



DEVENSOFT

Powering Your M&A Growth Engine

MANAGING INTEGRATION WORKPLANS

Version 20.1

Goal



Upon completion of this Webinar, participants will be able to better understand, navigate and utilize the Activity Map's hierarchy, dates, key features, and other critical information.



- **Upload** project management plans (Package)
- Explore Devensoft's **dates** and the impact on the **status** of Activities
- Manage team members
- Apply **shortcut** buttons to Activities
- Apply **Filters** to view and export data
- Easily **export** and **import** data

Agenda



Topic

Module 1 – Adding Project Plans

Module 2 – Activity Map Tour

Module 3 – Activity Map Hierarchy

Module 4 – Adding Data

Module 5 – Dates and Status Indicators

Module 6 – Managing Your Team

Module 7 – Filtering Data

Module 8 – Exporting and Importing Data

Module 9 – Question and Answer



Adding a Project Plan

Copy Package



1. Open an Integration.
2. Select **Copy Package**:
 - a. Navigate to the Activity Map.
 - b. Select **Copy Package**.

The screenshot shows the software interface for 'Zabean'. The top navigation bar includes 'HOME', 'TARGETS', 'INTEGRATIONS', 'CONTACTS', 'PLAYBOOK', 'ADMIN', 'REPORTS', and 'HELP'. Below the navigation bar, there is a summary for 'Zabean' with various metrics: 1 Project, 1 Category, 2 Workstreams, 19 Milestones, 174 Tasks, and 2 SubTasks. The 'Active Integrations' section is visible, and the 'Activity Map' tab is highlighted with a red box and labeled 'a'. Below the tabs, the 'Copy Package' option is highlighted with a red box and labeled 'b'. Other options include 'Filter', 'Export', 'Import', 'Gantt Chart', 'Edit all', 'Collapse All', 'Lock Plan', and 'Lock Forecast'. A table at the bottom shows a list of items with columns for WBS, NAME, RECENT NOTE, FORECAST START DATE, FORECAST END DATE, ACTUAL START DATE, ACTUAL END DATE, % COMPLETE, OWNER, RESPONSIBLE, and FUNCTIONAL TEAM. The table contains one row for 'Zabean'.

WBS	NAME	RECENT NOTE	FORECAST START DATE	FORECAST END DATE	ACTUAL START DATE	ACTUAL END DATE	% COMPLETE	OWNER	RESPONSIBLE	FUNCTIONAL TEAM
1	Zabean									1

Copy Packages From Playbook



Navigation: HOME | TARGETS | INTEGRATIONS | CONTACTS | PLAYBOOK | ADMIN | REPORTS | HELP

Standard Integration ✕

WORKSTREAMS	PHASES	
	(NOT SET)	6. INTEGRATION
Finance Integration		Develop Financial Consolidation Plan
Human Resources Integration		General Company Information Payroll Plan and Taxes Misc Comp Performance Management
IT Integration		General Project Management Office Netcom Service Management IT Business Alignment System Administration Availability Data Center System Administration - Facilities Data Services IT Asset Management
Procurement Integration		Consolidation IT Compliance Systems and Process Integration

Buttons: CANCEL | COPY

Annotations:
• Select your **Package**.
• Click **Copy**.

M & A Integration Package



[S](#)
[HOME](#)
[TARGETS](#)
[INTEGRATIONS](#)
[CONTACTS](#)
[PLAYBOOK](#)
[ADMIN](#)
[REPORTS](#)
[HELP](#)

Activity Map
1 Project: 1 0 0 0
| 1 Category: 1 0 0 0
| 3 Workstreams: 3 0 0 0
| 13 Milestones: 13 0 0 0
| 77 Tasks: 77 0 0 0
| 2 SubTasks: 2 0 0 0

Active Integrations > Cookies R Us >

[Activity Map](#)
[Projects](#)
[Categories](#)
[Workstreams](#)
[Milestones](#)
[Tasks](#)
[SubTasks](#)
[Risks](#)
[Actions](#)
[Issues](#)
[Decisions](#)
[Notes](#)
[Documents](#)
[Summary](#)
[Team](#)

[Filter](#)
[Export](#)
[Import](#)
[Copy Package](#)
[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
<input type="checkbox"/>	1 Cookies R Us								2	
<input type="checkbox"/>	1.1 M&A Integration		19-Nov-20	19-Dec-20			0%			
<input type="checkbox"/>	1.1.1 Functional Category		19-Nov-20	19-Dec-20			0%			
<input type="checkbox"/>	1.1.1.1 Human Resources Workstream		19-Nov-20	19-Dec-20			0%	Walters, Barbara		HR
<input type="checkbox"/>	1.1.1.2 IT Workstream		19-Nov-20	19-Dec-20			0%	Wallerdrone, Ron		IT
<input type="checkbox"/>	1.1.1.3 Procurement Workstream		19-Nov-20	19-Dec-20			0%	Nontark, Ned		Procurement

[Support](#)
[WalkMe Guides](#)

Module 2



Activity Map Tour

Activity Map – Key Areas



Activity Map 1 Project: 1 0 0 0 | 1 Category: 1 0 0 0 | 4 Workstreams: 2 0 0 2 | 21 Milestones: 5 0 0 0 | 0 103 | 3 SubTasks: 2 0 0 1 Bread Crumb

Active Integrations > Cookies R Us >

Activity Map Button Bar: Activity Map Financials Projects Categories Workstreams Milestones Tasks Su

Filter Export Import Copy Package Gantt Chart Edit all Collapse All Lock

Decisions Assumptions Notes Stream Documents Summary Team Settings Tab Bar

Copy Planned To Forecast Copy Forecast To Planned Shift dates

Help Support WalkMe Guides

WBS	NAME	RECENT NOTE	FORECAST START DATE	FORECAST END DATE	ACTUAL START DATE	ACTUAL END DATE	% COMPLETE	OWNER	RESPONSIBLE	FUNCTIONAL TEAM
1	▼ Cookies R Us						59%		8 2 2 1	
1.1	▼ M&A Integration		11-Nov-20	08-Mar-21	11-Nov-20		76%			
1.1.1	▼ Functional Category		11-Nov-20	08-Mar-21	11-Nov-20		76%			
1.1.1.1	▼ Finance Integration		11-Nov-20	21-Dec-20	11-Nov-20		77%	Fiveormore, Fred		Finance
1.1.1.1.1	▼ Develop Financial Consolidation Plan	Dates - roll up	11-Nov-20	21-Dec-20	11-Nov-20		77%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.1	Impact to Current Policies & Procedures	% Complete - based on work completed in the grouping & rolls up.	11-Nov-20	21-Dec-20	11-Nov-20	11-Nov-20	100%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.2	▼ Proposed Chart of Accounts		11-Nov-20	11-Dec-20			0%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.2.1	Final Review of Chart of Accounts		11-Nov-20	11-Dec-20			0%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.3	Recommended Changes to Financial Systems		11-Nov-20	11-Dec-20	11-Nov-20	11-Nov-20	100%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.4	Finance Consolidation Plan		11-Nov-20	11-Dec-20	11-Nov-20	11-Nov-20	100%	Rise, Haley	User, Ursula	Finance
1.1.1.2	▼ Human Resources Integration		11-Nov-20	11-Dec-20			0%	Walters, Barbara		HR



Activity Map Hierarchy

Integration – Activity Map Hierarchy



[HOME](#) [TARGETS](#) [INTEGRATIONS](#) [CONTACTS](#) [PLAYBOOK](#) [ADMIN](#) [REPORTS](#) [HELP](#)

Cookies R Us | 1 Project: **0 1 0 0** | 1 Category: **0 1 0 0** | 4 Workstreams: **0 2 0 2** | 21 Milestones: **0 5 0 16** | 137 Tasks: **0 34 0 103** | 3 SubTasks: **0 2 0 1**

Active Integrations >

[Activity Map](#) [Financials](#) [Projects](#) [Categories](#) [Workstreams](#) [Milestones](#) [Tasks](#) [SubTasks](#) [Risks](#) [Actions](#) [Issues](#) [Decisions](#) [Assumptions](#) [Notes](#) [Stream](#) [Documents](#) [Summary](#) [Team](#) [Settings](#)

[Filter](#) [Export](#) [Import](#) [Copy Package](#) [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	▼ Cookies R Us						59%			Finance
1.1	▼ M&A Integration						76%			Finance
1.1.1	▼ Functional Category						76%			Finance
1.1.1.1	▼ Finance Integration						7%	Fiveormore, Fred		Finance
1.1.1.1.1	▼ Develop Financial Consolidation Plan						77%	Rise, Haley		Finance
1.1.1.1.1.1	Impact to Current Policies & Procedures		04-Nov-20	14-Dec-20	04-Nov-20	04-Nov-20	100%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.2	▼ Proposed Chart of Accounts		04-Nov-20	04-Dec-20			0%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.2.1	Final Review of Chart of Accounts		04-Nov-20	04-Dec-20			0%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.3	Recommended Changes to Financial Systems		04-Nov-20	04-Dec-20	04-Nov-20	04-Nov-20	100%	Rise, Haley	User, Ursula	Finance
1.1.1.1.1.4	Finance Consolidation Plan		04-Nov-20	04-Dec-20	04-Nov-20	04-Nov-20	100%	Rise, Haley	User, Ursula	Finance
1.1.1.2	▶ Human Resources Integration		04-Nov-20	04-Dec-20			0%	Walters, Barbara		HR
1.1.1.3	▶ IT Integration		04-Nov-20	04-Dec-20	04-Nov-20	04-Nov-20	100%	Rowling, Jane		IT
1.1.1.4	▶ Procurement Integration		04-Nov-20	01-Mar-21	04-Nov-20	04-Nov-20	100%	Nontark, Ned		Procurement

Project Category Workstream Milestone Task Subtask

Key Integration Features



On the next few slides we will explore several features to manage your Integration.



Activity Map

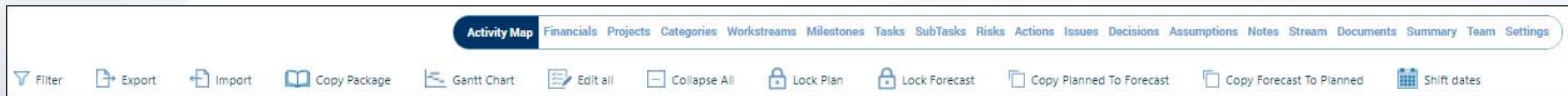
Easy-to-use drill down interface for your Integration.

Summary

Cloning, Integration details, add Financial Start Date

**Tasks, SubTasks,
Risks, Actions, Issues,
Decisions (RAID)**

Key Integration Features



Filter	Allows you to search on selected data sets.
Export	For large updates, export activity items to Excel and update.
Import	Once items have been updated in Excel, import to Activity Map.
Copy Package	Choose packages from the Playbook to include in your Integration.
Gantt Chart	A powerful, interactive feature to manage the project schedule.
Edit all	Conveniently allows you to edit your data within the UI.
Collapse All	Collapses ALL activities, displaying only the Integration title.
Lock Plan	Prevents future alterations by those without authority to do so.
Lock Forecast	Prevents future alterations to the Forecast date by those without authority to do so.
Copy Planned to Forecast	Schedules and dates may be easily transferred from the planned, or baseline period to the forecast without individually inputting that data for each activity within the Project, Workstream, Milestone, Task or Subtask.
Copy Forecast to Planned	Schedules and dates may be easily transferred from the forecast, or baseline period to the planned without individually inputting that data for each activity within the Project, Workstream, Milestone, Task or Subtask.
Shift Dates	if you're moving the entire project plan, adjust the start date.

Module 4



Adding Data

Updating Tasks



Activity Map 1 Project: 1 0 0 0 | 1 Category: 1 0 0 0 | 4 Workstreams: 4 0 0 0 | 21 Milestones: 21 0 0 0 | 177 Tasks: 177 0 0 0 | 2 SubTasks: 2 0 0 0






Active Integrations > Zabean >

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

Filter Export Import Copy Package 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	Zabean						0%			
1.1	M&A Integration		13-Nov-20	31-Mar-21			0%			
1.1.1	Functional Category		13-Nov-20	31-Mar-21			0%			
1.1.1.1	Finance Integration		13-Nov-20	31-Mar-21			0%	Fivecormore, Fred		Finance
1.1.1.1.1	Develop Financial Consolidation Plan		13-Nov-20	31-Mar-21	09-Nov-20		0%			
1.1.1.1.1.1	Impact to Current Policies & Procedures		13-Nov-20	31-Mar-21			0%			
1.1.1.1.1.2	Proposed Chart of Accounts		13-Nov-20	31-Mar-21	09-Nov-20		0%			
1.1.1.1.1.3	Recommended Changes to Financial Systems		13-Nov-20	31-Mar-21			0%			
1.1.1.1.1.4	Finance Consolidation Plan		13-Nov-20	31-Mar-21			0%			
1.1.1.2	Human Resources Integration		13-Nov-20	31-Mar-21			0%	Walters, Barbara		HR
1.1.1.3	IT Integration		13-Nov-20	31-Mar-21			0%	Wallerdrone, Ron		HR
1.1.1.4	Procurement Integration		13-Nov-20	31-Mar-21			0%	Nontark, Ned		Procurement

Activity Legend

-  – Select the **Edit** icon to edit an Activity, e.g. Task.
-  – Select the **Delete** icon to delete the Activity, e.g. Task.
-  – Select the **Plus** icon to add a child Activity.
-  – Select the **Start Task** to add the Actual Start Date of the Activity.
-  – Select the **Finish Task** to add the Actual End Date of the Activity.



Dates and Status Indicators



- **Planned Start and Planned End Dates**
 - Baseline/budgeted dates which do not change
 - Can be the same as Forecast Dates
- **Forecast Start and Forecast End Dates**
 - An estimated date
- **Actual Start and Actual End Dates**
 - Those tasks that have started and completed. Dates can be past or current dates but cannot be a future date.

Status Indicators



Status Indicators:

- Orange – At-Risk
- Red – Delayed
- Green – On-Schedule
- Blue – Closed

WBS	NAME	RECENT NOTE	FORECAST START DATE	FORECAST END DATE	ACTUAL START DATE	ACTUAL END DATE	% COMPLETE	OWNER	RESPONSIBLE	FUNCTIONAL TEAM
1	▼ Cookies R Us						14%		8 2 2	
1.1	▼ M&A Integration		24-Jun-19	10-Jun-22	26-Mar-20		15%	Wallerdrone, Ron		IT
1.1.1	▼ IT		24-Jun-19	10-Jun-22	26-Mar-20		16%	Ohare, Ian		IT
1.1.1.1	▼ Data Center		24-Jun-19	19-May-20	27-Mar-20		97%	Peronzini, Nick		Corporate Security
1.1.1.1.1	Identify locations of all data centers		24-Jun-19	31-Dec-19	19-May-20	19-May-20	100%	Ohare, Ian		IT
1.1.1.1.2	▶ Obtain inventory of all support hardware in each data center incl...		24-Jun-19	31-Dec-19	19-May-20	19-May-20	100%	Ohare, Ian		IT
1.1.1.1.3	Determine physical security of data center including type of entr...		24-Jun-19	31-Dec-19	19-May-20	19-May-20	100%	Stubs, Irene	Di Lorenzo, Nina	IT
1.1.1.1.4	Identify use of raised flooring and separation of network, power...		24-Jun-19	31-Dec-19	19-May-20	19-May-20	100%	Rowling, Jane		IT
1.1.1.1.5	Identify power requirements including redundancy, placement and c...		26-Mar-20	06-May-20	27-Mar-20		0%	Hogwart, Harry		HR
1.1.1.1.6	Identify network requirements including placement of hardware and...		26-Mar-20	19-May-20	04-May-20		100%	Peronzini, Nick		Corporate Security
1.1.1.1.7	Determine type of cooling, fire suppressant, ups and generator sy...		24-Jun-19	31-Dec-19	13-May-20	19-May-20	100%	Peronzini, Nick		Corporate Security
1.1.1.1.8	Determine scheduled maintenance history, ownership of overall sup...		24-Jun-19	26-Nov-19	19-May-20	19-May-20	100%	Rowling, Jane		IT
1.1.1.1.9	Obtain system loads and run times for each type of cooling, fire ...		26-Nov-19	26-Mar-20	19-May-20	19-May-20	100%	Stubs, Irene		IT
1.1.1.2	▼ Availability		19-May-20	10-Jun-22	26-Mar-20		2%	Hogwart, Harry		HR
1.1.1.2.1	Obtain existing incident, problem and change management standards...		12-Jul-20	12-Jul-20	19-May-20	19-May-20	100%			
1.1.1.2.2	Obtain list of applications and URL's supported and identify owne...		19-May-20	09-Jun-20	26-Mar-20	16-Apr-20	100%			

Status Indicators



Color Status Indicator
Green = On Schedule
Orange = At Risk
Red = Delayed
Blue = Closed

Status	Forecast Start Date	Forecast End date	Actual Start Date	Actual End Date
On Schedule	Greater than equal to current date	Null	Less than Forecast Start date	Null
On Schedule	Less than Current date	Greater than Current date	Equal to Forecast Start date	Null
On Schedule	Equal to Current date	Equal to or greater than Current date	Equal to Forecast Start date	Null
On Schedule	Less than or equal to Current date	Greater than or equal to Current date	Less than Forecast start date	Null
On Schedule	Equal or greater than current date	Null	Null	Null
On Schedule	Equal or greater than current date	Equal to or greater than Current date	Null	Null
At-Risk	Less than current date	Null	Null	Null
At-Risk	Null	Null	Null	Null
At-Risk	Null	Greater than or equal to current date	Null	Null
At-Risk	Less than current date	Equal to or greater than Current date	Null	Null
At-Risk	Less than current date	Equal to or greater than Current date	Greater than Forecast start date	Null
Delayed	Any date or Null	Less than Current Date	Any date or Null	Null
Closed	Any date or Null	Any date or Null	Any date or Null	Any date other than future date

Module 6



Managing Your Team

Team Tab



- Displays the Integration team members
- Use the **Link** button to add more team members
- To remove a Team member, select the name and **unlink** them from the team

Team 13 Contacts
Active Integrations > Zabeau >

Activity Map Financials Projects Categories Workstreams Milestones Tasks SubTasks Risks Actions Issues Decisions Assumptions Notes Stream Documents Summary **Team** Settings

Filter Create **Link** Functional Teams

Print Email Team

(Not Set)

FULL NAME	ORGANIZATION	BUSINESS UNIT	ROLE	PHONE	EMAIL	USER STATUS
Bartz, Betty		IT	Full Rights		bbartz@younameit.com	Active
Contacte, Carter			Full Rights		ccontacte@younameit.com	Active
Green, Joe	Gus Incorporated		Contact	703.555.8080	jgreen@younameit.com	Active
Zbart, Zelda	ZVP Solutions	Pharmaceutical	Full Rights	804.555.7856	zzbart@younameit.com	Inactive

Accounting & Finance

FULL NAME	ORGANIZATION	BUSINESS UNIT	ROLE	PHONE	EMAIL	USER STATUS
Zcirt, Zelda	Zylo International	Corporate	Contact	679.987.6530	zcirt@younameit.com	Active

Corporate Development

FULL NAME	ORGANIZATION	BUSINESS UNIT	ROLE	PHONE	EMAIL	USER STATUS
Poisitano, Gustavo	GP Technology Services	Corporate	Admin(Full Rights)	876.555.4242	gupoisitano@younameit.com	Active

Corporate Security

FULL NAME	ORGANIZATION	BUSINESS UNIT	ROLE	PHONE	EMAIL	USER STATUS
Peronzini, Nick	GP Technology Services	Technical Division	Full Rights	876.555.4243	nperonzini@younameit.com	Active

Managing your Team



Team 13 Contacts
Active Integrations > Zabeam >

Activity Map Financials Projects Categories Workstreams Milestones Tasks SubTasks Risks Actions Issues Decisions Assumptions Notes Stream Documents Summary **Team** Settings

Filter Create Link Functional Teams Print Email

LINK CONTACTS

Business Development

<input type="checkbox"/> FULL NAME ^	ROLE	ORGANIZATION	EMAIL
<input type="checkbox"/> Mackinaw, Mike	Contact	Mac Solutions Inc.	mmackinaw@younameit.com
<input type="checkbox"/> Statslo, Sally	(Not Set)	SS Software Inc.	sstatslo@younameit.com

Communications

<input type="checkbox"/> FULL NAME ^	ROLE	ORGANIZATION	EMAIL
<input type="checkbox"/> Gardner, Ulysses	Full Rights	Under-Over Fencing, Inc.	ugardner@devensoft.com
<input type="checkbox"/> Jacques, John	No Access	Wheaton Technologies	jjacques@younameit.com

Corporate Security

<input type="checkbox"/> FULL NAME ^	ROLE	ORGANIZATION	EMAIL
<input type="checkbox"/> Read, Ryan	Full Rights	R&R Resources	rread@younameit.com

CANCEL LINK

Module 7



Filtering Data

Filter Fields and Descriptions



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

Project
 Workstream
 Owner
 Criticality

Schedule
 Functional Team
 Tag
 Responsible

Project Type
 Timeframe
 Days since update
 Forecast Start

Forecast End
 Search

Project	Narrow down your search by selecting a Project.
Workstream	Searches one or several Activities within a Workstream(s).
Owner	Searches Activities by Owner.
Criticality	Searches Activities that are marked as Critical Path, High, <u>Medium</u> or Low.
Schedule	Searches Activities that are At Risk, Closed, Delayed, or On Schedule.
Functional Team	Searches Activities by Functional Team.
Tag	Those Activities that have tags will appear in your search result.
Responsible	Searches Activities that are assigned to the Responsible party.
Project Type	Used in Project and Categories to identify certain type of projects if there is a need a need to distinguish between projects.
Timeframe	Searches on Activities that are due within a certain <u>time period</u> .
Days since update	Workstream Leads can use this filter to determine what Tasks have not been updated for more than “n” days and send out a Request Update from Task owners. Relevant fields for Request Update are “Dates” and “% Complete.”
Forecast Start	Searches those Activities with the Forecast End Date.
Forecast End	Searches those Activities with the Forecast Start Date.
Search	Returns those Activities of the word(s) that was searched.

Module 8



Exporting and Importing Data

Exported Activity Map



ID	Entity Name	WBS Number	Name	Activity	Description	Owner	Responsible	Recent Note	Planned Start Date
2470	Integration		Integration Plan						
112849	Project	1.1	M&A Integration						11/19/2020
112850	Category	1.1.1	Functional Category						11/19/2020
112852	Workstream	1.1.1.2	IT Workstream				Di Lorenzo, Nina		11/19/2020
112859	Milestone	1.1.1.2.1	General						11/19/2020
112874	Task	1.1.1.2.1	Obtain total number of physical locations including remote sites						11/19/2020
112888	Task	1.1.1.2.1	Obtain total number of internal employees along with total number of IT employees						11/19/2020
112912	Task	1.1.1.2.1	Obtain existing ISO, PCI, SOC, SOX and other compliance guidelines, diagrams and documentation						11/19/2020
112934	Task	1.1.1.2.1	Obtain complete voice network diagrams/documentation						11/19/2020
112860	Milestone	1.1.1.2.2	Project Management Office						11/19/2020
112869	Task	1.1.1.2.2	Determine if PMO and/or project management methodology exist at acquired company						11/19/2020
112884	Task	1.1.1.2.2	Evaluate PMO org structure						11/19/2020
112897	Task	1.1.1.2.2	Evaluate PMO tools (i.e. Project Server, etc.)						11/19/2020
112861	Milestone	1.1.1.2.3	Service Management						11/19/2020
112870	Task	1.1.1.2.3	Determine IT service desk hours of operation including availability of after hours support						11/19/2020
112886	Task	1.1.1.2.3	Obtain current IT service desk staffing model						11/19/2020
112898	Task	1.1.1.2.3	Identify total number of external facing clients IT service desk supports						11/19/2020
112905	Task	1.1.1.2.3	Identify support channels(phone, email, chat, self service, etc.)						11/19/2020
112911	Task	1.1.1.2.3	Obtain average monthly customer contacts for all channels						11/19/2020
112862	Milestone	1.1.1.2.4	Data Center						11/19/2020
112872	Task	1.1.1.2.4	Identify locations of all data centers						11/19/2020
112887	Task	1.1.1.2.4	Obtain inventory of all support hardware in each data center including make, model, year, asset tags, support agreements and serial numbers						11/19/2020
112895	Task	1.1.1.2.4	Determine physical security of data center including type of entry/security systems						11/19/2020
112906	Task	1.1.1.2.4	Identify use of raised flooring and separation of network, power, fiber channel and other cabling						11/19/2020
112863	Milestone	1.1.1.2.5	IT Asset Management						11/19/2020
112871	Task	1.1.1.2.5	Determine when acquisition will be connected to network to provide access						11/19/2020
112881	Task	1.1.1.2.5	Determine IP address ranges for computer hardware (desktops, laptops and servers)						11/19/2020
112896	Task	1.1.1.2.5	Determine what software will be retained from acquisition and gather purchased licenses data if available						11/19/2020

Required fields to complete in Excel:

1. Column B – Entity Name
2. Column D – Name
3. Column M – Forecast Start Date
4. Column N – Forecast End Date
5. Column Q – % Complete

Detailed Exporting instructions can be found in the Customer Support Portal
<https://support.devensoft.com/a/solutions/articles/5000794161>

Activity Map Import Wizard



IMPORT WIZARD - CHOOSE FILE

Available templates:

- IntegrationSingleListTemplate - [download](#)

Please choose the Excel file

Choose File No file chosen

PREVIOUS CANCEL NEXT

IMPORT WIZARD - PREVIEW

Loading completed. No problems found. Revise the tables for importing and click next.

Table: Integrations

ID	ENTITY NAME	WBS NUMBER	NAME	DESCRIPTION	OWNER	RECENT NOTE	PLANNED START DATE	PLANNED END DATE	LOCK
1170	Integration		Project Whistler			Note 1		26-Jan-19	

PREVIOUS CANCEL NEXT

IMPORT WIZARD - FINISH

Successfully imported

CLOSE

Detailed Importing instructions can be found in the Customer Support Portal
<https://support.devensoft.com/a/solutions/articles/5000794643>

Summary of Today's Session



- Uploaded project management plans (Package)
- Explored Devensoft's dates
- Managed team members
- Applied shortcut buttons to Activities
- Applied Filters to view and export data
- Exported and imported data



Question & Answer Session