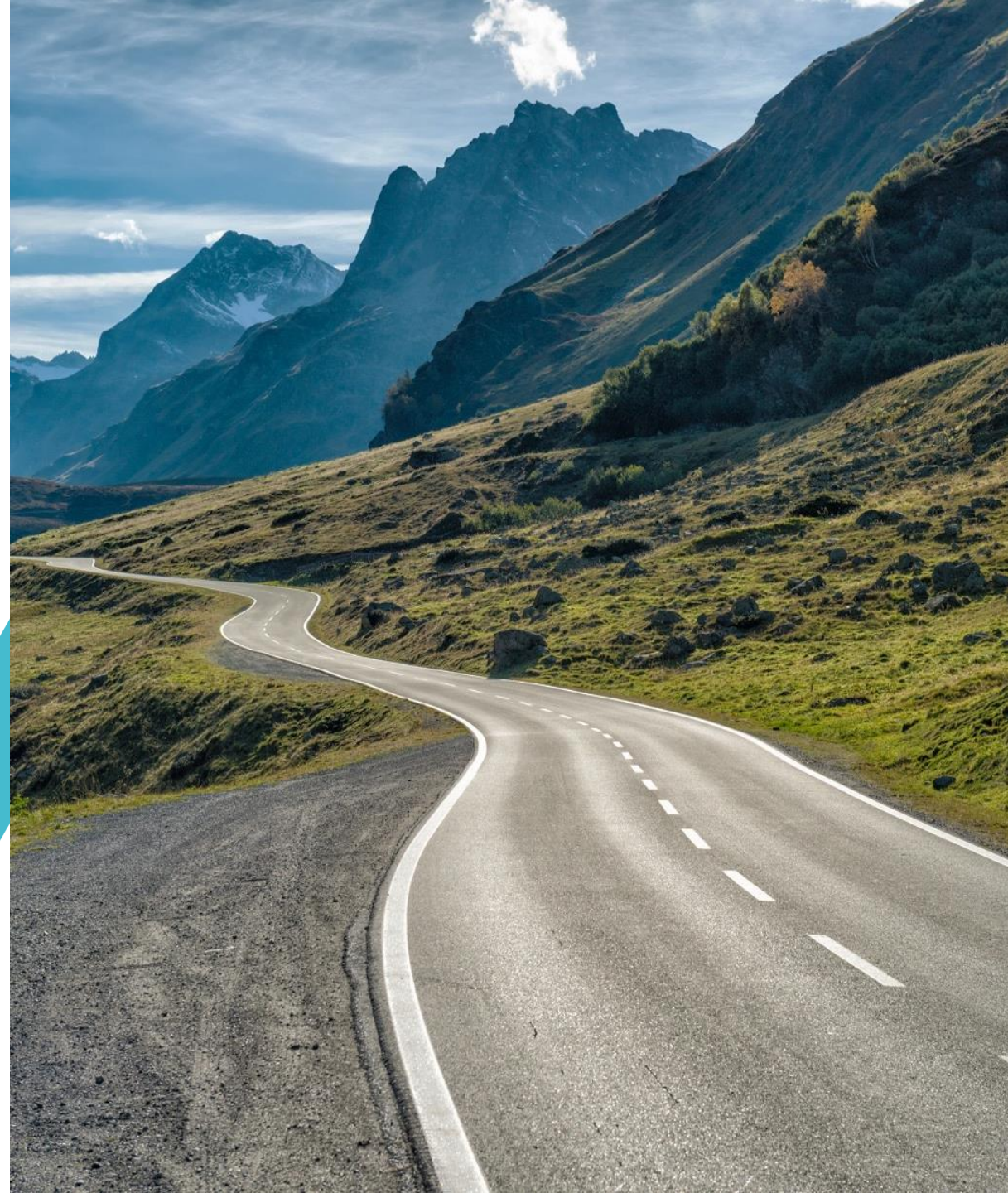


Pentana Disclose Roadmap

Quarter 2 2023



Disclaimer

The information contained in this roadmap is confidential and the copyright of Ideagen Plc. This roadmap is for information purposes only and Ideagen Plc makes no warranties, representations, express or implied or guarantees in relation to the development or delivery of any product, functionality, service, or part thereof. Any timings, development or delivery referenced in this roadmap shall be at the discretion of Ideagen Plc and may be subject to change.



Agenda

01 | Vision

02 | Release

03 | Roadmap

04 | Innovation



01.

Vision



Vision



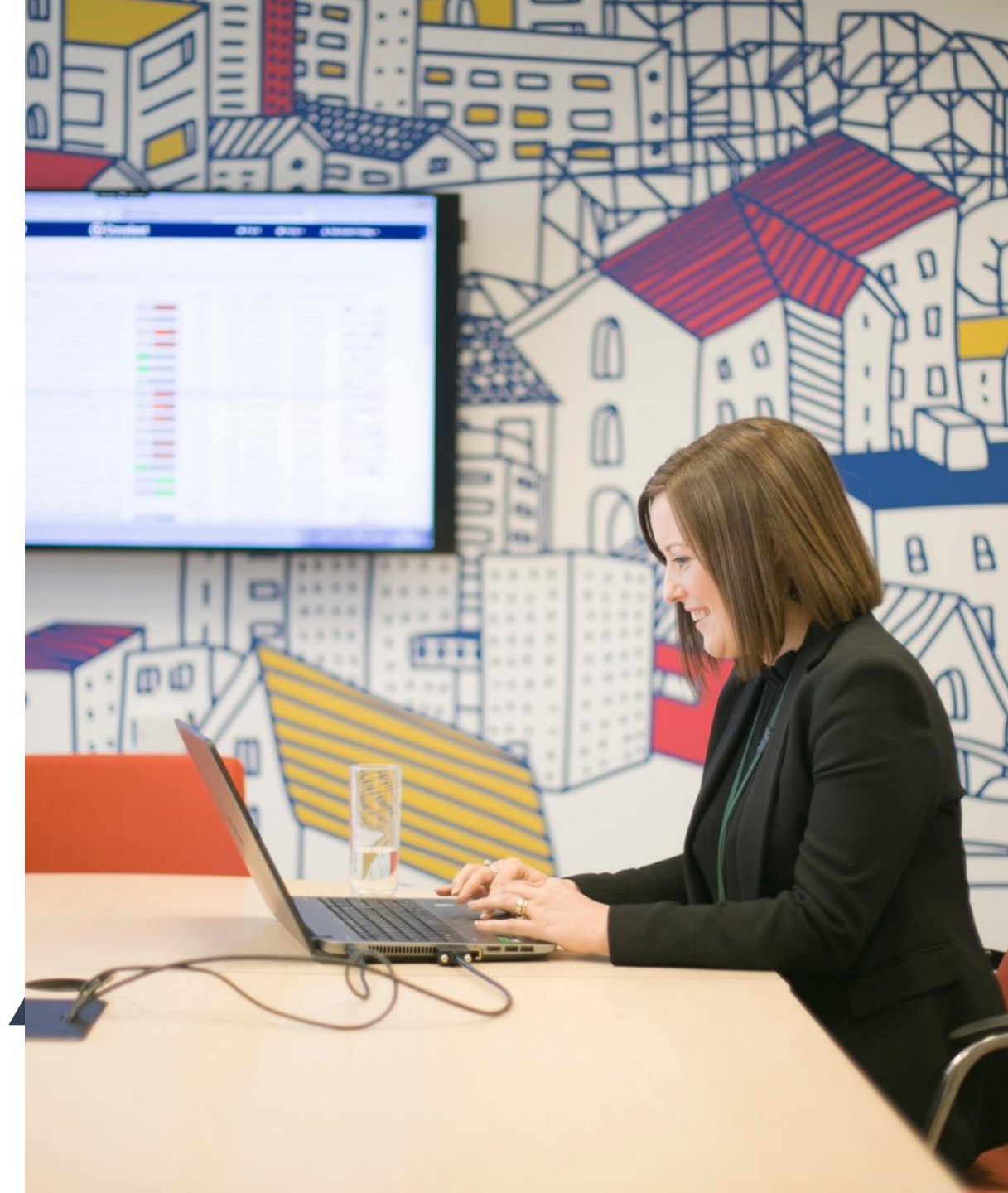
02.

Release



Product release update

- Release Nov 22
 - Notifications changed to redirect to Answer Set Details, to avoid accidental launch of answering mode when notification is viewed
 - Retention policy warnings on adding, importing and rolling forward Answer Sets to avoid accidental deletion



03.

Roadmap



Ideagen roadmap

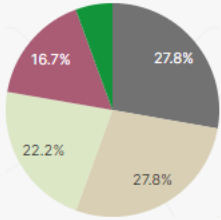


Product roadmap

Ideas overview

Add idea

Status



- 5 Will not implement
- 4 Planned
- 1 Shipped
- 0 Needs review
- 5 Future consideration
- 3 Already exists
- 0 Idea Triage

Ideas

0

September 6, 2022 September 12, 2022 September 18, 2022 September 24, 2022 September 30, 2022 October 6, 2022

18 ideas 1 ideas portals

Public comments

Idea DISCLOSE-I-16

Promote ▾ Details > 📄 ⋮ ✕

Promoted to feature DISCLOSE-106 📄

In development

MCW 2576 - Notification reg. Retention Policy

Created by sai.kiran.sannidhanam@pwc.com in Pentana Disclose Ideas Portal on Mar 23, 2022

Many users are not aware of Retention policy in Disclose, and so users are adding more than maximum number of checklists - which leads the older checklists getting deleted without notifying to users.

So, Its useful if users were prompted with a notification reg Retention policy while they are trying to add more than max number checklists.

Also, even Help documentation doesnot include any details reg. Retention policy. Kindly add that as well.

📄 Create mockup 📎 Attach files

OVERVIEW VOTES 1 PORTALS COMMENTS TO-DOS ⋮

Status Planned ▾

Workspace Disclose

Created by sai.kiran.sannidhanam@pwc.com

Assigned to 👤 Default (Unassigned)

Watchers No watchers

Categories

Product value 💰 0



One Ideagen Brand

Our purpose is to support the safe hands and quiet voices that protect the world and to do this well, we also need to be easy to do business with.

As a result, we are simplifying the brand experience for our customers, which includes evolving product naming to include Ideagen across our portfolio. We're unifying how our solutions look and feel, making them instantly recognisable as Ideagen - a trusted name in regulatory and compliance software.

As a fast-growing business, introducing more solutions to support the global community of organisations we work with, a unified Ideagen identity will enable a seamless integration of new innovative, world-class software and services for regulated and high-compliance industries.



Ideagen 
Disclose

Product roadmap



- **Usability improvements**

- Additional warning if adding client security
- Ability to select an answer set for checklist testing
- When tailoring is complete, answer set will open main checklist automatically
- Remember default settings on answer sets page

Product roadmap



- **Integration with Audit-XPRT**
 - Links in Disclose to access Audit-XPRT including authentication
 - Audit-XPRT provides the ability to upload financial statements and cast/cross-cast/check references, and review for disclosures

Product roadmap



- **Integration with Audit-XPRT**
 - Ability to automate the answering of the checklist (both tailoring and main checklist)
- **New report**
 - Answer sets details report to include information from answer sets details main page

04.

Innovation

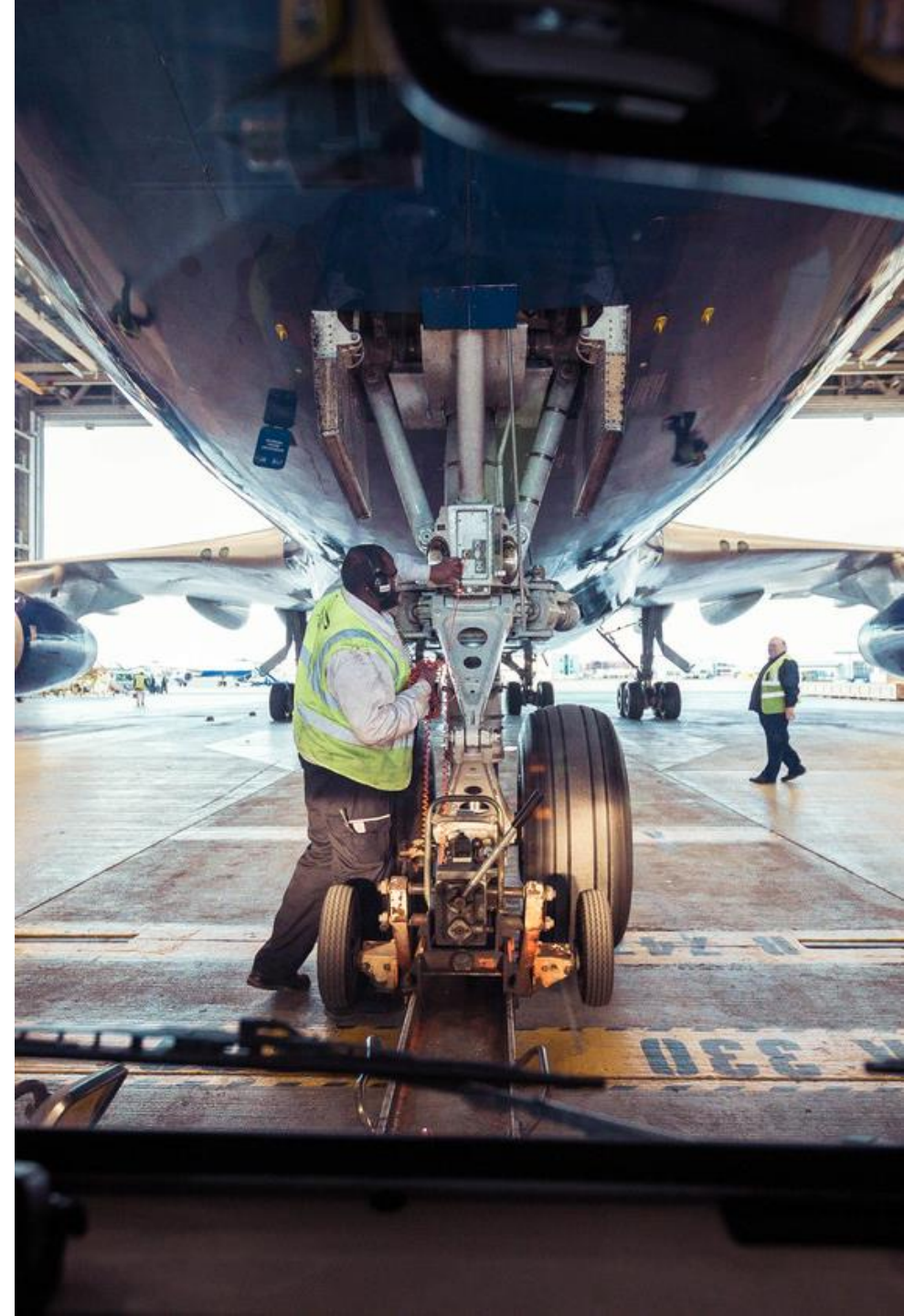


Ideagen engines of innovation

Customer Ideation

Customers are at the heart of everything we do so our short term roadmaps are heavily influenced by customers.

In the past releases customer ideas contribute on average more than 60% of our functional enhancements.

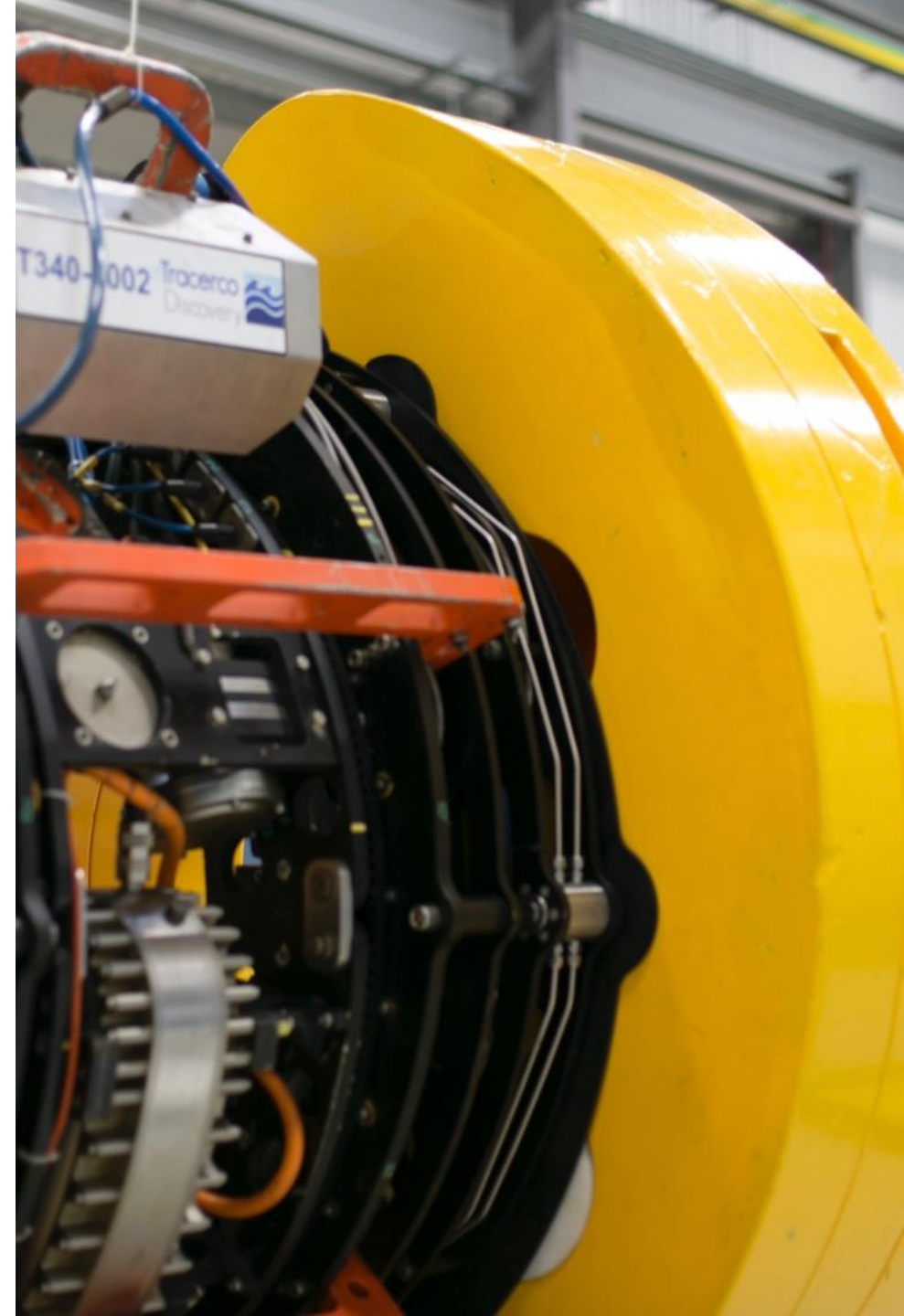


Subject Matter Expertise

Ideagen prides itself on our expertise and thought leadership.

Our Product team are both passionate product people and subject matter experts.

This means that the vision they set for their products are built on strong foundations with an eye to the future.



Intelligent

Our continued investment in AI and automation means that we will continue to add value for our customers by adding intelligent automation across our solutions.

Using technologies such as computer vision, NLP, neural networks and big data we will continue to innovate across our portfolio.



Thank you

