Training Guide

For Administrators

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Purpose of this Document

The purpose of the Getting Started Guide for Administrators is to become familiar with the basic concepts, setup, and features of the application. By following this step-by-step guide, you will be able to setup and use the application in a short period of time

Login to Devensoft M&A

Before you can login to the M&A Tool you must be assigned a Login ID, Password, and the URL. If you have not received these, please contact your internal Devensoft Administrator or send an email to support@devensoft.com. Once you have this information, use a supported browser (Chrome, IE 11+ or Firefox). Your login page will look like the below screen capture.

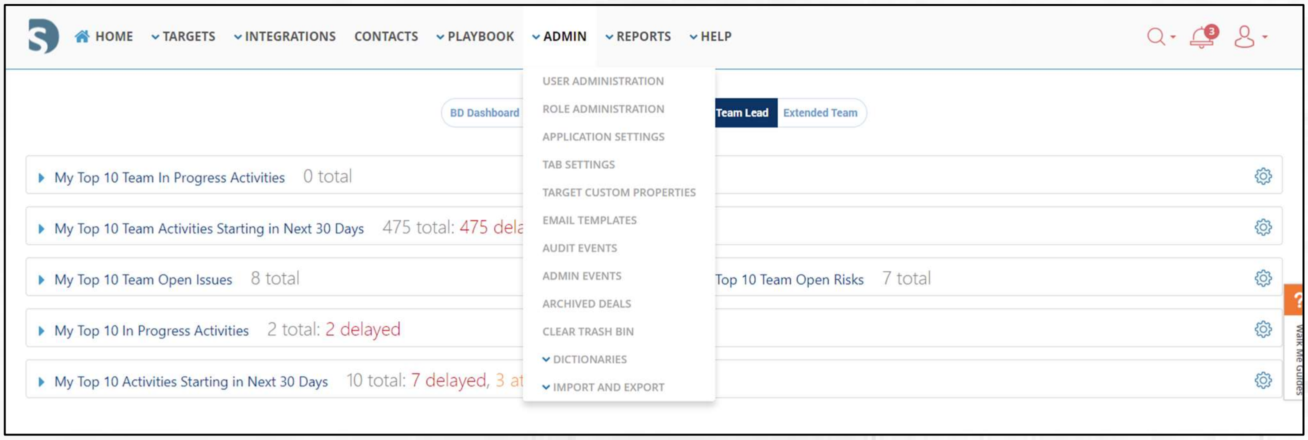
Verify Your Contact Details

To verify that your contact information has been correctly stored, click on the Avatar (top-right) and select **My Profile**. Select **Edit Profile** to modify changes and select **Update Profile** to save the changes.

Configure Application

Make sure you are logged in as an Administrator. You will know you are an Administrator if you can see the Admin menu item on the main menu bar next to PLAYBOOK. If you do not see this menu item and you are supposed to have Administrator access, please send an email to support@devensoft.com.

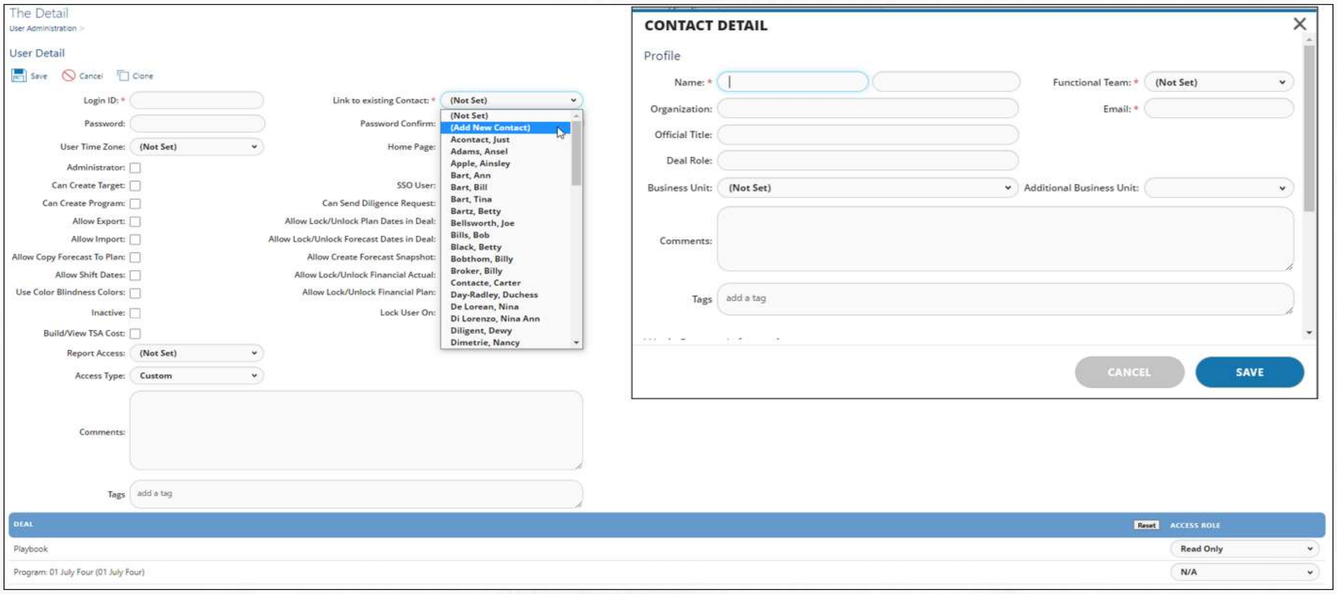
Configuring the Devensoft platform is comprised of adding users and possibly roles, and modifying dictionary items such as phases, functional teams, hierarchy names, etc. This guide will explain these items along with other configuration settings under the Admin menu.



User Administration – Create a User

For someone to login into the application, s/he must be setup as a user. When a user is setup, there must first be a corresponding Contact record to associate with the Login ID. A Contact record can be created while adding a new user, as illustrated below.

1. From the Menu Bar, select **Admin/User Administration**.



2. Select **+Create**. The User Detail page appears.

3. Complete the following fields:

    a. **Login ID**: Enter user's email address.

    b. **Link to existing Contact**: Select from the drop-down menu, link to existing contact. If the Contact record does not already exist for this user, then select **Add New Contact** and complete the first name, last name, and email address. Email address must be unique when creating a Contact.

    c. **Password**: Must be at least 8 characters and must contain lower and upper case letters, numerals and special characters(!,#,@,%,etc).

    d. **Password Confirm**: Enter the password again.

    e. **User Time Zone**: Select the appropriate time zone.

    f. **Home Page**: Select the default dashboard that the user will see. (user choice) displays ALL dashboards, e.g., BD Dashboard, Due Diligence, IMO Dashboard, Team Lead and Extended Team Lead

g. **Administrator**: Allows access to the Admin menu.

h. **Can Create Target**: User can create a Target.

i. **Can Create Program**: User can create a Program, e.g., Integration, Divesture, etc.

j. **Allow Export**: User can export the Target and Program Activity Map, Financials, Summary, and other locations throughout the system that display the Export icons.

k. **Allow Import**: User can import the Target and Program Activity Map, Financials, Summary, and other locations throughout the system that display the Export and Import icons.

l. **Allow Copy Forecast To Plan**: In the Financials Module a user can easily transfer data from the Forecast period into the baseline plan.

m. **Use Color Blindness Colors**: Assist individuals that are color-blind by adjusting the colors in the Devensoft M&A tool. This feature is applied to the Activity Map, Statuses, Deal tabs, and IMO Dashboard.

n. **Inactive**: When selected, this deactivates a user and helps manage user licenses efficiently when users are moving out of projects. The **Lock User On** field auto populates the current date preventing the user from logging into the Devensoft M&A instance.

o. **Build/View TSA Cost**: Allows a user to create and view transitional service agreements costs.

p. **Mobile User**: Allows users to update their Targets on the go as well as To-Do's, documents, and notes.

q. **SSO User**: Single Sign-on (SSO) is an authentication process that allows a user to sign in one time and gain access to multiple systems.

r. **Can Send Diligence Request**: Allows a user to send Diligence Request Items to a Target/Vendor.

s. **Allow Lock/Unlock Financial Plan**: Prevents the possibility of having financial data altered.

t. **Allow Lock/Unlock Plan Dates in Deal**: Prevents the possibility of having plan dates within a Deal altered.

u. **Allow Lock/Unlock Forecast Dates in Deal**: Prevents the possibility of having forecast dates within a Deal altered.

v. **Allow Lock/Unlock Financial Actual**: Prevents the possibility of having actual financial dates altered.

w. **Allow Create Forecast Snapshot**: Allows the user to take a snapshot of the dates to reference later.

x. **Report Access**: Defines the type of report access the user will have
   i. (Not Set) – user will not have access to Reports
   ii. Viewer – Can view and run reports.
   iii. Manager – Can view, run, and edit report properties.

y. **Lock User On**: This field is dependent on the **Inactive** checkbox and when selected, the system automatically inserts the current date to prevent the user from logging into the Devensoft M&A instance.

z. **Access Type**: Determines if the user has custom or limited access to Targets or Programs.
   i. **Custom**: Deals are outlined in the Deal Section and the Administrator defines on a deal-by-deal basis what type of access the user will have for that deal.

      1. **Deal Section**: You may grant the user access to any DEAL(s) – Target, Program, or Playbook displayed, by clicking on one or more pick list displayed under the “Access Role” column.

   ii. **Limited**: Removes the Deal Section and displays the Target and Program Access related drop-down menus and checkbox. Determines visibility for Targets and/or Programs at the following levels.

      1. **Target or Program Access**:
         a. **No Access**: User has no access to Targets or Programs.

         b. **Executive Level**: A user assigned to this Access automatically has the role “Full Rights” assigned and cannot be changed. This type of access means that the user has the same type of access as an Administrator but does not have access to the Admin menu.

         c. **Corp Dev/Strategy**: A user with this type of access can choose the type of role that they want assigned. Available roles include: Full Rights, Full Rights w/o Delete or Read Only.

         d. **Business Unit**: This type of access is affiliated with the Business Unit field in the Contact and Target records. If the Contact is assigned to the Business/Division Unit, “Manufacturing” and Targets are assigned to the Business

Unit, “Manufacturing,” this means that the user(s) will see ALL Targets affiliated with “Manufacturing.” A user has visibility only to Targets assigned to his/her Business Unit. The Business Unit for a user is defined on the Contact Detail page. Available roles include: Read Only, Full Rights w/o Delete, Full Rights, or custom roles.

e. **Project Specific**: This type of access means that you must be linked to a Target, via the Team Tab/link function, to access the Target. Available roles include: Read Only, Full Rights w/o Delete, Full Rights, or custom roles.

2. **Target Access only to associated program**: The checkbox enforces that the user can have access ONLY to those Targets that are related to a Program where he/she has access. For this to work, the Target and Program must be linked which will happen only when a Target is copied using **Copy to Integration** feature.

aa. Select the **Save** button to save the changes made on the User Detail page.

Clone a User

1. From the Main Menu Bar, select **Admin/User Administration**.

2. Hover your mouse over a username.

3. To the left of the name appears a square icon labeled “Clone User Setting.”

4. Select the **Clone User Setting** icon. The Clone User Setting opens. Complete the following fields:
    a. **Login ID**: Enter user’s email address.

    b. **Link to existing Contact**: Select from the drop-down menu, link to existing contact. If the Contact record does not already exist for this user, then select **Add New Contact** and complete the first name, last name, and email address. Email address must be unique when creating a Contact.

    c. **Password**: Must be at least 8 characters and must contain lower and upper case letters, numerals and special characters(!,#,@,%,etc).

    d. **Password Confirm**: Enter the password again.

    e. Select **Save**.

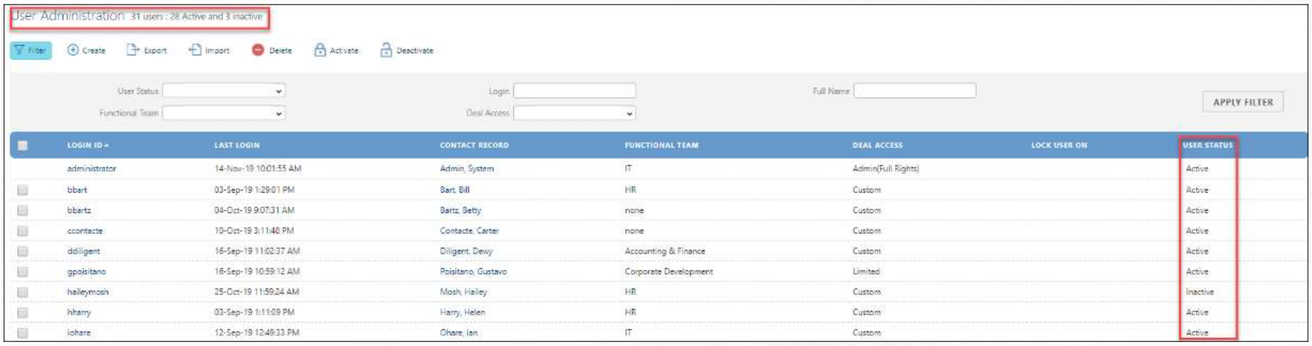
Exercise – User Administration – Create New User

1. Navigate to **Admin/User Administration**.

2. Select **+Create**.
    a. **Login ID**: Enter **tuser<#>**
    b. **Link to existing Contact**: Select the drop-down arrow and choose **Add New Contact**. Complete the first name, last name, and email address fields. Select **Save** to save the contact.
    c. **Password**: Enter **Hello12345!**
    d. Select **Save**.
    e. Select the options to allow access.
    f. In the Deal section, select the Access Role for the user based on access needs.
    g. Select **Save**.

User Administration View

After users are added to the application, their Login ID, Functional Team, Deal Access, etc. are displayed in the User Administration view. Functions such as filtering, creating, exporting, importing, deleting, activating and deactivating users are described in the table below.



Function	Description
Filter	The following user administration parameters are available: User Status, Login, Full Name, Functional Team and Deal Access.
Create	Adds a new user to your company's instance.
****Export***	Users are exported to Excel for viewing, manipulating data and printing purposes.
****Import***	Pulls data from the user template and transfers it to the UI.
Delete	Select the checkbox(es) in the left margin to delete a user(s).
Activate/Deactivate	Choose a login ID by selecting the checkbox(es) in the left margin to deactivate/activate a user(s).

***Note**: When using the import template, users can be assigned the same role to all Targets or Programs and cannot define different roles for each. When uploading users for the first time, the User Template will be blank and you can complete the template fields, followed by importing the users into the system. Thereafter, caution must be exercised in that if another bulk update is conducted when adding new users, use the blank template and add your new users **only**. When you import, only those new users will be uploaded to your company's instance and the remaining users will not be affected.

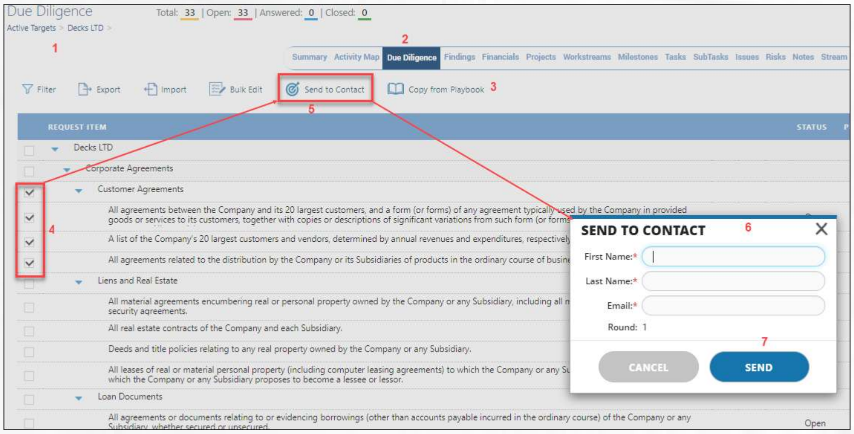
Managing Active/Inactive Users

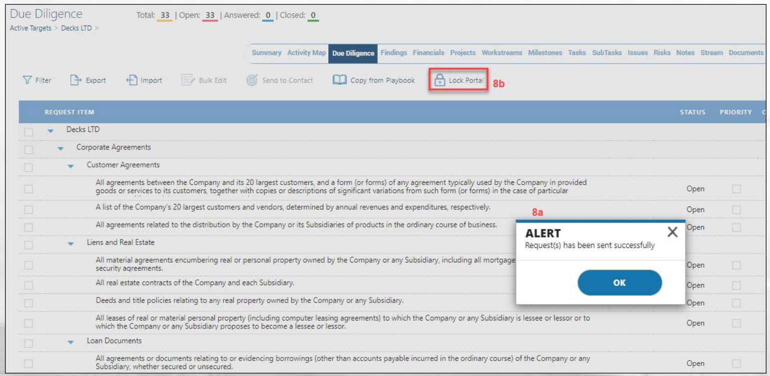
To help manage the user licenses efficiently, a status summary of authorized seats, active and inactive users is displayed at the top of the screen. When the Administrator attempts to add a new user, the system compares the total active users, (e.g. those who are not marked as inactive AND do not have a Lock Date set) to the total allowed seats. If the Administrator tries to add more than the allowed number of seats, a message is displayed to contact support@devensoft.com about increasing the allowed seat count or deactivate existing users to allow new users to be added.

Due Diligence

In the Due Diligence module, there is the Lock Portal/Unlock Portal button that is displayed for the Administrator and Deal Lead only. All other users will not see this button. This button will be displayed once the Due Diligence Request Items have been copied into the Deal and Request Items sent to the Target. To view this button:

1. Open a **Target**.
2. In the Tab Bar, click on the **Due Diligence** link.
3. If necessary, click on the **Copy from Playbook** button to load your Due Diligence Request Items.
4. On the left side of the screen, select a few Request Items.
5. Click on the **Send to Contact** button. The Send to Contact window opens.
6. Complete the required fields.
7. Press **Send**.
8. Once you press **Send**:
    a. The Alert Window opens.
    b. The **Lock Portal** button appears below the Tab Bar.





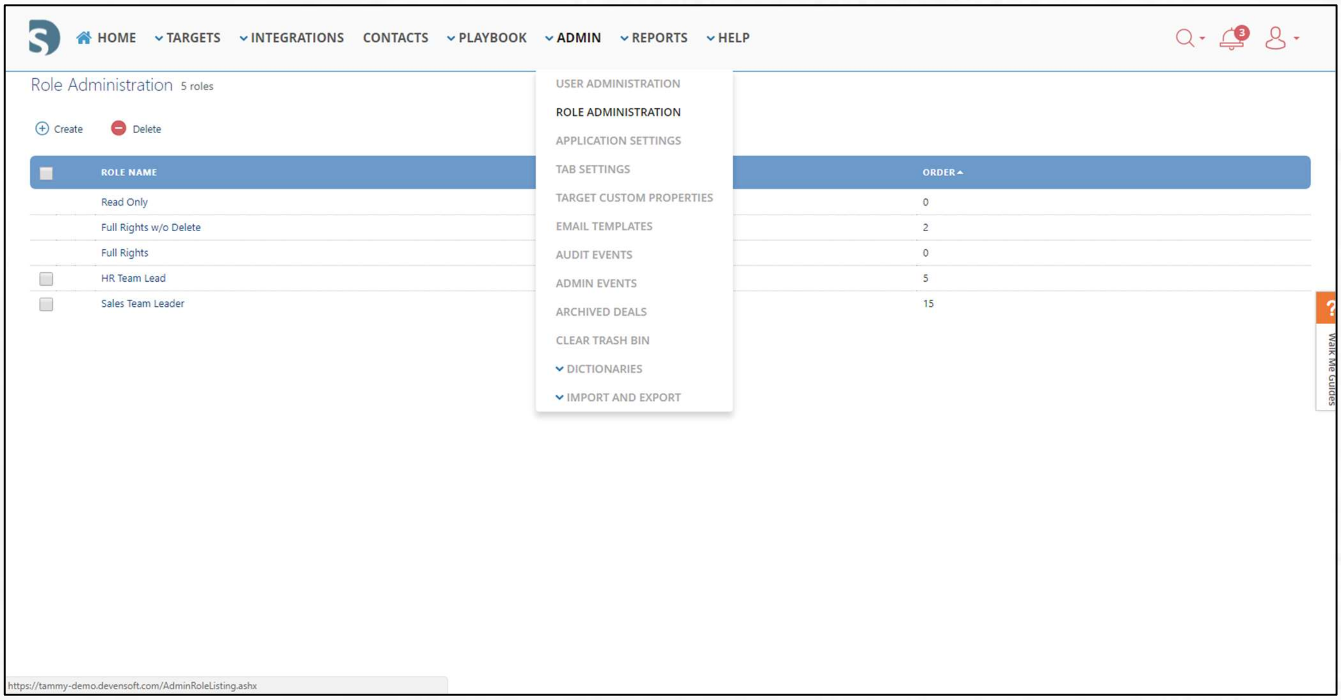
Tip: To add or change the Deal Lead, go to the Target's Summary page/Contact Info section to update the **Deal Lead** field.

Role Administration Setup

Before new users are added to the application, the Administrator should decide what functional/security roles to include within their instance. Users are generally assigned a role specific to each Target or Program. Keep in mind that roles can be added at any time, yet, best practices suggest that roles should be created prior to adding users.

The default roles automatically configured in Devensoft's M&A Tool are **Read Only**, **Full Rights w/o Delete**, and **Full Rights**. The additional roles to consider adding are HR and Legal, at a minimum. If everyone on your team will have access to all the information in each Target or Program, then you can skip this step and assign Full Rights to every person for each Target or Program.

When creating roles, careful thought should be given to which parts of the application each role should be given access and whether it can read, create, update and/or delete data. Access can be further restricted to specific Workstreams, Milestones, Tasks, Documents, and Document Folders within each Target and Program.



Create a Role

1. From the Main Menu Bar, navigate to **Admin/Role Administration**.

2. Select **+Create**.

    a. **Role Description**: Provide a name.

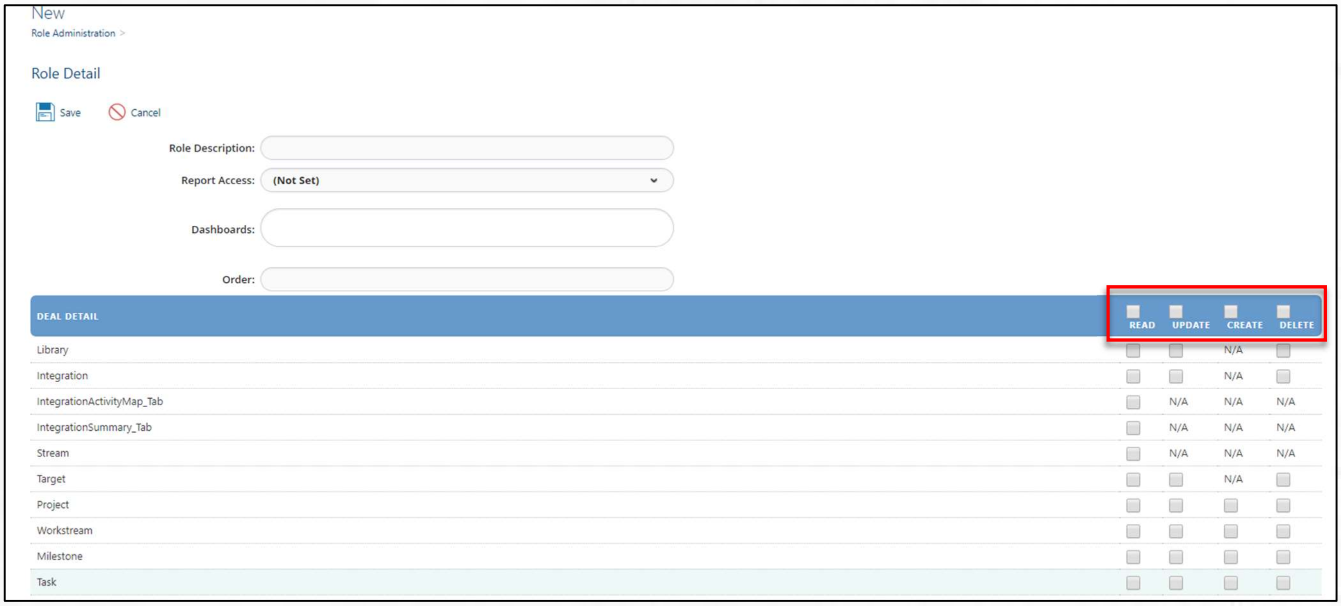
    b. **Report Access**: In the drop-down menu, determine if user need view or manager access regarding reports.

    c. **Dashboards**: Determine which dashboards the user will need.

    d. **Order**: Type in the order of the role.

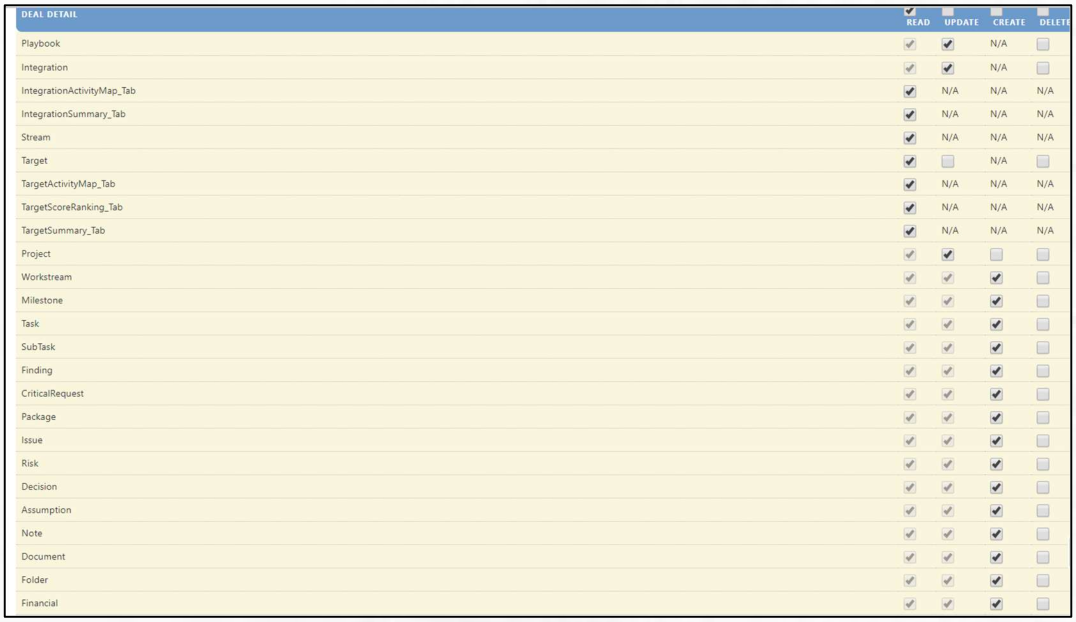
3. In the Deal Detail, select the which access the user will need by selecting “Read”, “Update”, “Create”, or “Delete”

4. Select **Save**.



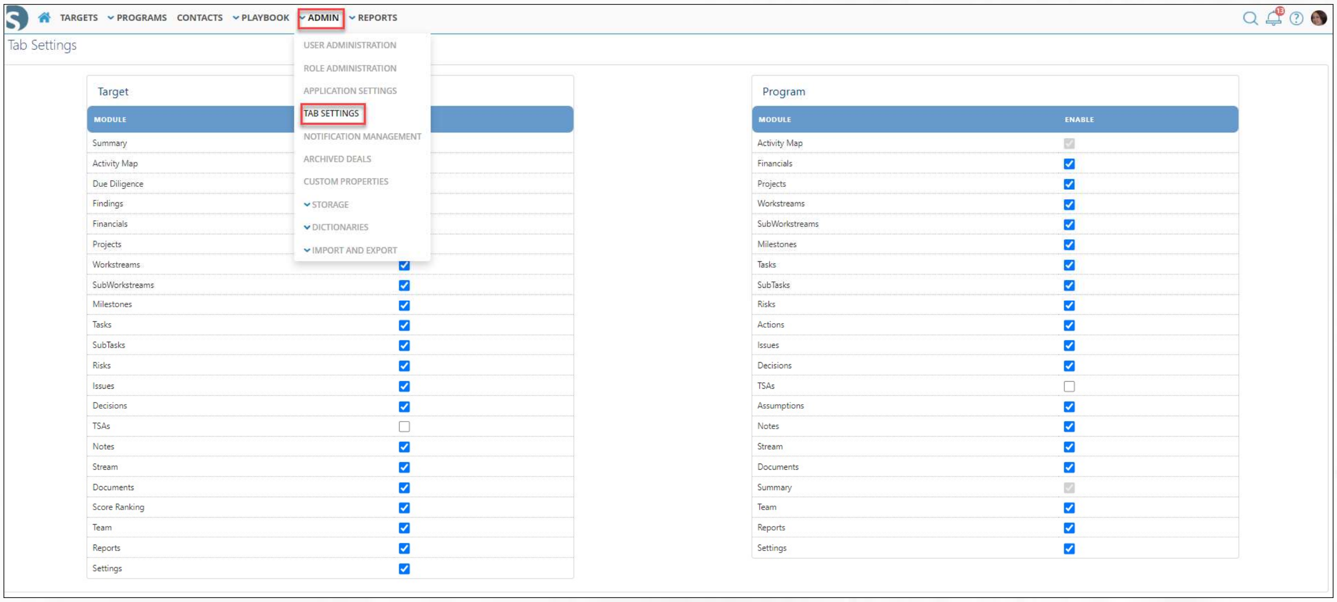
Exercise: Create a Role

1. Navigate to **Admin/Role Administration**.
2. Select **+Create**.
3. Role Description: **Hide Documents**
4. Report Access: **Viewer**
5. Dashboards: **Due Diligence** and **BD Dashboard**
6. Order: 2
7. Check the boxes under Deal Detail as shown in the below screen capture.
8. Select **Save**.



Tab Settings

Enable/Disable tabs for a Target or Program.

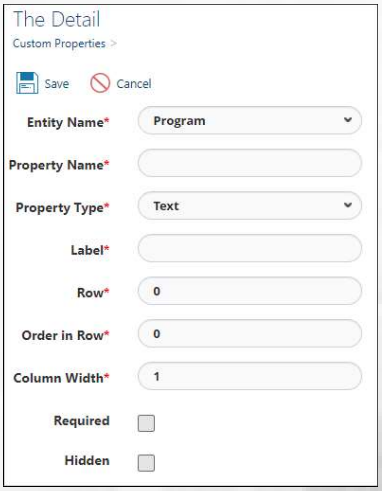


Custom Properties

Adding custom fields allows users to create fields throughout the platform. Fields can be created at the Program, Target, any of the six(6) Activity Levels and Financial level.

To add custom fields:

1. Navigate to the **Admin** menu.
2. Select **Custom Properties**. The Custom Properties page appears.
3. Select **+Add New Property** button. This will bring you to the new property detail page.



4. Below is a description of the Custom Property fields.

Entity Name	Choose the “location” or entity of where the field will be added.
Property Name	The name of the property.
Property Type	What type of data should be in this field?
Label	The label will display as the name of the data field.
Row	The row location of the field.
Order in Row	The order in a row (1st, 2nd, 3rd, etc.).
Column Width	The range of 1-5 row that will control access across 1-5 cells).
Required	In edit mode for Target detail page, an asterisk will display that it is a required field to include data.
Hidden	Choose hidden field to hide from users until later use.

5. Select the **Save** button. The custom property has been added to the list.

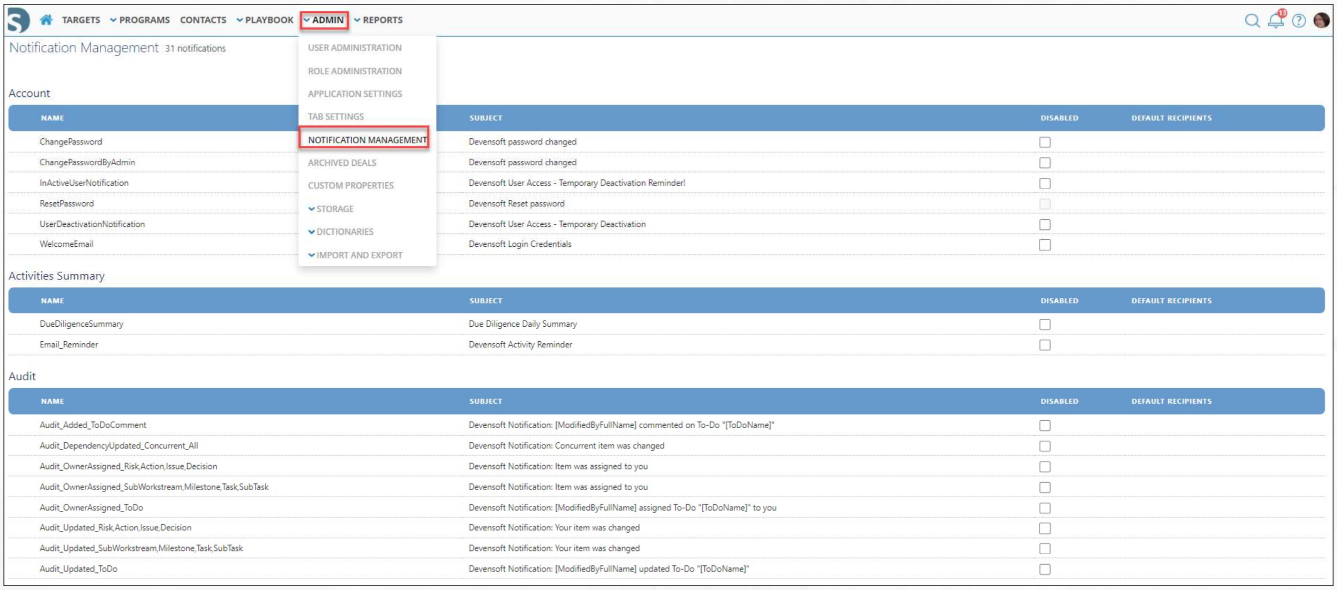
6. Navigate back to your Target or Integration to view the custom fields.

Notification Management

Email templates allow you to selectively configure the application's behavior. In this section Administrators will go through the two-step process to enable email notifications.

Step 1:

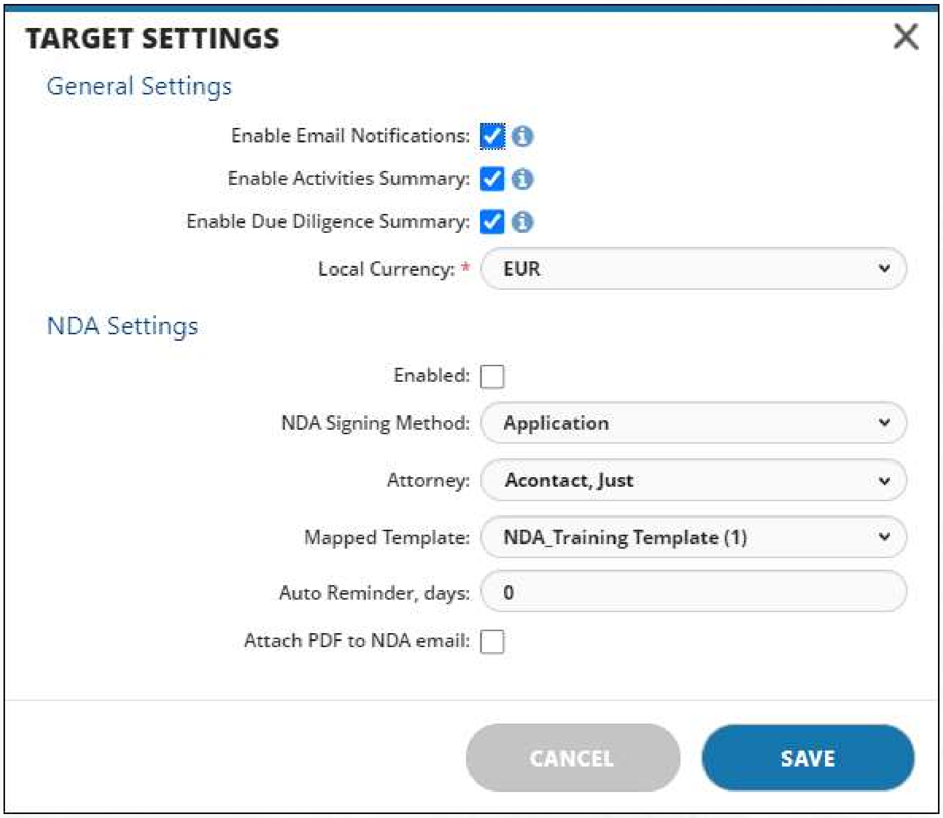
To enable/disable an email notification, navigate to the **Admin/Notification Management** menu. Under the column "Disabled," check the box to disable a notification and uncheck the box if you want the email enabled.

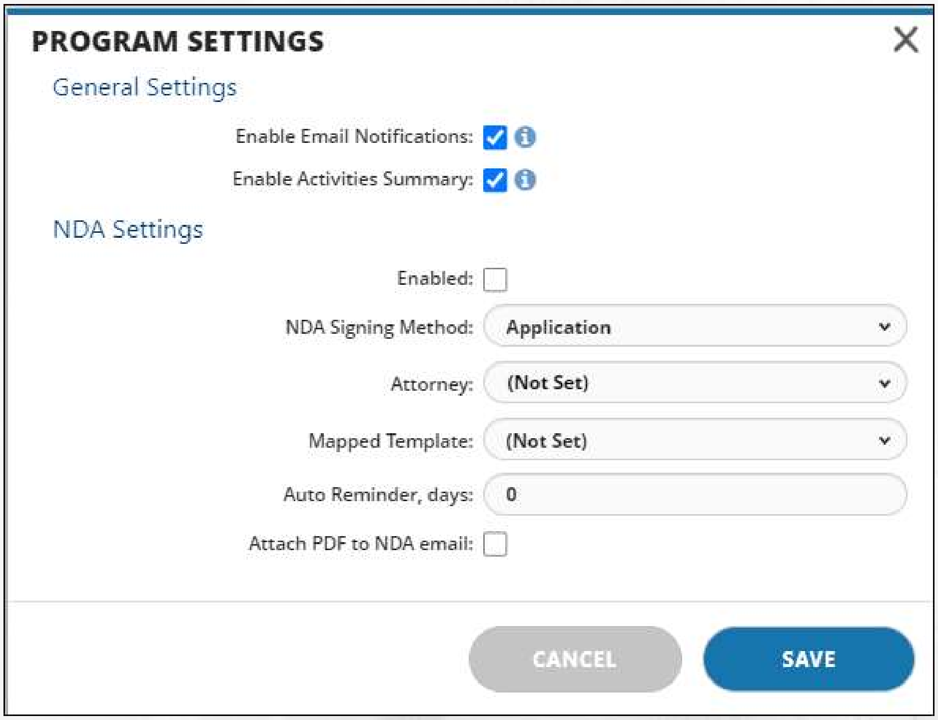


Step 2:

There is a place on the Target and Program Settings tab that must be enabled for the notifications to be sent to the users.

- Select a **Target** or **Program**.
- Select the **Settings** tab.
- Select **Edit**.
- Select **Enable Email Template**.


TARGET SETTINGS
General Settings
Enable Email Notifications:
Enable Activities Summary:
Enable Due Diligence Summary:
Local Currency: *
EUR
NDA Settings
Enabled:
NDA Signing Method:
Application
Attorney:
Acontact, Just
Mapped Template:
NDA_Training Template (1)
Auto Reminder, days:
0
Attach PDF to NDA email:
CANCEL
SAVE


PROGRAM SETTINGS
General Settings
Enable Email Notifications:
Enable Activities Summary:
NDA Settings
Enabled:
NDA Signing Method:
Application
Attorney:
(Not Set)
Mapped Template:
(Not Set)
Auto Reminder, days:
0
Attach PDF to NDA email:
CANCEL
SAVE

Exercise – Modify Email Template

1. From the Main Menu Bar, select **Admin/Email Templates**.

2. Ensure that WelcomeEmail is unchecked in the “Disabled” column.

3. Scroll to the left margin and hover over WelcomeEmail template until the pencil appears.

4. Select the pencil.

5. The Edit Email Template appears.

6. Include the name of your company under “Welcome to the Devensoft M&A Management application” text.

   Note: Please make changes to the static text only vs. linked text and text that is listed within brackets. Additional changes could result in this feature not working as expected.

7. Select **Save**.

Email Reminder

Devensoft M&A tool has a feature that will allow a user to know of their upcoming activities. These include: “Overdue”, “Due within 7 days” and “Starting within 7 days” activities.

Note: The user has to be assigned these activities in order to view the upcoming activities to receive email.

Below are the steps to setup Email Reminder.

Administrators

To enable the email reminder, the Admin needs to do the following step:

1. Navigate to the **Admin/Email Templates** menu.

2. Scroll down and look for Email Reminder. Make sure that the check box is unchecked.

Once the Administrator enables the Email Reminder, the user can go in and enable their email notification.

Users

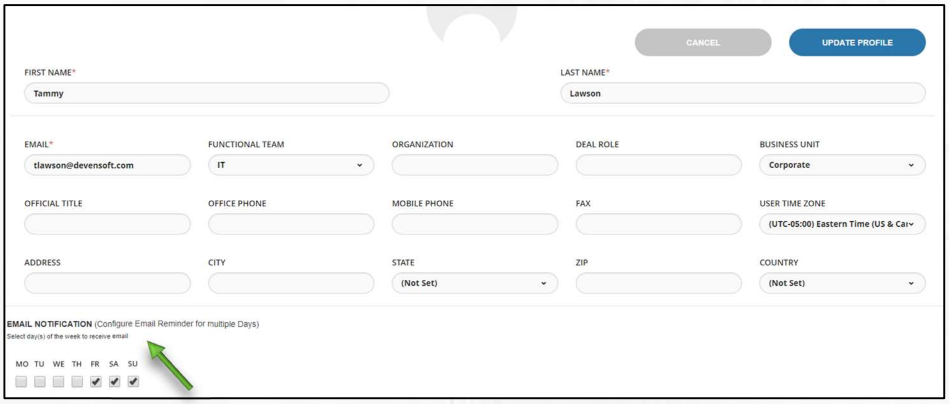
1. Navigate and select the Avatar in the upper-right corner.

2. Select **My Profile**.

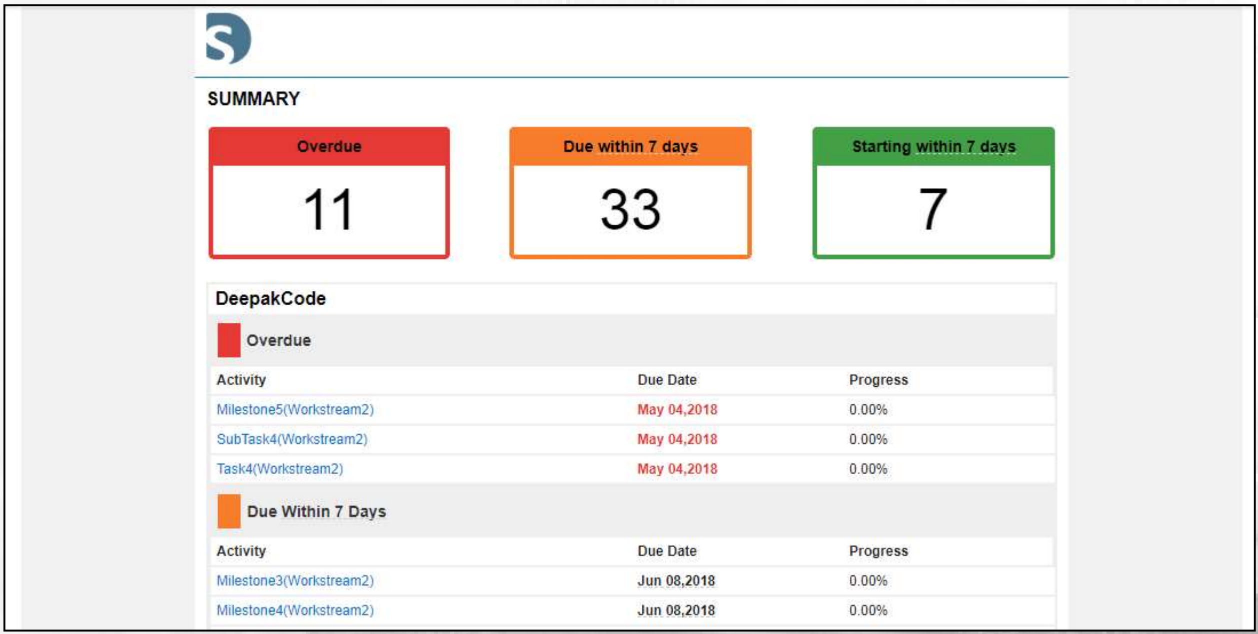
3. Select **Edit Profile**.

4. In the lower-left corner of your profile is the email notification. Select the day(s) in which you want an email sent.

   Note: If all 7 days are selected, you will receive an email every day.

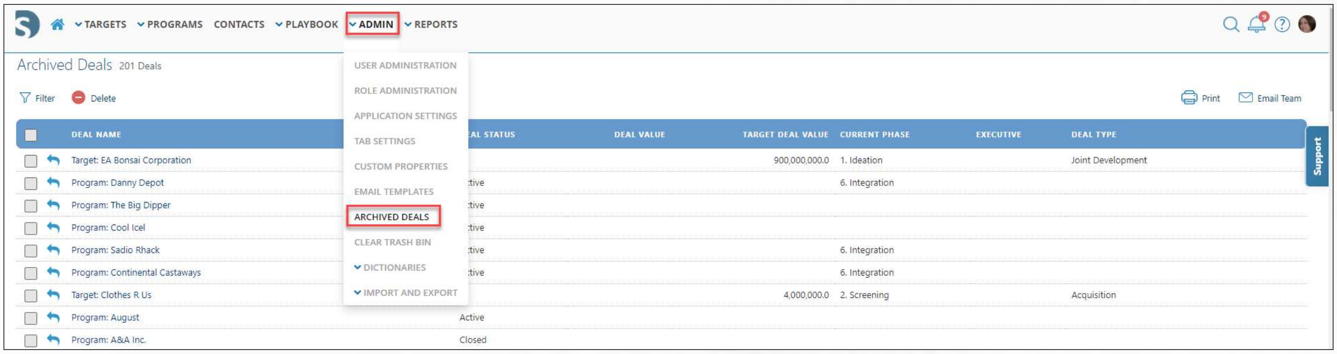


Sample Email Reminder



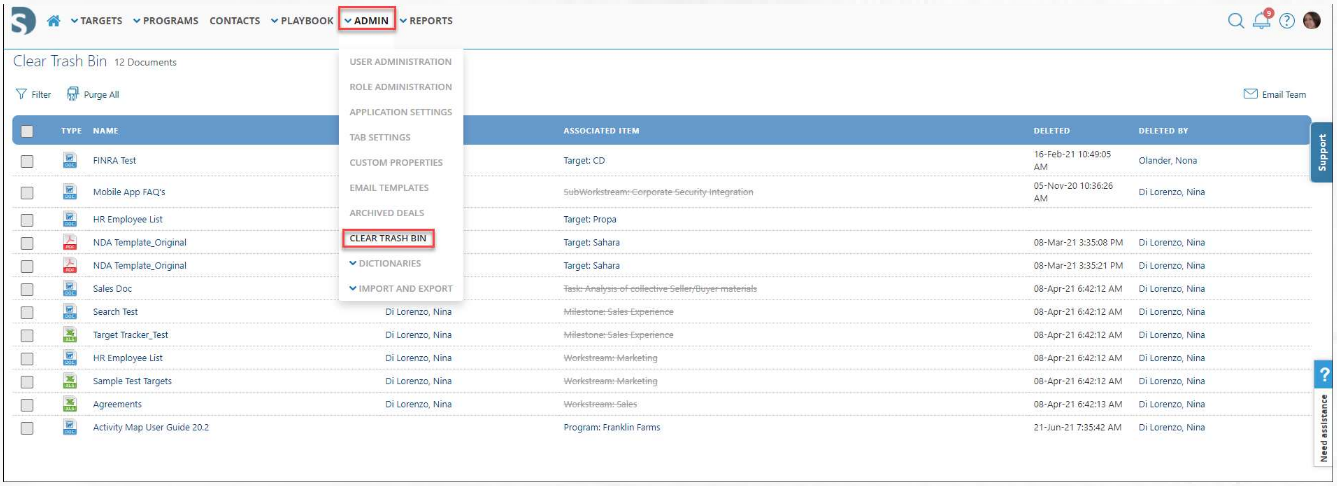
Archived Deals

If items such as Integrations and Targets are deleted, they can be viewed in Archived Deals.



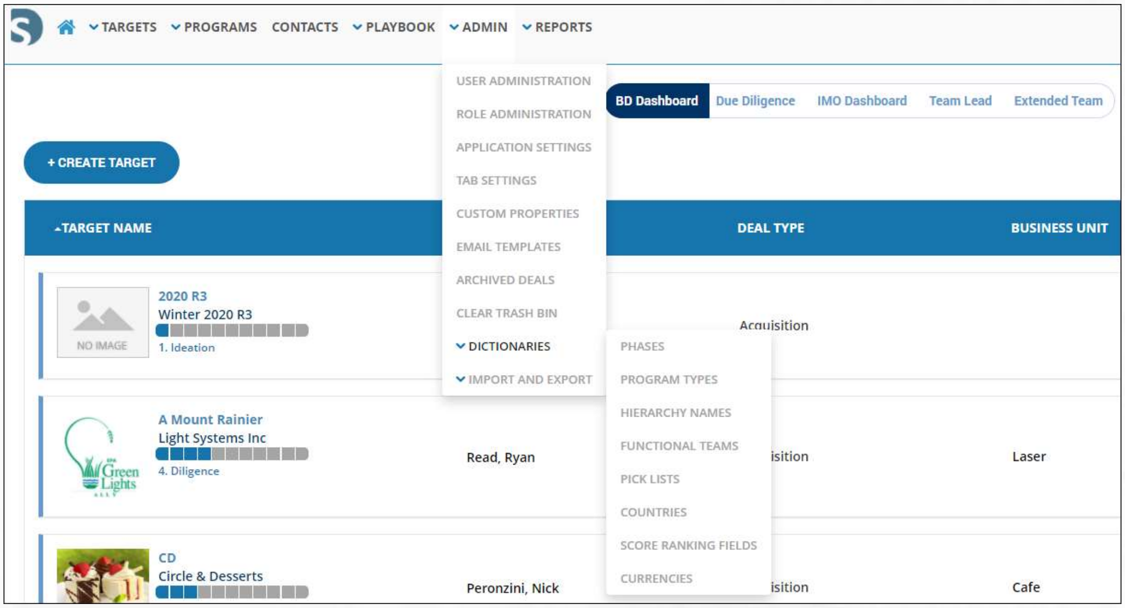
Clear Trash Bin

Documents that have been deleted appear in the Trash Bin. f items such as Integrations and Targets are deleted, they can be viewed in Archived Deals.



Dictionaries

Devensoft's Dictionaries are picklists that the Administrator can modify. Pick lists, such as Phases, Program Types, etc., appear as a submenu to the **Admin/Dictionaries**. The majority of the pick list items appear under the submenu Pick Lists and are described on pages 26 – 28.



Phases

Phases can be defined as a list of stages in a process of change.

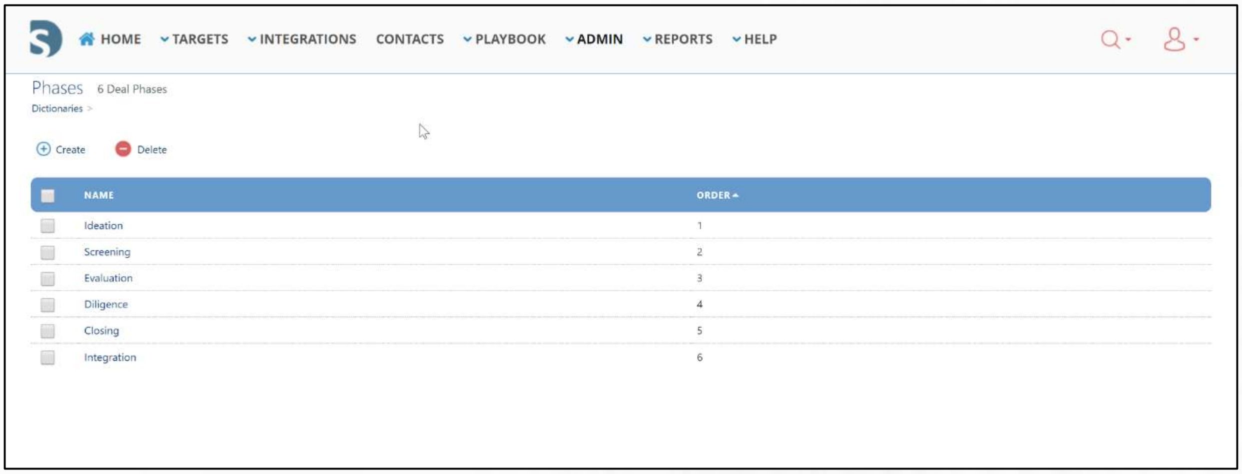
Create a Phase

1. From the Main Menu Bar, select **Admin/Dictionaries/Phases**.

2. On the Phases screen you create, edit, or delete phases to align with your business requirements.

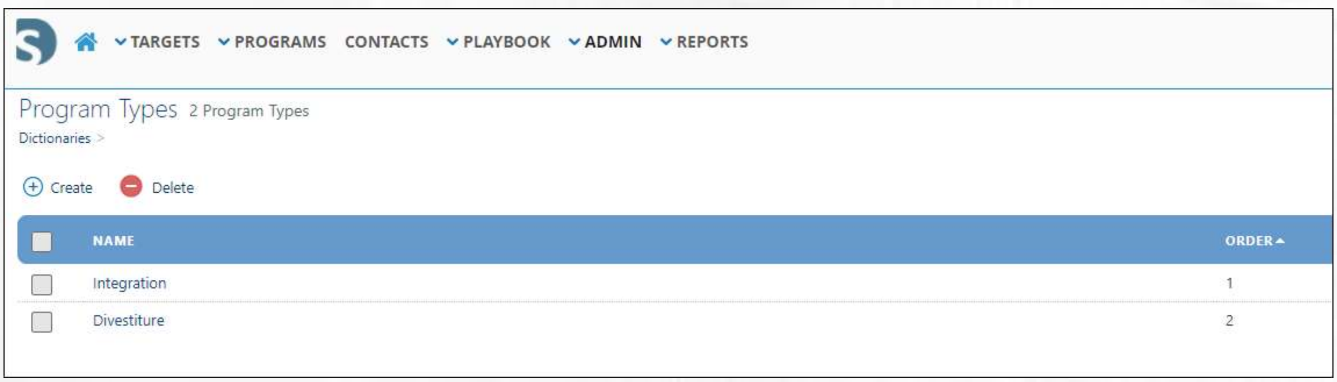
    a. **Edit** – by clicking on the appropriate phase name under the NAME column, you can edit the name.
    b. **Delete** – by selecting the checkbox, you can delete the phase.
    c. **Create** – by selecting the **+Create** button, the Deal Phase pop-window appears.
        i. Name: Enter a name.
        ii. Order: Enter a number which defines where within the list the phase will appear in the view and picklist.

3. When done with one of the above actions, click **Save**.

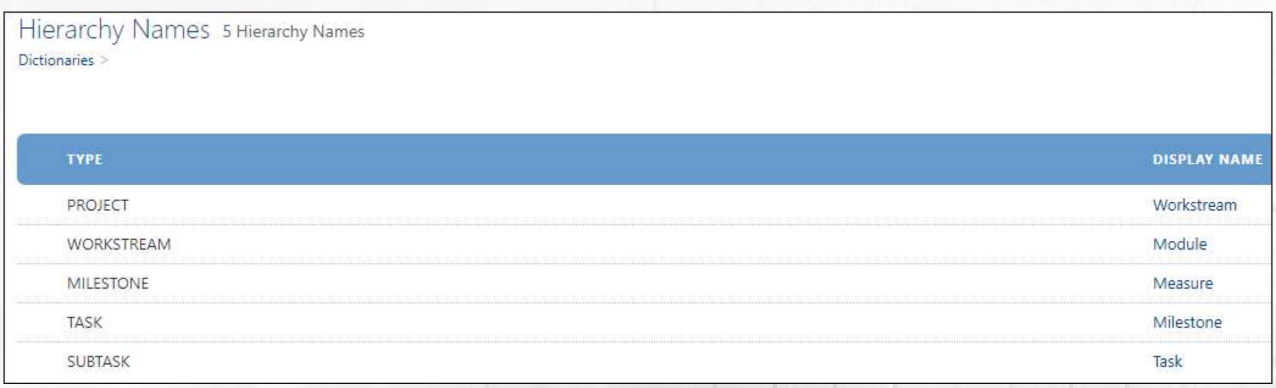


Program Types

Devensoft allows users the flexibility to create other Program Types such as divestitures, cost optimization, value creation and any other program you wish to track in the Devensoft platform.



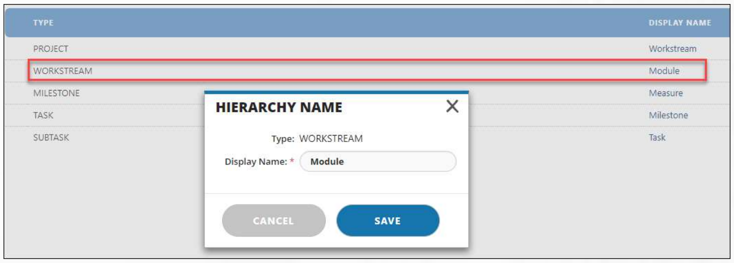
Hierarchy Names



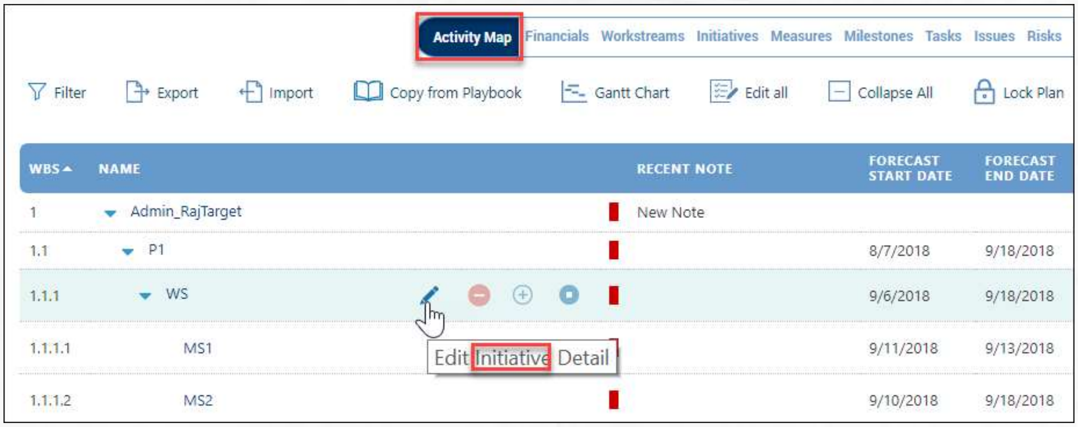
Users can rename Project, Workstream, Milestone, Task and SubTask to a name that is more aligned to their organization’s nomenclature.

Create a Hierarchy Name

1. From the Main Menu Bar, select **Admin/Dictionaries/Hierarchy Names**.
2. Choose the Type that you want to edit and click on the **Edit Pencil** icon .
3. The Hierarchy Name window is displayed.

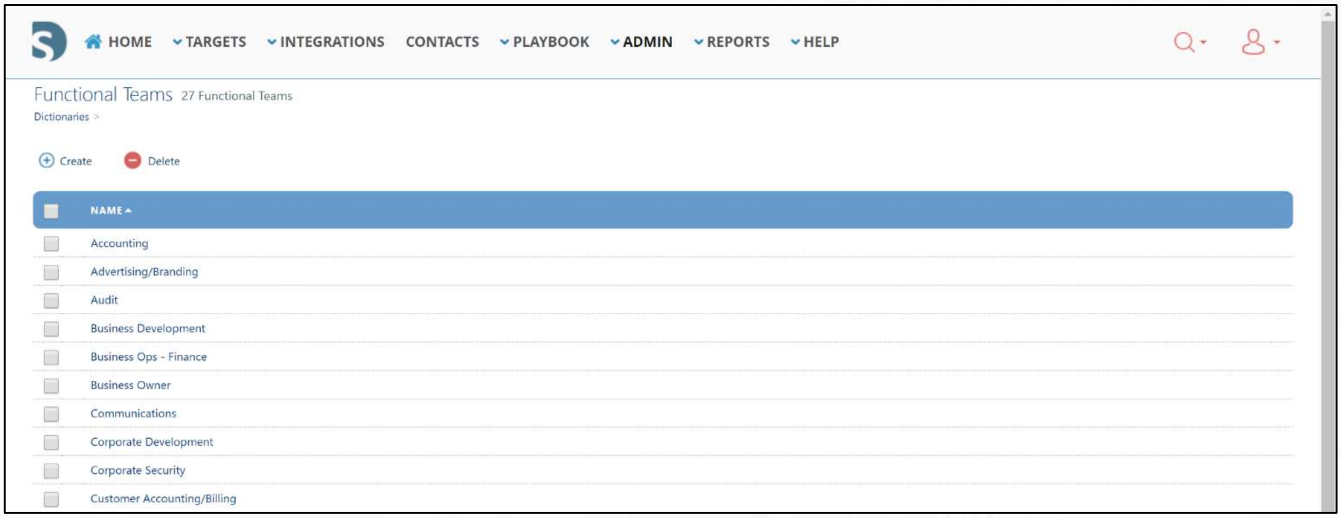


4. In the Display Name field enter the new name.
5. Select **Save**.
6. Return to the Target or Program's Activity Map to confirm that the Hierarchy name has been changed.



Functional Teams

You can create different functional teams or departments to align with your business. Functional Teams can be added, edited, or deleted.

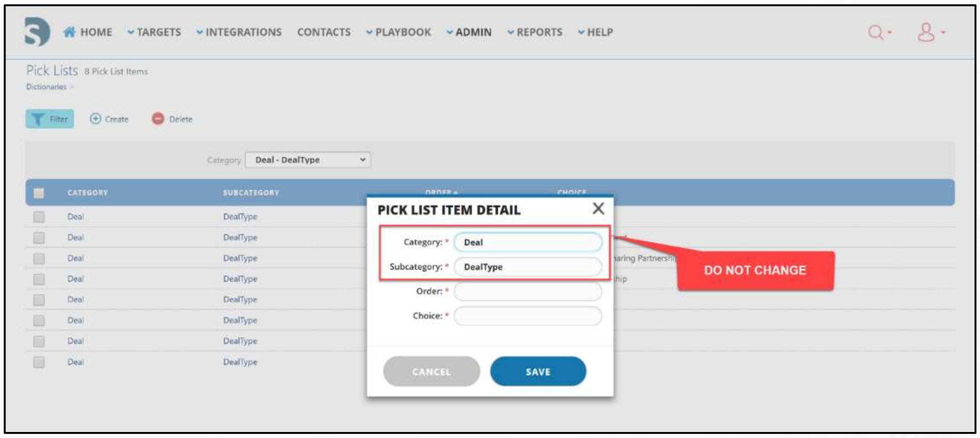


Create a Functional Team

7. From the Main Menu Bar, select **Admin/Dictionaries/Functional Teams**.
8. Select the **+Create** button. The functional team pop-up window appears.
9. Type in a name of a functional team or department to assign to the user.
10. Select **Save**.

Pick Lists

A pick list lets your user select values from a list that you define. Almost all of the pick lists (drop-down lists) in the application can be configured to meet your business needs.



Update Pick Lists

1. From the Main Menu Bar, select **Admin/Dictionaries/Pick Lists**.

2. Select the **Filter** button.

3. In the Category field, select the drop-down menu to display all pick list fields.

4. To add a selection to the Pick List, select **+Create**. The Pick List Item Detail pop-up window appears.

5. Complete the four fields: Category, Subcategory, Order, and Choice.

6. Select **Save**.

7. To remove a selection from the Pick List, click on one or more of the check boxes in front of the Choice you wish to remove and click the “Delete” button.

8. To modify the Pick List, click on the pencil (hover to the right of the check box) to modify the desired Choice and select **Save**.

Note: You should not change the “Finance – Type” pick list as it is linked to other pick lists. If you require a change to this particular pick list, please contact us and we will make the appropriate changes for you.

Exercise: Update a Pick List

1. From the Main Menu Bar, select **Admin/Dictionaries/Pick Lists**.

2. Select **Filter**.

3. Update the following:

   a. Select Category: **Deal – Deal Type**.
   b. Click the **+Create** button.

c. Leave Category and Subcategory fields alone.
d. Enter any number in the Order field.
e. Enter a Deal Type name of your choice
f. Select **Save**.

4. Open a Target.

5. Select **Edit**.

6. Scroll to the Deal Summary section and select the Deal Type drop-down menu to see the new menu choice that you added in Step 3.

Setup Countries

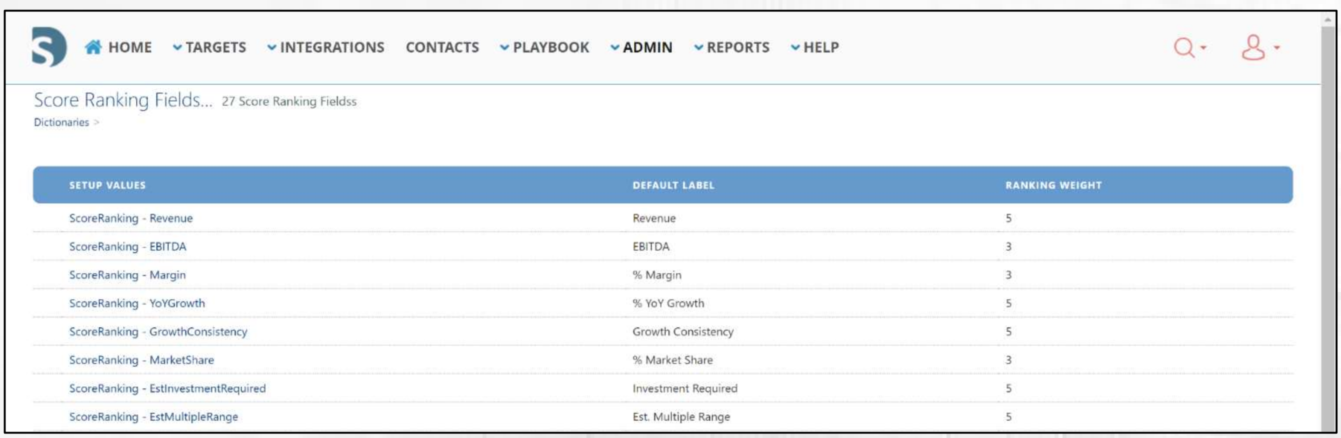
This will allow you to include any countries you require that are not already listed in the countries detail page and in the contacts section.

Add a country

1. From the Main Menu Bar, navigate **Admin/Dictionaries/Countries**.
2. Select the **+Create** button. The Country Detail pop-up window appears.
3. Type the name of the country. Include a short code of that country.
4. Select the **Save** button.

Setup Score Ranking

If you plan to use this feature, please consult with your team on your desired scoring methodology.



1. From the Main Menu Bar, select **Admin/Dictionaries/Ranking Fields**.

2. The Score Ranking Fields section is where you would identify the fields and weighting

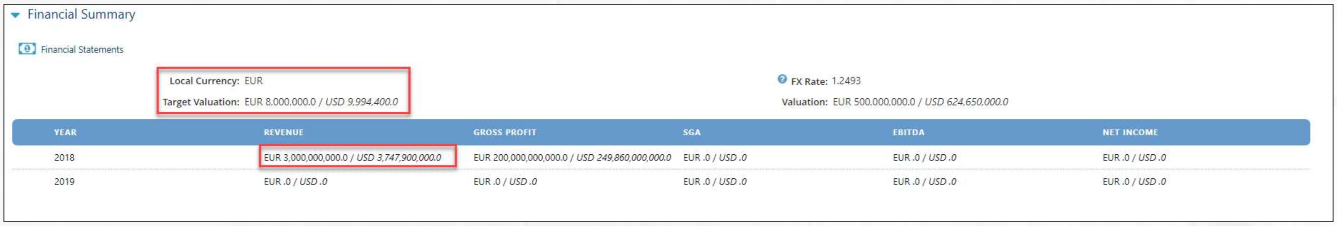
value for each. The values in the pick lists would be modified under **Dictionaries/Pick Lists**.

Create Currencies

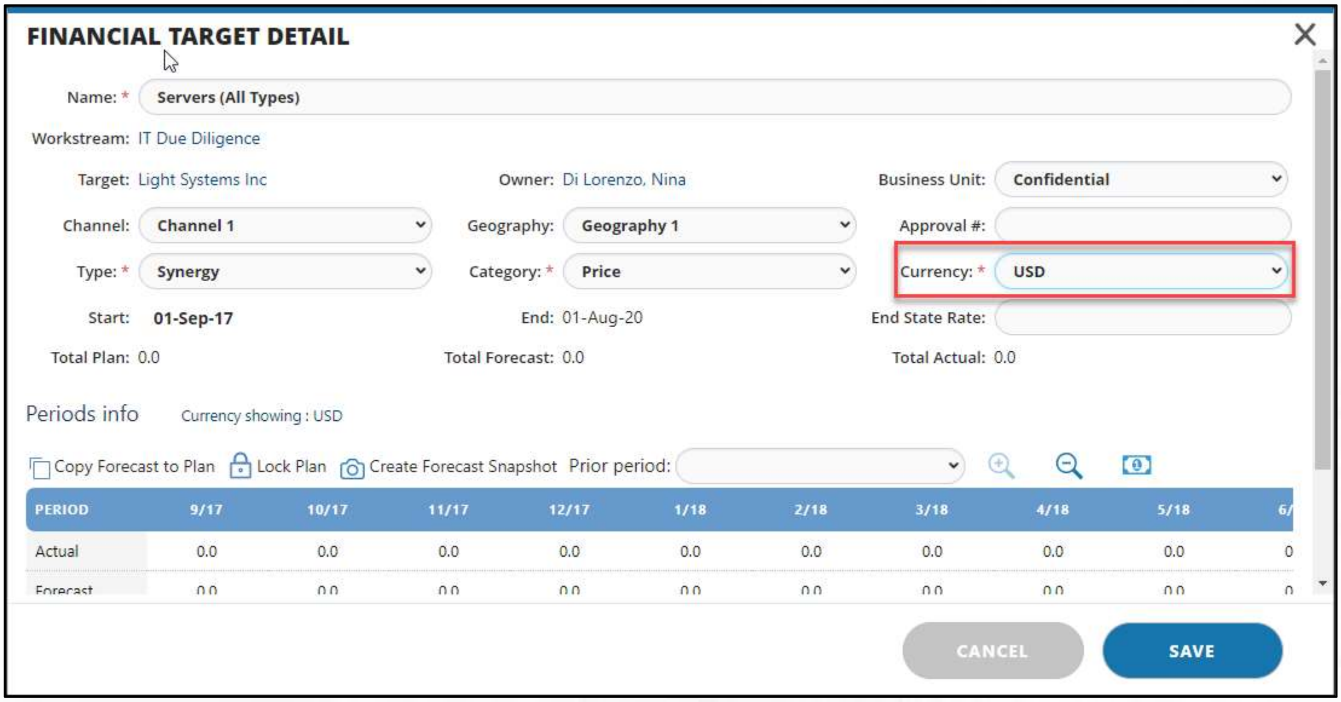
1. From the Main Menu Bar, select **Admin/Dictionaries/Currencies**.
2. Select **+Create**. The Currency detail window appears.
3. Include the Name, Code, FX Rate, and the FX Rate Date.
4. Select **Save**.

Setup Currencies for a Deal

1. Navigate to the **Targets/All Targets** menu.
2. Select a Target from the Target Name column.
3. Select the **Settings** tab.
4. Select **Edit**.
5. Under General Settings, in the **Local Currency** field, select another currency from the drop-down menu.
6. Select **Save**.
7. Navigate back to the **Summary** tab.
8. Scroll down and look for the Financial Summary section. Notice the local currency and the USD currency.



Currencies can also be changed in the Financials tab when creating a new financial. Currency will display as a drop-down to change the default currency.



Importing and Exporting Data

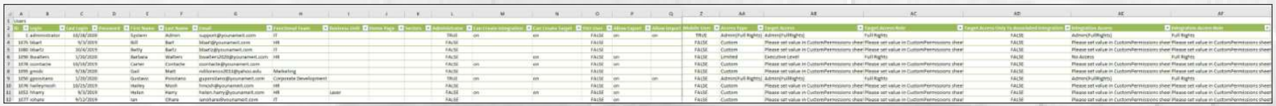
The Administrator (and those with Importing and Export privileges) can import and export a vast amount of data including Users, Targets and Program data. Below are instructions for importing and exporting various types of data.

Users

Should Administrators need to perform a mass update of User Detail data, it's best to export the Users to Excel, make the necessary updates followed by importing back to the Devensoft instance. To do this:

Exporting Users

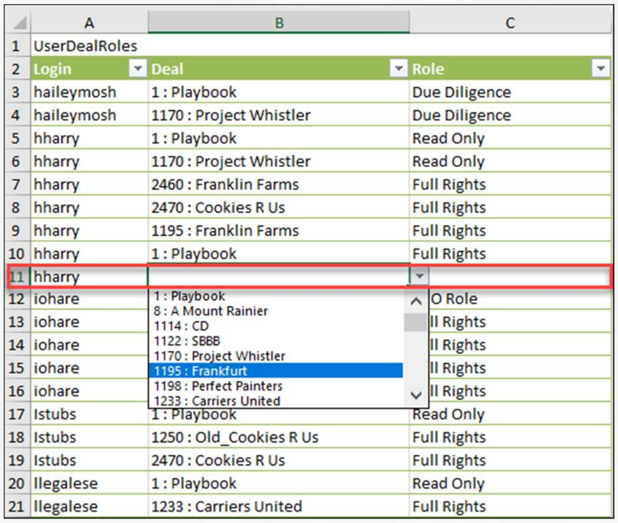
1. From the Main Menu, select **Admin/User Administration**.
2. Select the **Export** button.
3. Users are exported to Excel and resemble a spreadsheet like the below screen capture.



Note: Columns R – Y have been omitted from the above screen capture.

4. Within the spreadsheet Administrators can add rows to enter new users, update Functional Team, Business Unit, etc.
5. For Users whose Access Type (column AA) equals **Custom** means that any changes that need to be made to the below fields must be made on the CustomPermission worksheet.
    - Target Access
    - Target Access Role
    - Program Access
    - Program Access Role

6. Select the CustomPermission worksheet which displays the login, deal and role for that deal.
7. To change a user’s role of a Deal, navigate to the role of the Program or Target, select the down arrow (column C) and make the change.
8. To grant a user access to another Deal, insert a column and select the Deal from column B and Role from column C.



	A	B	C
1	UserDealRoles		
2	Login	Deal	Role
3	haileymosh	1 : Playbook	Due Diligence
4	haileymosh	1170 : Project Whistler	Due Diligence
5	hharry	1 : Playbook	Read Only
6	hharry	1170 : Project Whistler	Read Only
7	hharry	2460 : Franklin Farms	Full Rights
8	hharry	2470 : Cookies R Us	Full Rights
9	hharry	1195 : Franklin Farms	Full Rights
10	hharry	1 : Playbook	Full Rights
11	hharry		
12	iohare		O Role
13	iohare		ll Rights
14	iohare		ll Rights
15	iohare		ll Rights
16	iohare		ll Rights
17	Istubs	1 : Playbook	Read Only
18	Istubs	1250 : Old_Cookies R Us	Full Rights
19	Istubs	2470 : Cookies R Us	Full Rights
20	llegalese	1 : Playbook	Read Only
21	llegalese	1233 : Carriers United	Full Rights

9. Save the spreadsheet and close the file.

Importing Users

1. From the Main Menu, select **Admin/User Administration**.
2. Select the **Import** button.
3. Select the **Choose File** button to choose the User file.
4. Select **Next**.
5. In the 'Import Wizard – Preview' window, the message "Loading completed. No problems found…"
6. Select **Next**.
7. In the 'Import Wizard – Choose Update Algorithm' window, leave the default selection as "Merge" and select **Next**.
8. The 'Import Wizard – Finish' window appears with the message "Successfully imported."
9. Select **Close**, to close the window.
10. Refresh the Browser page to view the changes that were made to the users.

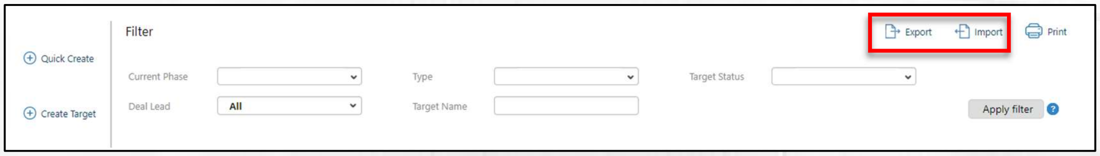
Targets

Should Administrators need to perform a mass update of Target data, it is best to export the data to Excel, make the necessary updates followed by importing back to the Devensoft instance. To do this:

Exporting Targets

Exporting Targets is best done from the **Targets/All Targets** view as those Targets with a status of active, closed and monitoring will be captured in the exported file. To export Targets:

1. From the Main Menu, select **Targets/All Targets**.
2. Select the **Export** button located on the far-right side of the screen.



3. Excel opens the file of exported Targets.
4. At the top of the screen, select the **Enable Editing** button highlighted in yellow.
5. Begin adding text by either typing data directly in the cell or selecting text from a drop-down picklist.

6. To add rows, stay within the table and insert as many rows as needed.
   Note: If rows or data are added outside the table, the import will not work.

ID	Code Name	Target Name	Parent Company	Parent Website	Country	Street	Street 2	City	State	Zip	Main Phone
1114	CD	Circle & Desserts			United States	14901 Bogle Drive Suite 304	Apt. 2	Chantilly	Virginia	29151	703-555-4356
1436	FandC	Franklin and Co									
1195	Frankfurt	Franklin Farms			Germany			Frankfurt			
1438	NEWCORP	Jozem Corp									
1273	LJ	Lava Joe			Colombia			Bogota			
8	A Mount Rainier	Light Systems Inc			United States	585 Highland Blvd	Suite 100	New York	New York	10001	212-220-2200
1353	L&L C	Lunch & Learn Cafe			United States	999 Waxpool Road	Suite 900	Chantilly	Virginia	20151	703-555-1234
2439	OBX	Outerbanks Bank									
1122	SBBB	Secret Bureau of Brown Bags			United States			Leesburg	Virginia	20176	
1432	SSS	Special Places				123 Simon Street		Rockville		20851	301-881-1593
2437	Soup	Sunny's Our Us									
2465	SSST	Super Sample Sample Target									
2464	SST	Super Sample Target									
2467	test	tttt									
2438	WERT	World East Regional Techs									

Inside the table displays alternating, highlighted rows.

Outside the table does not display alternating, highlighted rows.

7. Once all the data has been added to the table, save the file to begin the importing process.

Importing Targets

1. From the Main Menu, select **Targets/All Targets**.
2. On the far-right side of the screen, select the **Import** button.
3. Select the **Choose File** button to choose the Targets file or whatever file name you used.
4. Select **Next**.
5. In the 'Import Wizard – Preview' window, the message "Loading completed. No problems found…"

   Note: If a problem was found it will need to be fixed by editing the item(s). To edit an item, click on the pencil icon to the left of the identified item. Once fixed, loading will be complete.
6. Within the window, scroll down to see the new data that will be added as it is highlighted in white.
7. Select **Next**.
8. In the 'Import Wizard – Choose Update Algorithm' window, leave the default selection as "Merge" and select **Next**.
9. The 'Import Wizard – Finish' window appears with the message "Successfully imported."
10. Select **Close**, to close the window.
11. Refresh the Browser page to view the changes that were made to the Targets.

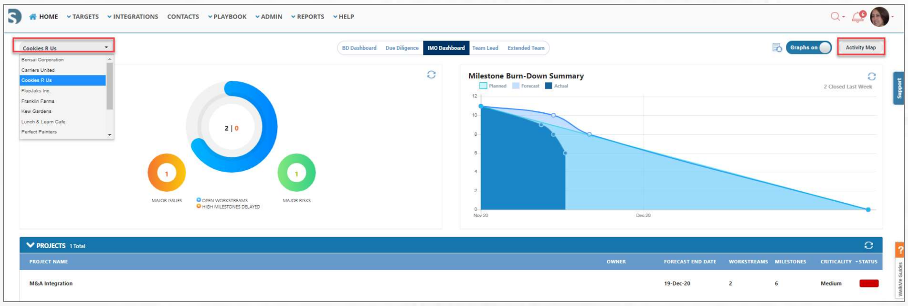
Programs

Should Administrators need to perform a mass update to an Program's Activity Map, it is best to export the data to Excel, make the necessary updates followed by importing back to the Devensoft instance. To do this:

Exporting the Program Activity Map

Exporting the Program Activity Map is done from the Program itself. To get started, please follow the below instructions.

1. Open a Program using one of the following methods:
    a. From the Main Menu, select **Home/IMO Dashboard**. Select a Program from the drop-down menu, followed by clicking on the **Activity Map** button.



    b. From the Main Menu, select **Programs/Programs**.

2. Select the **Export** button located below the Tab bar.

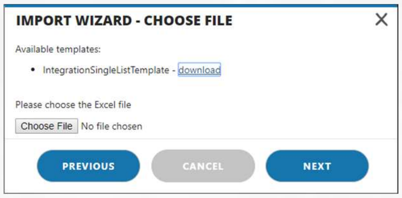
3. Excel opens the file of the exported Activity Map.
4. At the top of the screen, select the **Enable Editing** button highlighted in yellow.
5. Begin adding text by either typing data directly in the cell or selecting text from a drop-down picklist.
6. To add rows, stay within the table and insert as many rows as needed.
   Note: If rows or data are added outside the table, the import will not work.
   Note: Red filled cells are required fields that you must complete.

7. When editing your spreadsheet, please follow these guidelines:
    a. Leave rows 1 - 2 alone. Editing these rows will disrupt the import process.
    b. Do add or delete the ID's or WBS Numbers as these are system generated once imported.
    c. Deleting data can be done using Column E: Activity and must be a separate action. You cannot combine adding data and deleting data on the same spreadsheet. You can only add data then import it into the system or delete data and import it into the system.
    d. Do not edit or remove the column headers.
    e. Column B: Entity Name – use the drop-down menu values vs. manually typing in “Task.” Manually typing in tasks, etc. WILL NOT import properly.
    f. Column D: Name – replace the existing text with your company language.
    g. Column J: Planned Start Date – use the following format: 12/20/2020.
    h. Column I: Planned End Date – use the following format: 3/20/2021.

8. Once all the data has been added to the table, save the file to begin the importing process.

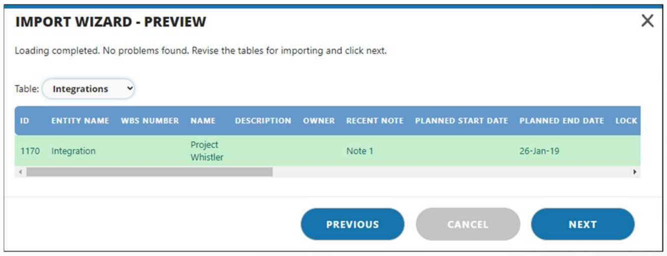
Importing the Integration Activity Map

1. Open an Integration.
2. From the **Activity Map** tab, click on the **Import** button. The Import Wizard is displayed.

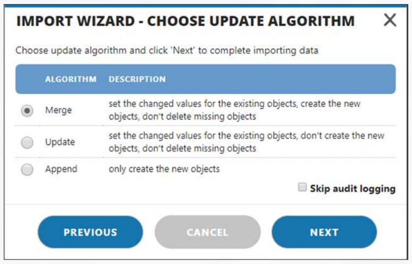


3. Click on **Choose File**.
4. Select the file to import.
5. Click **Open**.

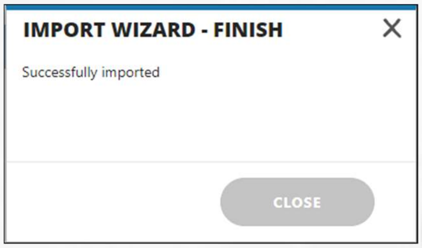
6. Click **Next**.
7. The Import Wizard – Preview window is displayed.



8. You will see one of two messages displayed below the Import Wizard - Preview title.
   a. Loading Complete – signifies that there were no problems found.
   b. Problem Found – signifies a problem has been identified and needs to be fixed. To edit an item, click on the pencil icon to the left of the identified item. Once fixed, loading will be complete, and your screen will look like the screen above.
9. Click **Next**.
10. The Import Wizard - Choose Update Algorithm is displayed.



11. Choose **Merge**.
12. Click **Next**.



13. Click **Close**.
14. Refresh the Browser page to view the changes that were made to the Activity Map.