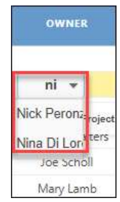
Winter 2021 Release Notes

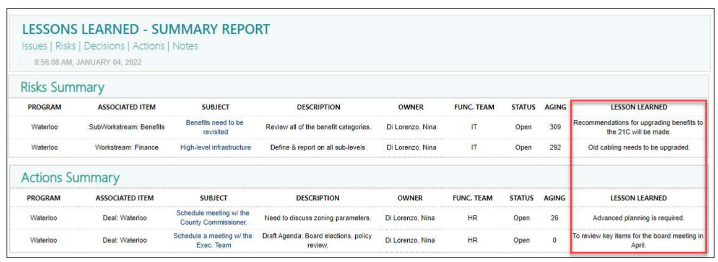
Product Features

- **Activity Map**
  - **Search Capability**
    - Is available within the **Owner** and **Responsible** drop-down fields for Targets, Programs and Playbook.



  - **Lesson Learned Checkbox**
    - Displays validation prompts for Risks, Actions, Issues and Notes if the Lesson Learned checkbox **is** selected and the following fields are **not** completed.

      * Mitigation Plan (Risk)
      * Comments (Actions)
      * Resolution (Issue)
      * Key Focus Areas (Notes)



LESSONS LEARNED - SUMMARY REPORT

Issues | Risks | Decisions | Actions | Notes

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Risks Summary

PROGRAM	ASSOCIATED ITEM	SUBJECT	DESCRIPTION	OWNER	FUNC. TEAM	STATUS	AGING	LESSON LEARNED
Waterloo	SubWorkstream: Benefits	Benefits need to be revisited	Review all of the benefit categories.	Di Lorenzo, Nina	IT	Open	309	Recommendations for upgrading benefits to the 21C will be made.
Waterloo	Workstream: Finance	High-level infrastructure	Define & report on all sub-levels.	Di Lorenzo, Nina	IT	Open	292	Old cabling needs to be upgraded.

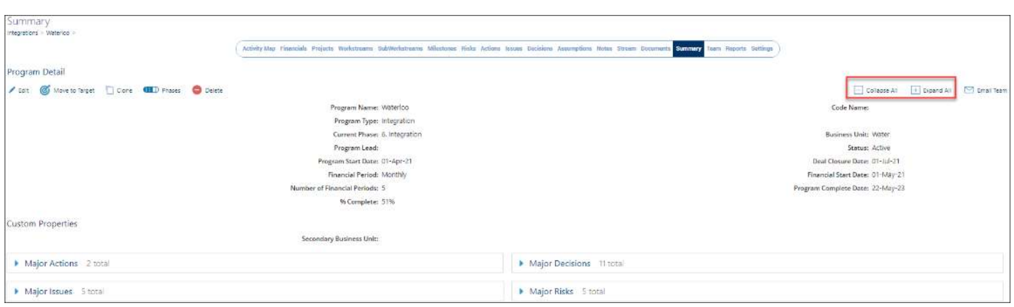
Actions Summary

PROGRAM	ASSOCIATED ITEM	SUBJECT	DESCRIPTION	OWNER	FUNC. TEAM	STATUS	AGING	LESSON LEARNED
Waterloo	Deal: Waterloo	Schedule meeting w/ the County Commissioner.	Need to discuss zoning parameters.	Di Lorenzo, Nina	HR	Open	26	Advanced planning is required.
Waterloo	Deal: Waterloo	Schedule a meeting w/ the Exec. Team	Draft Agenda: Board elections, policy review.	Di Lorenzo, Nina	HR	Open	0	To review key items for the board meeting in April.

    - The data for these fields is displayed in the Lessons Learned Report, Lesson Learned column.

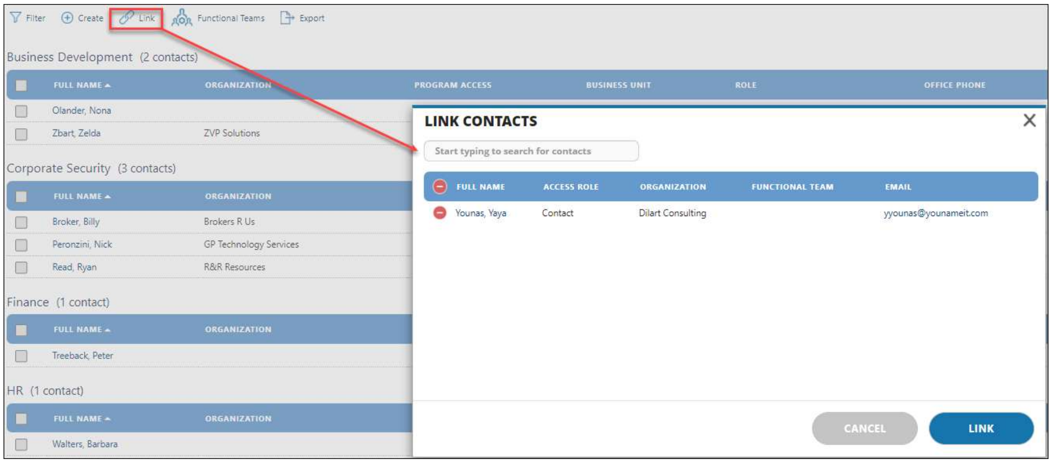
  - **Target/Program Summary Tab**
    - The **Expand All** and **Collapse All** buttons have been added to control visibility of all Sections on this tab.

Target Tab

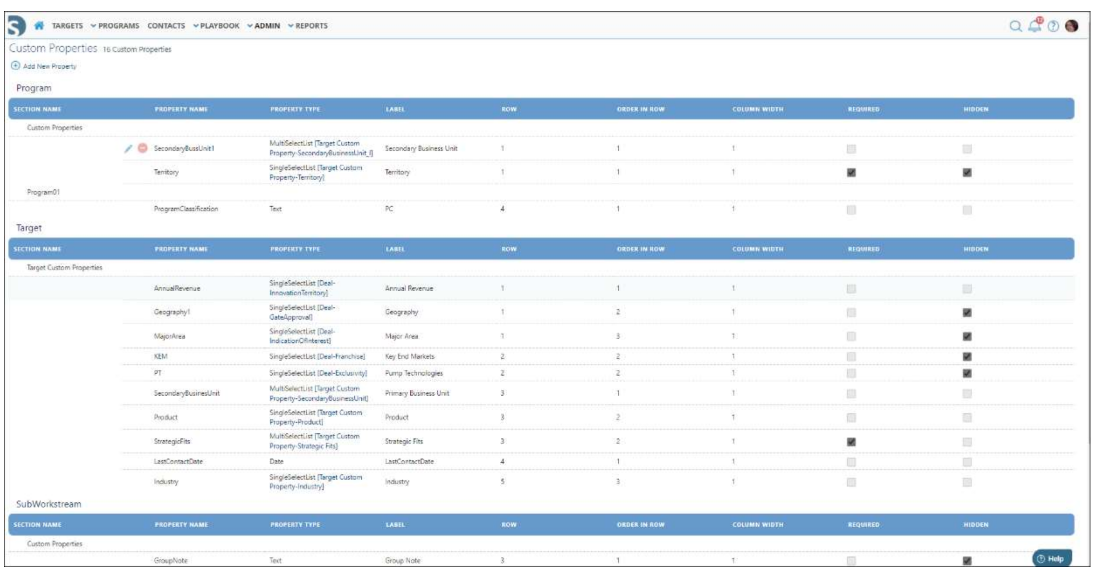


Program Tab

- **Linking Contacts to the Team**
  - The newly redesigned "Link Contacts" window allows users to search for Contacts that have not been added to the Team. Once they are linked, their name will appear in the Teams list.



- **Administration**
  - **Admin/Archived Deals**
    - In this view, the newly added **Archived Date** column displays the date the deal was archived.
  - **Admin/Custom Properties**
    - All Custom Properties are categorized by the Entity name, e.g., Program, Target, Project, etc. in an easy-to-read table.
    - Administrators can edit existing properties within the applicable section or add a new property.



Report Enhancements

- **Operational Reports**

  - **Workstream – Milestone And Task Performance**
    - The filter "**Include Report Objective / Introduction**" has been added. When "**Yes**" is selected and the report is exported to PDF, the report's objective, applied filters and other useful information is displayed on the report cover page.
    - Within the Report, the following changes have been made to the Milestone & Task – Details section:
      - Responsible and Tag columns have been removed.
      - Recent Note and Dependencies, displayed as a hyperlink link, columns have been added. When the link is selected, a new browser page opens to display the dependency(ies.)

  - **Workstream Status Report**
    - The following filters have been added:
      - *Activity Type* – determines if Milestones, Tasks or SubTasks will display in the report.
      - *Show Report Section* – The "Yes" or "No" selections determine if the RAID items will display in the report.
      - *Section Type* – user decides which sections to display/not display in the report.
      - *Include Report Objective / Introduction* – When "Yes" is selected and the report is exported to PDF, the report's objective, applied filters and other useful information is displayed on the report cover page.
    - Newly added sections include Key Updates and Key Focus Areas.
    - RAID interactive links open in a new tab.

  - **SubWorkstream Status Report**
    - The following filters have been added:
      - *Activity Type* – determines if Milestones, Tasks or SubTasks will display in the report.
      - *Show Report Section* – The "Yes" or "No" selections determine if the RAID items will display in the report.
      - *Section Type* – user decides which sections to display/not display in the report.
      - *Include Report Objective / Introduction* – When "Yes" is selected and the report is exported to PDF, the report's objective, applied filters and other useful information is displayed on the report cover page.
    - Newly added sections include Key Updates and Key Focus Areas.
    - RAID interactive links open in a new tab.

- **Executive Project Summary Report**
  - The following filters have been added:
    - *Show Report Section* – The "Yes" or "No" selections determine if the RAID items will display in the report.
    - *Section Type* – user decides which sections to display/not display in the report.
    - *Include Report Objective / Introduction* – When "Yes" is selected and the report is exported to PDF, the report's objective, applied filters and other useful information is displayed on the report cover page.
  - Newly added sections include Key Updates and Key Focus Areas.
  - RAID interactive links open in a new tab.
- **User Details Report**
  - Filters have been added:
    - Functional Team, Created From, Created To, Last Login From, Last Login To, and Include Report Objective / Introduction.
  - Format changes have been made to the report, e.g. Last Login, Created Date and Notes column.
- **Lessons Learned Report**
  - Filters have been added:
    - *Show Report Section* – The "Yes" or "No" selections determine if the RAID items will display in the report.
    - *Section Type* – user decides which sections to display/not display in the report.
    - *Include Report Objective / Introduction* – When "Yes" is selected and the report is exported to PDF, the report's objective, applied filters and other useful information is displayed on the report cover page.
  - Minor formatting changes have been made, e.g., spacing within the table.