



DEVENSOFT

Powering Your Strategic Growth

ADMINISTRATION BEST PRACTICES WEBINAR

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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



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

Module 1



Role Administration

Role Administration



Role Administration 3 roles

2 Create **1** Delete

ADMIN USER ADMINISTRATION
ROLE ADMINISTRATION
APPLICATION SETTINGS
TAB SETTINGS
CUSTOM PROPERTIES
EMAIL TEMPLATES
AUDIT EVENTS
ADMIN EVENTS
ARCHIVED DEALS
CLEAR TRASH BIN
▼ DICTIONARIES
▼ IMPORT AND EXPORT

ROLE NAME	ORDER
Read Only	0
Full Rights w/o Delete	0
Full Rights	0

Support

Need assistance

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



Navigation: HOME, TARGETS, PROGRAMS, CONTACTS, PLAYBOOK, ADMIN, REPORTS, HELP

The Detail

Role Administration >

Role Detail

Save Cancel

1 Role Description: *

Report Access: (Not Set)

2 Dashboards:

3 Order: *

DEAL DETAIL	READ	UPDATE	CREATE	DELETE
NDA_Tab	<input type="checkbox"/>	N/A	N/A	N/A
Playbook	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
DueDiligence	<input type="checkbox"/>	N/A	N/A	N/A
Program	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
ProgramActivityMap_Tab	<input type="checkbox"/>	N/A	N/A	N/A
ProgramSummary_Tab	<input type="checkbox"/>	N/A	N/A	N/A
Stream	<input type="checkbox"/>	N/A	N/A	N/A
Summary	<input type="checkbox"/>	N/A	N/A	N/A
Target	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
TargetActivityMap_Tab	<input type="checkbox"/>	N/A	N/A	N/A
TargetScoreRanking_Tab	<input type="checkbox"/>	N/A	N/A	N/A
TargetSummary_Tab	<input type="checkbox"/>	N/A	N/A	N/A
Project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SubWorkstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Support

Need assistance ?

Function ←

Access →

Exercise: Create a Role



Create the following Role:

1. Navigate to **Admin/Role Administration**.
2. Select  Create
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	<input checked="" type="checkbox"/> READ	<input checked="" type="checkbox"/> UPDATE	<input type="checkbox"/> CREATE	<input type="checkbox"/> DELETE	
NDA_Tab	<input checked="" type="checkbox"/>	N/A	N/A	N/A	Support
Playbook	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	
DueDiligence	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
Program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	
ProgramActivityMap_Tab	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
ProgramSummary_Tab	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
Stream	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
Summary	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
Target	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	
TargetActivityMap_Tab	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
TargetScoreRanking_Tab	<input checked="" type="checkbox"/>	N/A	N/A	N/A	Need assistance
TargetSummary_Tab	<input checked="" type="checkbox"/>	N/A	N/A	N/A	
Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Workstream	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SubWorkstream	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Milestone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SubTask	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Package	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Risk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Issue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Decision	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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 Detail

Save Cancel Delete

Login ID: * hmosh Link to existing Contact: * Mosh, Hailey

Password: Password Confirm:

User Time Zone: (Not Set) Home Page: (user choice)

Administrator: SSO User:

Can Create Target: Can Send Diligence Request:

Can Create Program: Allow Lock/Unlock Plan Dates in Deal:

Allow Export: Allow Lock/Unlock Forecast Dates in Deal:

Allow Import: Allow Lock/Unlock Financial Actual:

Allow Copy Forecast To Plan: Allow Create Forecast Snapshot:

Use Color Blindness Colors: Allow Lock/Unlock Financial Plan:

Inactive: Lock User On: dd-MMM-yy

Build/View TSA Cost: Report Access: Manager

Mobile User:

Access Type: Custom

REAL	ACCESS ROLE
Playbook	Full Rights
Program: Carriers United	N/A
Program: Cookies R Us	N/A
Program: Durango Ranch	N/A
Program: Rapids Inc.	N/A
Program: Franklin Farms	N/A
Program: Kavi Gardens	N/A
Program: Project Whistler	N/A
Program: Rivers Under Team	N/A
Program: San Paulo	N/A
Program: Soshiba	N/A
Program: Trucks United	N/A
Program: Waterloo	Human Re...
Target: Crole & Desserts	N/A
Target: DO Frankfurt	N/A
Target: Franklin and Co	N/A
Target: HGM Productions	N/A
Target: Lava Ice	Human Re...

User Administration



Limited Access

The Detail
User Administration >

User Detail

Save Cancel Delete

Login ID: * Link to existing Contact: *

Password: Password Confirm:

User Time Zone: Home Page:

Administrator: SSO User:

Can Create Target: Can Send Diligence Request:

Can Create Program: Allow Lock/Unlock Plan Dates in Deal:

Allow Export: Allow Lock/Unlock Forecast Dates in Deal:

Allow Import: Allow Lock/Unlock Financial Actual:

Allow Copy Forecast To Plan: Allow Create Forecast Snapshot:

Use Color Blindness Colors: Allow Lock/Unlock Financial Plan:

Inactive: Lock User On:

Build/View TSA Cost: Report Access:

Mobile User: Target Access Role:

Access Type:

Target Access:

Target Access only to associated program:
Program 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>

Module 3



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**.

Module 4



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



Navigation: HOME, TARGETS, PROGRAMS, CONTACTS, PLAYBOOK, ADMIN, REPORTS, HELP

User Administration 40 authorized seats: 35 active, 4 inactive, 5 available

Actions: Filter, Create, Export, Import, Delete, Activate, Deactivate

Search filters: User Status, Functional Team, Login, Access Type, Full Name

LOGIN ID	LAST LOGIN	CONTACT RECORD	FUNCTIONAL TEAM	ACCESS TYPE	LOCK USER ON	USER STATUS
administrator	18-Feb-21 9:07:23 PM	Admin, System	IT	Admin(Full Rights)		Active
bbart	03-Sep-19 1:29:01 PM	Bart, Bill	HR	Custom		Active
bbartz	04-Oct-19 9:07:31 AM	Bartz, Semy	IT	Custom		Active
Bwalters	11-Feb-21 9:10:18 AM	Walters, Barbara	HR	Limited		Active
ccontacte	10-Oct-19 3:11:48 PM	Contacte, Carter	Marketing	Custom	24-Feb-21	Inactive
gmldc	23-Feb-21 10:11:02 AM	Matt, Gall	Marketing	Custom		Active
gpolsitano	20-Jan-20 10:09:00 AM	Polisitano, Gustavo	Corporate Development	Admin(Full Rights)		Active
hharry	03-Sep-19 1:11:09 PM	Harry, Helen	HR	Custom		Active
hmosh	23-Feb-21 2:54:23 PM	Mosh, Halley	HR	Custom		Active
lohare	23-Feb-21 12:05:33 PM	Ohare, Ian	IT	Custom		Active
Istubs	23-Feb-21 10:37:27 AM	Stubs, Irene	IT	Custom		Active
jjacques	20-Mar-19 6:54:12 AM	Jacques, John	Communications	Limited	24-Feb-21	Inactive
llegalese	30-Jan-19 7:16:59 AM	Legalese, Larry	Legal	Custom		Active
Llicense	07-Jan-21 9:50:55 AM	License, Leslie	Legal	Custom		Active
llight	12-Mar-19 11:18:59 AM	Light, Leslie	Z_Contacts	Custom		Active
mlamb	02-Dec-20 11:21:03 AM	Lamb, Mary	HR	Admin(Full Rights)		Active
mmouse	24-Apr-20 2:38:52 PM	Mouse, Minnie	Marketing	Custom		Active

Module 5



Dictionarys

Dictionaries



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

The screenshot shows a software dashboard with a navigation menu at the top: HOME, TARGETS, PROGRAMS, CONTACTS, PLAYBOOK, ADMIN, REPORTS, HELP. The 'ADMIN' menu is expanded, showing options like USER ADMINISTRATION, ROLE ADMINISTRATION, APPLICATION SETTINGS, TAB SETTINGS, CUSTOM PROPERTIES, EMAIL TEMPLATES, AUDIT EVENTS, ADMIN EVENTS, ARCHIVED DEALS, CLEAR TRASH BIN, and 'DICTIONARIES' (highlighted with a red box). A sub-menu for 'DICTIONARIES' is open, listing: PHASES, PROGRAM TYPES, HIERARCHY NAMES, FUNCTIONAL TEAMS, PICK LISTS, COUNTRIES, SCORE RANKING FIELDS, and CURRENCIES. The dashboard also features a 'Statistics' section with a donut chart showing '13 | 0' and a 'Milestone Burn-Down Summary' line chart. Below the charts are sections for 'PROJECTS' and 'SUBWORKSTREAMS OVERVIEW' with data tables.

PROJECT NAME	OWNER	FORECAST END DATE	SUBWORKSTRE/	MILESTONES	CRITICALITY	-STATUS
HIP Integration		05-Aug-21	3	11	Medium	■
M&A Integration		21-Jun-21	10	92	Medium	■

SUBWORKSTREAM NAME	OWNER	FORECAST END DATE	MILESTONES	TASKS	% COMPLETE	CRITICALITY	-STATUS
Human Resources Workstream	Walters, Barbara	05-Aug-21	5/5	47/47	0%	Medium	■

Hierarchy Names



Hierarchy Names 6 Hierarchy Names
Dictionaries >

TYPE	DISPLAY NAME
Activity Level 1	Project
Activity Level 2	Workstream
Activity Level 3	SubWorkstream
Activity Level 4	Milestone
Activity Level 5	Task
Activity Level 6	SubTask

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.

Functional Teams: 28 Functional Teams

Dictionary

Create Delete

NAME

- ABC - Corp Dev.
- Accounting & Finance
- Advertising
- Audit
- Business Development
- Communications
- Corporate Development
- Corporate Security
- Facilities
- Finance
- HR
- IT
- Legal
- Marketing
- Operations
- Procurement
- Product Mgmt.
- Real Estate

USER ADMINISTRATION

ROLE ADMINISTRATION

APPLICATION SETTINGS

TAB SETTINGS

CUSTOM PROPERTIES

EMAIL TEMPLATES

AUDIT EVENTS

ADMIN EVENTS

ARCHIVED DEALS

CLEAR TRASH BIN

DICTIONARIES

IMPORT AND EXPORT

PHASES

PROGRAM TYPES

HIERARCHY NAMES

FUNCTIONAL TEAMS

PICK LISTS

COUNTRIES

SCORE RANKING FIELDS

CURRENCIES

Contacts: 84 Contacts

Filter Create Delete

Print Email Team

(Not Set)

FULL NAME	ORGANIZATION	BUSINESS UNIT	DEAL ROLE	OFFICE PHONE	EMAIL	USER STATUS
Olandercontact, Nora					nolander@yournameit.com	N/A
Pitt, Brad					bpitt@yournameit.com	N/A
Special, Sally					sspecial@yournameit.com	Active
Stats, Nora					nstats@yournameit.com	N/A
Thomson, Billy					bthomson@yournameit.com	N/A
Thomson, Sasha	Rockville Technology Group	Legal	CEO	765.555.7234	sthomson@gmail.com	N/A
Viewser, Roger					rviewser@yournameit.com	Active
Younas, Vajja	Dilart Consulting	Technical Division	Business Manager	987.555.1234	vyounas@yournameit.com	N/A

Accounting & Finance

FULL NAME	ORGANIZATION	BUSINESS UNIT	DEAL ROLE	OFFICE PHONE	EMAIL	USER STATUS
Bothom, Billy					bbothom@yournameit.com	N/A
Giggart, Vlad	All Natural	Cafe			vgiggart@yournameit.com	N/A
Smithouse, Joe	RD Services	Corporate	Project Manager	312.555.7623	jsmithouse@noemail.com	N/A
Target, Tom	Powerline Systems	Pharmaceutical	Project Lead	212.220.2200	tom_target@yournameit.com	Active
Workka, Willy	Workka World	Corporate	Chocoflier	603.555.7690	wworkka@noemail.com	N/A
Zourt, Zaida	Zylo International	Corporate	Business Manager	679.887.6530	zourt@yournameit.com	N/A

Advertising

FULL NAME	ORGANIZATION	BUSINESS UNIT	DEAL ROLE	OFFICE PHONE	EMAIL	USER STATUS
Bart, Nina						Active
Bills, Bob					bbills@yournameit.com	N/A

Module 6



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



Operational

HOME TARGETS PROGRAMS CONTACTS PLAYBOOK ADMIN **REPORTS** HELP

OPERATIONAL
ANALYTICS

▶ Pipeline Reports

▶ Status Reports

▶ Common Reports

▼ Other 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

▶ Financial Reports

▶ Legal Reports

Support

Need assistance ?

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



Question & Answer Session