ADMINISTRATION BEST PRACTICES WEBINAR

Agenda

– Creating Roles and Associating Users

– Manage User Permissions and Confidential Documents

– Manage Active/Inactive Users

– Overview of Dictionaries

– Run Administration Reports

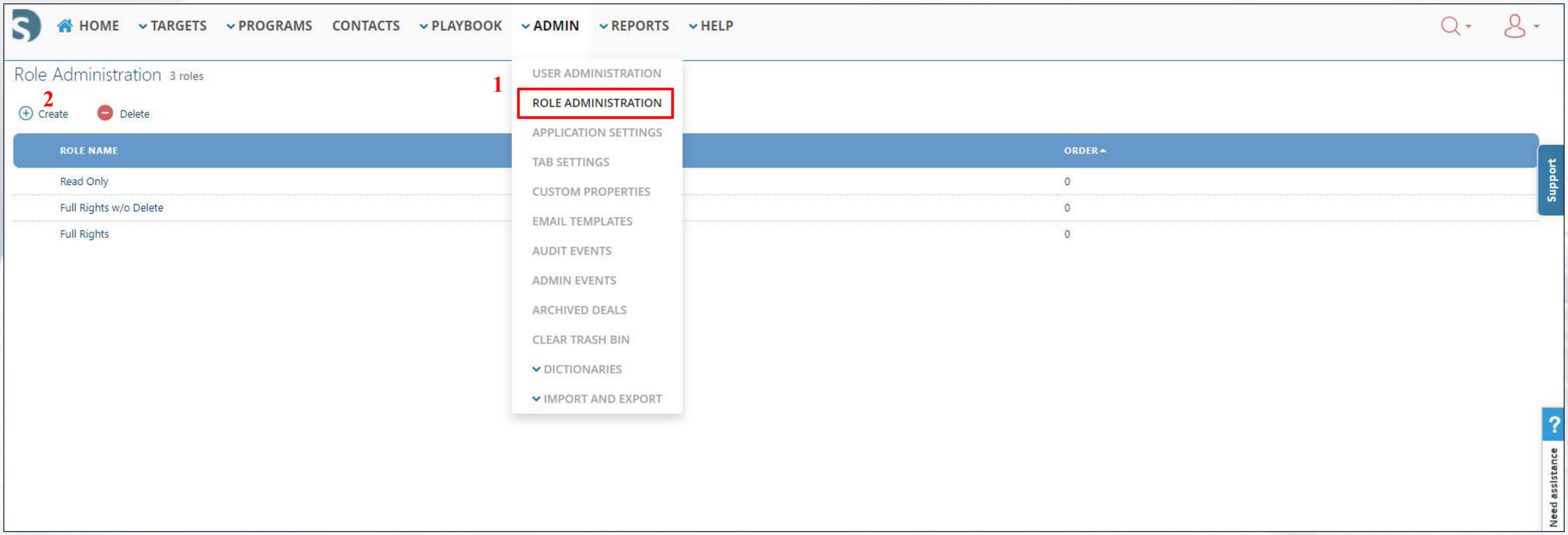
– Question & Answer Session

Modules

Topics
Module 1 – Role Administration
Module 2 – User Administration
Module 3 – Documents/Folders Permissions
Module 4 – Manage Active & Inactive Users
Module 5 – Dictionaries
Module 6 – Administration Reports
Module 7 – Question & Answer Session

Role Administration

Role Administration

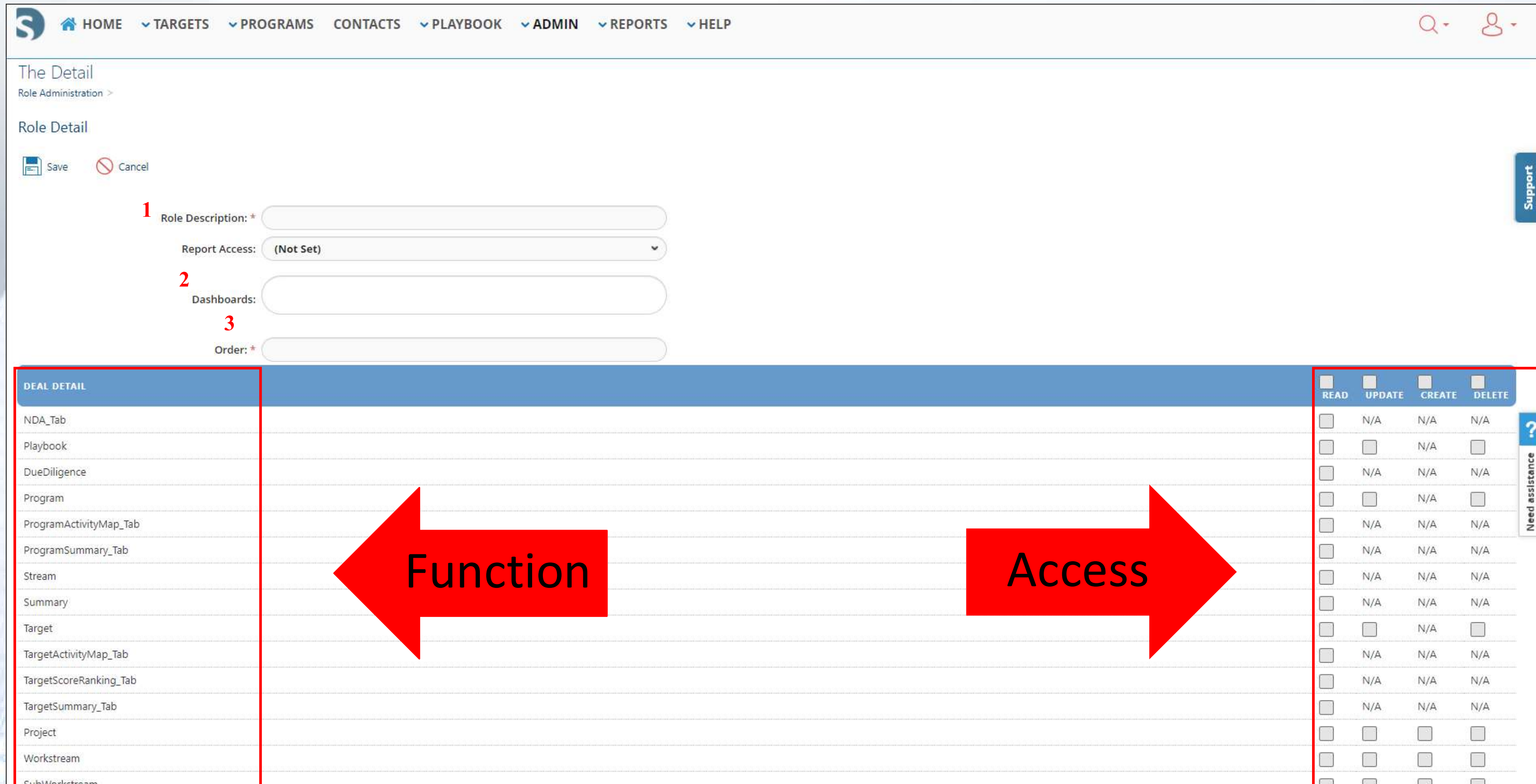


Roles

A role determines what areas within a Target or Integration a user has access to. One user may have access to read certain data while another user has access to read and edit the data. Roles can be predefined as explained below or customized based on a company's functional area.

- **Read Only** — A user assigned to this role can read the data with the system.
- **Full Rights w/o Delete** — Users assigned to this role have full rights to the system – they can read, update, and create data…they just can't delete data.
- **Full Rights** — Users have full rights to the system…they can read, update, create and delete data.

Create/Modify Role – Role Detail



Exercise: Create a Role

Create the following Role:

1. Navigate to **Admin/Role Administration**.
2. Select 

3. Complete the remaining fields:
    a. Role Description: **IT Lead**
    b. Report Access: **Manager**
    c. Dashboards: **Due Diligence** and **BD Dashboard**
    d. Order: **0**
4. Check the boxes under Deal Detail as shown on the next slide. This Role can be given to a Power User.
5. Select **Save**.

Exercise: Create a Role

DEAL DETAIL	READ	UPDATE	CREATE	DELETE
NDA_Tab	✓	N/A	N/A	N/A
Playbook	✓	✓	N/A	✓
DueDiligence	✓	N/A	N/A	N/A
Program	✓	✓	N/A	✓
ProgramActivityMap_Tab	✓	N/A	N/A	N/A
ProgramSummary_Tab	✓	N/A	N/A	N/A
Stream	✓	N/A	N/A	N/A
Summary	✓	N/A	N/A	N/A
Target	✓	✓	N/A	✓
TargetActivityMap_Tab	✓	N/A	N/A	N/A
TargetScoreRanking_Tab	✓	N/A	N/A	N/A
TargetSummary_Tab	✓	N/A	N/A	N/A
Project	✓	✓	✓	✓
Workstream	✓	✓	✓	✓
SubWorkstream	✓	✓	✓	✓
Milestone	✓	✓	✓	✓
Task	✓	✓	✓	✓
SubTask	✓	✓	✓	✓
Finding	✓	✓	✓	✓
Package	✓	✓	✓	✓
Risk	✓	✓	✓	✓
Action	✓	✓	✓	✓
Issue	✓	✓	✓	✓
Decision	✓	✓	✓	✓

Support

Need assistance

Role Examples

Below are examples of different types of Roles that you can add to your Production site. Keep in mind that you will need to determine which features you want these roles to have access to.

- **HR Lead** Read, update, create, and delete to selected features. Per the below screen capture, this role does not have access to the Due Diligence and Stream tabs.
- **HR Member** Read, update, and create selected features.
- **Legal Lead** Read, update, create, and delete selected features.
- **Legal Member** Read, update, and create selected features.

For more information on Roles, please reference the article Roles & Permissions

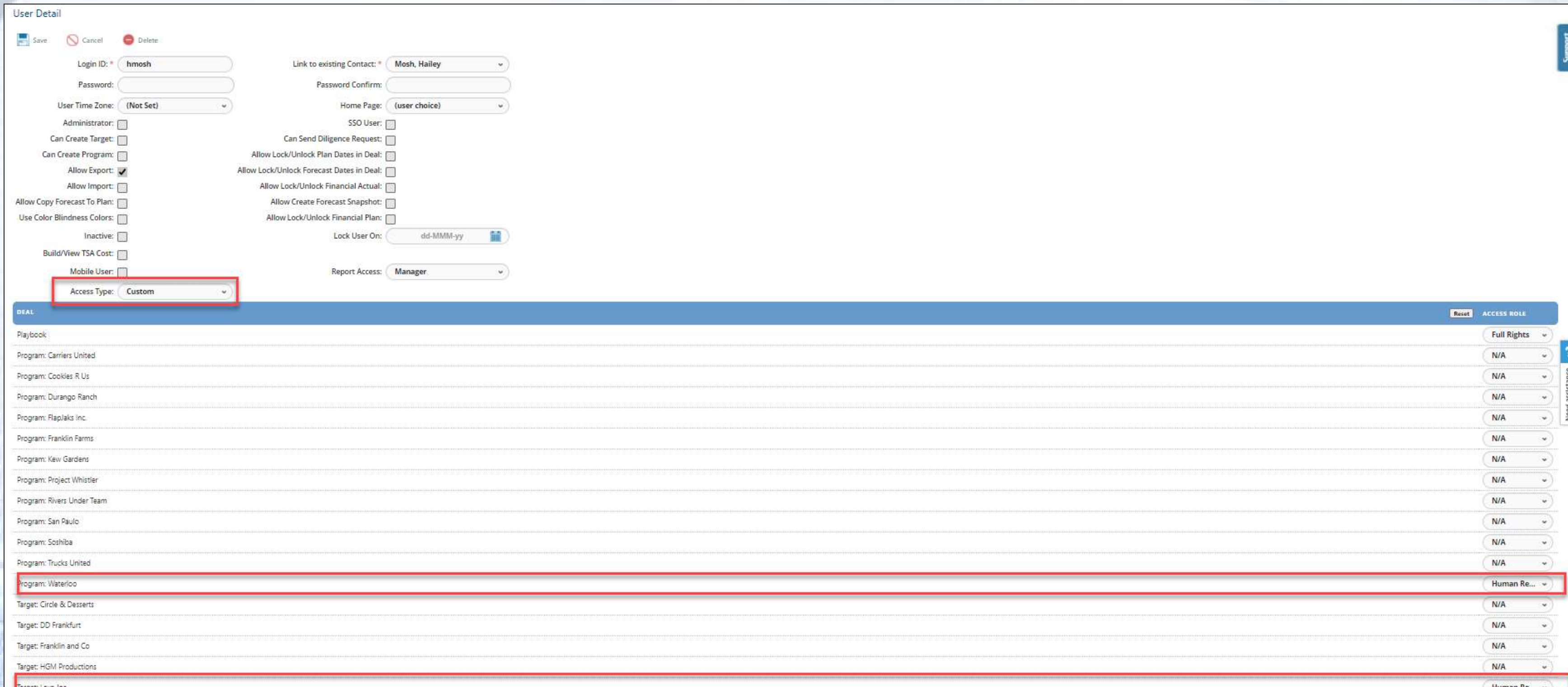
Module 2

User Administration

User Administration

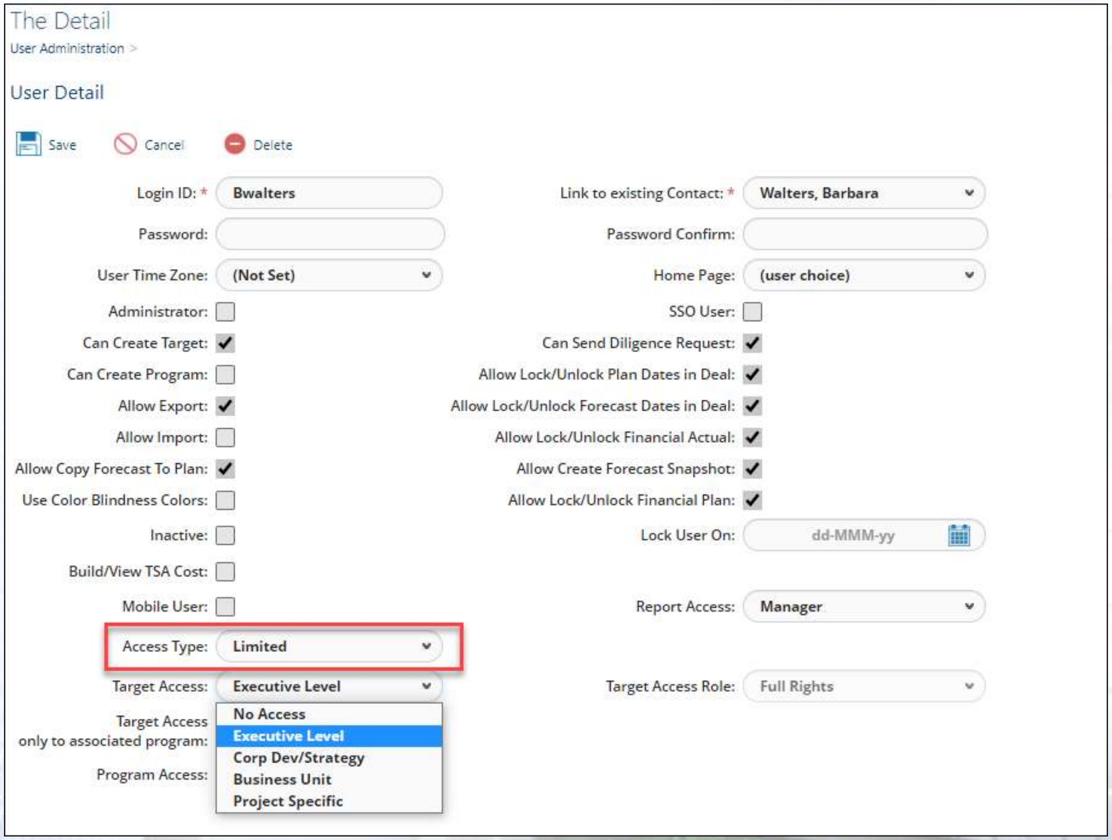
VERIFY the users have the appropriate roles enabled in their User Profile by viewing their Custom or Limited access levels.

Custom Access



User Administration

Limited Access



For a complete description of the User Detail fields, please reference the Administrator User Guide located on the Customer Support Portal →
https://support.devensoft.com/a/solutions/categories/5000036516/folders/5000298634

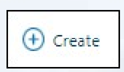
Manage Permissions

Permissions

- Setting Permissions can be done for:
  - Documents
  - Folders
  - Activity Map
    - Project
      - Workstream
        - » SubWorkstream
          - » Milestone
            - » Task
              - » SubTask

Setting Permissions for Documents

1. From the Menu Bar, navigate to **Playbook/Program/ Documents**.
2. In the Documents View, click on the **document name**.
3. To set up two types of Permissions, go to the **Access Permissions** section and click on the blue arrow to expand the Section.
4. Permission 1:
   a. Click on the 

   button to set the **Everyone** permission for your document.
   b. Select the Role **Everyone** and leave the Read/Update/Delete boxes unchecked and click **Save**. This will disable access to everyone, EXCEPT the Roles you specify in the next step.
5. Permission 2:
   a. Click on the 

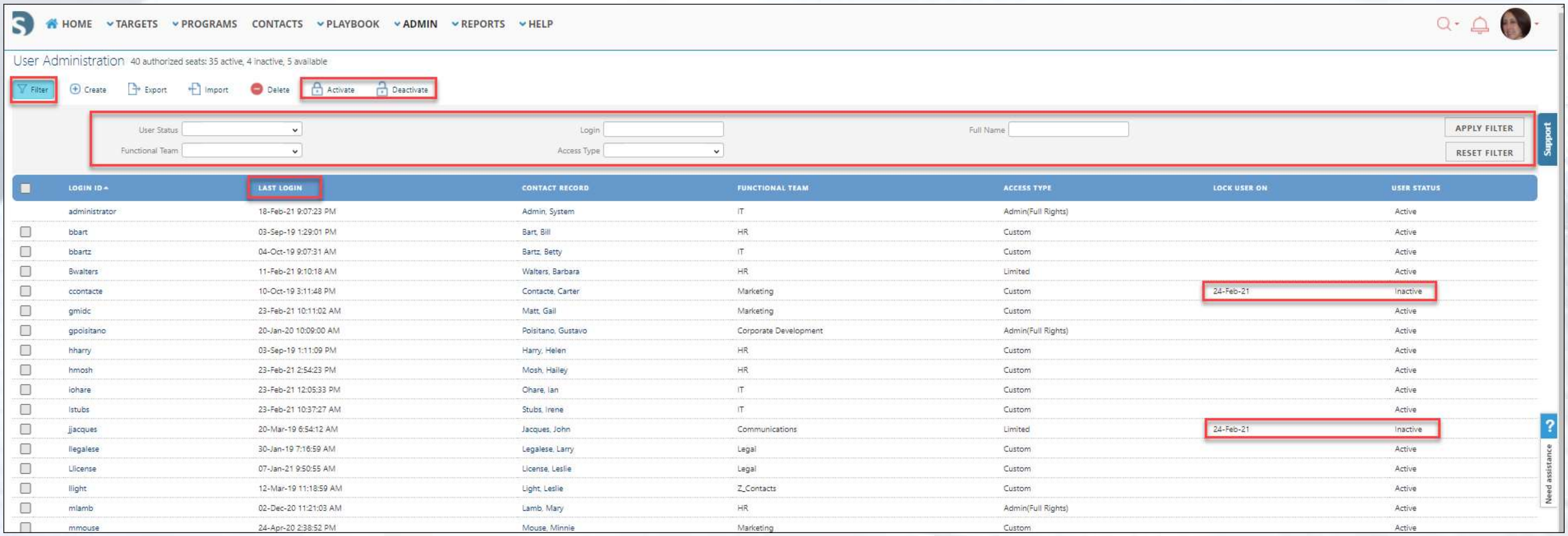
   button to set permissions for the Role that should have access to the document.
   b. Assign the applicable permission(s) and click **Save**.

Manage Active & Inactive Users

Administration View

- Used for activating and deactivating users
- Filter by “Access Type,” User Status,” etc.
- Sort by column headings, e.g. Last Login

Admin/User Administration View

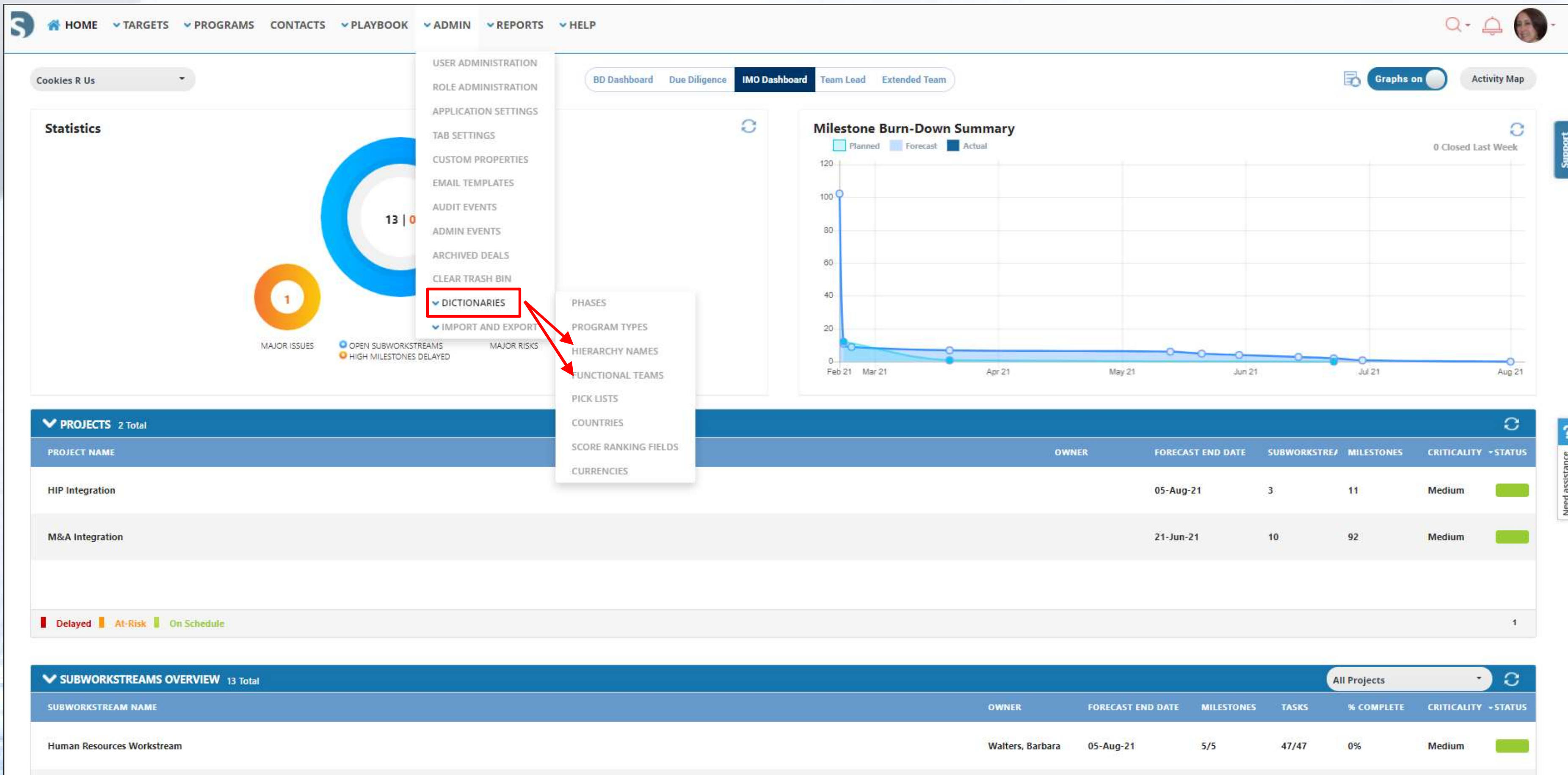


Module 5

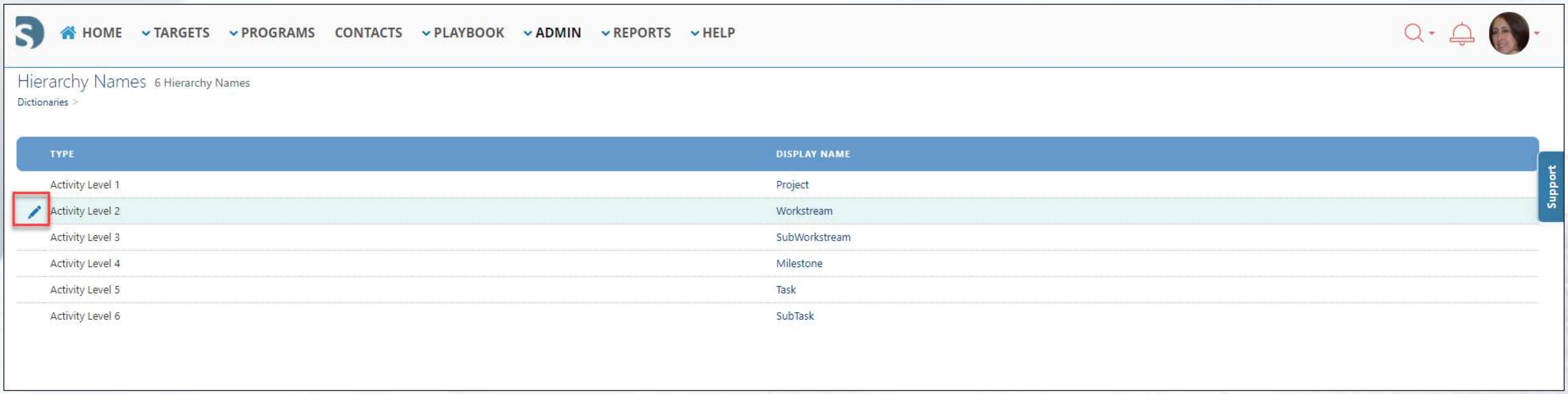
Dictionaries

Dictionaries

Lists predefined phases, hierarchy names, functional teams, pick lists, countries, and currencies.



Hierarchy Names

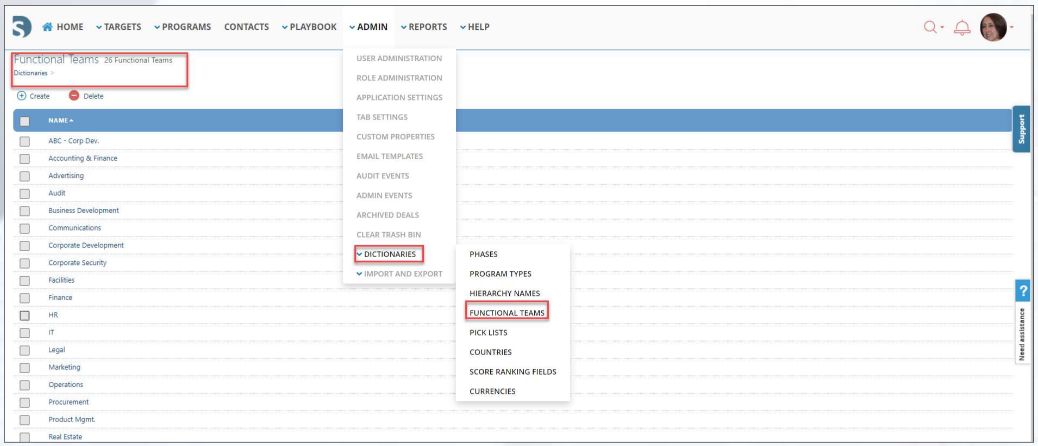


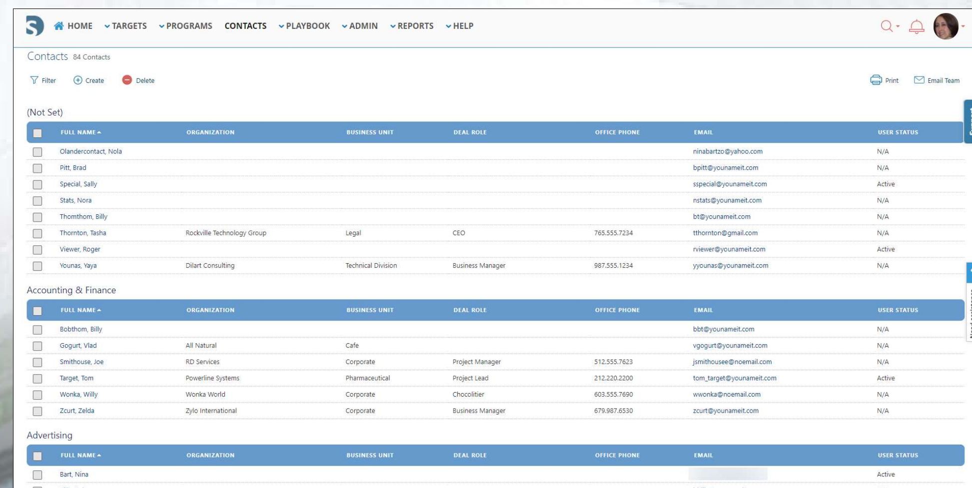
To edit a Hierarchy Name**:**

1. Navigate to the left of the Type column/Activity Level.
2. Click on the **Edit** icon.
3. Delete the current Display Name and type in the new name.
4. Save.

Functional Teams

Editing the Functional Teams picklist ensures that your Contacts are categorized by their Functional Team.





Administration Reports

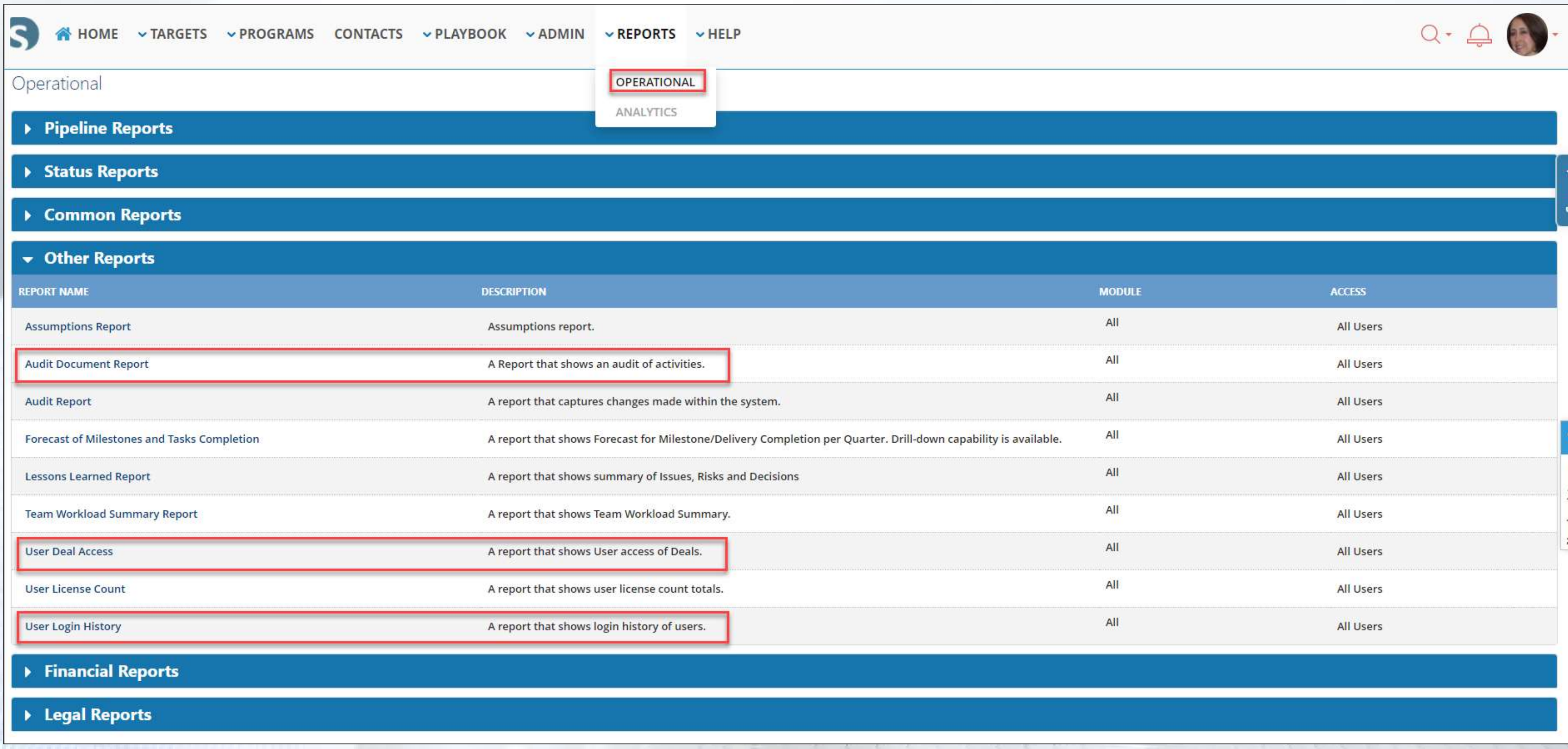
Administrator Reports

- **Audit** – captures various parameters within a Deal(s) based on the Operation performed (update, create, archive), when the change was made, who made the change, previous and current values, plus other useful information.

- **User Deal Access** – Displays the User's access for each deal, deal type and access role. The sole parameter for this report is "Deal," which includes all Deals, even those that are archived.

- **User Login History** – a report that shows the login history of users.

List of Administrator Reports



REPORT NAME	DESCRIPTION	MODULE	ACCESS
Assumptions Report	Assumptions report.	All	All Users
Audit Document Report	A Report that shows an audit of activities.	All	All Users
Audit Report	A report that captures changes made within the system.	All	All Users
Forecast of Milestones and Tasks Completion	A report that shows Forecast for Milestone/Delivery Completion per Quarter. Drill-down capability is available.	All	All Users
Lessons Learned Report	A report that shows summary of Issues, Risks and Decisions	All	All Users
Team Workload Summary Report	A report that shows Team Workload Summary.	All	All Users
User Deal Access	A report that shows User access of Deals.	All	All Users
User License Count	A report that shows user license count totals.	All	All Users
User Login History	A report that shows login history of users.	All	All Users

Audit Report

Search Criteria

From	4/15/2020 12:00:00 AM	To	4/23/2020 12:00:00 AM
Deal	Cookies R Us	Object	Action, DealFinancial, Finding, Folder, ..
User	nina	Project	[NULL]
Workstream	[NULL]	Milestone	[NULL]
Tag	(NO TAG)	Object IDs	
WBS Number		Owner	[NULL], ., JP Morgan, Acontact, Just, Ad.
Functional Team	[NULL], Accounting, Accounting & Fina.		

Cookies R Us Audit Report

Audit Report

From 8:00:00 PM, APRIL 14, 2020 to 8:00:00 PM, APRIL 22, 2020

Event ID	Deal	Operation	Event Time	Login	Object Type	Object ID	Object	Property Name	Previous Value	Current Value
214546	Cookies R Us	Update	7:20:16 AM, APRIL 20, 2020	nina	Project	63023	M&A Integration	Completed	0.52	0.79
214542	Cookies R Us	Update	7:18:44 AM, APRIL 20, 2020	nina	Project	63023	M&A Integration	Status	Delayed	AtRisk
214542	Cookies R Us	Update	7:18:44 AM, APRIL 20, 2020	nina	Project	63023	M&A Integration	Completed	0.27	0.52
214535	Cookies R Us	Archive	7:17:53 AM, APRIL 20, 2020	nina	SubTask	104152	Task 3	IsArchived	False	True
214534	Cookies R Us	Update	7:17:46 AM, APRIL 20, 2020	nina	Project	63023	M&A Integration	Status	AtRisk	Delayed
214534	Cookies R Us	Update	7:17:46 AM, APRIL 20, 2020	nina	Project	63023	M&A Integration	Completed	0.52	0.27
214530	Cookies R Us	Create	7:17:46 AM, APRIL 20, 2020	nina	SubTask	104152	Task 3	ID		104152
214530	Cookies R Us	Create	7:17:46 AM, APRIL 20, 2020	nina	SubTask	104152	Task 3	GroupingType		SubTask
214530	Cookies R Us	Create	7:17:46 AM, APRIL 20, 2020	nina	SubTask	104152	Task 3	Deal		Cookies R Us
214530	Cookies R Us	Create	7:17:46 AM, APRIL 20, 2020	nina	SubTask	104152	Task 3	Description		Task 3
214530	Cookies R Us	Create	7:17:46 AM, APRIL 20, 2020	nina	SubTask	104152	Task 3	FullDescription		

User Deal Access Report

Cookies R Us User Deal Access Report

Deal: CRU ← Search Criteria

1 of 1 Find | Next

User Deal Access

User Login	Deal Name	Deal Type	Access Role
administrator	ALL DEALS	Playbook/Target/Integration	Administrator
bbart	CRU	Integration	Full Rights
gpoisitano	ALL DEALS	Playbook/Target/Integration	Administrator
iohare	CRU	Integration	Full Rights
Istubs	CRU	Integration	Full Rights
ndisclosure	CRU	Integration	NDA Only
nina	ALL DEALS	Playbook/Target/Integration	Administrator
nperonzini	CRU	Integration	Full Rights
rwallerdrone	CRU	Integration	Full Rights
zzcurt	CRU	Integration	Full Rights

User Login History Report

Earth Day's Instance

Login administrator, mlamb, llegalese, npero Last 30 Days

1 of 1 Find | Next

Search Criteria

User Login	First Name	Last Name	Date User Created	Date Last Logged In
mlamb	Mary	Lamb	N/A	22-Apr-20 12:19:48 PM
nina	Nina	Di Lorenzo	N/A	22-Apr-20 11:01:16 AM
administrator	System	Admin	N/A	21-Apr-20 9:54:30 AM
# of users				3

Summary

– Create New Roles and Users

– Manage User Permissions and Confidential Documents

– Manage Active/Inactive Users

– Overview of Dictionaries

– Run Administration Reports

– Question & Answer Session

Module 9

Question & Answer Session