



# **Integration Request Updates**

## **User Guide**

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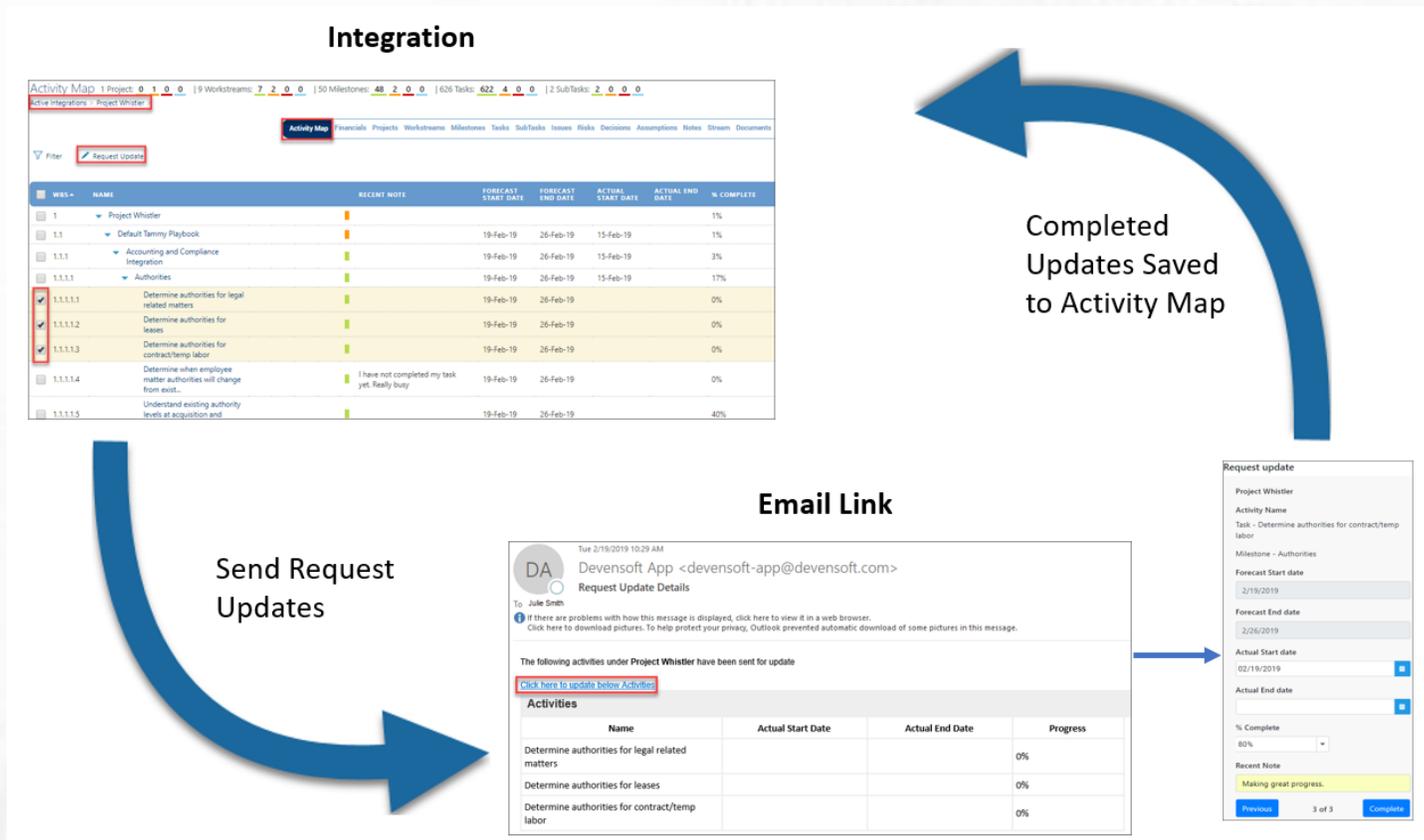
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## About Request Updates

The Request Updates feature provides Integration Management Office (IMO) Leads an easy way to request updates from their team members. Offers team members the ability to update their assigned Activities via an email link without logging into the application.

The diagram below illustrates the workflow between Request Updates and updating Activities outside of the M&A Tool.



## Purpose of this Document

The purpose of this document is to outline the instructions of how to request updates and have team members update their Activities without logging into the M&A Tool.

# Selecting Activities

Once you have successfully logged into Devensoft's M&A Tool, determine what Integration Activities need to be sent to the Integration Management Office (IMO) team members to record their updates.

To do this:

1. From the Main Menu bar, select **Integrations/Active Integrations**.
2. In the **Integration Name** column, select an Integration.

Activity Map 1 Project: 1 0 0 0 | 9 Workstreams: 9 0 0 0 | 50 Milestones: 50 0 0 0 | 625 Tasks: 625 0 0 0 | 2 SubTasks: 2 0 0 0

Active Integrations > Project Whistler >

Activity Map Financials Projects Workstreams Milestones Tasks SubTasks Issues Risks Decisions Assumptions Notes Stream Documents Milestone Map Summary Team Reports Settings

Filter Export Import Copy from Playbook Gantt Chart Edit all Collapse All Lock Plan Lock Forecast Copy Planned To Forecast Copy Forecast To Planned Shift dates

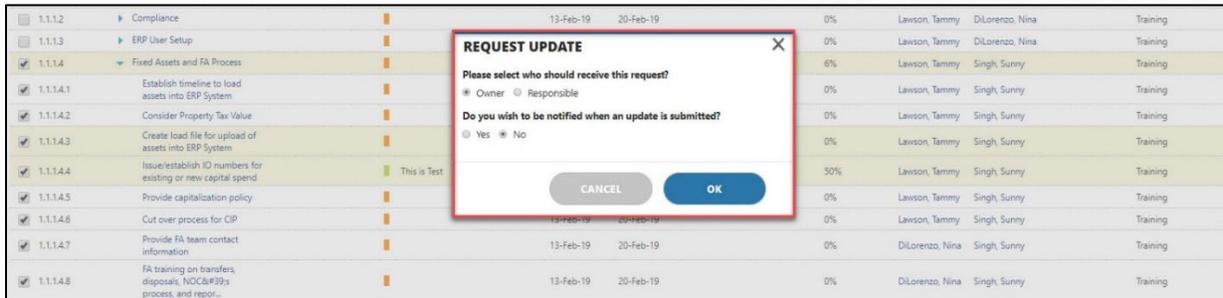
WBS	NAME	RECENT NOTE	FORECAST START DATE	FORECAST END DATE	ACTUAL START DATE	ACTUAL END DATE	% COMPLETE	OWNER	RESPONSIBLE	FUNCTIONAL TEAM
1	Project Whistler						0%			
1.1	Default Tammy Playbook		13-Feb-19	20-Feb-19			0%			
1.1.1	Accounting and Compliance Integration		13-Feb-19	20-Feb-19			0%			
1.1.1.1	Authorities		13-Feb-19	20-Feb-19			0%			
1.1.1.2	Compliance		13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
1.1.1.3	ERP User Setup		13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
1.1.1.4	Fixed Assets and FA Process		13-Feb-19	20-Feb-19			0%	Lawson, Tammy	Singh, Sunny	Training
1.1.1.5	General Information		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina	Singh, Sunny	Training
1.1.1.6	GL Business Processes and Training		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina	Singh, Sunny	Training
1.1.1.7	Identify Revenue Recognition Issues		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina		Training
1.1.1.8	Items for Non-ERP		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina		Training
1.1.1.9	Legal Entity Setup and Setup in ERP Systems		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina		Training
1.1.1.10	Opening Balance Sheet Considerations		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina		Training
1.1.1.11	Transition Services		13-Feb-19	20-Feb-19			0%	DiLorenzo, Nina		Training

3. If necessary, expand Workstreams and Milestones.
4. In the left margin, select the check-box(es) for those Activities that you want to request an update.

WBS	NAME	RECENT NOTE	FORECAST START DATE	FORECAST END DATE	ACTUAL START DATE	ACTUAL END DATE	% COMPLETE	OWNER	RESPONSIBLE	FUNCTIONAL TEAM
1	Project Whistler						0%			
1.1	Default Tammy Playbook		13-Feb-19	20-Feb-19	13-Feb-19		0%			
1.1.1	Accounting and Compliance Integration		13-Feb-19	20-Feb-19	13-Feb-19		0%			
1.1.1.1	Authorities		13-Feb-19	20-Feb-19			0%			
1.1.1.1.1	Understand existing authority levels at acquisition and obtain au...		13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
1.1.1.1.2	Determine level of vendor and client contract approval levels for...		13-Feb-19	20-Feb-19			0%	Singh, Sunny		Technology
<input checked="" type="checkbox"/>	1.1.1.1.3	Determine changes to existing authorities for capital projects	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input checked="" type="checkbox"/>	1.1.1.1.4	Determine who will complete Project Proposals for newly acquired...	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input checked="" type="checkbox"/>	1.1.1.1.5	Determine when employee matter authorities will change from exist...	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input type="checkbox"/>	1.1.1.1.6	Determine authorities for legal related matters	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input type="checkbox"/>	1.1.1.1.7	Determine authorities for contract/temp labor	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input type="checkbox"/>	1.1.1.1.8	Determine authorities for leases	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input type="checkbox"/>	1.1.1.1.9	Determine authorities for charitable contributions	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training
<input type="checkbox"/>	1.1.1.1.10	Determine if acquisition will maintain existing advertising spend...	13-Feb-19	20-Feb-19			0%	Lawson, Tammy	DiLorenzo, Nina	Training

5. Select the  button.

6. The Request Update window appears.

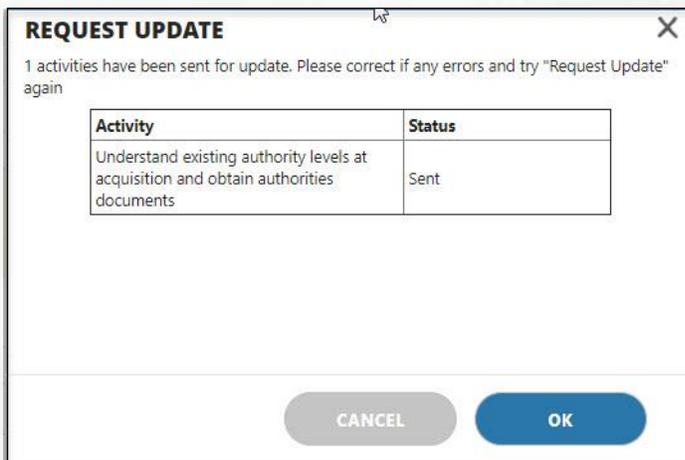


7. The popup displays the following items:

- Select who should receive this request – **Owner** or **Responsible**.
- Select **Yes** or **No** if you would like to be notified when an update is submitted.

8. After selections have been made, click **OK**.

A Request Update notification pop-up displays the Activity and Status of the Activities (Milestones, Tasks, Subtasks) that have been sent.



**Note:** If Owner/Responsible has not been selected for an Activity for which a Request Update is being sent, it will display an error under status.

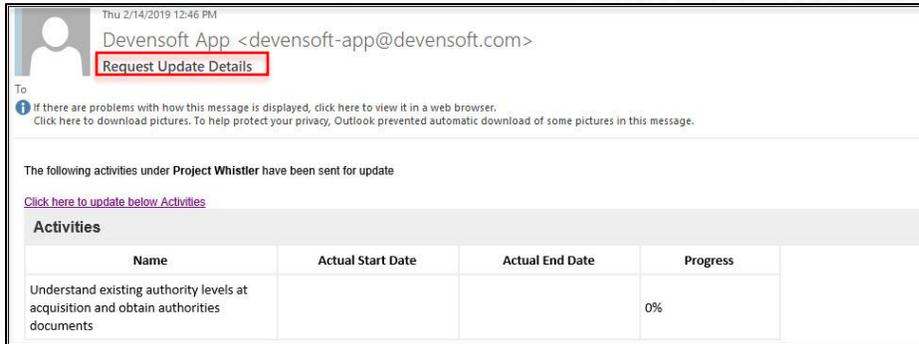
9. Select **OK**.

10. The Owner/Responsible user will receive a Request update email with a link to update the Activities.

# Updating Requests

To update your requests:

1. From your email Inbox, open the message from Devensoft App.
2. Click on the link → [Click here to update below Activities](#) and it will redirect the team member to the Request update window.

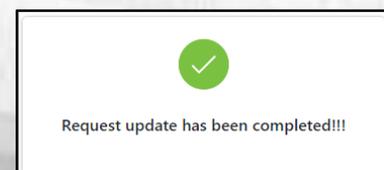


3. The screen to the right is displayed for the team member to complete the fields.
4. Complete the **Actual Start date**, **% Complete** and **Recent Note** fields.
5. When done with one Activity, select **Next**.
6. The user can navigate Activities by clicking the **Next/Previous** buttons.
7. When done with the updates, select the **Complete** button.

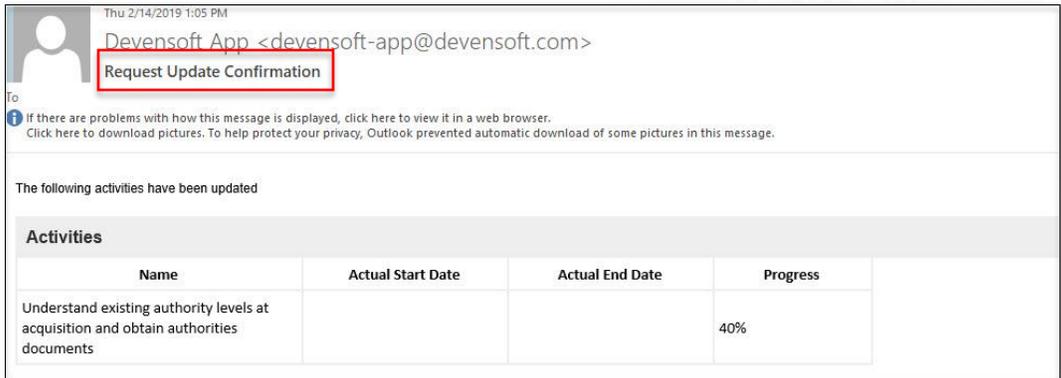
The screenshot shows the 'Request update' form. It contains the following fields and options:

- Project Whistler
- Activity Name: Task - Understand existing authority levels at acquisition and obtain authorities documents
- Milestone - Authorities
- Forecast Start date: 2/13/2019
- Forecast End date: 2/20/2019
- Actual Start date: [input field]
- Actual End date: [input field]
- % Complete: 0% (dropdown menu)
- Recent Note: [input field]
- 1 of 1
- Complete button

8. It will display the message indicating that "Request update has been completed."



9. The Integration Lead who sent the request update to the team member will get a “Request Update Confirmation” email.



10. The Integration Lead can return to the M&A tool and review the notes, dates and % Complete for the requested Activities.

WBS	NAME	RECENT NOTE	FORECAST START DATE	FORECAST END DATE	ACTUAL START DATE	ACTUAL END DATE	% COMPLETE
1.1.1.5	General Information		19-Feb-19	20-Feb-19			0%
1.1.1.6	GL Business Processes and Training		19-Feb-19	26-Feb-19			0%
1.1.1.7	Identify Revenue Recognition Issues		19-Feb-19	26-Feb-19			0%
1.1.1.8	Items for Non-ERP		19-Feb-19	26-Feb-19			0%
1.1.1.9	Legal Entity Setup and Setup in ERP Systems		19-Feb-19	26-Feb-19	19-Feb-19		7%
1.1.1.9.1	Determine the legal entity	Ahead of schedule.	19-Feb-19	26-Feb-19	19-Feb-19		70%
1.1.1.9.2	Establish co. codes or use existing?	Ran into a road block.	19-Feb-19	26-Feb-19	19-Feb-19		20%
1.1.1.9.3	GL Mapping - create new accts if needed	Finished ahead of schedule.	19-Feb-19	19-Feb-19	19-Feb-19	19-Feb-19	100%
1.1.1.9.4	Establish I/C structure		19-Feb-19	26-Feb-19			0%
1.1.1.9.5	Establish & Load Cost center hierarchy - need for both COS &...		19-Feb-19	26-Feb-19			0%