Release Notes Spring 2021

Product Features:

- **Due Diligence Module**
  The Due Diligence workflow has been enhanced to allow multiple Target contacts to view and submit responses based on permissions assigned to them. The concept of Groups is introduced, which is like functional teams where external users can be grouped together and assigned certain set of permissions.

  - **Target Groups –** Admins can now categorize Due Diligence Portal users into various groups. The groups and external contacts can be managed from ***Target Groups*** button displayed on the right side of the Diligence page.
    - **External Admin –** Default group is automatically added. Permissions can be edited for the external admin.
      - External Contacts can be added from the ***Contacts View*** button and added as external admin.
    - **Create** - Create new groups and contacts as needed representing different functional areas for the request like HR, Legal etc.
    - **Edit –** Edit group name or permission access using the pencil icon. Contacts can be edited to update name, email, or status.
    - **Delete –** Groups can be deleted if not required except the External Admin group.
    - **Multiple Contacts** - Several contacts can be added or removed from Target Groups->Contacts view.

  - **Due Diligence View**
    - **Group Column –** Users will now see the Group associated with each request. Groups can only be changed when the request is in Open status.
    - **Bulk Edit –** Multiple requests can be selected and assigned to a group by using the ***Bulk Edit*** button.
    - **Send to Target –** Select requests to send to multiple target groups/users.
    - **Group Filter –** Filter requests based on associated groups to track progress.

  - **Access Permissions –** Admin users can assign permissions to internal team members. Use the ***Permissions*** button in the Diligence page to manage user permissions.
    - Access Permissions can be added at any level of the Diligence list – Function, Category, Request.
    - Permissions set at a higher level will apply to all child items underneath. For e.g., Permissions given for a Function will apply to all categories and requests under HR function.
    - Permissions set on the Requests will be applied to Responses, Comments, Documents and Findings.

- **Due Diligence External Portal**

  The Due Diligence portal functionality has been enhanced to allow multiple Target contacts to login and view/add responses based on permissions assigned to them. The concept of Groups is introduced, which is like functional teams so users can be grouped together and assigned certain set of permissions.

  - **User Management –** Portal admins/users can have user management privilege to add their team members required to complete the diligence requests. This will help delegate certain request items to appropriate functional teams.
    - **Groups –** Groups shown under User Management in Navigation menu. Admins can manage/categorize users into various groups.
      - **External Admin –** A default group called ***External Admin*** is created by the buyer and permissions are provided in advance. Admin can add more users into the group but cannot edit any permission.
      - **Manage Groups –** Admin users can create, edit, and view groups from a single page.
    - **Users –** Users shown under User Management in Navigation menu. Admins can create and manage users and assign them to various groups.
      - User can be setup with limited permissions if required.
    - **Email Notification –** Users receive emails when they are added to the portal and assigned certain requests.
  - **Filters –** Group filter is added to view requests by groups assigned.
  - **Updating Requests/Responses**
    - Requests can be updated with a group name seen as a new drop down.
    - Multiple requests can be filtered by Status and assigned in bulk to a group.
    - Requests must be in Open status or In Progress to be able to select in bulk and for group field to be visible.
  - **Export/Import**
    - Requests can be exported and imported back with responses by individual groups depending on their permission.

Product Improvements:

- **Due Diligence Module**
  - **Request Import –** Import process of requests file has been optimized for faster execution.
  - **Copy Package –** Optimized copy package process for faster execution.
  - **Request Totals –** Request totals will reflect changes when request items are deleted.
  - **Save In Progress –** User will see a loading wheel when saving a package.

    - **Filters –** Users may now narrow requests by Functions, Groups, Status, Round, Submitted Date Range, Priority, Owner.
    - **Submitted Filter –** Users can now narrow requests by 'Submitted' in the Status filter. Status Summary numbers reflect the number of request items 'Submitted' out of the total "Open" requests with a slash like x/xx.
    - **Sending Requests –** Optimized process to send requests to External Portal for faster execution.
    - **External Portal**
        - **Import –** User may only import those requests which they have access to.
        - **Export –** Users may only export those requests belonging to the same group.
- **RAID Item Export –** Export for large number of Risks, Actions, Issues and Decisions has been optimized for shorter execute time.
- **NDA Attachment –** NDA PDF attachments will automatically be named based on the template name.
- **Popup title** – Renamed informational message popups title as "Message".

Retired features

- **Audit and Admin Events** – Removed Audit events and Admin events menu items from the Admin menu as audit events are tracked in Audit report. As more events are tracked and logged continuously, showing hundreds of thousands of events in application menu will slow down application performance.