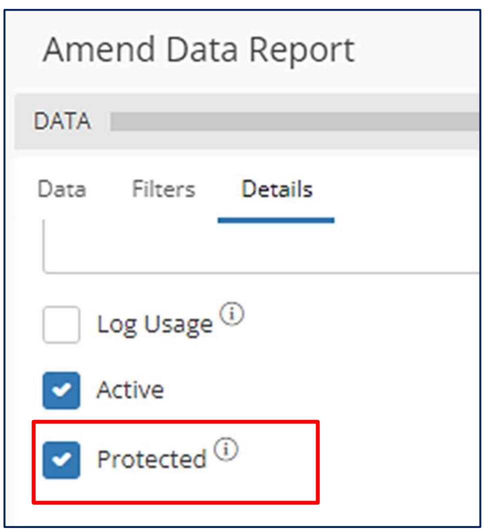
Protected Reports

Reports and Widgets can now easily be prevented from deletion by optionally setting a *Protected* flag within the report or widget configuration.

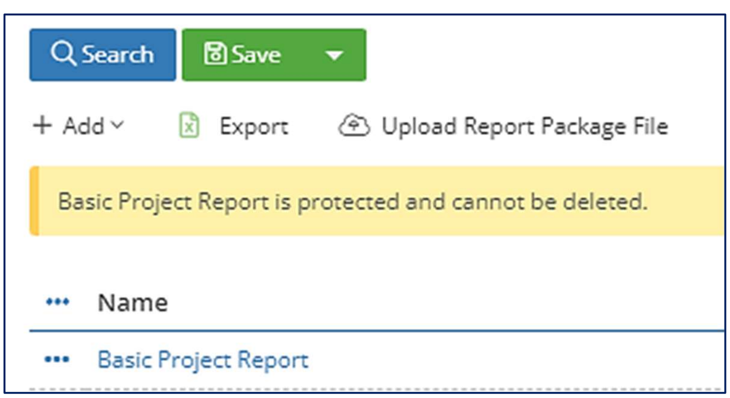
Feature Usage

The Protected field can be set for any new or existing chart or data reports (or widgets) configured in the enhanced report writer.

Simply select the **Protected** checkbox on the Details tab within the Report or Widget configuration screen and save the changes.



Protected Reports or Widgets cannot be deleted, and a warning is displayed:



Project Management Enhancements

Multi-Select Project Custom Fields

Multi-select Custom Fields have been introduced to the **Project entity** to simplify the management and reporting of Projects where capturing multiple values per data field is necessary. At this time only custom fields on the Project record can include multi-select values. All other record types will remain the same such as Activity, Action, Task, Assignment, Risk/Issue, etc.

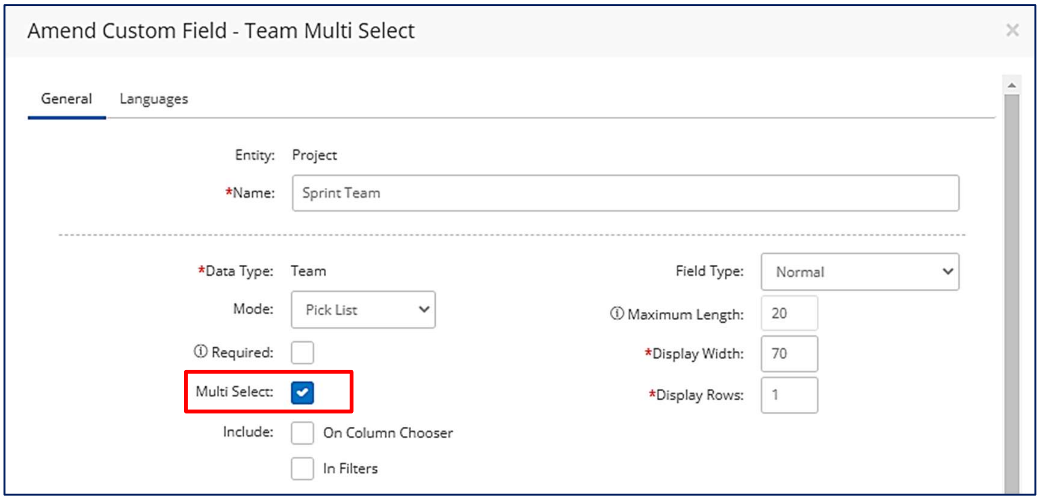
Feature Setup

This feature is available to clients using a Project Workflow enabled environment and available to certain custom fields on the Project entity.

The Project custom field types that can be configured for multi-select are:

- Keywords
- Number lists
- Activity
- Client (Customer)
- Department (Team)
- Project
- Resource
- Role

Any new or existing custom field type from the list above can be configured to allow multiple saved values by selecting the *Multi Select* checkbox in the Custom Field configuration screen:



Please note the Multi Select option cannot be unchecked once the custom field has data subsequently stored against it.

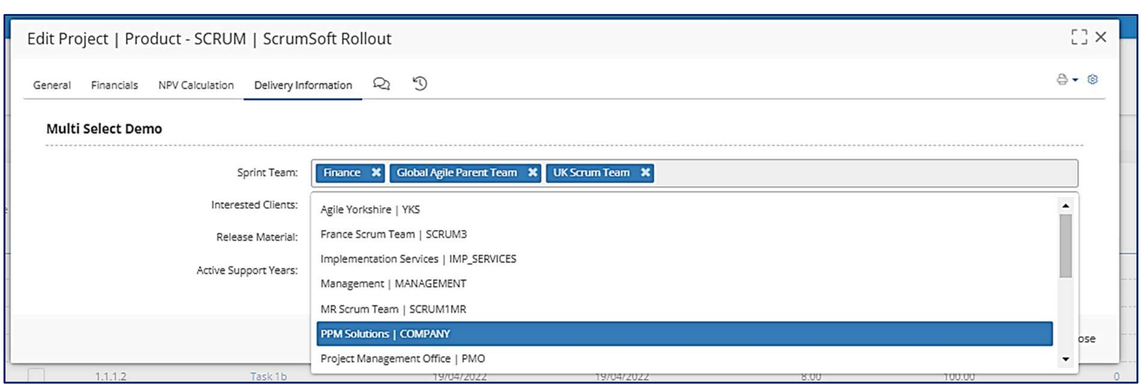
Multi-select fields are configured on Project Types in the usual manner; a default value of multiple values can simply be set by selecting the required values.

Feature Usage

Selecting Values

Multi-select custom fields available to Project Types can be viewed and edited on the Project Edit screen and Project Search Screen via inline edit.

Simply click and select to add additional values, or remove values using the 'x' symbol.

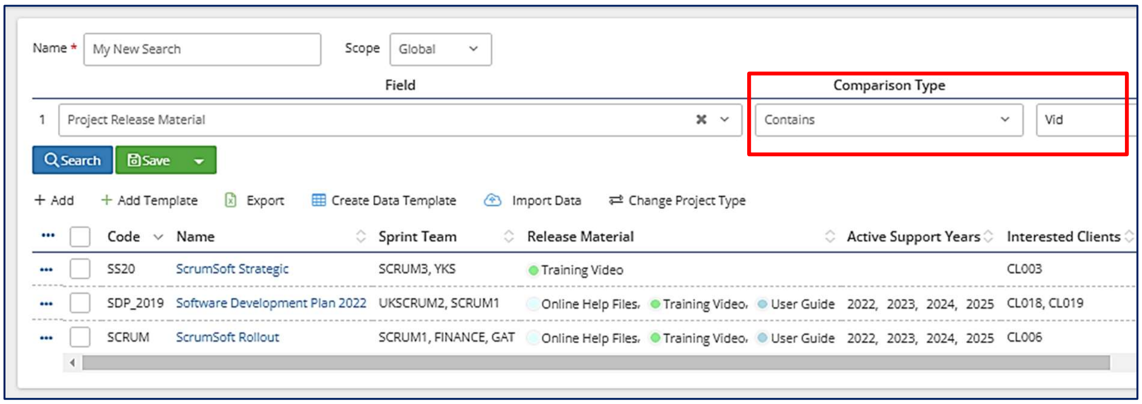


Searching for Values

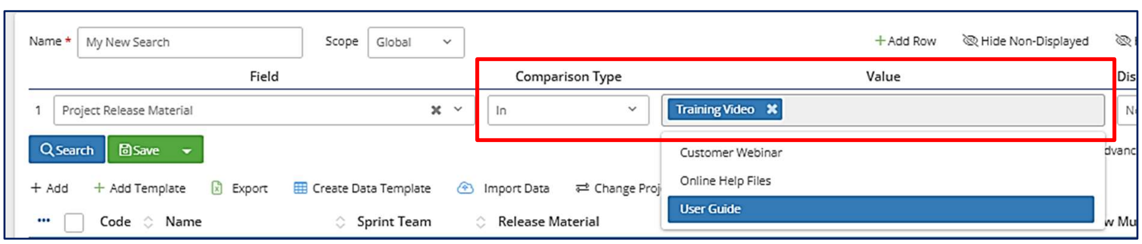
When selecting a multi-select custom field on the Project search screen, the comparison types are restricted to Contains and In (and their *Not* equivalents).

The Contains operator will return matches where any one of the multiple values matches the text in the contains filter.

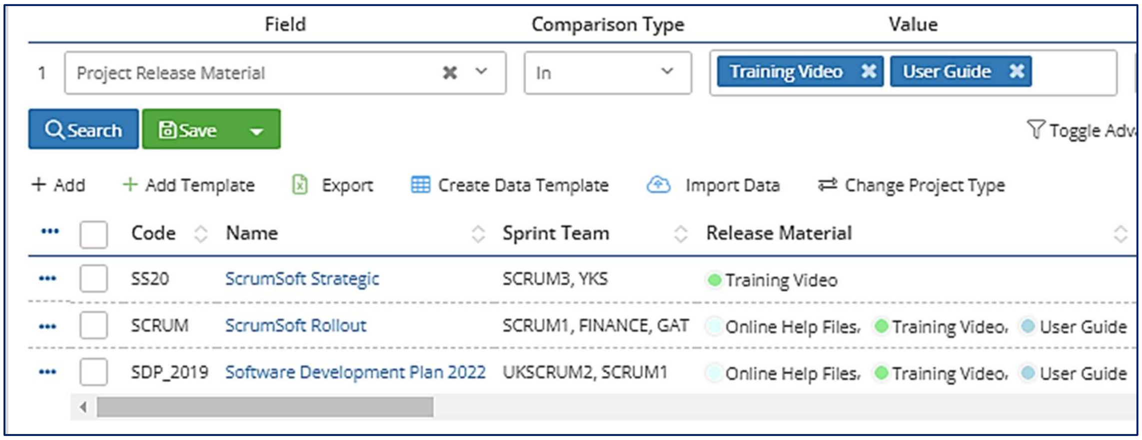
In this example, using a **Contains** comparison type and searching on "*Vid*" returns Projects where the Release Material field has matches of Training *Video*. The values are comma separated, and uses the Keyword configured colour in this case.



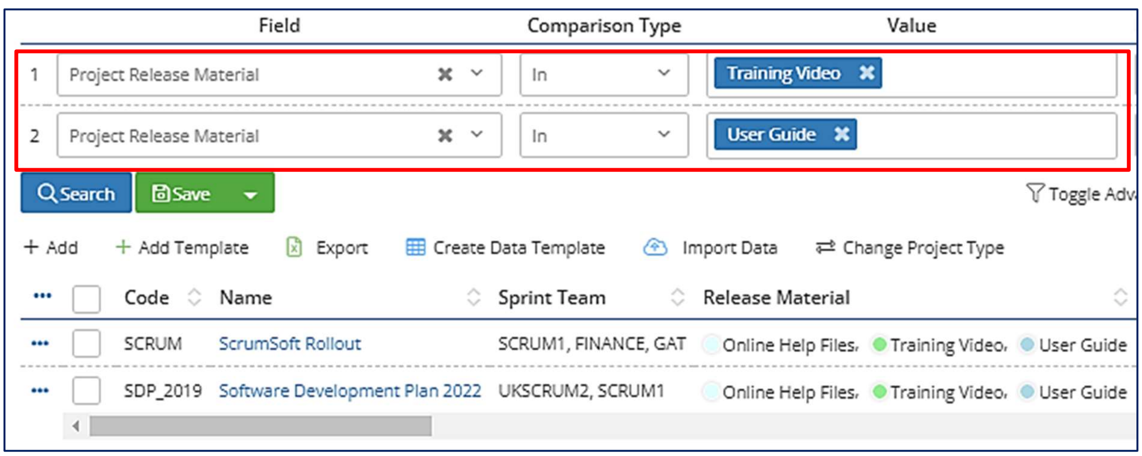
Using the **In** comparison type will be the preferred option for most users as it allows selection from a list of configured values, for example:



Selection of multiple search values in the same filter row returns results for Projects that have **ANY** of the selected values.



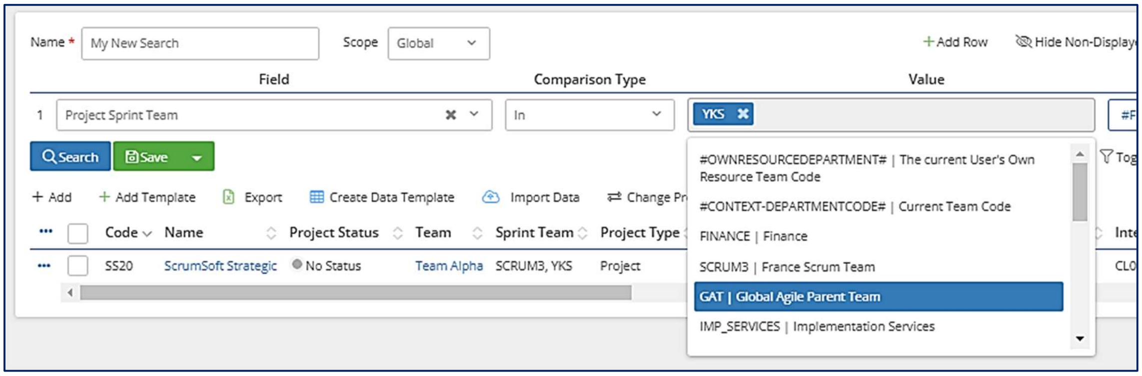
If requiring results based on **ALL** selected values, then multiple filter rows should be used for example:



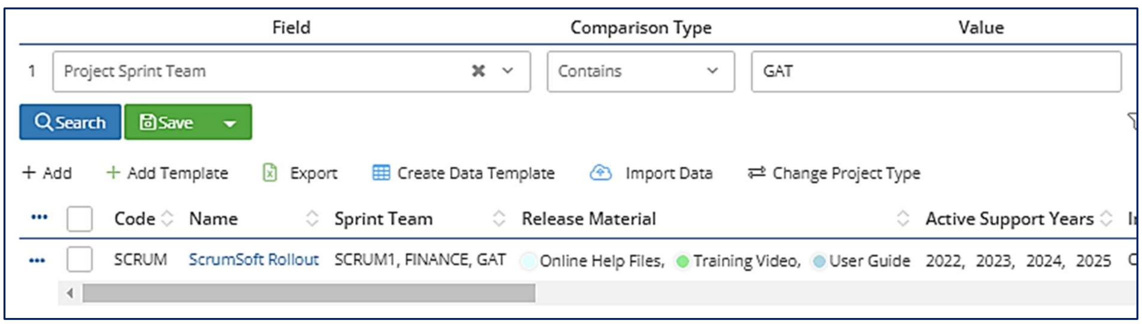
Important Information for Entity Multi-Select Fields

When an Entity based multi-select field is used (for example Client, Team or Resource) a current limitation is that results will be listed by their Code, not the Name as can be seen in the *Sprint Team* field below:

Using the **In** filter for these field types allows type ahead search on Code and Name:



but using the **Contains** will require the Code to be used:



Project Type Conditions and Updates

Multi-select custom fields Project Types can be configured in Project Type Conditions and Updates to both validate and set values, respectively, on status movements as part of the existing Project Type configuration process.

Reporting on Multi-Select Values

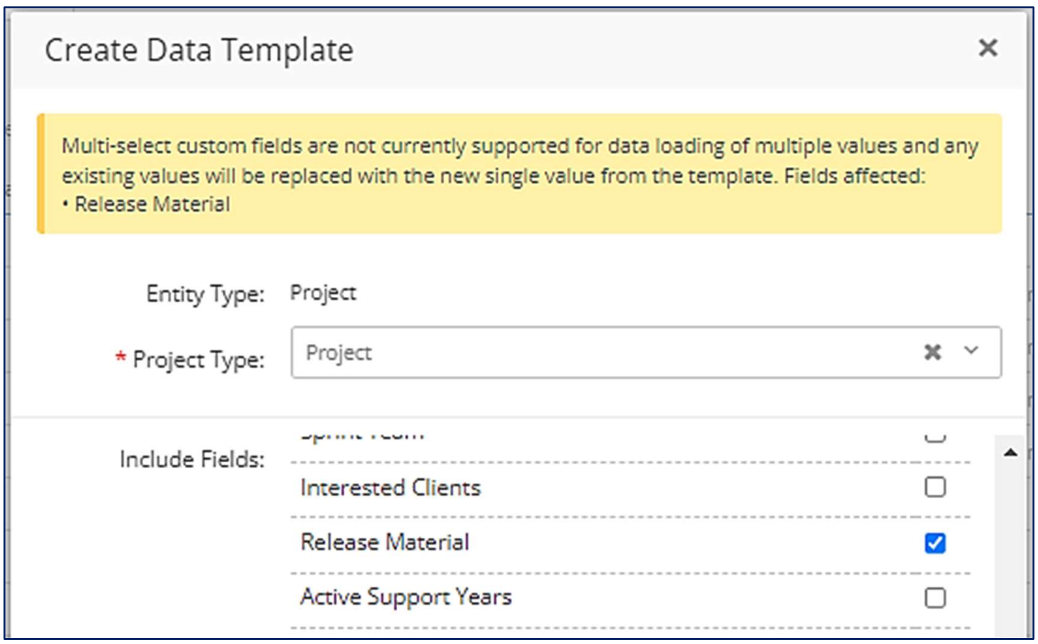
The enhanced Report Writer allows reporting on multi-select Custom Field values, with filtering options consistent with the Search Screen described above.

Additionally, a new filter and column chooser item for the *Multi* Select custom field property is available on the Custom Field search screen and reporting Dataview to allow System Administrators to more easily identify which custom fields have been created, or converted to, multi-select.

Dataloading Multi-Select Values

It is **not** currently possible to dataload multiple values into a multi-select configured field and any attempt to dataload values will replace all multiple existing values with the new single value from the dataload template.

Therefore, if any multi-select custom fields are selected in the Project Dataload template options, a warning will be displayed to remind users:



Task Kanban Enhancements

New Board Level Field for Manual Task Tagging

A new **Board Level** field is available in the enhanced Task Planning Gantt to allow users to more easily define, visualise and manage Tasks relating to agile work items, such as bugs, stories, features, and to view those on the interactive Task Board.

This is a feature extension to the automatic Task roll-up Hierarchy initially introduced in a previous release which allows users to select and view different Task Levels on the Board determined, and restricted, by Summary and Child Task relationships.

The original Automatic hierarchy continues to function as designed but will be overridden with the new manual mode if a new *Board Level* field is populated for any Task on the Project.

Feature Setup

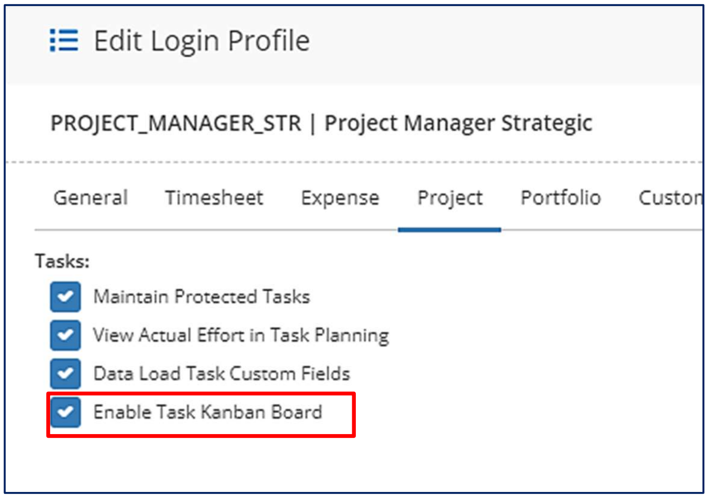
The Task Board first needs to be enabled and configured to use this feature.

If the Board is already configured, please skip to, and review, the ***Defining Task Board Levels*** section.

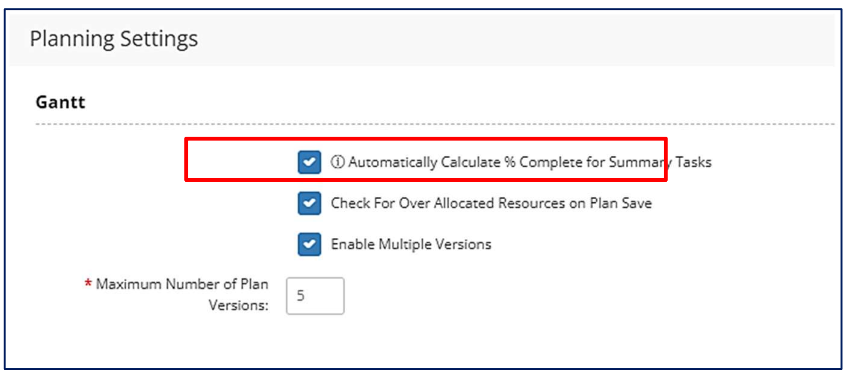
Enabling the Board View

- The Task Board view is only available if the Enhanced Task Plan Gantt is enabled (this will be enabled by default for new clients after March 2018).

- Access to the Board view is controlled by a Login Profile setting, ***Enable Task Kanban Board***, which is not initially set by default.



- **Auto-calculate % Complete for Summary Tasks must be enabled** within *Configuration > Planning Settings* if intending to tag Summary Tasks. This is a requirement so that the % complete of any Summary Tasks are automatically calculated to appear in the correct Board column based on the weighted child Tasks.



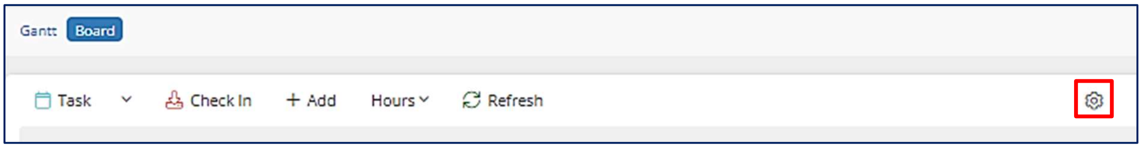
Task Board Configuration (Overview Only)

It is recommended that the Board view is first configured by a System Administrator having the ***Login Profile setting > Ability to set System Defaults*** before being made generally available as the specific setup applies globally to all users within the client system.

For initial setup, once the Board view has been enabled, navigate to a Task Plan ensuring the Published version is active and select ***Board***.

All standard Tasks (excluding Summary Tasks) on the Gantt will now be represented as tiles on Board, in columns based on their percent complete.

To configure the Board options, select the cog icon.

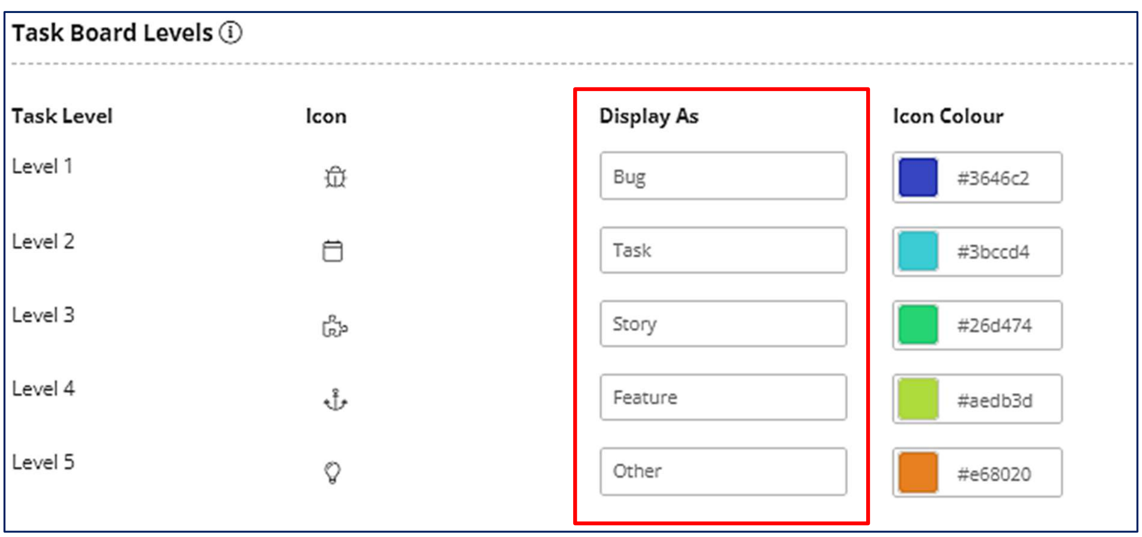


Important: Full details relating to Task Board configuration are explained in the earlier v7.3 Release Guide (readily available on the Support portal if required). **However, to take advantage of the new tagging feature, it is important that at least one Task Level is defined with a *Display As* value, explained below.**

Defining Task Board Levels

The Task Board configuration screen allows up to 5 Task Levels to be defined. For customers already using the Board view in conjunction with automatic roll-up, the levels will reflect Tasks based on the Parent/Child relationships, for example where level 1 may be a 'Task' and level 5 represents an 'Initiative'.

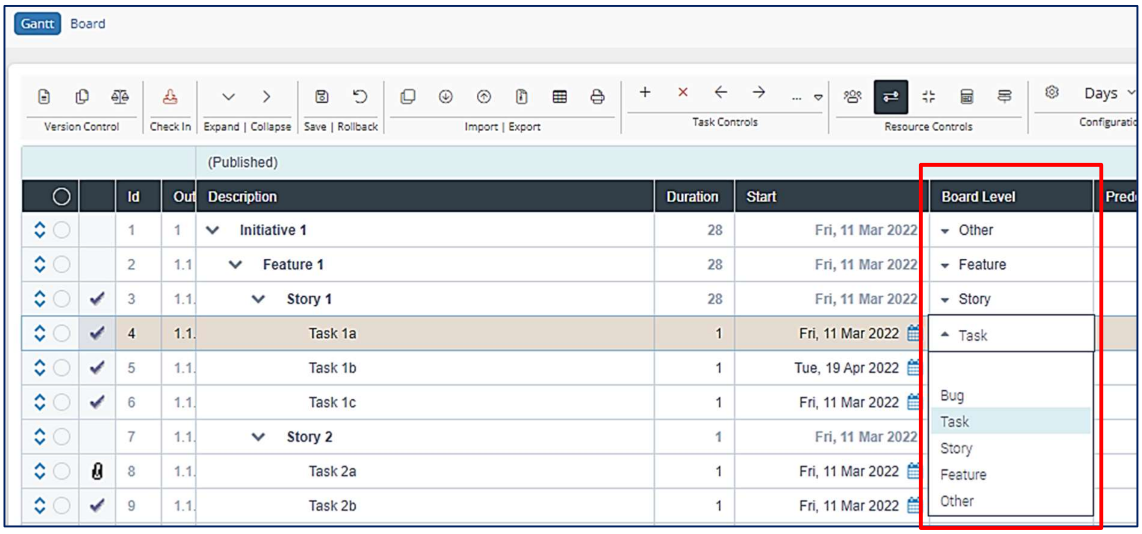
There is no requirement to change this naming convention, but please ensure the **Display As** values are set for any levels that you would like to manually tag Tasks against – these will determine what is visible in the Board Level field as explained in the following ***Feature Usage*** section.



Feature Usage

Tagging Tasks

On the main Task Gantt page, Tasks can be *tagged* with one of the five defined Board Level fields to represent desired work items. The Board Level field is available as a column on the Task Grid, or on the Task Edit screen if at least one Task Board Level has been defined with a *Display As* value as described above.



- If one or more Tasks are tagged with a Board level, that level will be selectable via the drop down on the Board view, to view those Tasks.

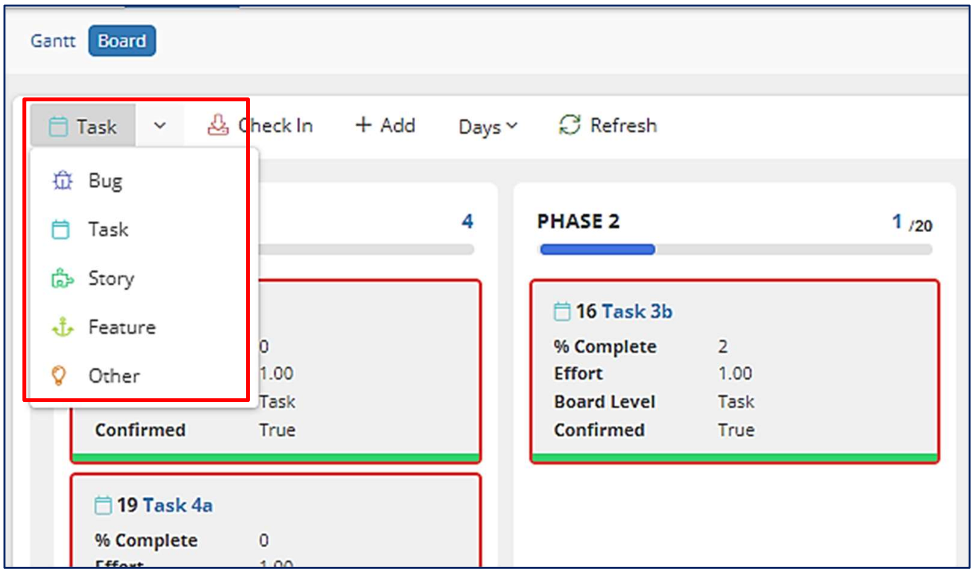
- If the Board field for any Task is left blank then the Task won't be visible on the Board view at all.

- If the Board fields for All Tasks are left blank, the Board will attempt to load the original automatic roll-up hierarchy – this requires a consistently nested parent/child relationship between Tasks, and full details for this mode of operation can be found in the original documentation for v7.3.

Tip: Board Level is available in the Bulk Edit feature to update multiple rows simultaneously.

Viewing Tagged Tasks on the Board

Provided at least one Task has been tagged with a Board Level, the Board view selector allows selection of the available tagged levels for the published Project plan.



The initial default selection will be the lowest level (*Bug* in this example), but selection of a different level will be retained, per user, between visits and across Projects (where possible).

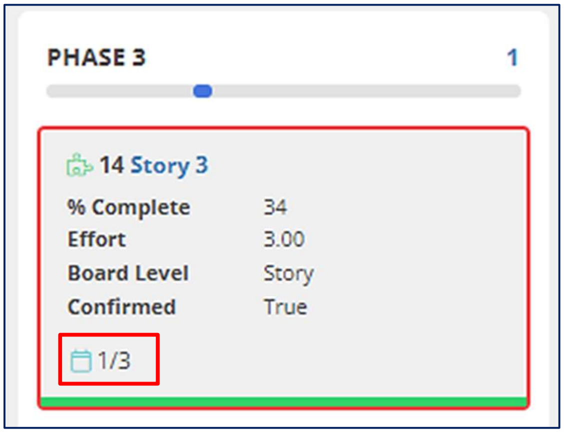
Managing Tagged Tasks on the Board

With the manual tagging approach, any selected Board level may now contain a mixture of standard and/or Summary Tasks. As per the existing behaviour, standard (non-Summary) Tasks can be dragged and dropped between columns to update the percent complete.

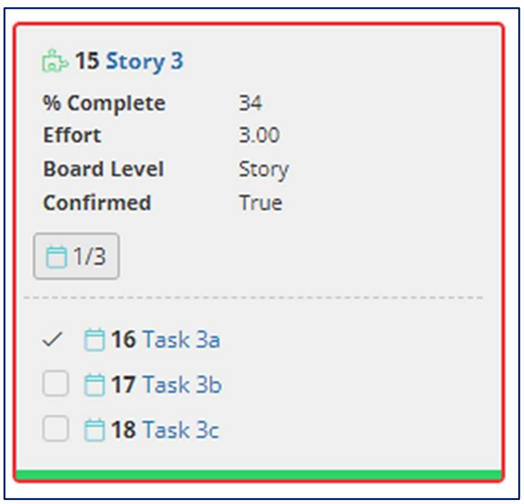
Summary Tasks cannot be dragged between columns as their percent complete is automatically calculated from the child Tasks.

The key difference between the existing automatic mode and the new flexible manual tagging mode is that your Task plan **does not require** a Summary Task structure to be able tag, view and manage Tasks on the Board. However, where

Summary and child Tasks are being used, clear visibility of that relationship is provided with any direct child Tasks indicated by the icon on the tile, corresponding to the tagged level.



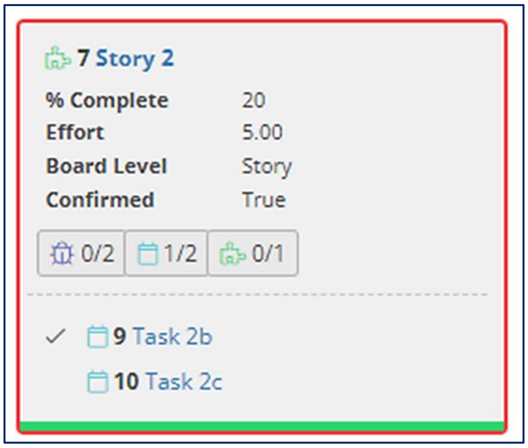
As per current behaviour, clicking the child Task icon displays further details:



Tick to complete the child Task (allowed if the child is not a Summary) or click to view and edit further details.

There are no restrictions on tagging, so a Task can have child Tasks of different types, which can be represented by different symbols, using the defined shape and colour if configured.

Each child Task icon can be selected to view the different child Tasks based on the tagging.


7 Story 2
% Complete 20
Effort 5.00
Board Level Story
Confirmed True
0/2 1/2 0/1
9 Task 2b
10 Task 2c

Additional Task Board Column Views

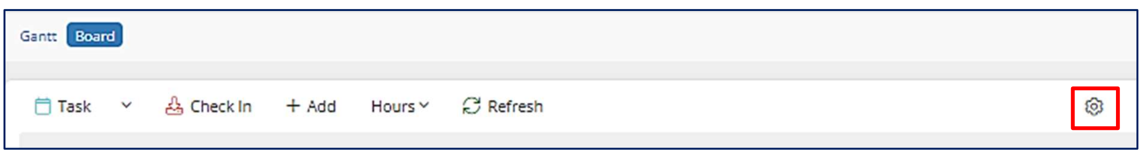
The original Task Board provided one configurable view to allow Tasks to be viewed and managed in columns based on percent complete.

For this release, up to 10 different Column Views can now be configured and made available to different groups of users for increased flexibility in managing different types of agile Projects, across different teams.

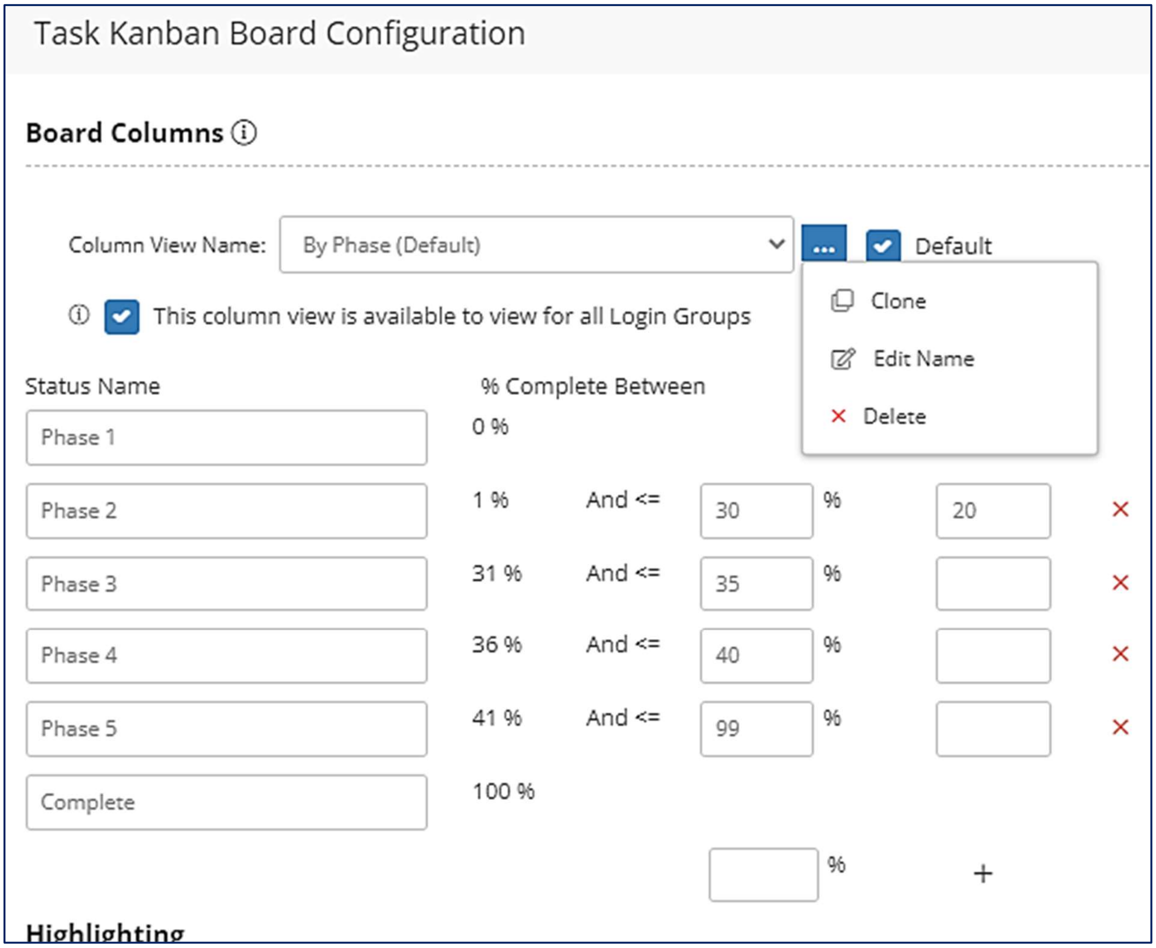
The alternative Column Views do not affect which Tasks are displayed, but simply ***which columns*** they appear in.

Feature Setup

To access the Task Board configuration screen, select the Board cog icon. This is available to users with the Login Profile permission to set system defaults.



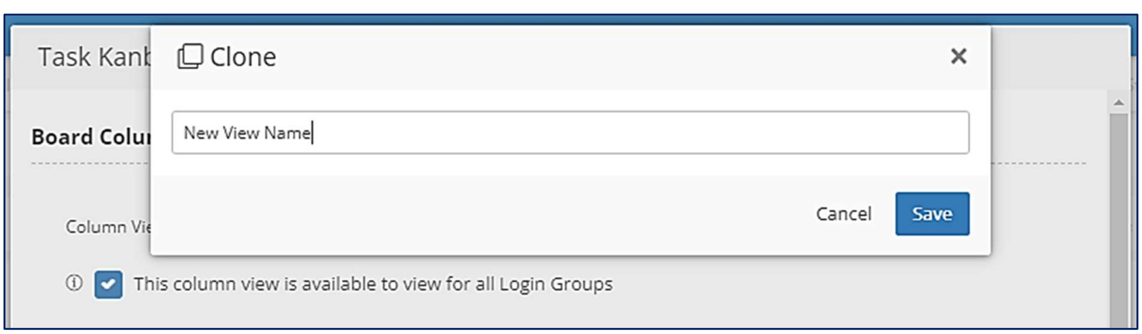
On the Task Board Configuration screen, select the ellipsis icon […] for options of **Clone, Edit Name**, and **Delete**.



Clone to create a new Column View

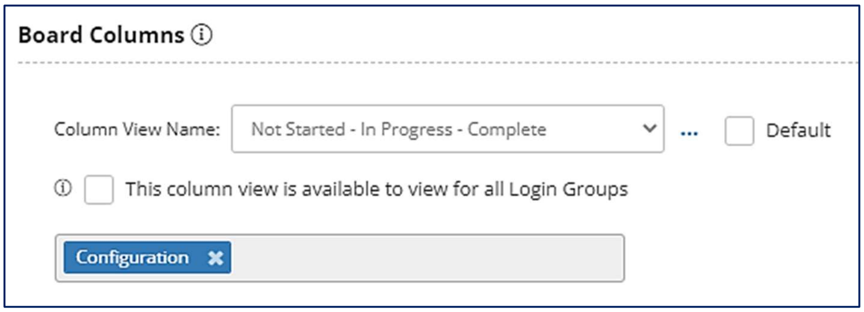
A maximum of 10 Column Views can be created, achieved by cloning an existing view:

- Select the Clone option from the menu to create a copy of the selected view
- Enter a new name when prompted
- Amend (or add additional) Status Names, % Complete boundaries and Task Limits as desired.
- The new view is automatically created at this point



Set Login Group Availability

The new view is automatically available to all Login Groups. To restrict this view to selected Login Groups uncheck the box and type ahead to find and select the required Login Groups. This won't be allowed if the view is set as the Default view.



Save any further changes before proceeding.

Editing an existing Column View

- Select an existing Column View from the dropdown menu
- Amend (or add additional) Status Names, % Complete boundaries, Task Limits or Login Group availability as desired.
- Save changes when complete

Renaming a Column View

- Select an existing Column View from the dropdown menu
- Select Edit Name from the ellipsis menu
- Enter the new name and the change is saved automatically

Deleting a Column View

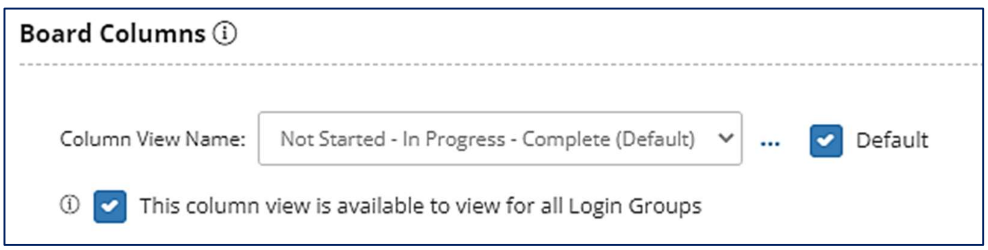
- Select an existing Column View from the dropdown menu
- Select Delete from the ellipsis menu
- **Note, the view marked as *Default* cannot be deleted**

Setting the Default Column View

At least one Column View, the *Default,* must always exist, be available to all Login Groups, and cannot be deleted.

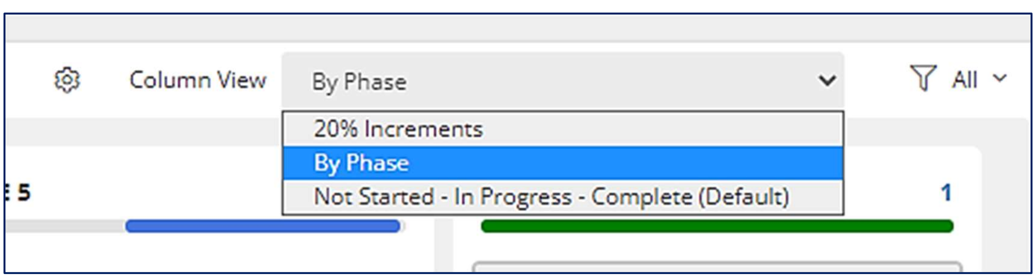
To change the default Column View simply select a Column View name and tick the Default checkbox, and the change is applied and saved. Any users who were previously using a non-default view which has been removed will revert to the new Default.

If this was previously restricted to individual Login Groups, selecting Default will now make it available to All Login Groups (a requirement for the Default view).



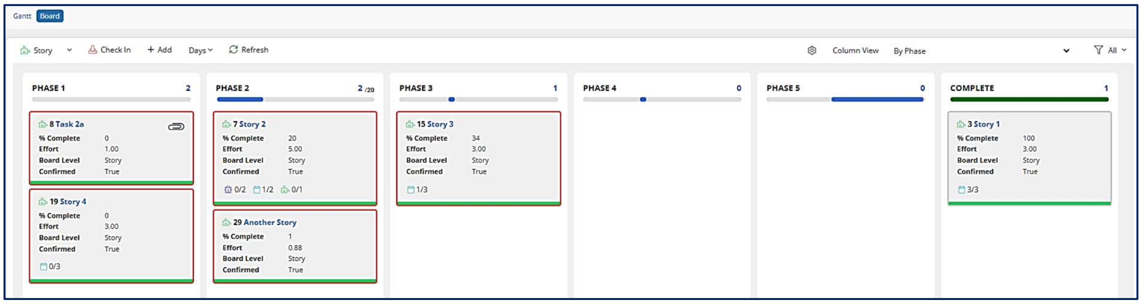
Feature Usage

If more than one Column View has been configured, the Column View dropdown is shown on the Task Board displaying the available views ordered alphanumerically.

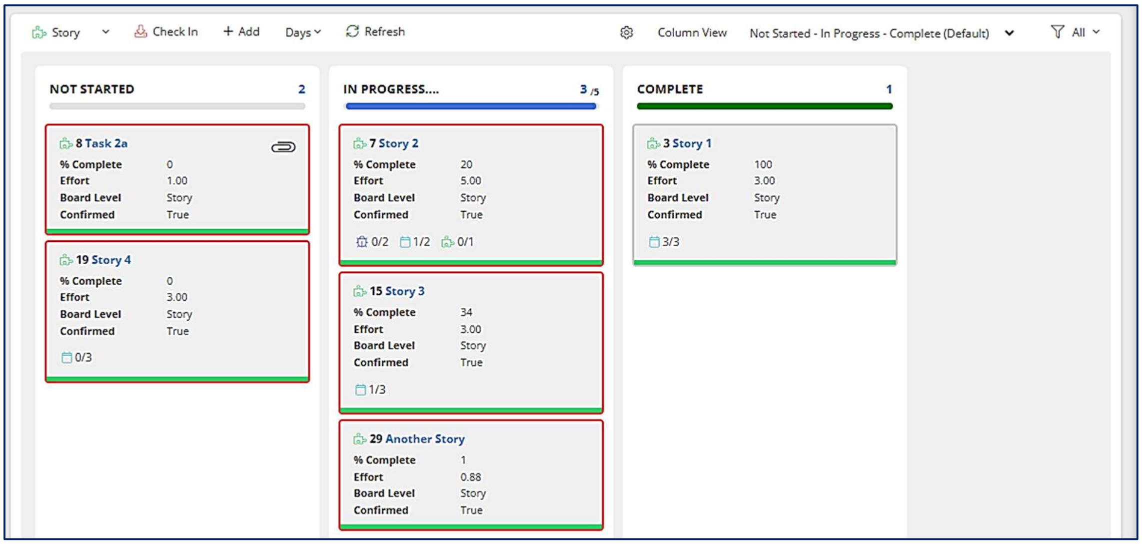


All users will initially see the Default Column View, but can select any of the other views available to them (or their Login Group).

Viewing the ***By Phase*** user defined Column View:



Viewing the **Not Started/In Progress/Complete** user defined Column View:



In both cases, the same number of Tasks are displayed, but the columns they appear in are defined by the column percent complete boundaries.

Selection of a different view will be remembered for that user for all Projects when using the Board view.

If a user's Column View is later removed, the view will revert to the Default when the Task Board is next opened.

New system field to record Project Outcome

A new optional system field, *Project Outcome,* has been introduced to provide a consistent means of capturing the success, failure or otherwise of Projects throughout your organisation.

Having a standard system field to represent the Outcome mitigates dependency on Custom Fields which can be easily changed, removed or duplicated, potentially compromising data quality.

Customers who created their own custom field for Outcome reference should consider using the new system field and updating its values based on current data.

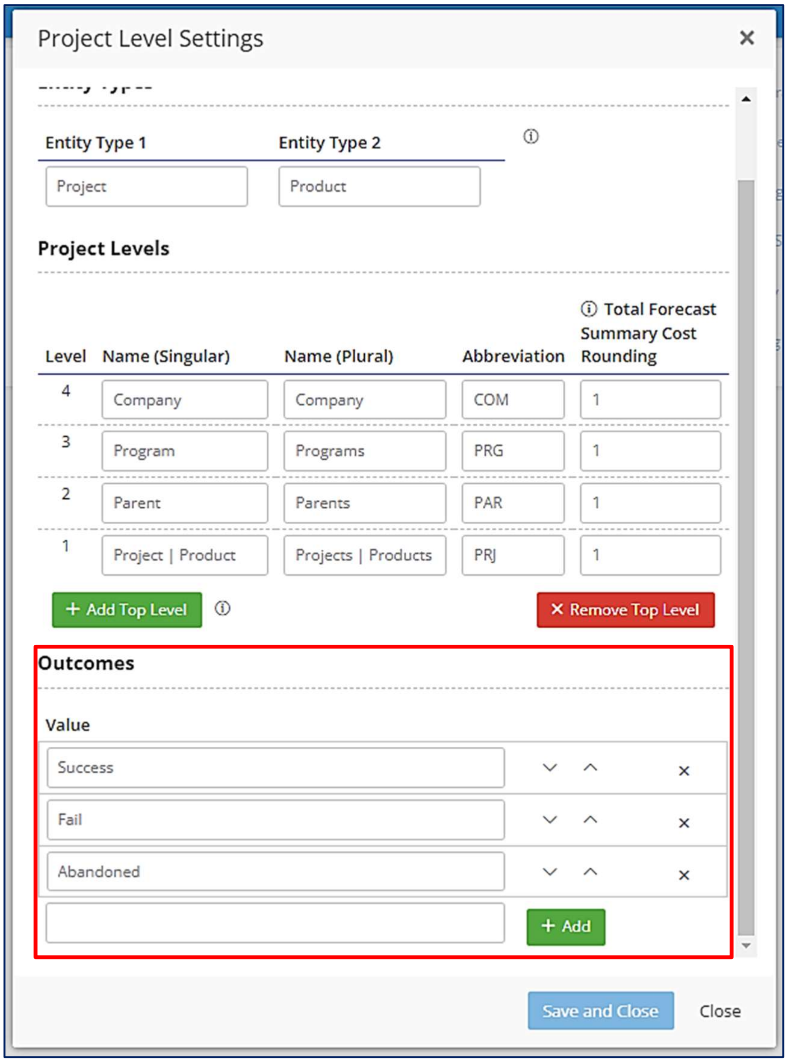
Additionally, we recommend the ongoing capture of Project Outcomes for any clients interested in our services offering for Artificial Intelligence to predict future outcomes based on historical information.

Feature Setup

Pre-requisites: This feature is only available in Project Workflow enabled environments.

The Project Level Settings screen allows up to 10 outcomes to be defined as shown below.

Once two or more Outcomes have been defined, the Outcome field can be added to Project Types as desired; covered in the *Feature Usage* section.

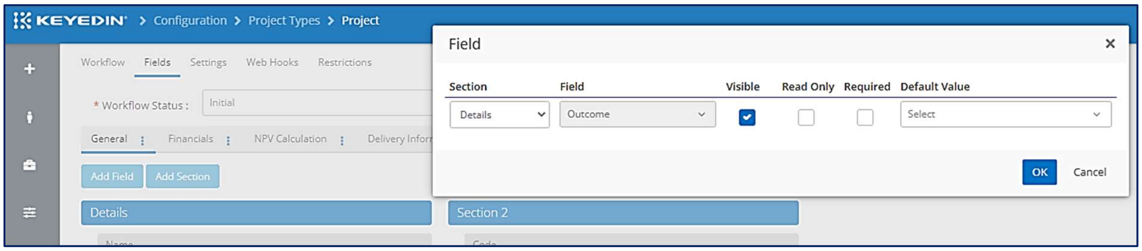


- Enter an Outcome and select **+ Add** to create a new Outcome
- Re-order existing Outcomes using the arrows
- Select X to delete an Outcome (not allowed if any Projects are using this Outcome)

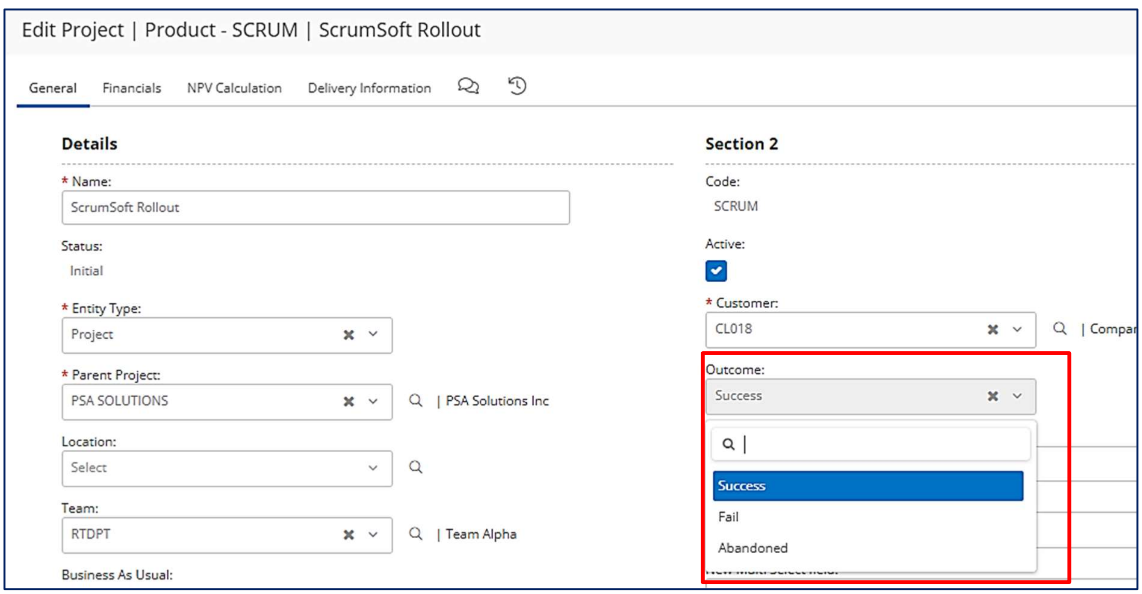
For clients who would prefer alternative terminology to Outcome, this can be set in *Configuration > Screen Labels.*

Feature Usage

The Outcome field is available to add to Project Types using the existing Project Type configuration screen.



The Outcome field can then be viewed and edited on the Project Edit screen for the configured workflow statuses:



Outcomes can also be updated with any of the following:

- Project search screen in-line edit
- Project dataload
- Project Type Workflow Update
- V3 API

Outcome is available in all data views referencing Project data, and included in Project Snapshots.

Administration Enhancements

Administration Dataload Improvements

Dataloads relating to the core Administration entities have been redeveloped using the modern slide-in screens, supported by the API which allows background processing and improved notifications and error handling.

A key change is the use of a single wizard-type screen which combines both template creation and subsequent loading of data, simplifying the current segregated process.

Additionally, using the API to support the processing allows additional fields to be exposed that may not have been available previously – this is particularly prevalent on the Login dataload which provides additional flexibility for creating new Logins.

The following dataloads rewritten using this new methodology are:

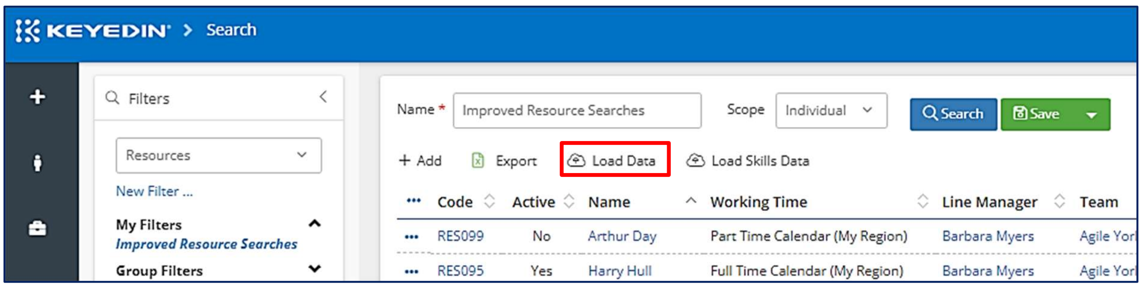
- Activity
- Benefit Actual
- Charge
- Client/Customer
- Contact
- Cost
- Cost Centre
- Department/Team
- Location
- Login
- Resource
- Resource Skill
- Role
- Skill

Feature Usage

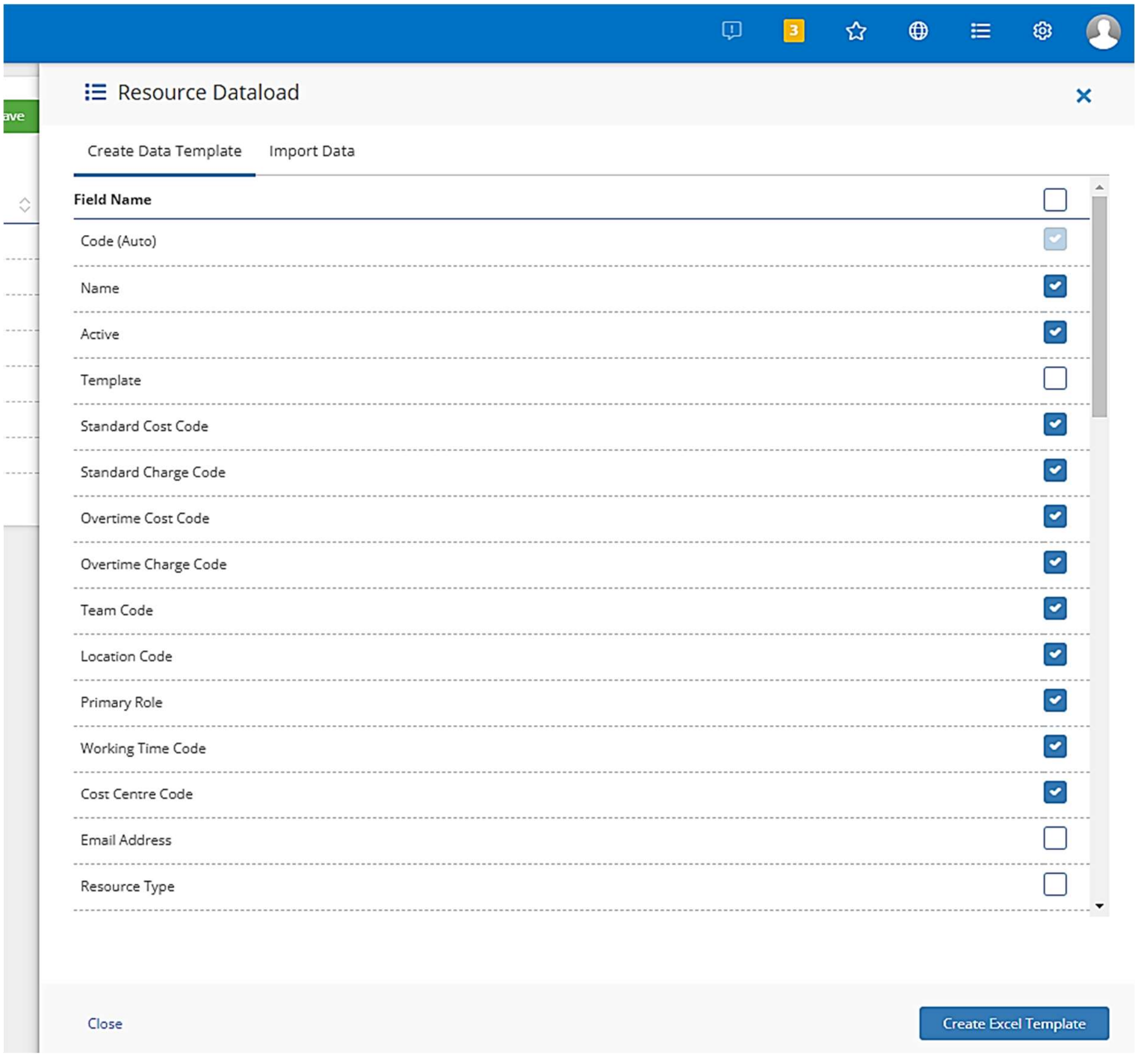
Creating a Dataload Template Spreadsheet

First select the required entity to dataload (either via the Search Screen or top Administration Menu) and then select the **Load Data** icon.

The example below uses the Resource entity.



The first tab of the slide-in dataload screen, **Create Data Template**, allows selection of the template data fields. Select fields as required and then select **Create Excel Template**.

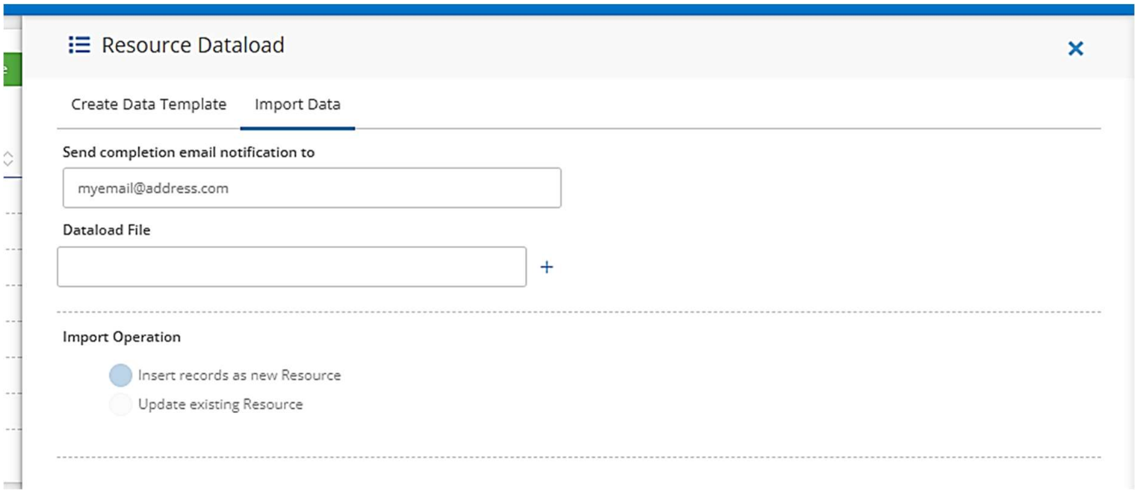


This will download the Excel Template spreadsheet, whilst keeping the dataload screen open.

Other than increased availability of fields, no changes have been made to the Excel Template spreadsheets so populate and save as per the usual process.

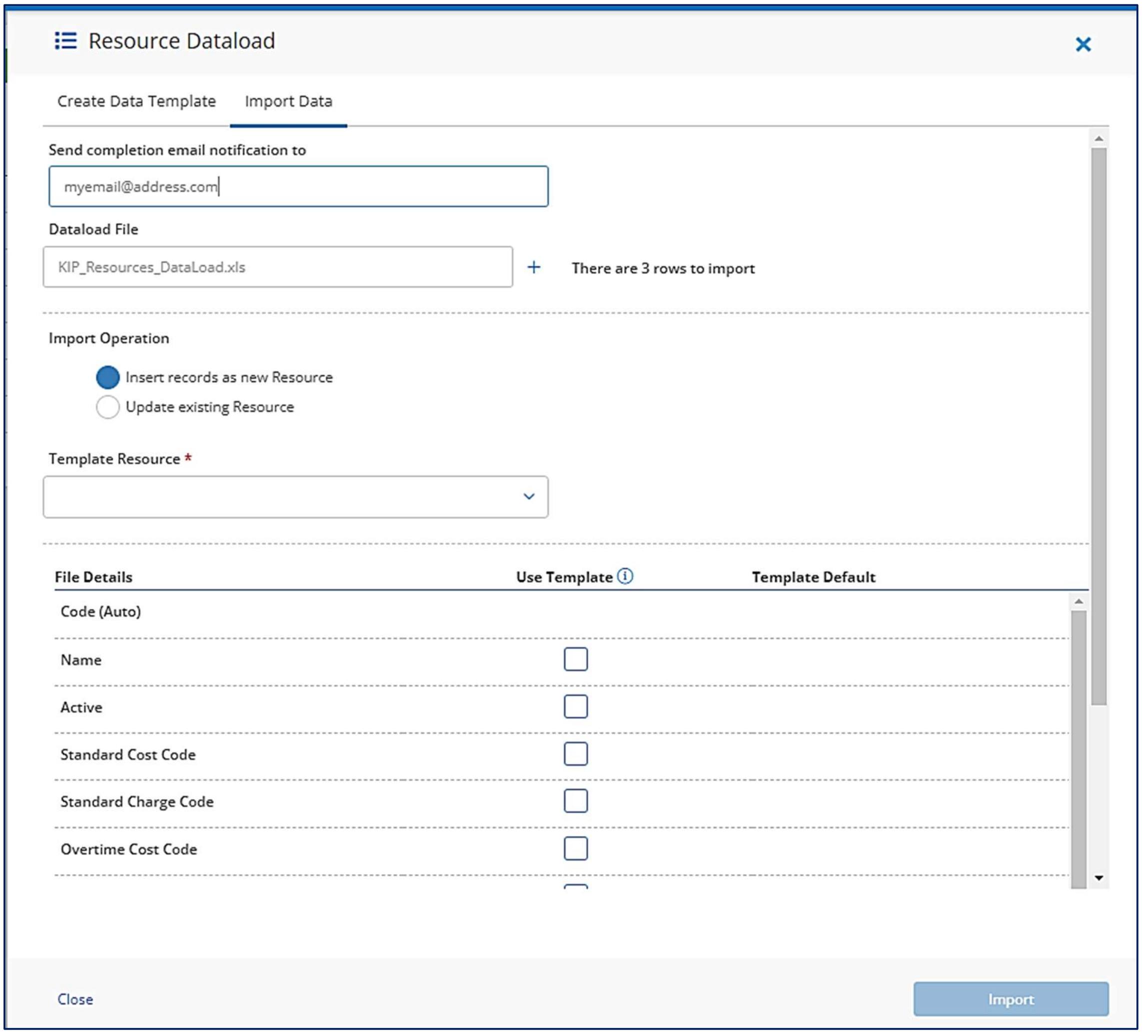
Importing Data from the Template Spreadsheet

Switch to the **Import Data** tab of the Dataload screen



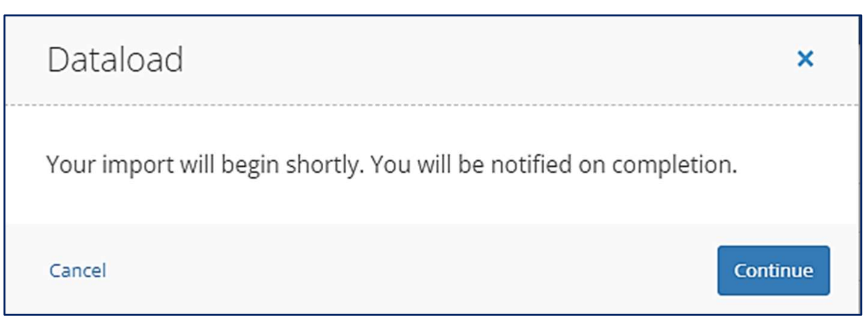
Send completion email notification to: is pre-populated with Resource email address associated to the active Login (if set) and can be optionally used to receive email notifications following processing.

Dataload File: Click **+** to select and upload the completed Template spreadsheet.

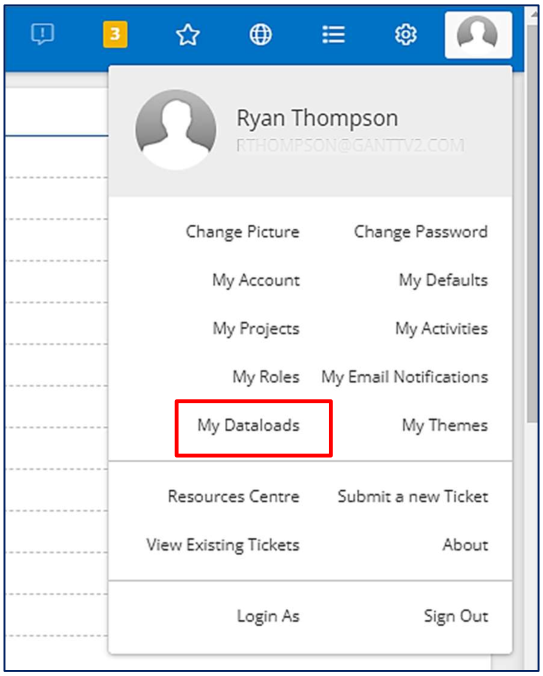


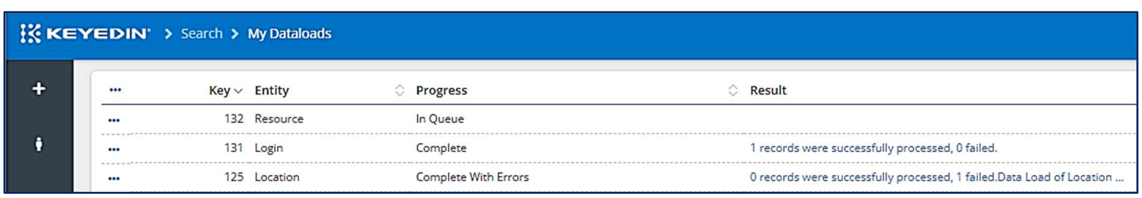
Once the file has uploaded select whether to **Insert** or **Update**, completing the remaining options are per the usual process.

Select **Import** when ready to start the background processing.

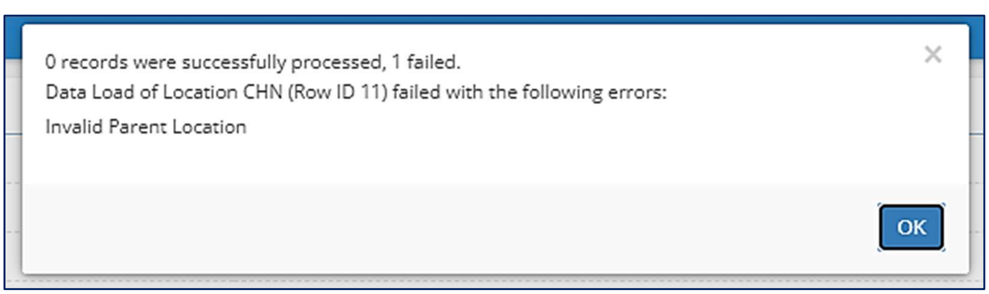


The status of any current and previous dataloads can be seen in the **My Dataloads** screen, accessible via the user's personal menu.





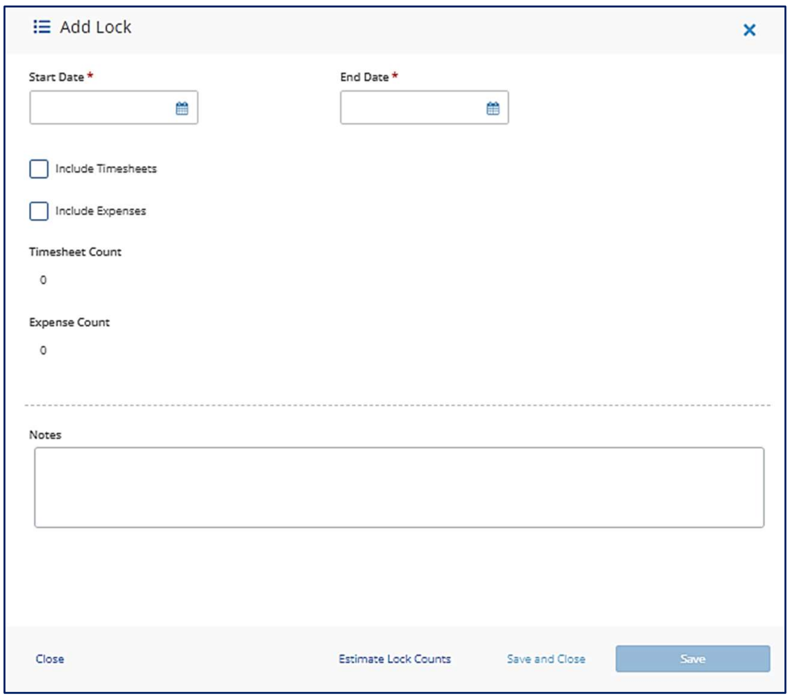
Click into the result to see further detail around any errors or view the automatically produced email sent to the chosen email address above.



New Slide in Screen for Locks (Timesheet and Expense)

Locks represents the last of the remaining Administration entities to be redeveloped using the modern slide-in screens and improved presentation.

The fields and operation are as before, and requires *Login Profile > Customer Accounts > Create and View Locks* permission to access from the Search Screen.



Data View Changes for v7.5

A summary of Data View changes since the last major release (v7.4) can be found below.

Summary of **new** Data Views since v7.4:

Data View	Description
Billing Information Data, All Invoices (v1.0.0)	New Data View to report on Draft as well as Authorised Invoices
Planning General Data, all Versions (v7.0.0)	New Data View to report on Draft as well as Published plans
Report Usage (v1.0.0)	New Data View showing report configuration and usage detail
Skill, Demand and Capacity Monthly Data (v7.0.0)	New Data View to report on skills demand against capacity, by month
Skill, Demand and Capacity Weekly Data (v7.0.0)	New Data View to report on skills demand against capacity, by week

Summary of Data View **changes** for v7.5.
Earlier changes after v7.4.0 are additionally denoted by an asterisk (*).

Data View	New Fields
Action General Data (v6.0.10)	Added Project Outcome, Parent Project Fields
Action Type Data (v6.0.2)	Added Project Outcome
Billing General Data (v6.0.6)	Added Project Outcome
Billing Allocated vs Invoiced Data (v6.0.1)	Added Project Outcome
Contract General Data (v6.0.5)	Added Project Outcome
Billing Information Data (v6.0.3)	Added Project Outcome
Billing Un-allocated Time and Expense (v6.0.1)	Added Project Outcome
Budget General Data (v6.0.1)	Added Project Outcome
Customer Data (v6.0.6)	Added Project Outcome
Custom Field Data (v6.0.4)	Added Is Multi Selectable
Deliverable Data (v6.0.14)	Added Project Outcome, Project Owner*, Parent Project Fields

Deliverable Audit Data (v6.0.9)	Added Project Outcome, Project Owner,* Project Department*, Previous Delivery Date*, Parent Project Fields
Forecast Demand Comments (v6.0.5)	Added Project Outcome
Forecast Demand Data (v6.0.14)	Added Interested Resources*, Project Outcome
Forecast Demand Monthly Data (v6.0.2)	Added Project Outcome
Forecast Demand Weekly Data (v6.0.4)	Added Project Outcome to v6.0.4 * v6.0.3 was a reissued data view to correct duplicate data over split periods in the previous version v6.0.2. Certain fields have been removed; please consult with Support to assess impact if upgrading from v6.0.2.
Forecast Demand Only Data (v6.0.17)	Added Project Outcome
Forecast Expenditure Comments (v6.0.2)	Added Project Outcome
Expense General Data (v6.0.5)	Added Project Outcome
Issue General Data (v6.0.3)	Added Project Outcome, Parent Project Fields
Location Data (v6.0.1)	Added Parent Location Code and Name
Planning General Data (v6.0.20)	Added Project Plan Control Fields *, Project Outcome, Task Board Level, Task Skills*
Planning Assignment with Resource Charge Rates (v6.0.6)	Added Project Outcome
Portfolio Analysis Data (v6.0.1)	Added Project Outcome
Project Audit Data (v6.0.4)	Added Project Outcome
Project Workflow Approval Audit (v6.0.4)	Added Project Outcome
Project Workflow Outstanding Approval Data (v6.0.1)	Added Project Outcome
Forecast Summary Data (v6.0.16)	Added Project Outcome
Forecast Benefit Data (v6.0.7)	Added Project Outcome
Forecast Expenditure Data (v6.0.10)	Added Project Outcome
Project Data (v6.0.10)	Added Project Outcome, Parent Project Cost Centre
Project Snapshot Data (v6.0.7)	Added Project Outcome, Risks and Issues Fields*

Resource Demand Data (v6.0.3)	Added Project Outcome, Belongs to Department*, Resource Line Manager*, Resource Cost Centre* fields
Risk\Issue General Data (v6.0.7)	Added Project Outcome, Parent Project Fields
Risk General Data (v6.0.4)	Added Project Outcome, Parent Project Fields
Security Group Data (v6.0.1)	Added Project Outcome
Project Supply and Assignment Data (v6.0.2)	Added Project Outcome
Project Supply Data (v6.0.5)	Added Project Outcome
Time and Expense General Data (v6.0.5)	Added Project Outcome
Timesheet General Data (v6.0.13)	Added Project Outcome, Task Is Deleted*, Parent Project Fields
Task Actual and Planned Data by Resource (v7.0.1)	Added Project Outcome

Data View changes are not applied automatically. Please contact your customer representative for installation guidance if required.

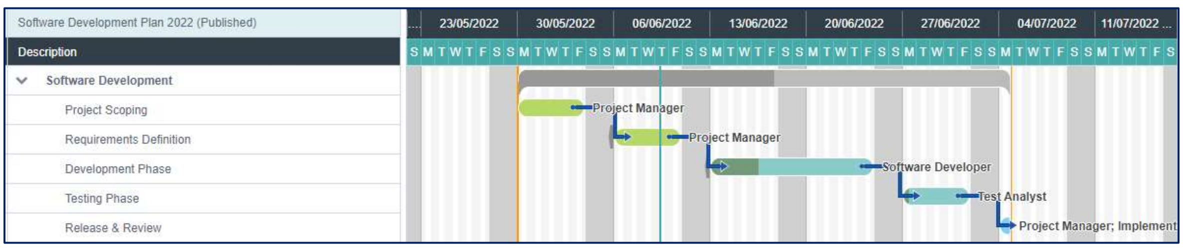
Summary of Additional Features since the last Major Release (v7.4)

7.4.1 (January 2022)

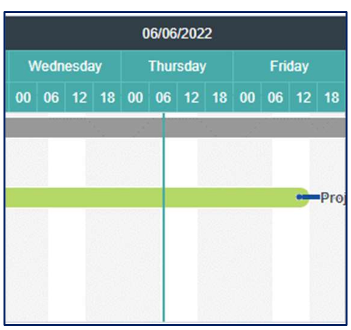
Addition of a *Today* Line on the enhanced Task Planning Gantt

The Gantt chart within Task Planning has been enhanced with a new green vertical line denoting the current date to easily identify current planned Task activity, including overdue Tasks, at a glance.

Example where the current date is 9th June:



At higher zoom levels where time is displayed, the Today line aligns with the current system time:



The line is also displayed when viewing the Projects timeline (above level one).

Resource Plan: View Scheduling Requests' Assignments Detail (Roles)

Feature Summary

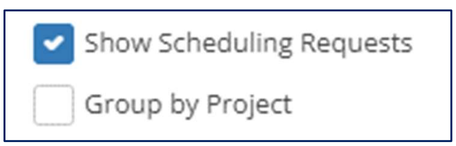
In the v7.2 Release (Autumn 2020) the Scheduling Mode Resource Plan was enhanced with a new Resource Assignment information panel to provide improved visibility of Resource Assignment details for a selected period.

For v7.4.1, this functionality has been extended to the 'Scheduling Requests' (Role Assignments) grid.

The new panel, which can be optionally toggled on or off, replicates the existing information shown when expanding the Roles/Project details and hovering over the information symbol.

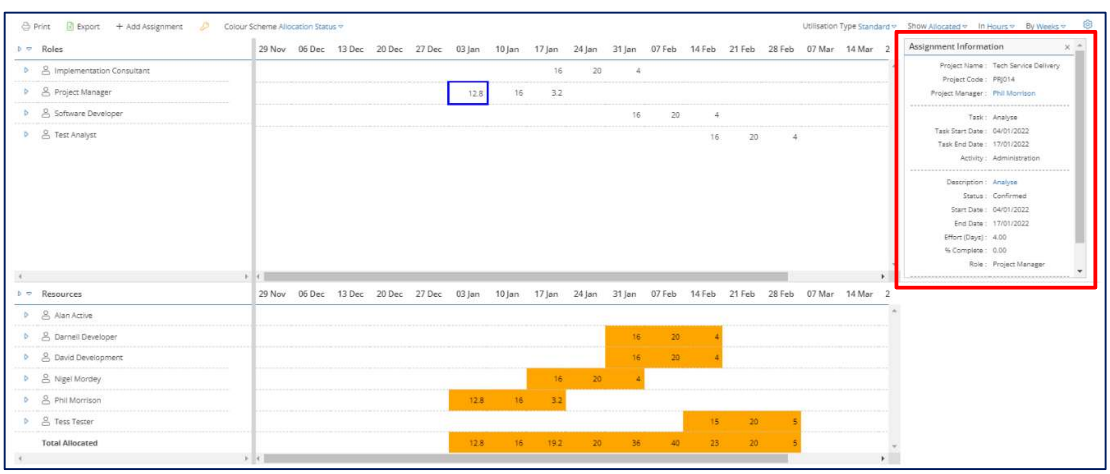
Feature Usage

This feature is available to all users of the Scheduling Mode Resource plan when the 'Show Scheduling Requests' filter option is selected.

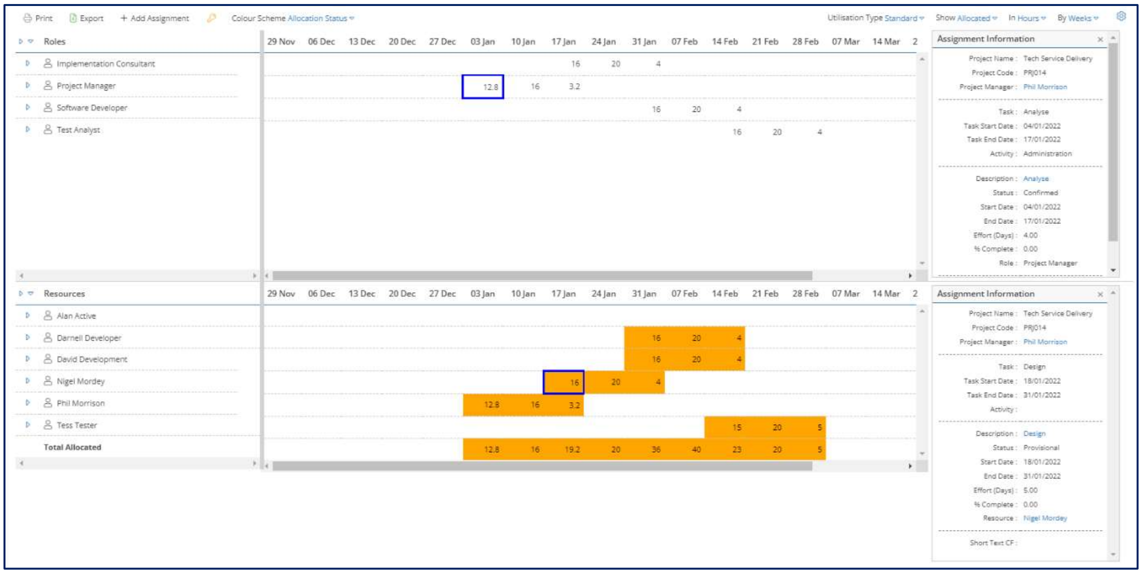


Displaying the panel

To display the new panel simply **double click on a cell against the Role row**, for any period. The panel will display to the right of the normal grid. Once shown, the panel will continue to display in future sessions until it is closed using the 'x' symbol.

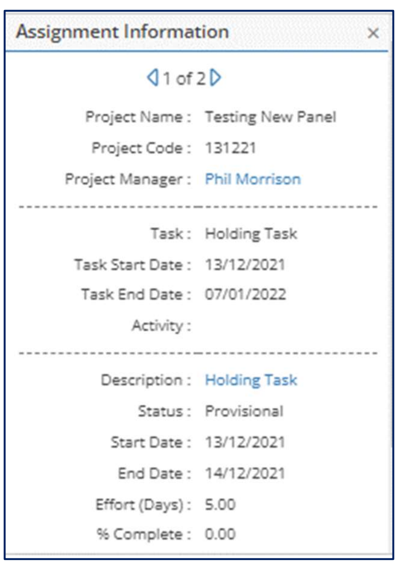


The new Role Assignment panel can be displayed in addition to the existing Resource Assignment panel displayed by double clicking any Resource Assignment cell in the lower grid – no changes have been made to this existing behaviour.



Navigating Assignments

The new Role Assignment panel behaves like the existing Resource Assignment panel, where each scheduled Role Assignment in the selected period is displayed. If the Role has multiple Assignments, the number of Assignments is indicated at the top of panel, with navigation cursors to scroll through the detail.



Please be aware that if the ***Group By Project*** option is selected, the Role Assignment panel will only show the Assignments for the selected role, in the selected period for the selected Project.

To view another Role, single click on a cell against another Role row, for any period.

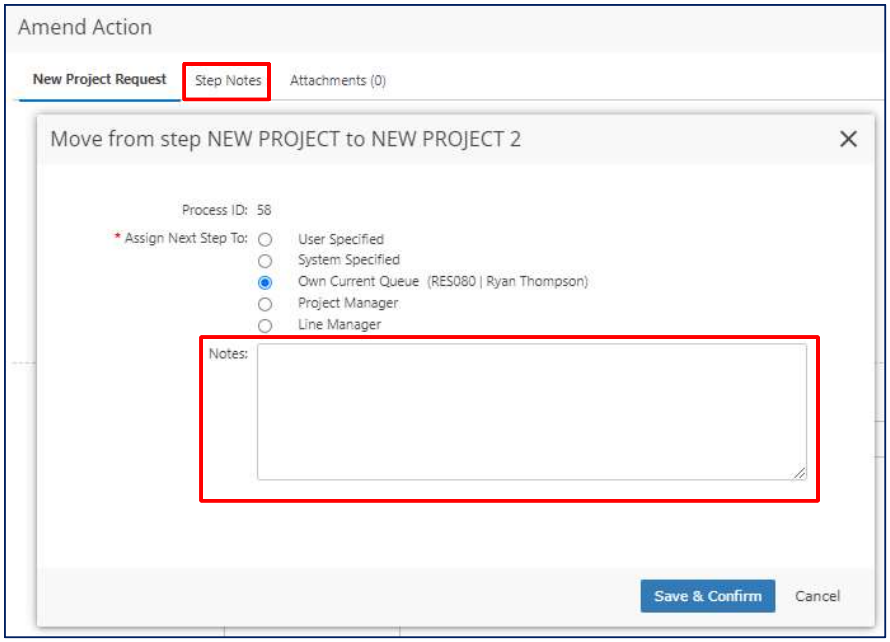
As per the existing behaviour, clicking anything other than a cell on the Role or Resource row (for example Project or Assignment level results row) will **not** update the panels, as the primary use case is to facilitate navigation at a Role or Resource summary level.

Ability to disable Step Notes for 'Process Support' Action Types

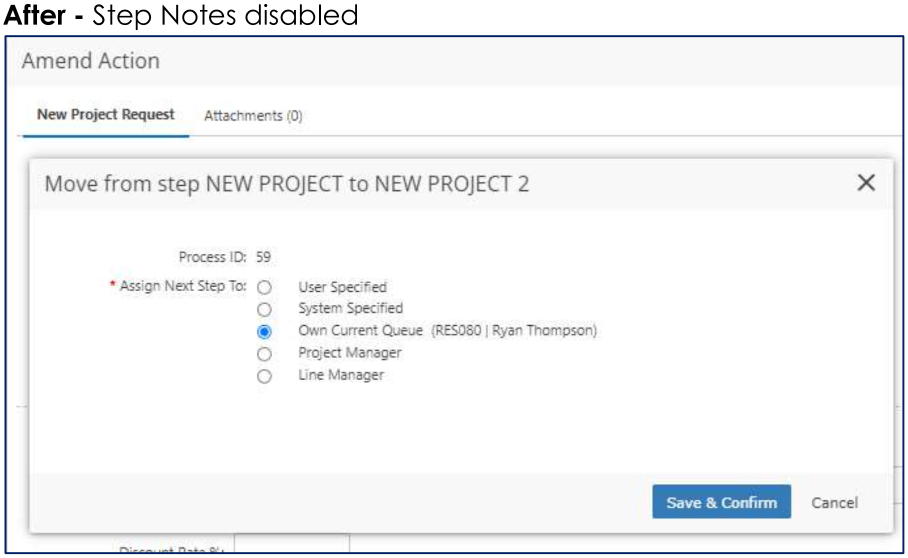
For clients using 'Process Support' Action Types, for example where a process flow is configured over multiple steps, the individual Action Types can now be configured so that Step Notes are suppressed when moving between steps.

Where Step Notes have been disabled on a specific Action Type, the Step Notes tab and Notes box when moving steps are no longer visible.

Before - existing behaviour with Step Notes allowed:

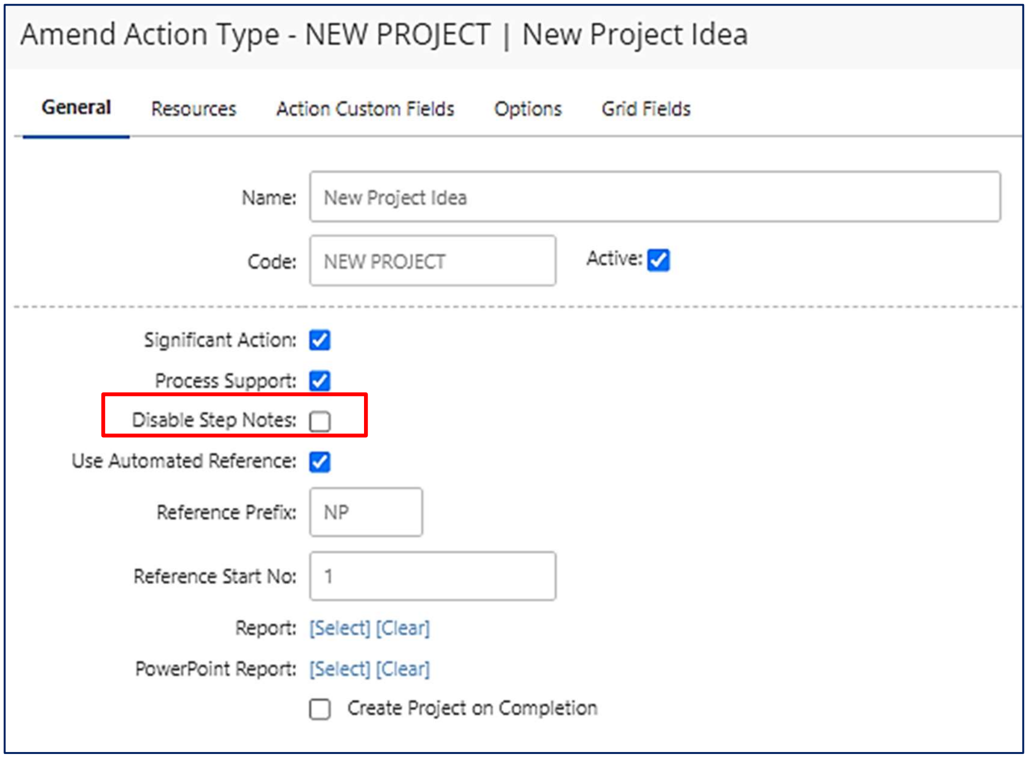


After - Step Notes disabled



Action Type Configuration

System Administrators, or those responsible for configuring Action Types, will now see a new option, ***Disable Step Notes***, when adding or editing a Process Support Action Type.



Please be aware, to suppress Step Notes for all steps of this process flow, this will need to be repeated for each Process Support Action Type associated with the Action View.

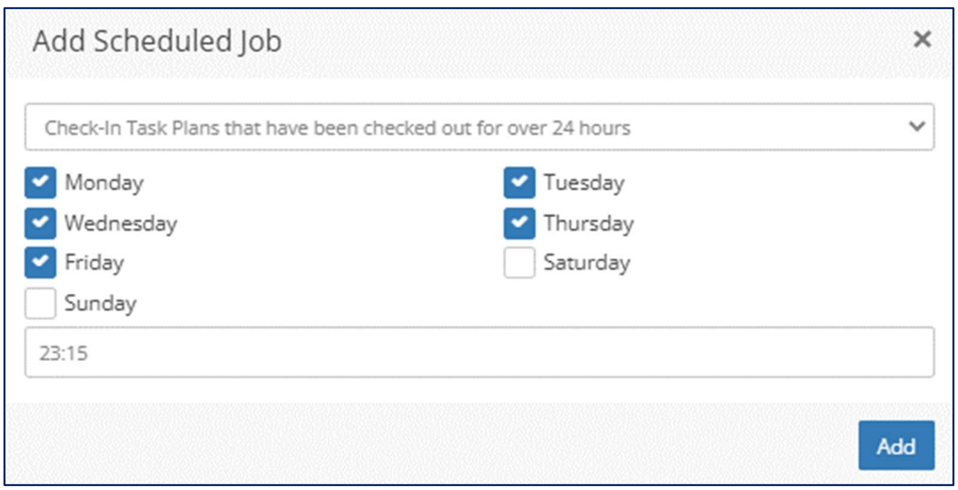
7.4.2 (February 2022)

New Scheduled Job to check-in Task Plans that have been checked out over 24 hours

A new scheduled job is available in Configuration > **Scheduled Jobs** to allow System Administrators to automatically check-in all Project Task Plans that have been checked out for over 24 hours. This applies to both Published and Draft plans.

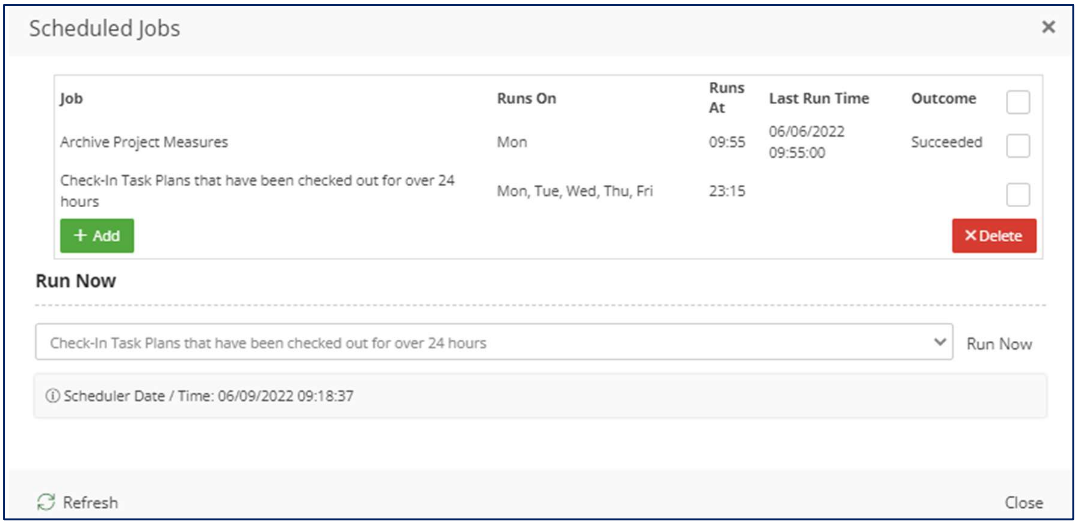
For Projects where multiple users are required to check-out and work on the same plan, this helps eliminates the uncertainty where the previous user may not have remembered to check the plan back in.

The job, named ***Check-In Task Plans that have been checked out for over 24 hours*** can be scheduled for selected days of the week at an appropriate time.



Please be aware that all dates and times in KeyedIn are based on the server time for your region (UK, USA, AUS). Therefore the time of the scheduled job and the last check-out time of the Task plan are relative and consistent for all users across your organisation.

Alternatively, the job can be run instantaenously using the ***Run Now*** option

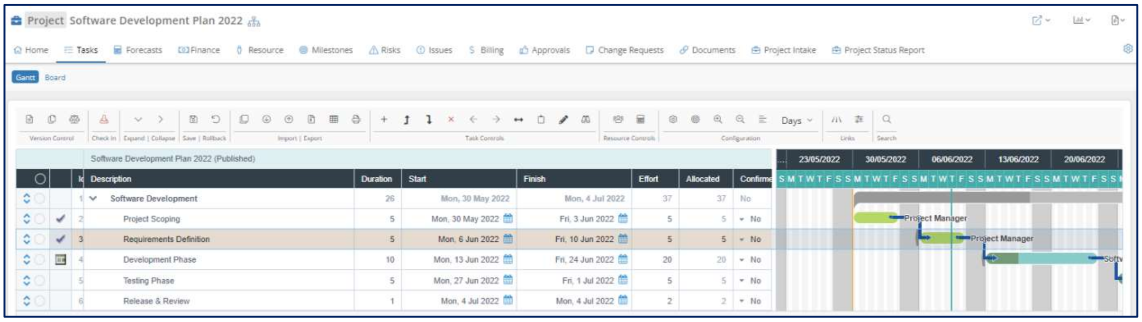


Important: if any users are working on the Task Plan at the time the scheduled job is run then any unsaved changes will be lost. Therefore please consider scheduling the job outside of standard business hours to minimise risk, and communicate any process changes with users where appropriate.

Any Task Plans that have been checked out for less than 24 hours will not be affected by the scheduled job.

Task Plan Gantt - Highlight the Current Date's Task on Open

The enhanced Task Planning Gantt now automatically locates and highlights the earliest Task scheduled on the current date when the plan is loaded.



The highlighting applies to the earliest visible Task where any of its scheduled dates coincide with the current date. Where a Task is matched, the Gantt panel will scroll to the current date, also visually indicated by the recently introduced *Today* line.

The new behaviour for landing on a Task with the current date only applies when initially loading the Task plan or selecting a different plan version. Note, it does not apply to Summary Tasks, or Tasks hidden in a collapsed Summary Task.

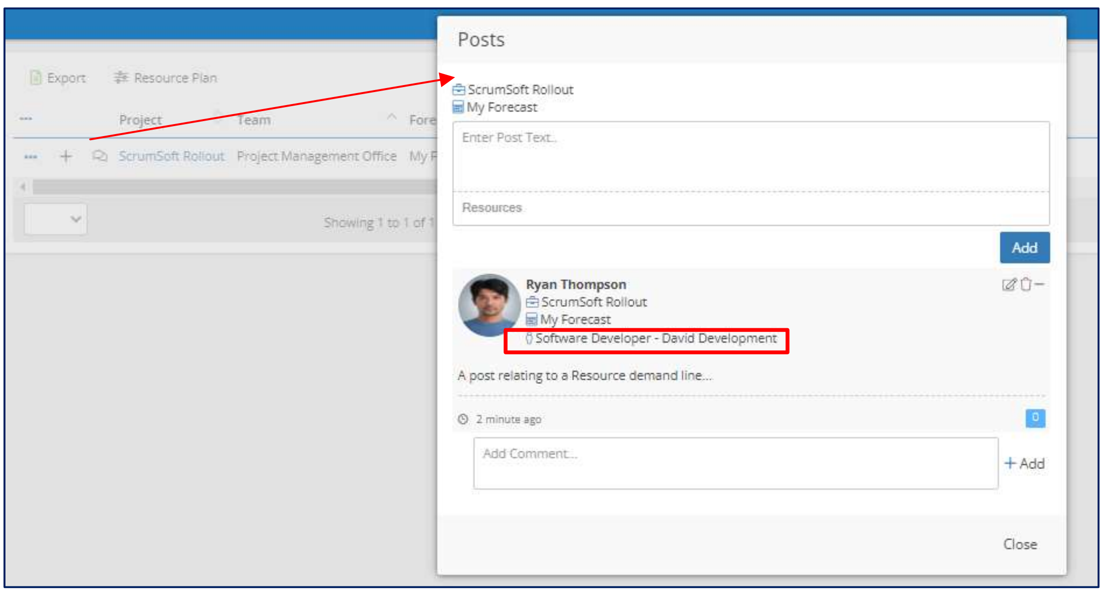
The existing behaviour where the focus remains on the last selected Task following a Save, or Check-Out operation continues to apply.

View Role / Resource on Forecast Demand Collaboration Posts

For clients using Forecast Demand Collaboration Posts, an additional reference to the Demand line's Role (or Role and Resource) is now displayed when viewing the Post outside of the Forecast (such as on the on Requests Screen or Collaboration widget) to make it easier to locate Demand line being referenced.

The Resource/Role reference is linked directly to the Forecast Demand line and will be automatically updated if further changes to the Role or Resource are made on the Forecast.

Example: Viewing the Forecast Demand post on the Request screen:



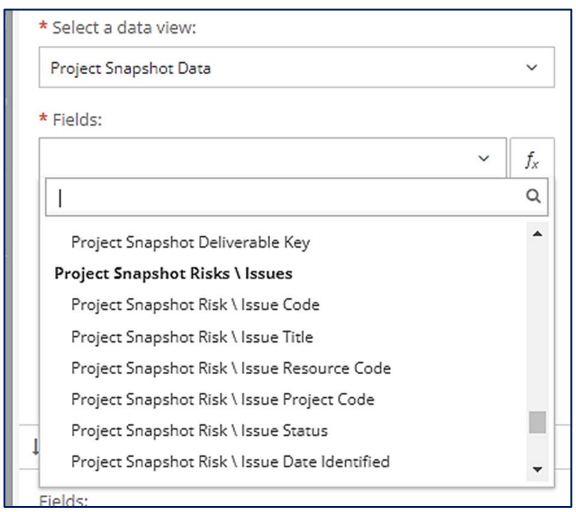
7.4.3 (March 2022)

Inclusion of Risks and Issues data in Project Snapshots

When creating a Project Snapshot (either manually or a scheduled job) any Risks or Issues recorded on Projects at or below the specified snapshot level will now be included in the snapshot data.

Please note that Risks and Issues included in a snapshot cannot be deleted from the system, only *Closed*.

The Project Snapshot data view has been updated to include this additional data in the new Risks/Issues section, where the *Type* field can be used to differentiate between the two.



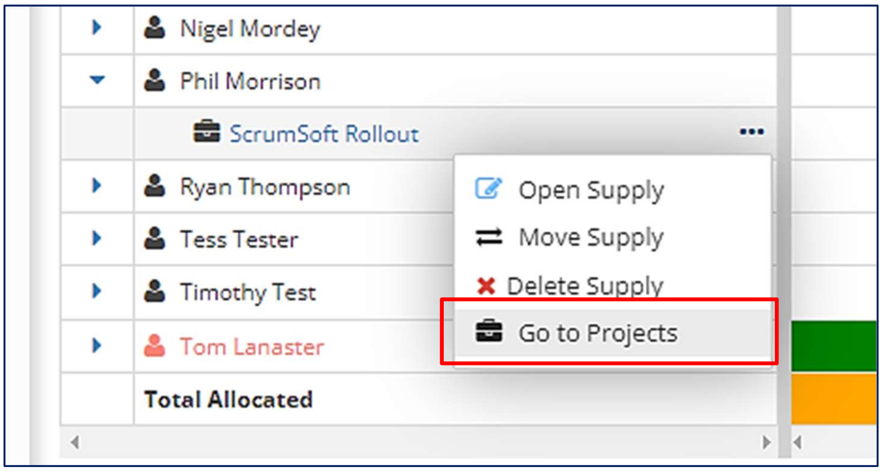
The updated data view is available on request from Support.

7.4.4 (April 2022)

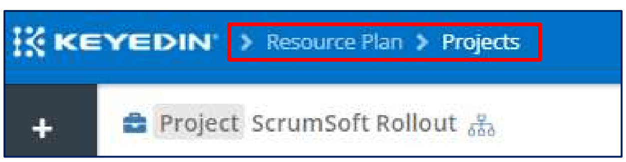
Navigate to a selected Project from the Resource Plan

A new link on the Resource Plan, ***Go to Projects,*** is now provided against the Project row's menu […] to more easily view the selected Project's dashboard (Home tab).

This is available in all Resourcing Modes (Scheduled, Strategic and Combined)

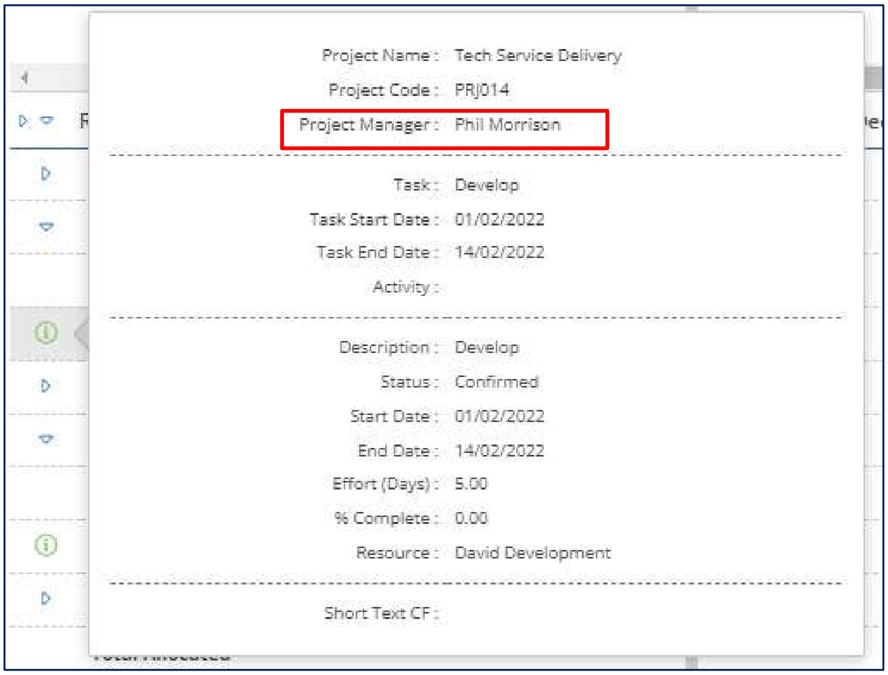


A breadcrumb trail is provided back to the Resource Plan:



Project Manager display on Resource Plan Assignment Information

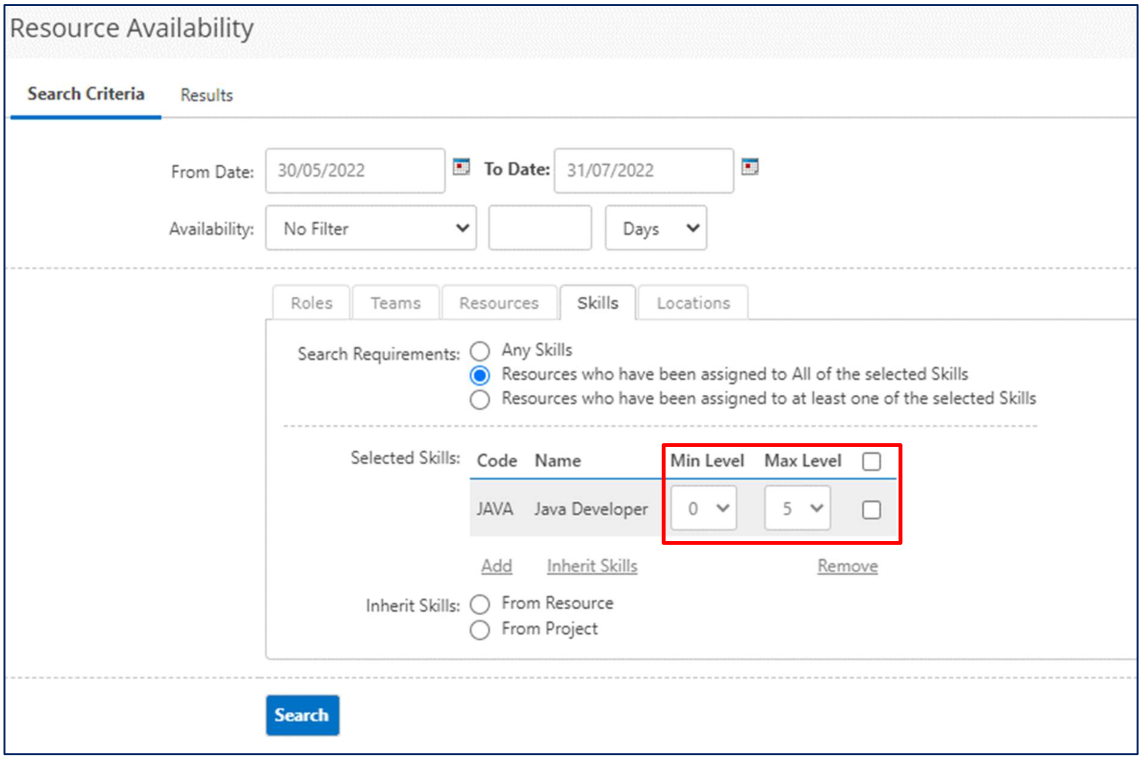
When hovering over the information tooltip for Resource Plan Assignments, the Project Manager name is now displayed, as highlighted below:



Additionally, this is also visible in the Assignment Information pop-up panel (scheduling mode only) if in use:

Supply Availability Search – filter by Skill Level

The Resource Supply Availability Search, accessible when adding Supply via the Requests Screen or Strategic Resource Plan, has been improved to allow search and filter by Skill ***Level***, in addition to the existing search of Skill(s) simply being present.

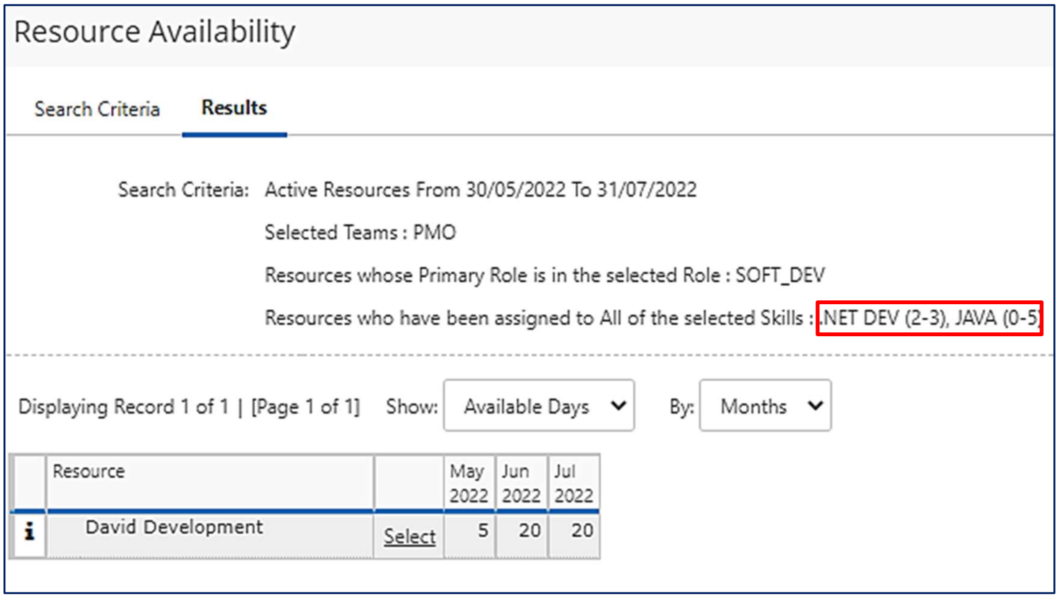


For flexibility, the *range* of the Skill levels can be filtered, and the following logic describes how the *Min* and *Max* Skill Level filters are applied by default:

- When manually **adding** selected Skill(s), or if the skills are pre-selected because the related **Forecast demand line** has associated Skill(s), then the *Min* and *Max* are set to the lowest and highest value allowed, as configured against the selected Skill(s), respectively.
- When **inheriting** selected Skill(s), the *Min* and *Max* are both set to the specific Skill level of the Resource (or Project) being inherited from.

In either case, the search range can be manually adjusted to suit your process.

The search results page will also indicate the skill level, if applicable:



* Please note, it is not currently possible to ***request*** a specific skill level (via the Forecast) however this will be addressed in a future enhancement as part of the upcoming Forecast redevelopment.