



Activity Map 2020.R2.0

User Guide

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Table of Contents

INTRODUCTION	3
MENU BAR	4
ACTIVITY MAP	4
Request Update	4
Activity Map Table Buttons	5
Activity Map Hierarchy	6
Bulk Edit	7
Visual Enhancements	8
Gantt Chart	9

Introduction

One of Devensoft's hallmark features in its platform is the Activity Map and while it has served our clients for years, we are pleased to introduce the new and improved Activity Map for Integrations and Targets. While the functionality has not drastically changed, the key improvement, ***inline editing***, like Excel, allows users to edit directly on the screen. This translates into fewer clicks with data entry and improved efficiencies and effectiveness.

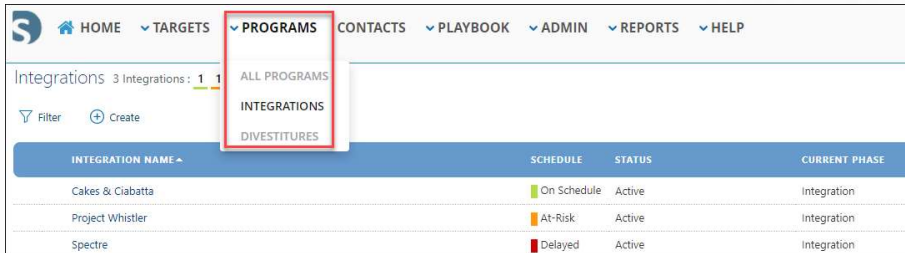
Other improvements include the Menu Bar whereby **Programs** replaces the menu choice, **Integrations**. Under Programs, Integrations is listed along with All Programs and Divestitures. The ***Bulk Edit*** functionality has been improved along with exporting the Activity Map to PDF, enabling/disabling columns, plus a host of other new enhancements and features.

Lastly, the hierarchy has been improved with the replacement of "Category" with "SubWorkstream." The hierarchy is defined by Project, Workstream, SubWorkstream, Milestone, Task and SubTask.

This guide explains how to navigate to your Integrations and use the new features in the Activity Map primarily for Integrations with references to the Target module when required.

Menu Bar

Integrations now lives under the Programs menu choice. Navigate to **Programs/Integrations** to view your integrations.



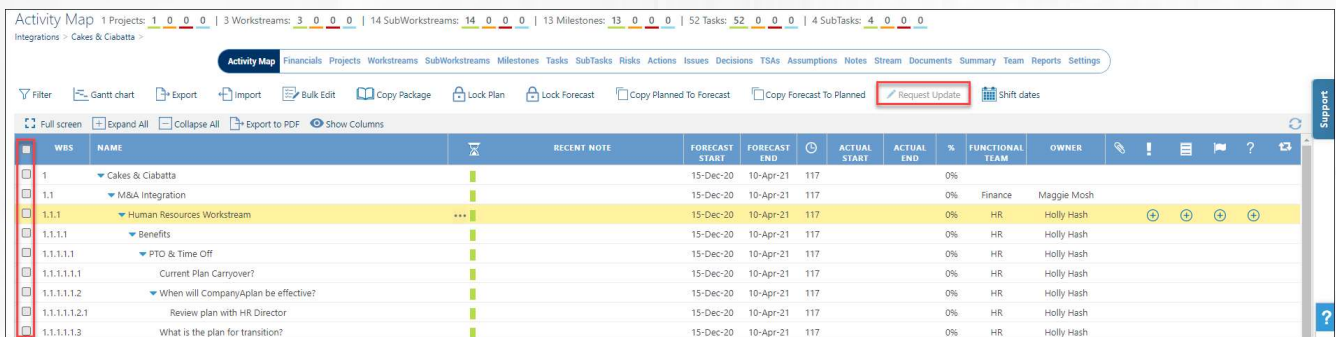
PROGRAM MENU

For our clients that manage Divestures, these can be managed under the Programs menu. Creating and managing Divestures follows the same process as Integrations.

Activity Map

The Breadcrumbs and Tab Bar remain the same as in the previous version. The Activity Map Button Bar now displays the **Request Update** button as grayed out until Activities are selected in the far-left column of the Activity Map.

Request Update

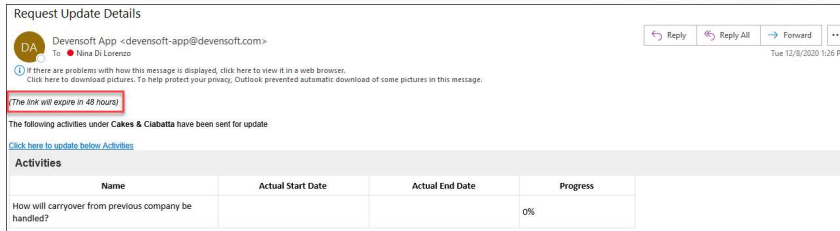


ACTIVITY MAP VIEW

To use the Request Update feature:

1. Click in the checkbox(es) to select the activities that you want to update.
2. Select the **Request Update** button.
3. In the Request Update window, make your selections.
4. Click **OK**.
5. The Request Update confirmation window appears.

- Click **OK**.
- The recipient receives a message like the one below.



REQUEST UPDATE EMAIL

Note: As indicated in the email, the link to the activities will expire in 48 hours.

- Once the updates are made, they are immediately reflected in the Activity Map.

Activity Map Table Buttons

The Activity Map table has several buttons that are described below.

The screenshot shows a table with columns: WBS, NAME, RECENT NOTE, FORECAST START, FORECAST END, ACTUAL START, ACTUAL END, %, FUNCTIONAL TEAM, and OWNER. The table contains several rows of data, including 'Cakes & Ciabatta', 'M&A Integration', 'Human Resources Workstream', 'Benefits', 'PTO & Time Off', '401(k) Plan', and 'Health Insurance'. The table also has buttons for 'Full screen', 'Expand All', 'Collapse All', 'Export to PDF', and 'Show Columns' at the top.

ACTIVITY MAP TABLE BUTTONS

Full screen	Displays the Activity Map in full screen. Breadcrumbs, Tab Bar and the Activity Map Button Bar are not available in this mode. To exit Full Screen mode, select the button in the upper, left corner with the same name
Expand All	Expands the entire Activity Map.
Collapse All	Collapses the Activity Map.
Export to PDF	Exports the Activity Map (or whatever data is displayed on the screen) to PDF with options to rotate, download and print. Note: Prior to using this feature, select Expand All so that the entire workplan is displayed in the PDF file. You can also apply filters to display filtered data in the PDF file.
Show Columns	Enables/disables those columns that a user wants to display/not display in the Activity Map.

Activity Map Hierarchy

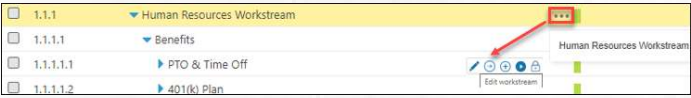
The only change within the Activity Map hierarchy is the “Category” level which has been replaced with the “SubWorkstream” level as displayed in the below screen capture.

WBS	NAME	TYPE	RECENT NOTE	FORECAST START	FORECAST END	ACTUAL START	ACTUAL END	%	FUNCTIONAL TEAM	OWNER
1	▼ Cakes & Cabatta			15-Dec-20	10-Apr-21	117		0%		
1.1	▼ M&A Integration	Project		15-Dec-20	10-Apr-21	117		0%	Finance	Maggie Mosh
1.1.1	▼ Human Resources Workstream	Workstream		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1	▼ Benefits	Subworkstream		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1	▼ PTO & Time Off	Milestone		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.1	Current Plan Carryover?			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.2	▼ When will Company/Plan be effective?	Task		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.2.1	Review plan with HR Director	SubTask		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.3	What is the plan for transition?			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.4	How will carryover from previous company be handled?			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.5	Personal Leave Time			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.6	Confirm process on PTO payout if EE terminates prior to scheduled depts			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.7	Holidays?			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash
1.1.1.1.1.8	What about Jury Duty, Holiday Pay for current year?			15-Dec-20	10-Apr-21	117		0%	HR	Holly Hash

ACTIVITY MAP HIERARCHY

Editing Activities has changed by pointing the mouse over the ellipsis and the editing/managing menu appears. Each button displayed on this menu, along with the default columns, is described in the below table.

Note: Devensoft’s dates roll up, so that if a SubTask has an Actual Start Date of December 12, the Task will also have an Actual Start Date of December 12.

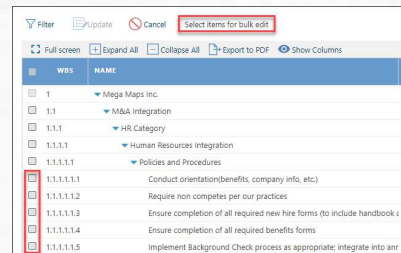
Name	To edit, view details, add, start or lock a forecast date, select the ellipses at the end of the Name row.  Note: Once the Start icon is selected, it switches to the Finish icon.
Status	Displays the hourglass icon ⌚ in the header.
Recent Note	Double-click the field to enter or edit an existing note.
Forecast Start	Double-click the date (or area where the date would be displayed), then select it again to display the calendar. Only the <i>current date or past dates</i> may be entered in this field. Note: This field is required field for Gantt chart purposes.
Forecast End	Double-click the date (or area where the date would be displayed), then select it again to display the calendar. Only the <i>current date or future dates</i> may be entered in this field. Note: This field is required field for Gantt chart purposes.
Duration	This is a new field that auto calculates the number of days it will take to complete the Activity. The duration is calculated by adding the Forecast Start date and the Forecast End date. This field is a non-editable field.
Actual Start	Double-click the date (or area where the date would be displayed), then select it again to display the calendar. Select the start date of the activity. Note: Only the current date or previous dates may be entered.

Actual End	Double-click the date, (or area where the date would be displayed), then select it again to display the calendar. Select the start date of the activity. Note: Only the current date or previous dates may be entered.
%	For Integrations only as this field is not available within a Target's Activity Map.
Functional Team	Auto populates once the Owner field is completed. You may also assign a different team.
Owner	Select an owner from the picklist and the functional team is automatically assigned. Yet, you can assign a different team.
Responsible	Not shown in the above screen capture. Can be enabled by pressing the Show Columns button, press Show Columns again and select Responsible .
Attachment	Displays the sum of Attachments at that level.
Risk	Displays the sum Risks at that level.
Action	Displays the sum of Actions at that level.
Issue	Displays the sum of Issues at that level.
Decision	Displays the sum of Decisions at that level.
Dependencies	Displays Dependency arrows between two (2) Activities.

Bulk Edit

This process has been streamlined to improve the efficiencies in updating forecast dates, actual dates, owner, and functional team. Please follow the below steps when using this feature.

1. From the Activity Map, select the **Bulk Edit** button.
2. Place a checkmark in the checkbox to indicate what activities should be updated.



BULK EDIT SELECTIONS

3. Once Activities have been selected, the **Update** button is enabled.
4. Press the **Update** button. The Bulk Edit window is displayed.

The BULK EDIT window is a modal dialog with a close button (X) in the top right. It contains the following fields:

- Forecast Start Date: dd-MMM-yy
- Forecast End Date: dd-MMM-yy
- Actual Start Date: dd-MMM-yy
- Actual End Date: dd-MMM-yy
- Owner: (Not Set)
- Functional Team: (Not Set)

 At the bottom, there are two buttons: CANCEL and SAVE.

BULK EDIT WINDOW

5. Make the necessary updates.
6. The updates are reflected in the Activity Map

Visual Enhancements

Adjusting the width of columns, hiding and unhiding columns and tool tips are several enhancements that are described below.

The screenshot displays the Activity Map interface for 'Cakes & Ciabatta'. The top navigation bar includes 'Activity Map' and various menu options like 'Risks', 'Actions', 'Issues', etc. Below the navigation bar, there are several icons for actions like 'Filter', 'Gantt chart', 'Export', 'Import', 'Bulk Edit', 'Copy Package', 'Lock Plan', 'Lock Forecast', 'Copy Planned To Forecast', 'Copy Forecast To Planned', 'Request Update', and 'Shift dates'. The main area shows a tree view on the left with a 'Show Columns' button highlighted. A dropdown menu is open, listing various columns with checkboxes. Red arrows point to the vertical lines between columns in the table, indicating where widths can be adjusted. A red box highlights the 'Show Columns' button and the dropdown menu. A red box also highlights a 'Tool tip for' message that appears over a task description.

WBS	NAME	NOTE	FORECAST START	FORECAST END	ACTUAL START	ACTUAL END	%	FUNCTIONAL TEAM	OWNER	1	1	2
1	Cakes & Ciabatta		15-Dec-20	06-Aug-21	235		2%					
1.1	M&A Integration		15-Dec-20	06-Aug-21	235	11-Dec-20	2%	Finance	Maggie Mosh			
1.1.1	Human Resources Workstream		15-Dec-20	06-Aug-21	235	11-Dec-20	3%	HR	Holly Hunter			
1.1.1.1	Benefits		15-Dec-20	06-Aug-21	235	11-Dec-20	4%	HR	Holly Hunter			
1.1.1.1.1	PTO & Time Off		15-Dec-20	06-Aug-21	235	11-Dec-20	7%	HR	Holly Hunter	1		
1.1.1.1.1.1	Current Plan Carryover?		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			
1.1.1.1.1.2	When will Company Plan be effective?		15-Dec-20	10-Apr-21	117	12-Dec-20	0%	HR	Holly Hunter			
1.1.1.1.2.1	Review plan with HR Director		15-Dec-20	10-Apr-21	117	12-Dec-20	0%	HR	Holly Hunter			
1.1.1.1.3	What is the plan for transition?		15-Dec-20	10-Apr-21	117	11-Dec-20	100%	HR	Holly Hunter		2	
1.1.1.1.4	How will carryover from previous company be handled?		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			
1.1.1.1.5	Personal Leave Time		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter	1		
1.1.1.1.6	Confirm process on PTO payout if EE terminates prior to scheduled depar...		11-Apr-21	06-Aug-21	118		0%	HR	Holly Hunter			
1.1.1.1.7	Holiday		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			
1.1.1.1.8	Task		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			
1.1.1.1.9	PTO FAQs		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			
1.1.1.1.10	PTO Leave Balances Needed		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			
1.1.1.1.11	Provide hours to rollover into ERP to Steph		15-Dec-20	10-Apr-21	117		0%	HR	Holly Hunter			

- **Show Columns** – On the Activity Map menu, select the **Show Columns** button, followed by Show columns menu to display the menu of columns. Select the column(s) to display or not display within the Activity Map.
- **Column Adjustments** – In the Activity Map header, all column widths can be adjusted by dragging the vertical, white line to the left or right. The red arrows in the above screen capture reference the location of these lines.
- **Tool Tip** – Automatically appears for all Activities. For those Activity descriptions that do not completely display in the column, use the Tool Tip to read the full description.

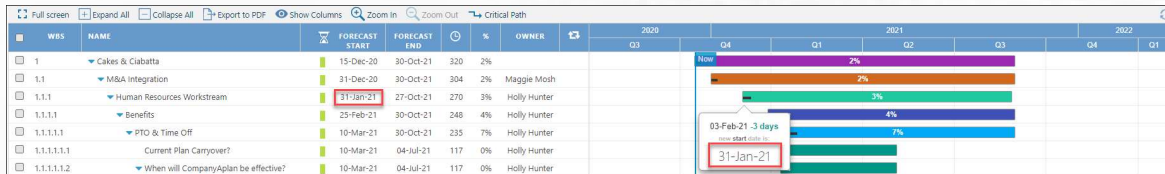
Note: The above changes are user specific and are saved for when they return to the Activity Map.

Gantt Chart

Several enhancements have been made in the Gantt Chart, both visually and functionally. The major improvement is that changes made in the Gantt Chart are made in real time.

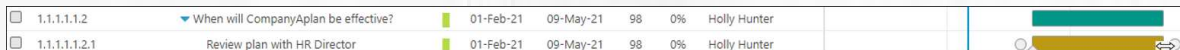
There are several ways a user can move Activities within the Gantt Chare and are described below.

- Selecting any part of the Activity, the user can drag the Activity Bar left and right. During this process, date changes are being made on the bar **and** in the Forecast Start and Forecast End date columns. Once the user removes his/her finger from the mouse, the remaining dates within the plan are automatically adjusted.



GANTT CHART – MOVING AN ACTIVITY

- Another technique that is used to change the date of an Activity is to navigate to the end of an Activity. In the below screen capture, the Child Task is changed by selecting the right side of the task. The mouse arrow converts to a double-head arrow and the dates are displayed on the bar **and** in the Forecast Date columns. Once this change is made, all Parent activities are changed, which affects the Task per the below screen capture.

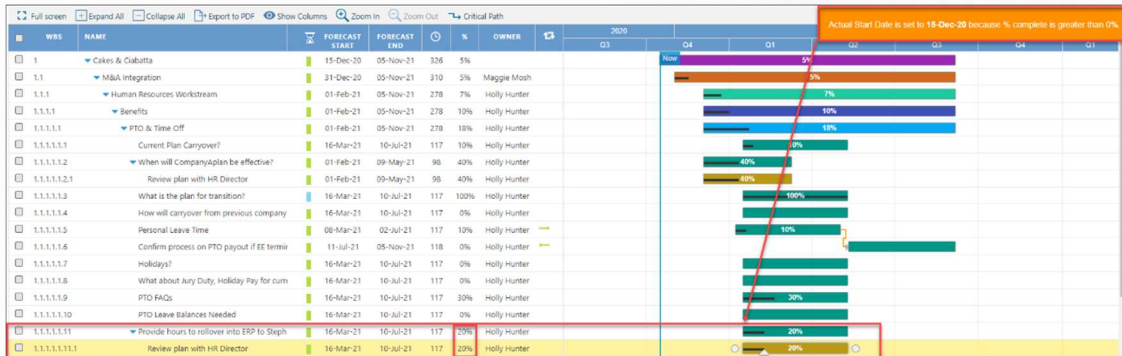


GANTT CHART – DRAGGING THE RIGHT SIDE OF THE BAR

- To change the % Complete of an Activity, select the triangle icon on the Activity Bar and drag it to the right.



- Per the below screen capture, the SubTask was changed to 20%, which affects the Parent activity, the Task. The % Complete column updates to 20% and a notification is displayed at the top of the screen.



Note: this functionality only works on the Integration Activity Map.

- Critical Path** – When the Critical Path generator icon is selected, whichever Milestone, Task or SubTask has the highest Forecast End Date will be highlighted in Red.

