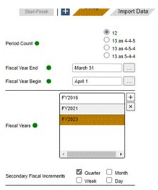
Build 1.0.48.0

Tuesday, February 14, 2023 9:59 AM

fiscal years in sequence warning

Per our discussion today and the changes to the template, I've changed the backend and GUI such that fiscal years in the setup of the engagement must be in sequential order.

However, as shown below, there are existing test engagements that have random FY entries that did not previously follow the rule. Because of the complexity of "fixing" this data, I am choosing to leave them the way they are. My input is that it's not worth the time to write a script to fix them. Do you agree?



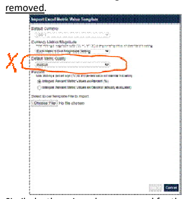
All engagements created with or after build 48 will follow the sequential rule.

For those engagements already out of order, starting with build 48 it will only allow you to add fiscal years min(fiscal years) – 1 and max(fiscal years) + 1, leaving the existing gaps. Similarly, you can only remove min(fiscal years) and max(fiscal years). So everything will work, but the gaps won't be fixed automatically.

new metric quality behavior

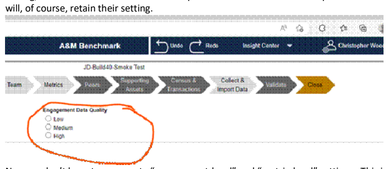
Changes:

1. Metric values will no longer be implicitly set when entering metric values.
2. Therefore, there is no longer the need for this setting when importing the template. This has been removed.



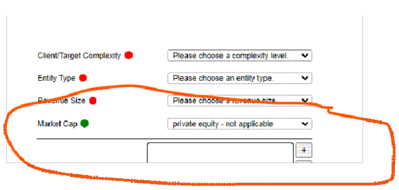
3. Similarly, there is no longer a need for the same idea on the GUI. This has been removed.

4. From now on, the user must explicitly set the metric quality either from
   a. The dropdown list on the GUI
   b. The metric quality field on the Excel template
5. The word "default" remains. It essentially means "not set". If you prefer a different word, let me know. After I thought about it, it seems like it still applies here.
6. When closing the engagement, for any metric in the engagement that still has "default" as its setting, the value the user sets here will replace it. All metrics that had explicit individual setting will, of course, retain their setting.



7. Now we don't have two separate "engagement-level" and "metric-level" settings. This is better for the data repository.

Market Cap field - New Value



new delete all engagement data function

I'm sending this again to be sure we're all on the same page. The delete all engagement data points function is implemented and will be available in build 48.

Changes:

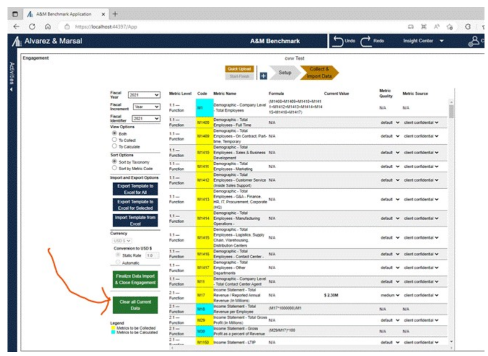
1. There is a new button "Clear all Current Data" on the "Collect & Import Data" chevron. It a special button so it has the green color like the finalize button. (This finalize button only appears here when the chevrons are collapsed in "Quick Upload" mode and there is no "Close" chevron). See the button in pic below.
2. Regular engagement team members will not see the button. The user must be an engagement manager or above.
3. When the user presses the button, a confirmation prompt appears. See pic below.
4. The operation is not undoable.
5. The operation deletes all data point in every fiscal increment and in every collection point.
6. This can only be done on open engagements.

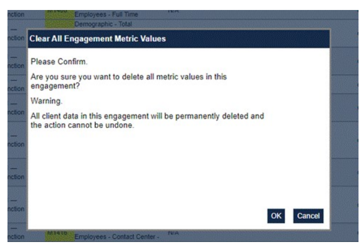
Note from Chris for everybody: In order to implement this functionality, I reused the delete procedures we already had. As I reviewed them to be sure they satisfied our new use case, I was reminded as to why I'm hesitant about the practice of reopening engagements that have already been closed. I would caution against normalizing reopening closed engagements when training our users. It should only be done when absolutely necessary when there is an extraordinary circumstance. It should not be used as a normal feature or as part of a user's workflow. Here's why: In the future, engagements will be included in peer groups. Engagements can only be included in peer groups once they've been closed since we know the data is immutable from that point on. If we reopen a closed engagement, we must necessarily remove it from any existing peer groups, in which it was included. This can be damaging/messy for obvious reasons.

Let me know if you have any questions.

Thanks,

Chris





Engagement Data Metric spreadsheet

For the engagement with parameters on "Setup" chevron:

1. FY begin: Jan 1
2. Fiscal Years: 2021, 2022, 2023 (fiscal years sequential?)
3. Secondary increments: Month, Quarter

We can have two template modes – essentially it allows the user to customize the template. It does not change the data buckets, necessarily so.

1. Standard
2. "Custom"

For (1) standard, no parameters are required, the data just pops out.

For (2), we'd have a pop-up with the questions:

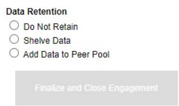
Begin Month 21	Jan	
End Month 23	Jun	
Increments		
	Annual	x
	Quarter	x
	Month	x

engagement states and reporting

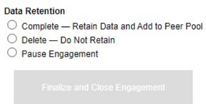
As you know, I've been working on the engagement status report, which has now become the dashboard because that was the faster option. Since the state of the engagement is necessary to create the report, I had to clarify the states "Suspended" and "Shelved" with Andy because I couldn't remember the details about those states.

After my discussion with Andy, we made some minor changes, which I'll describe below. In addition, I'll show the meaning of all states in a chart for documentation purposes.

Old "Close" chevron:



New “Close” chevron:



Here is a summary of the engagement states overall that will be reflected in the report:

Old Word	New "Report" Word	Meaning	Visibility	Functionality	Retention Status
Open	Active	Engagement is active for team members	Team members, BU/PA engagement managers, BU/PA administrators, global engagement administrators	Left-hand menu item appears for user; appears as 'active' in dashboard; user can edit the engagement	Data is in DB, but not in peer pool
Closed	Complete	Engagement has been completed and data is in peer pool	BU/PA administrators, global engagement administrators	Appears in dashboard as 'complete'; when viewed ("View this Engagement"), it is read only – no editing allowed; possible to reopen	Data is in peer pool
Deleted	Deleted	The engagement was deleted because (1) no data consent was granted at time if closing the engagement, or (2) the project manager decided to dump the data when closing the engagement.	BU/PA administrators, global engagement administrators	Appears in dashboard as 'deleted'; not possible to 'view' the engagement; not possible to reopen it	Data has been permanently deleted in the DB.
Shelved (removed)	N/A	N/A	N/A	N/A	N/A
N/A	Paused	The engagement was 'paused' from the close chevron.	BU/PA administrators, global engagement administrators Do we want to include engagement managers?	Appears in dashboard as "paused"; when viewed ("View this Engagement"), it is read only – no editing allowed; possible to reopen the engagement	Data is in DB, but not in peer pool
Suspended	Suspended	The engagement is in the suspended state because after previously 'completing' the engagement, AMB detected that the consent in PRIME was revoked.**	BU/PA administrators, global engagement administrators	Appears in dashboard as "Suspended"; when viewed ("View this Engagement"), it is read only – no editing allowed; possible to reopen the engagement (with the intention of closing it again with either "Delete" or "Complete" depending on ultimate PRIME status).	Data is in DB, but has been removed from the peer pool

Setup Chevron - Add Information bubbles

Revenue Size

- Small – Any target company having revenue less than 2.5 Billion
- Large – Any Target company having revenue more than 2.5 Billion

Business Complexity

- Consolidated – Any Target company having its business locally – All National/Domestic companies having operations in only one country.
- Diverse – Conglomerate or any Target company having business operations in more than one country

Based on the Revenue and complexity of doing business (local Vs Global) - The aforesaid criteria will enable the user to identify the target into one of the 4 categories - **Small Consolidated**, **Large Consolidated**, **Small Diverse** or **Large Diverse**

Market Capital

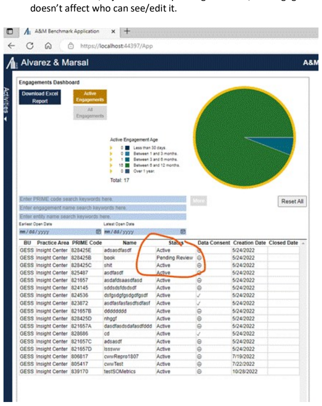
Small Cap - A small-cap stock is a stock from a public company whose total market value, or market capitalization, is about $250 million to $2 billion.
Mid Cap – A Mid-cap stocks are shares of companies with total market capitalization in the range of about $2 billion to $10 billion.
Large Cap – A Large-cap (sometimes called "big cap") refers to a company with a market capitalization value of more than $10 billion.

Pending Review Status

I was busy with other things, so I didn't have a chance to write this email this morning. I didn't mention anything on the call because we were out of time. The "pending review" state was one of those things that was so simple, because it has no functional difference. So it took less time to do it than discuss it. As was said on the call, it is "only" a reporting state and doesn't affect any system functionality.

Note differences below:

1. In "Active" view, it just shows as pending. As I said, the engagement is still considered open and doesn't affect who can see/edit it.



2. In "All" view, it has a filter everywhere as you'd expect following the pattern of the other categories.

Dashboard Access

- Need to check what projects are in flight - Open, closed
  - Chris to build dashboard instead of query - More time effective
    - Dashboard access - See only engagements based on role that are allowed to see
      - Team Member - Not on engagements, see nothing
      - Team Member - On engagements, see engagement they can access
      - Engagement Manager - All engagements for BU or PA
      - Admin - See All

Dashboard

I've completed unit testing on the dashboard. I will do more complete user-oriented testing tomorrow. I apologize that my test data isn't very 'pretty'. (I cannot source the DEV environment until the DEV DB is updated to build 48, enabling all the functionality here.)

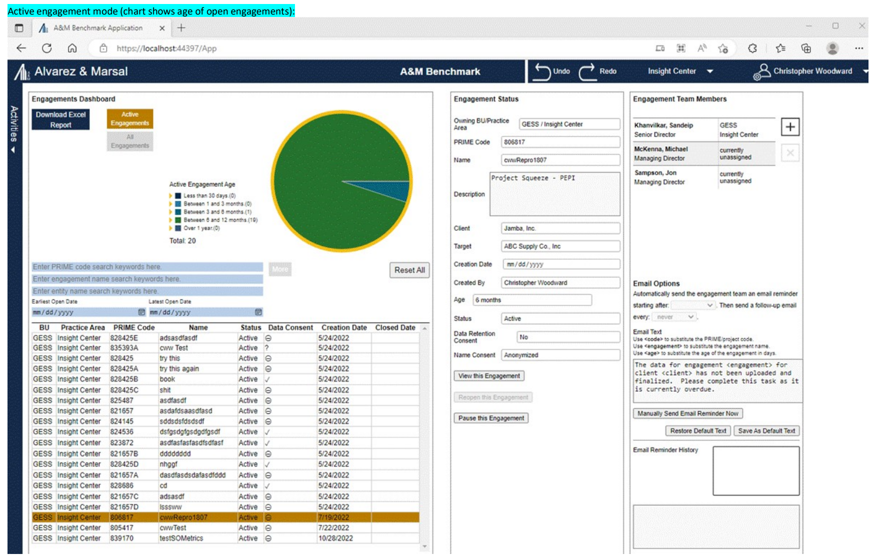
ASK: If you have time, can you please review the screenshots below and have a look at the attached Excel output. Please let me know if you think additional requirements for reporting purposes before I conclude this task.

Below, after the screenshots, I've described the functionality in more detail primarily for testing purposes for Jack.

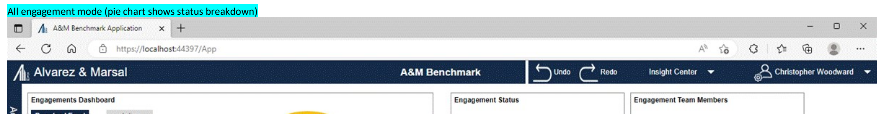
Thanks,

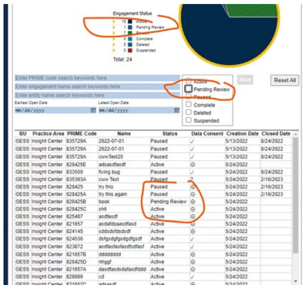
Chris

Active engagement mode (chart shows age of open engagements):

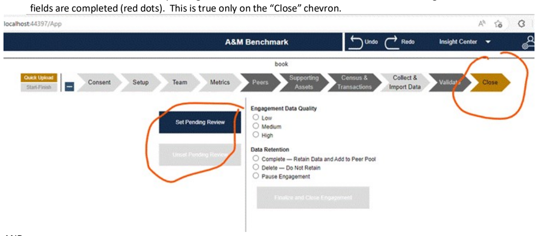


All engagement mode (pie chart shows status breakdown)

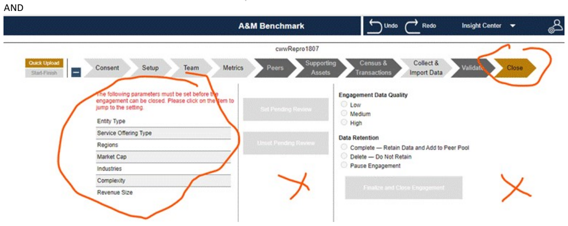




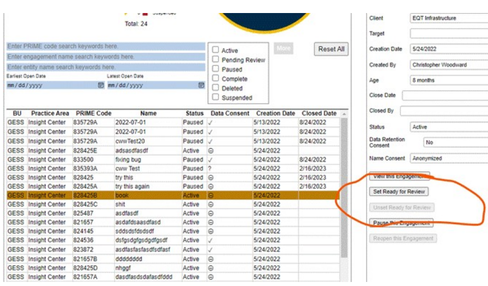
3. It is not required to ever use the "pending review". Again, it has no functionality other than to show up that way in the reports. So users who want to use this can, and those who don't, don't have to.
4. Old rule: Only users with elevated privileges could see the "Close" chevron.
5. New rule: All users can see the "Close" chevron. This is so the team members have access to the "set pending" functions.
6. New rule: Only elevated users can see the "Finalize" column (rightmost column where you can finally close the engagement).
7. Any user can set or unset the "pending review".
8. Like the "finalize column", the "pending review" column will not activate unless all outstanding fields are completed (red dots). This is true only on the "Close" chevron.



AND



9. Following the same pattern on the dashboard, these functions can also be invoked there. On the dashboard, it can be done even without having cleared out all the red dots (for simplicity). Of course, you still can't close unless all red dots are cleared.



Since "pending review" has no functional difference, you can close the engagement whether the status is "Active" or "Pending Review". There is no difference, and that is why the users aren't forced to use the state.

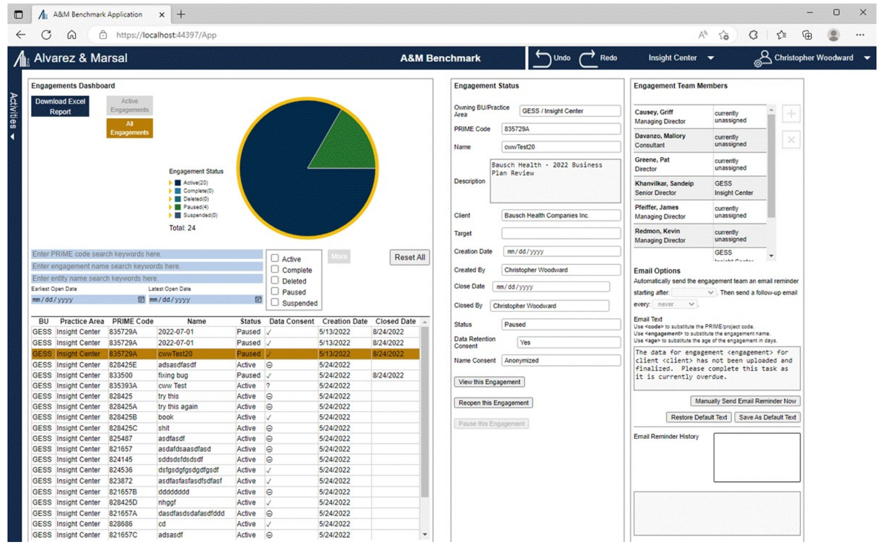
Global Undo/Redo Functionality

As previously discussed, the app-wide change for undo/redo has been implemented and is in build 48.

The undo/redo stack will no longer keep a memory of all actions since the beginning of the session. Instead, the undo/redo stack will be reset each time:

1. The user loads any new object (i.e. click on a service offering in the left-hand list where the details appear)
2. The user creates a new object (the undo of the create will be on the stack, but no previous actions).
3. The user deletes an object (when undo of delete is allowed, the undo of the delete will be on the stack, but no previous actions).
4. The user switches editors/objects from the left-hand menu tab.

As discussed, this will prevent confusion as to what is going on if the user presses undo or redo when not looking at the object, which the action would affect.



Details:

1. The user can only see engagements for which they're authorized. Therefore, the appearance differs user to user.
2. Regular team members and engagement managers can only see the "active" mode.
3. Administrators can use the "all mode".
4. The Excel report reflects the query on the screen.
5. Possible search filters:
    a. PRIME code
    b. Engagement name
    c. Entity name
    d. Open date
    e. End date
    f. Include active engagements ("all mode only")
    g. Include complete engagements ("all mode only")
    h. Include deleted engagements ("all mode only")
    i. Include paused engagements ("all mode only")
    j. Include suspended engagements ("all mode only")
6. To do in future: Page mode. The page mode will be necessary when there are thousands of engagements in the DB where we can only fetch a page at a time. In this mode, the Excel export and the pie chart won't make sense since we only ever have a portion of the data.
7. The user can click on an engagement in the list to get the detail view of it on the pane to the right.
8. All users can click "View this Engagement" to open the engagement in the engagement editor.
9. Only administrators can reopen the engagement.
10. Only administrators can pause an engagement.
11. Modified per Chris 3/13/23 - Only elevated access (Engagement Mgr & above) can pause an engagement. Only administrators can re-open an engagement.
12. All users can see the current team members.
13. Engagement managers and above can add/remove team members right here.
14. It is only permitted to change team members for active engagements.
15. Only administrators and engagement managers can see the email section.
16. To do in future: The automatic email reminders. This requires the nightly batch job functionality. Currently the user cannot set the frequencies.
17. The user can send an email to the team members (and also the associated engagement managers) with the "Manually Send Email Now". The body of the email will be whatever is in the "Email Text" message box.
18. The substitution keywords <code>, <engagement>, <age> can be used for the PRIME code, engagement name, and age of engagement, respectively. The system will automatically substitute the keywords for the actual value for the engagement.
19. "Restore Default" resets the email text to that which is stored with the engagement. Thus, the user can temporarily alter the email text for sending a particular email. The restore button will put the default from the DB back.
20. "Save as Default" allows the user to alter the email text in the message box and then save that to the DB as new text customized for their purposes.
21. The "email" history shows a list of all emails that have been sent.
22. Clicking on a historical email date show the text that was sent at that time.