

DEVENSOFT IMPROVEMENTS 2022.Q1&Q2

Tuning Up the Engine that Powers
Your Strategic Growth



ENHANCEMENTS

CUSTOM PROPERTIES PAGE SECTIONS

Admin can now create new sections for your custom properties in **Target Summary** page. Order them, and specify visibility based on target phase.



CLICK: Admin → **Custom Properties, then:**

EDIT SECTION [X]

Name*

Visibility

EDIT SECTION [X]

Name*

Visibility

EDIT SECTION [X]

Name*

Visibility

Target Phases

- All
- Not Set
- Ideation
- Screening
- Evaluation
- Diligence
- Closing
- Integration

NOTE ID

We have added a **Note Identification Number** so you can easily cross-reference your notes from the UI and an exported file.

ID	NOTE	DATE	CREATED BY	ASSOCIATED ITEM
29976	Testing Note	4/29/2022	Singh, Amandeep	Task: testing
29977	Actual Date Change	4/29/2022	Singh, Amandeep	Task: Identify security model for all data services platforms
29978	test	4/29/2022	Iugko, Roman	Task: Obtain scalability footprint on all data services systems
29979	ni	4/29/2022	Iugko, Roman	Task: Obtain scalability footprint on all data services systems
25177	Put notes	7/12/2021		Project: M&A integration
23866	New Note	5/10/2021	Admin, Devensoft	Program: A Large.Integration (Sunny)
23867	New Note	5/10/2021	Admin, Devensoft	Program: A Large.Integration (Sunny)
23868	New Note	5/10/2021	Admin, Devensoft	Program: A Large.Integration (Sunny)
21585	Note added on edit	2/15/2021	Admin, Devensoft	SubTask: Subtask 49



USER DEACTIVATION NOTIFICATION

Promote usage of the tool and maintain a hygienic list of active users in your tenant. Set the **number of days** of inactivity for users. Once that threshold is met, an auto-generated reminder is sent to the user to remind them to login. If the user does not log in by '# days, a second auto-generated email will go out to notify them of **deactivation status**.

 **CLICK: Admin** → **Application Settings:**

Other settings

NAME	VALUE
SwitchTargetIntegrationStageToIntegration	false
ApplicationTimeZone	Mountain Standard Time
AutoCreateFoldersInDeal	
ColorizationStrategy	ForecastAndActual - 7DaysCheck
DefaultAttachmentFolder	Email Integration
EMAUserGuide	
DueDiligenceSummaryBufferDaysToCheckInActivity	2
DueDiligenceSummaryTimeToSend	8
InActiveUserDaysConfig	
EnableAutoUserDeactivation	false
AutoUserDeactivationBufferDays	

 **CLICK: Admin** → **Email Templates:**

Email_Reminder	Devensoft Activity Reminder
Email_RequestUpdate	Request Update Details
InActiveUserNotification	Devensoft User Access - Temporary Deactivation Reminder!
MeetingActivityNotification	Meeting Activity Details
RegisterDdUser	Due Diligence Registration link
RequestUpdateConfirmation	Request Update Confirmation
ResendRoundNotificationDdUser	Due Diligence Additional Request Items
ResetPassword	Devensoft Reset password
UserDeactivationNotification	Devensoft User Access - Temporary Deactivation

OPTIMIZED PERFORMANCE

We have moved the Import/Export function to its own dedicated server.



REPORTS

HIGH LEVEL GANTT REPORT

This report now brings improved layout and functionality with the inclusion of **additional context via on-page notations.**

The screenshot shows the 'High Level Gantt Report' interface. At the top, there are navigation tabs: 'Status Reports > High Level Gantt Report', 'Common Reports', 'Other Reports', and 'Financial Reports'. Below these is a filter section with dropdown menus for Program (A Large.Integration (Sunny)), Project (&Projectn I tested this ticket in Test an...), Workstream (AB Workstream, Corporate Security Inc...), SubWorkstream (ABC Subworkstream, Import WS 1, Imp...), Status (Closed, On Schedule, At-Risk, Delayed), Tags ((No Tags)), Criticality ((Not set), High, Medium, Low), Activity Type (Milestone), From (2/1/2022 12:00:00 AM), To (2/24/2023 12:00:00 AM), and Include Report Objective / Introduction (No). A search bar with 'Find | Next' is also present.

The main content area displays the report details for 'PROGRAM : A Large.Integration (Sunny)' at 4:47:02 AM, JULY 06, 2022. A legend for 'Milestone' shows: On Schedule (green triangle), At Risk (yellow triangle), Delayed (red triangle), and Completed (blue triangle). The 'PROJECT' description states: '&Projectn I tested this ticket in Test and observed that filters been added to the activity map and working fine. While testing notice few issues: Issue#1: The filters layout in the playbook activity map is NOT matching the layout of the filters in the Target/ Integrations activity map..A Project,M&A Integration'.

The Gantt chart shows a timeline from Feb 22 to Feb 23. It includes a 'Legal Integration category' bar, a 'Workstream This is test for long Text, This is test for long Text , This is test for lon...' bar, and a 'SD Check (M)' marker. A legend for 'Milestone' is also visible at the top right of the chart area.

Detail shown on High Level Gantt Report:

This detailed screenshot shows the Gantt chart area. The timeline spans from Feb 22 to Feb 23. The 'Workstream' header is at the top. Below it, there are two main bars: 'Legal Integration category' (blue) and 'Workstream This is test for long Text, This is test for long Text , This is test for lon...' (green). A 'SD Check (M)' marker is shown as a red triangle at the bottom of the chart. The 'Milestone' legend at the top right indicates: On Schedule (green triangle), At Risk (yellow triangle), Delayed (red triangle), and Completed (blue triangle).

DEPENDENCY REPORT & DEPENDENCY BY FUNCTIONAL TEAM REPORT

Enhance your reports with added detail and usability. Gain visibility on the dependencies at the **workstream** and **functional team levels**.

Dependency Report:

Common Reports > Dependency Report

Other Reports

Financial Reports

Deal: Sunny.Integration Project: A Project, GanttReportTest, Project I c

Workstream: AB Workstream, Accounting Workstream Owner: [NULL], 360, Rajneesh, access, no, Admi

Tags: (No Tags), @Aman, @Rajesh Status: Closed, On Schedule, At-Risk, Delayed

Activity Type: Milestone, Task, SubTask Include Report Objective / Introduction: Yes

Date From: NULL Date To: NULL

14 4 1 of 2 > < Find | Next

Sunny.Integration Dependency Report

As of 5:28:44 AM, JULY 06, 2022

Dependency Summary

Project	Workstream	Dependent Project	Dependent Workstream	Number of Items with Dependencies
GanttReportTest	Test Workstream	A Project	AB Workstream	1
Sunny.Project	Accounting Workstream	Internal	Legal.Workstream	1
		Test.Project	I10.Workstream	1
	HR.Workstream	GanttReportTest	Test Workstream	1
		Internal	Accounting Workstream	4
		Internal	Internal	22
			IT.Workstream	3
			Legal.Workstream	2
		Test.Project	2	
		I20.Workstream	2	
Total				39

Dependency Report (Generated @ 7/6/2022 - 5:28:44 AM DST)

PDF Export Objective/ Introduction:

Sunny.Integration Dependency Report

As of 5:28:44 AM, JULY 06, 2022

Report name: Dependency Report

This Dependencies report captures all the dependencies associated with Workstreams across the program and projects for leadership.

Note: Based on the users' filter criteria selection, the output of the report will be modified accordingly!

Filters Applied:

Program: Sunny.Integration

Project: A Project, GanttReportTest, Project I tested this ticket in Test and observed that filters been added to the activity map and working fine. While testing notice few issues: Issue#1: The filters layout in the playbook activity map is NOT matching the layout of the filters in the Target/ Integrations activity map, Sunny.Project, Test.Project

Workstream: AB Workstream ,Accounting Workstream ,HR.Workstream ,I10.Workstream ,I20.Workstream ,J8.Workstream ,J9.Workstream ,JT.Workstream ,Legal.Workstream ,Test Workstream ,Workstream This is test for long Text, This is test for long Text , This is test for long Text , This is test for long Text , This is test for long Text

Owner: [NULL], 360, Rajneesh, access, no, Admin, Devensoft, Admin, Mobile, Admin, non, AM, Test, AM, Test1, rd, ab, Checkbox, Test, Contacts, Import, Deep, Aman, Devensoft, Rajneesh, Dunlop, Christine, Dwivedi, Sweta, Dwivedi, Swetanon, Executive, G, Executive, Ponn, Fulhdlay, SuAday, gupta, vivha, Hazela, Neetu, Hoeft, Todd, J, r, Jupko, roman, Jupko, Roman, Konnura, Rashmi, Nonadmin, Sunny, nonadminuser, neetu, Playbook, Corp/Dev, Rashmi EX, Executive, Regis Updated, ARJUN, Singh, Sunny, Test, G, Test, Import, Testreports, Corp/Dev, User 1, Custom 1, User 2, Custom 2, User 3, Custom 3, User 4, Custom 4, User 4, Dummy, User, Import, User4, Mobile, vib, check

Tag: (No Tags), @Aman, @Rajesh

Status: Closed, On Schedule, At-Risk, Delayed

Activity Type: Milestone, Task, SubTask

Date filter: All To All

Report generated on: 7/6/2022 - 5:28:44 AM DST

Dependency by Functional Teams Report:

Common Reports > Dependency By Functional Teams Report

Other Reports

Financial Reports

Deal: Sunny.Integration Project: A Project, GanttReportTest, Project I c Function Team: Advertising /Branding, A/E, Audit, Busi,

Status: Closed, On Schedule, At-Risk, Delayed Activity Type: Milestone, Task, SubTask

Date From: NULL Date To: NULL

14 4 1 of 2 > < Find | Next

Sunny.Integration Dependency Report

As of 5:27:39 AM, JULY 06, 2022

Dependent Functional Team =>	Not Set	Audit	Business Development	Informatics and Warehouse	Legal	Medical Management	Network OPS	Product	Total
Not Set	0	1	0	0	0	0	0	0	1
Audit	1	10	1	0	0	1	0	0	13
Business Development	1	5	11	1	1	0	1	1	21
Legal	0	1	1	0	0	0	0	0	2
Total	2	17	13	1	1	1	1	1	37

Functional Team	Name	Status	Parent Item				Dependent Item											
			Planned Start	Forecast Start	Actual Start	Planned End	Forecast End	Actual End	Functional Team	Type	Name	Status	Planned Start	Forecast Start	Actual Start	Planned End	Forecast End	Actual End
Not Set	Subtask (S)	Delayed		12/10/2018	9/1/2021		4/16/2019		Audit	Concurrent	Accounting Subtask (S)	Delayed	11/1/2020	9/28/2019	12/0/2020	11/30/2020	3/3/2022	
	HR Task (T)	Delayed	5/29/2020	12/7/2018	9/1/2021	9/23/2020	1/10/2020	Internal	Concurrent	Accounting Task (T)	Delayed	11/1/2020	9/28/2019	12/0/2020	11/30/2020	3/3/2022		
	HR Task (T)	Delayed	5/29/2020	12/7/2018	9/1/2021	9/23/2020	1/10/2020	Internal	Concurrent	Legal Task (T)	At Risk	3/4/2022	1/14/2021			5/31/2023		
	HR Task (T)	Delayed	5/29/2020	12/7/2018	9/1/2021	9/23/2020	1/10/2020	Internal	Concurrent	I10 Task (T)	Delayed		4/24/2021	6/15/2021			7/19/2021	
	HR Task (T)	Delayed	5/29/2020	12/7/2018	9/1/2021	9/23/2020	1/10/2020	Internal	Pre/Post	I20 Task (T)	Closed		11/29/2024	5/31/2021			1/19/2025	6/4/2021
	HR Task (T)	Delayed	5/29/2020	12/7/2018	9/1/2021	9/23/2020	1/10/2020	Business Development	Pre/Post	Task 1 (T)	Delayed		3/1/2021	2/1/2021			7/30/2021	6/26/2021
	HR Task (T)	Delayed	5/29/2020	12/7/2018	9/1/2021	9/23/2020	1/10/2020	Internal	Concurrent	Task here (T)	Delayed		5/25/2021				8/13/2021	

PERFORMANCE REPORT

Enhance your reports with added detail and usability. We have added "**% Complete**," **Due Date**, **Grouping By Workstream**, as well as a **Multi-select Aging Filter**.

▶ **Status Reports** / > Performance Report

▶ **Common Reports**

▶ **Other Reports**

▶ **Financial Reports**

Deal: A Large.Integration (Sunny) | Project: &Projectn I tested this ticket in Test an.

Workstream: AB Workstream, Corporate Security Int. | SubWorkstream: ABC Subworkstream, Import WS 1, Imp.

Status: Closed, On Schedule, At-Risk, Delayed | Tags: (No Tags)

Report Section: Delayed Milestone, At Risk Milestone, ... | Aging: < 15 days, 15-30 days, 30-60 days, 60-90

Due In: All | Include Report Objective / Introduction: Yes

From: NULL | To: NULL

14 | 1 | of 1 | Find | Next

A LARGE.INTEGRATION (SUNNY) PERFORMANCE 7/6/2022 - 5:31:50 AM DST

LEAD

FORECAST START: 10/26/2020

FORECAST END: 4/27/2022

4

 % completed

Milestone

1 closed

194 delayed



Milestone Burndown 0 closed last week



Team Milestone

FUNCTIONAL TEAM

Team	Milestone Status
No Team	Total: 189
Asuda	Total: 3



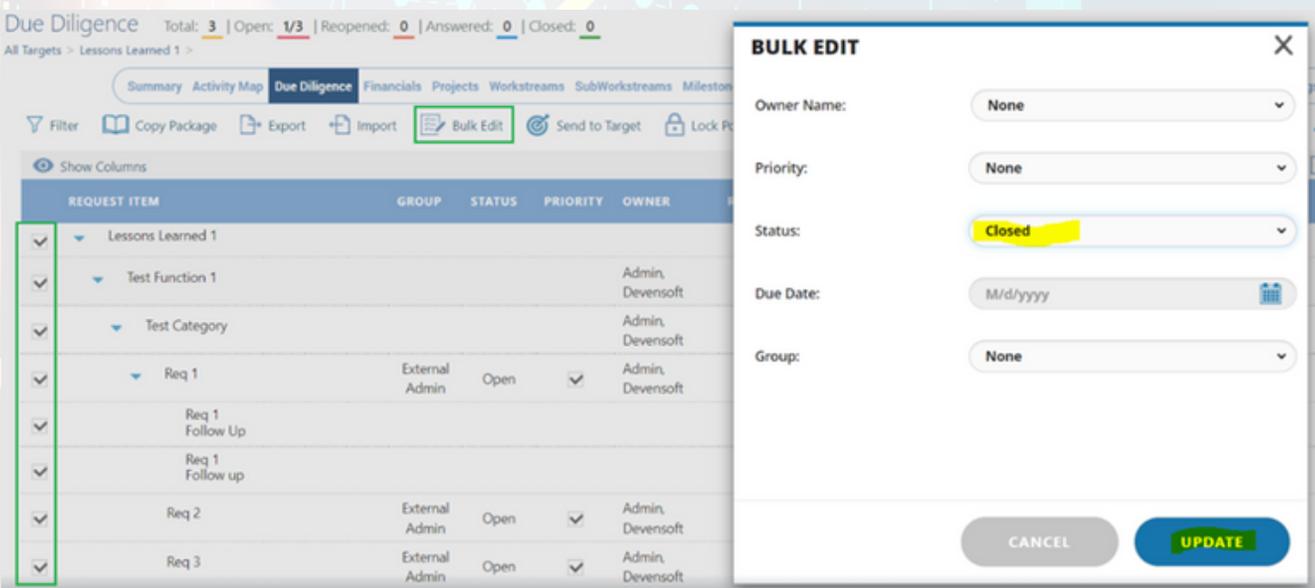
DUE DILIGENCE

DUE DILIGENCE MODULE IMPROVEMENTS

We have made a number of improvements to the functionality and usability of the Due Diligence (**DD**) module, on internal and external sides of the portal.

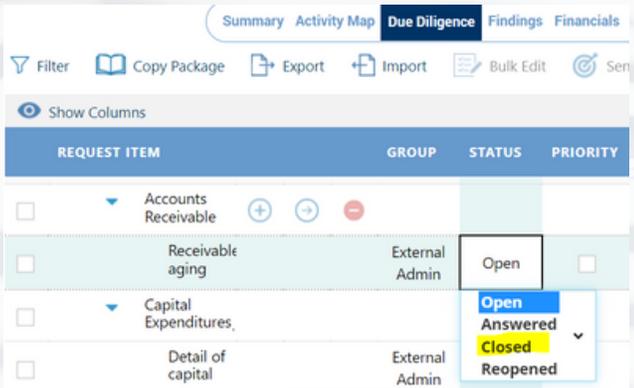
CLOSING REQUEST ITEMS VIA BULK EDIT

Set DD request items Status to 'Closed' using **Bulk Edit**. Change the status of a DD request item(s) to Closed using the Bulk Edit option, *even if the request item has not been answered.*



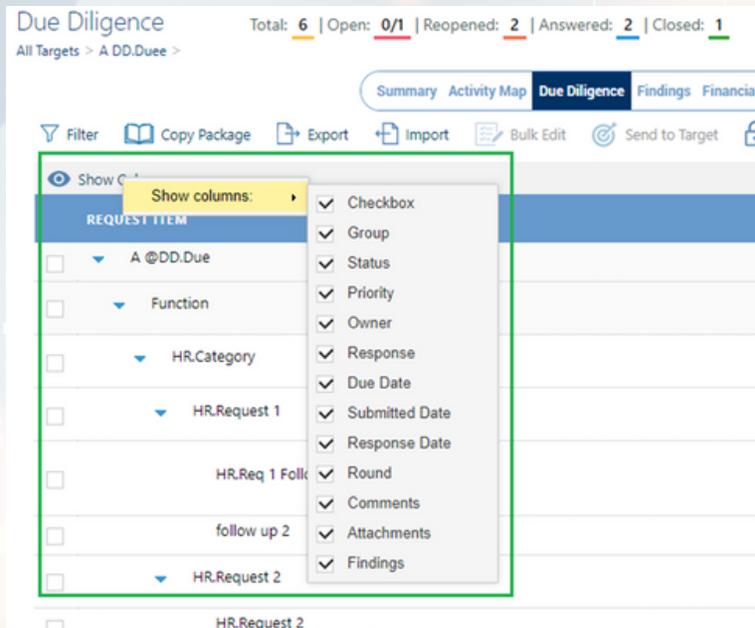
CLOSING REQUEST ITEMS WITHIN UI

Ability to set **DD request item status to Closed** within the UI. Now you can set the status of an individual DD Request Item to Closed by **double-clicking** in the status cell and selecting '**Closed,**' *even if the Request Item has not been answered.*



DUE DILIGENCE GRID COLUMN CONFIGURATION

Users can now determine what data is displayed under the **Due Diligence Tab**, providing you with a customized set of information most relevant for you.



DUE DILIGENCE: IMPROVEMENTS TO THE FLOW FOR MULTIPLE FOLLOW UPS

Changes on internal and external portal:

1. **Multiple follow ups** are possible for a request even if they are not answered in parallel.
2. In case multiple follow ups are opened, the system should give the option for submitting responses to **all the follow ups** on the portal side - in any order.
3. In case of the internal user, System should discard all comments/documents which are in a saved state for the internal users, and they are not visible. Portal user still can see their comments and attachments across multiple follow up threads.

Follow ups

Q: Follow up 1 ▲

Q: Follow up 2 ▼

Attach Clear Save

Attachment1 Attachment2 Attachment3

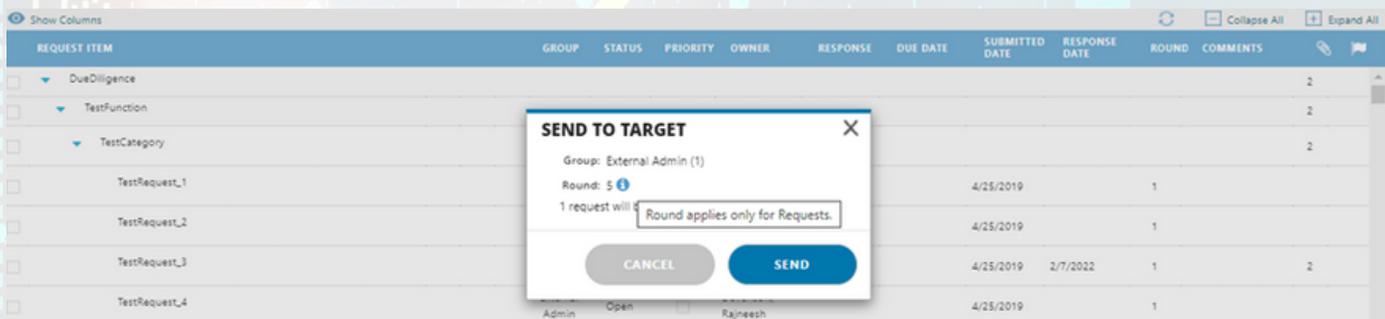
Q: Follow up 3 ▲

Submit

DUE DILIGENCE: CAPTURE MULTIPLE RESPONSES FROM PORTAL USER

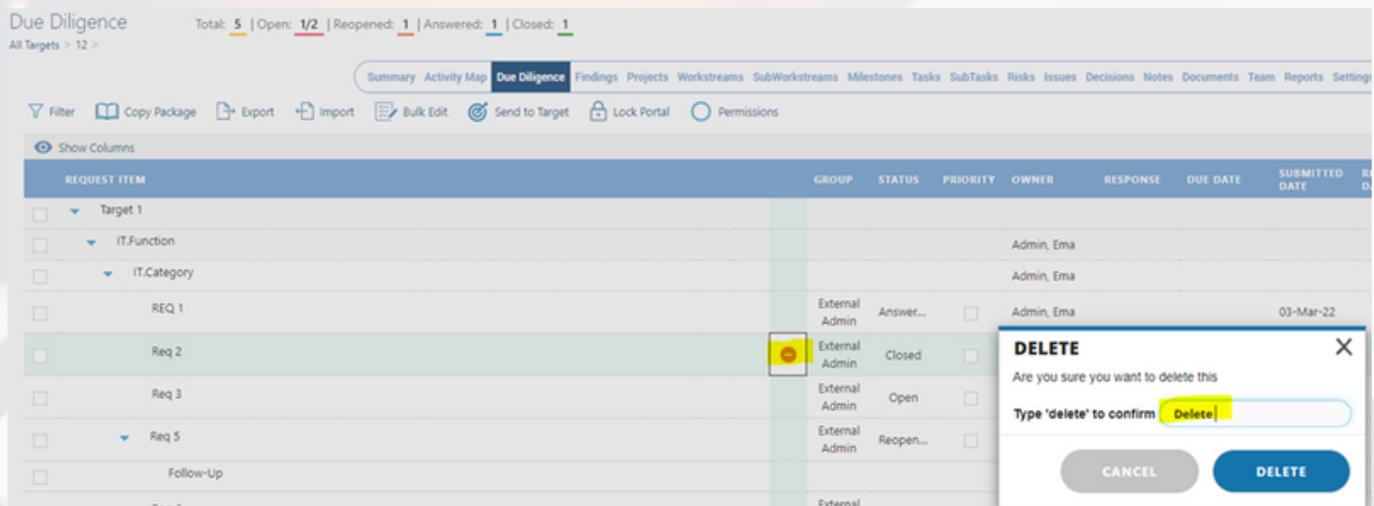
1. If a number of follow ups are displayed under a request, then portal users can **add comments** and **attachments** - saving to independent follow ups in any order. Upon submitting the request all comments and attachments under respective follow ups will be visible to the internal user.
2. If an internal user changes the **request status** to **answered/closed** before the portal user submits, the request will be in a submitted state to the portal user automatically. All comments and attachments, if are in a saved state, will be discarded by the system for the internal user. These comments and attachments are still visible to the portal user in read-only format.
3. **Info icon** added for explaining "round" attribute. When sending follow-up requests the round is changing in the app, pop-up in-app, and portal.

New info icon as 'Round' is only applicable for Requests:



DUE DILIGENCE: DELETE A REQUEST ITEM, EVEN IF ALREADY SUBMITTED

1. Check any Request or reopen - follow-up Item can be **deleted** by the user **regardless of Status**.
2. If a Request Item is deleted, any associated document should remain in the Document tab.



DUE DILIGENCE: UPDATE REQUEST VIA IMPORT/EXPORT COLUMN HEADING

1. In import, the *internal* user can **change any status** (Open, Answered, Reopen, Closed) to any other status (Open, Answered, Reopen, Closed) throughout the lifecycle.
2. *Internal* Users can **add/edit**: Group/priority/status/Due date/response/response date/follow up response/comments in any state, irrespective of any action taken by users from the external portal, in order to keep the system up to date with information received from any channel - phone/email etc.
3. In the exported file, the internal user can change any status column headings where 'Export Only' is written or 'Answered Requests Only' is written signifies that these are **read only** and **will not** update.

RequestID	Group	Function	Category	Request	Owner	Priority	Status	Round (Export Only)	Comments (Export Only)	SubmittedDate (Export Only)	DueDate	Response	ResponseDate (Export Only)	FollowUpID (Answered Requests Only)	FollowUp FollowUpResponse
26353	External Admin	TestFun	TestCat	Request_1	Rajneesh C	FALSE	Open	1		3/24/2021					
26354	External Admin	TestFun	TestCat	Request_2	Rajneesh C	FALSE	Open	1		3/24/2021					
26355	External Admin	TestFun	TestCat	Request_3	Rajneesh C	FALSE	Open	1	djd	3/24/2021					

"DUE IN" FILTER ADDED TO WORKSTREAM-MILESTONE & TASK PERFORMANCE REPORT

1. The **"Due in"** filter has been added and provides the following drop down values (All, 1 week, 2 Weeks, 3 Weeks, 4 Weeks, 6 Weeks, 8 Weeks, 12 Weeks) The report will take the forecast end date using the amount of weeks you select from the current report generated date.
2. In case user select All option in **"Due In"** filter then the system will pull all future records between report date and maximum future date within the **'Delayed', 'At-risk'** or **'On Schedule'** record
3. If user is using the **"Due in"** filter along with Date range filter (From and To) then keep the future date range duration similar to weeks selected in **"Due in"** filter.

Status Reports > Workstream - Milestone And Task Performance

Deal: Waterloo | Project: US Integration Project
 Workstream: IT (W/S) | SubWorkstream: Network Infrastructure (SWS)
 Status: On Schedule | Tags: (No Tags, N/W)
 Due In: All | Include Report Objective / Introduction: No
 From: NULL | To: NULL

WORKSTREAM PERFORMANCE 03-AUG-22 - 3:45:26 PM EST

US Integration Project - IT (W/S)

WORKSTREAM LEAD: O'hare, Ian | FORECAST START: 03-Aug-22 | FORECAST END: 13-Sep-24

TASK: 12 on schedule

0% completed

Milestone & Task - Status

Legend: Closed (Blue), On Schedule (Green), At Risk (Orange), Delayed (Red)

WBS ID	SubWorkstream	Milestone	Task Status	SubTask Status
1.1.1.1.3	Network Infrastructure (SWS)	Network Locations and Hardware	Total: 10 10 On Schedule	Total: 2 2 On Schedule
1.1.1.1.4	Network Infrastructure (SWS)	4th Milestone	Total: 2 2 On Schedule	Total: 0

Milestone & Task - Details 16 total

SubWorkstream	Type	Name	Dependency	Owner	Responsible	Status	Recent Note	Forecast Start	Forecast End	Actual Start	Actual End	% Complete	Tag
Network Infrastructure (SWS)	Milestone	Network Locations and Hardware	0	Lamb, Mary		On Schedule		08-Aug-22	27-Aug-23	05-Jul-22		31%	N/W
Network Infrastructure (SWS)	Task	Obtain total number of physical locations including remote sites	0	Lamb, Mary	Wonka, Willy	On Schedule		08-Aug-22	19-Aug-22			0%	