DealVision™ User Guide for Administrators

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Chapter 1: Introduction

DealVision™ makes the due diligence process faster and easier for buyers to evaluate targets and make informed investment decisions. With DealVision, buyside teams can upload their existing due diligence checklist to the project and connect to the seller's data room.

DealVision recommends documents from the seller's data room to the buyer based on the checklist items.

The deal lead then assigns content based on checklist items to the team of subject matter experts. The subject matter experts view the documents and enter their findings, which can then be exported into Excel for use during progress meetings. In addition, the real-time project-level dashboard provides a visual depiction of the project's progress.

Logging in

Each time you visit DealVision, you will be asked to log in by entering your email address and password. You have a single set of credentials that allow you to log in to all Intralinks products to which you have access. Having the same login credentials for all products allows you to switch to another application without entering your login credentials again.

If your organization uses Intralinks' Single Sign-On (SSO) functionality, you will be asked to log into your corporate network, rather than Intralinks, when you display the login page. If you are already logged into the corporate network, DealVision is displayed automatically.

Activating your account and logging in for the first time

If you are a new user to Intralinks, that is, you have not activated an Intralinks account, when you are invited to DealVision, you will receive an email message from Intralinks. The message includes a link to activate your account. Activating your account includes steps for accepting the EULA, creating a password, and setting up two factor authentication to ensure your account is secure.

Note: If your organization uses Intralinks' Single Sign-On (SSO), you will not receive an email message.

About your email address

Your email address serves as your Intralinks user ID. If you have more than one email address, use the address for the account where you received the invitation message to DealVision. If your email address changes, contact Intralinks Customer Service for assistance in updating your Intralinks ID. Local telephone numbers for Intralinks Client Services can be found at:

http://www.intralinks.com/contact/client-services/

▶ **To activate your account**

1. Locate the email messages containing your invitation to DealVision.

2. Click **Activate Account**.

3. Read the license agreement and click **Accept** to continue logging in.

   If you do not agree to the terms of the license agreement, click **Decline**. You will not be able to log in until you accept the license agreement.

4. Enter your password.

5. Reenter your password and click **Next**.

6. Set up how you want Intralinks to verify your identity by setting up one or more of the following options:

   Receive a code by text (SMS) – Select the country and enter the phone number to which you want an SMS code to be sent and click **Activate**.

   Use Intralinks Authenticator – Use your phone to scan the QR code or enter the secret key displayed in this dialog box in the Authenticator section in the Intralinks Mobile app on your phone. Click the icon at the end of the secret code to copy the code. In the **Verification code** field, enter the 6-digit code generated by the app and tap **Activate**.

   Note: This option cannot be used with Okta Verify with Push.

   Use Okta Verify with Push – Okta Verify with Push eliminates the need to enter a code. Instead, it sends a push verification to your phone and you must tap **Yes, it's me** to authenticate. Use your phone to select the type of account and scan the QR code in this dialog box in the Okta Verify App on your phone.

   This option requires that you phone be connected to the internet. If your phone does not have an internet connection, you can choose to verify using a code and you will be enrolled in Okta Verify.

   Note: This option cannot be used with Intralinks Authenticator.

   Use your preferred authenticator – Scan the QR code or enter the secret key displayed in this dialog box in the Authenticator App on your phone. Click the icon at the end of the secret code to copy the code. In the **Verification code** field, enter the 6-digit code generated by the app and tap **Activate**.

7. When you have finished setting up account security, click **Finish**. DealVision is opened.

Logging in after you have activated your account

▶ **To log in after you have activated your Intralinks account**

1. To display the login page, using your Web browser, go to www.intralinks.com and click **Log In**.

   Note: If your organization uses Intralinks' Single Sign-On (SSO) functionality and you are logged into the corporate network, DealVision is displayed automatically. (If you are not logged into the corporate network, you will be asked to log into it.)

2. In the **Email Address** field, enter the email address for the account where you received your invitation to the exchange and click **Next**.

3. In the **Password** field, enter your password and click **Login**.

4. If you have forgotten your password, click the **Forgot your Password?** link and follow the instructions that appear on your screen. (For step-by-step instructions, refer to "Resetting a forgotten password" on page 10.)

5. If you are asked to verify your identity, either enter the security code in the **Verification Code** field and click **Next**, or tap **Yes, it's me** in your Okta Verify app. The security code is sent based on the method you selected when you activated your account.

The security verification is triggered based on the result of evaluating security behavior and risk-based authentication, referred to as adaptive authentication. Security behavior detection continually tracks specific user behavior and generates a challenge when any change in the tracked history of behavior for a given user is detected, such as a new device that has never been used or a new geographic location from which the user has never logged in to Intralinks.

Risk-based authentication is an additional layer of security that evaluates risk automatically using multiple features such as IP address, device, and behaviors for each user attempting to authenticate. Risk-based authentication is done with security behavior detection.

Changing a forgotten or expired password

The need to change your password typically is required under the following circumstances:

- You have forgotten your password. You can change your password by clicking **Forgot password?** during login.

- Your password has expired. Typically, passwords expire every 365 days to ensure the security of the exchange. If your password has expired, a message appears when you attempt to log in and you are guided through the password reset process.

  Note: If your organization uses Intralinks' Single Sign-On (SSO) functionality, you do not have a separate Intralinks password, and you will not receive password expiration alerts.

▶ **To change a forgotten password**

1. On the login screen, enter your email address and click **Next**.

2. Click **Forgot password?**

3. In the **Verification Code** field, enter the verification code that is sent to you and click **Next**.

4. In the **Password** and **Confirm Password** fields, enter the new password. For greater security, create a strong password as indicated by the password strength meter.

5. Click **Next**.

▶ **To change an expired password**

1. On the login screen, enter your email address and click **Next**.

2. Enter your password and click **Login**. The **Update Password** screen is displayed.

3. In the **Password** and **Confirm Password** fields, enter the new password. For greater security, create a strong password as indicated by the password strength meter.

4. Click **Next**.

Resetting your authentication factors after your mobile phone number has changed

If you are enrolled in SMS as one of your authentication factors, you can update your phone number and authentication factors when your mobile phone number changes. If you are not enrolled in SMS, contact Intralinks Customer Support.

▶ **To reset your authentication factors**

1. When you are asked to verify your identity when logging in, click **Update phone number used for SMS**.

2. In the **Country Code** field, select the country code of your old phone.

3. In the **Phone Number** field, enter your old phone number.

4. Click **Validate**.

    If you enter the correct phone number, an email is sent to you with a code that you can use to reset your authentication factors. This code is good for ten minutes.

    If you enter an incorrect phone number five times, you will be locked out. Contact Intralinks Customer Support.

5. In the **Code** field, enter the code that was sent to you in an email and click **Next**. If you click the link in the email, you will need to reenter your email address and password.

    All previously enrolled authentication factors are removed.

6. In the Account Security Setup screen, reconfigure the authentication factors that you want to use to verify your identity.

    Receive a code by text (SMS) – Select the country and enter the phone number to which you want an SMS code to be sent and click **Activate**.

    Use Intralinks Authenticator – Use your phone to scan the QR code or enter the secret key displayed in this dialog box in the Authenticator section in the Intralinks Mobile app on your phone. Click the icon at the end of the secret code to copy the code. In the Verification code field, enter the 6-digit code generated by the app and tap **Activate**.

    Note: This option cannot be used with Okta Verify with Push.

    Use Okta Verify with Push – Okta Verify with Push eliminates the need to enter a code. Instead, it sends a push verification to your phone and you must tap **Yes, it's me** to authenticate. Use your phone to select the type of account and scan the QR code in this dialog box in the Okta Verify App on your phone.

    This option requires that you phone be connected to the internet. If your phone does not have an internet connection, you can choose to verify using a code and you will be enrolled in Okta Verify.

    Note: This option cannot be used with Intralinks Authenticator.

    Use your preferred authenticator – Use your phone to scan the QR code or enter the secret key displayed in this dialog box in the Authenticator App on your phone. Click the icon at the end of the secret code to copy the code. In

the **Verification code** field, enter the 6-digit code generated by the app and tap **Activate**.

7. Click **Finish**.

Logging out

Whenever you have finished working, log out of DealVision to ensure that others cannot view information that is not meant for them. If there is no activity in any Intralinks application for 30 minutes, you will be logged out automatically. A message appears five minutes before this occurs, giving you the opportunity to continue working in your exchanges.

▶ **To log out**

◇   Click the ⊚ icon in the navigation bar at the top of the screen and select **Logout**.

User roles

DealVision users can have one of the following roles:

*   Project Administrator – This role is assigned to users by Intralinks. Project administrators can close projects. To change or add a project administrator, contact Intralinks' Buyside support. You can view a list of project administrators on the **Settings** tab.

*   Organization Administrator – Users with this role can create and view projects in their organization, and perform all tasks that project members can perform.

*   Project members – Users with this role can link the project to a sellside data room, invite project managers and subject matter experts to the project, and organize content.

Logging in to another Intralinks application

If you have access to other Intralinks applications, you can switch applications without the need to reenter your login credentials.

▶ **To log in to another Intralinks application**

1. Click the application menu ▦ in the top right of the header.

    This menu only appears if you have access to other Intralinks applications.

2. Select the application that you want to log in to.

    The application opens in a new browser window.

Chapter 2: Setting up projects

Before beginning due diligence, the buyer administrator must prepare the project, that is, the online space dedicated to the buyside team. Typically, the Intralinks administrator creates the project. Once created, you can set up the project by performing the following tasks:

1. Link the project to the seller's data room
2. Import or create the buyside checklist
3. Invite users to the project
4. Assign checklist items to users

Creating a project

If you have the ability to create a project, and the Intralinks administrator did not create a project for you, you can create a project. During project creation you can link to the seller's data room or create the project and link to the data room at a later time.

▶ **To create a project**

1. Log in to DealVision.
2. Click **Create Project**.
3. In the **Project Name** field, enter the name of the project.
4. In the **Project currency** field, select the currency type to use for the project. A project can have only one currency.

   Note: You can change the project currency later by clicking **Settings** and clicking **Project Details**. If you do this, the labels in the user interface will change, but any previously entered amounts will not be converted to the new currency.

5. (Optional.) To link to the seller's data room, click **Link to Data Room**.

   In the **Linked Data Room** field, select the seller's data room. The list contains all of the data rooms to which you have been invited.

6. Click **Create project**.

   If you linked to the data room, the product scans through the documents and recommends documents based on checklist items. Depending on the size of the data room, this process may take some time. You can view the suggested files by clicking on the checklist item and clicking **Suggestions** in the **Associated Files** section.

Linking a project to the seller's data room after project creation

If your project was not linked to a seller's data room when it was created, you can link to the seller's data room to access the documents required for due diligence.

▶ **To link to the seller's data room**

1. From within your project, click the **Files** tab.

Note: You can also link to the seller's data room from the **Settings** tab and clicking **Project Details**.

2. Click **Link project to VDR**.

3. In the **Linked Data Room** field, select the seller's data room. The list contains all of the data rooms to which you have been invited.

4. Click **Link project**.

The product scans through the documents and makes suggestions about which documents are relevant to checklist items. Depending on the size of the data room, this process may take some time. You can view the suggested files by clicking on the checklist item and clicking **Suggestions** in the **Associated Files** section.

Creating and updating a checklist

You can import a checklist, copy and paste checklist items from a Microsoft Excel spreadsheet, or create a checklist manually. When you open your project, the **Checklist** tab is displayed by default. If there are no checklist items, **Start tracking your diligence** is displayed instead of a blank list of checklist items. You can begin by creating a checklist using Excel, or, if you are going to manually create a checklist, you can add your first checklist item. After you have added at least one checklist item, the list of checklist items is displayed.

You can create categories for checklist items and assign a person to be the default assignee for the category. All checklist items assigned to the category will be assigned to the default assignee unless another person was explicitly assigned to the checklist item. Notifications are sent to the person assigned to the checklist item to make them aware of the item. If a checklist item is moved from one category to another a notification is sent to the default assignee unless the item is explicitly assigned to another user.

Importing a checklist

Before you import a checklist for the first time, you must download the checklist template and add your checklist items.

▶ **To import a checklist for the first time**

1. From within the project, click the **Checklist** tab.

2. Click **Create Checklist Using Excel**.

3. Download the checklist template and add checklist items to it.

   • In the text under Import from Excel, click **checklist template**.

   • Open the downloaded file and create a separate tab for each checklist category and add the checklist item description to the first column. Note that the description must be 1000 characters or less. If the description is greater than 1000 characters, an error occurs during import.

   • Save your changes.

4. Click **Select File**.

5. Navigate to the checklist file and click **Open**.

The number of checklist items and categories that will be imported is displayed.

6. Click **Import**.

▶ **To import a checklist after the initial import**

To add additional checklist items or update existing items, you can reimport an updated version of the original Excel file or import a new file.

If you upload an edited version of the original Excel file, updates are made to existing checklist items, for example, an updated description, and new items are added.

If you upload a different Excel file, the entries are added to the checklist. If a category is the same as an existing category, the new entries are added to the bottom of the list.

Checklist items are never removed even if they are removed from the Excel file.

1. Click the **Settings** tab.
2. Click **Import Checklist**.
3. Click **Add to Checklist Using Excel**.
4. Click **Select File**.
5. Navigate to the checklist file and click **Open**.
6. Click **Import**.

Copying and pasting checklist items and categories from Excel

You can copy and paste checklist items and categories from an existing Excel spreadsheet. If you copy multiple rows from a single column, they are copied as checklist items. For example is you copy rows 2 through 10 in column C, they are imported as checklist items.

If you copy multiple columns and rows, items in the first column are imported as checklist items and items in the second column are imported as categories. All other columns are ignored. For example if you copy rows 2 through 10 in columns C, D, and E, items in column C are imported as checklist items, items in column D are imported as categories, and items in column C are not imported.

Checklist item names that have more than 100 characters, checklist item descriptions that have more than 1,000 characters, and categories that have more than 30 characters are truncated. The preview import screen indicates truncated fields.

▶ **To create a checklist by copying and pasting checklist items**

1. Click the **Checklist** tab.
2. Click **Create Checklist Using Excel**.
3. Open your spreadsheet and copy the rows and columns that you want to add to the checklist.
4. Click **CTRL-V**. The preview screen displays the checklist items that will be imported.

5. Verify that the import is as expected and click **Import**.

▶ **To copy and paste checklist items into an existing checklist**

1. Click the **Checklist** tab.

2. From the **Import/Export** menu, select **Import Checklist items**.

3. Open your spreadsheet and copy the rows and columns that you want to add to the checklist.

4. Click **CTRL-V**. The preview screen displays the checklist items that will be imported.

5. Verify that the import is as expected, and click **Import**.

Creating a checklist manually

To create a checklist manually, you will first add a checklist item. Then, on the **Settings** tab you create the categories, then add checklist items to them.

▶ **To create the first checklist item**

1. Click the **Checklist** tab.

2. On the **Start tracking your diligence** screen, click **Add a Checklist Item**.

3. In the **Checklist Item Description** field, enter the checklist item.

4. In the **Category** field, select the category to which this checklist item belongs.

5. (Optional.) In the **Due Date** field, enter the date when the checklist item should be completed.

6. (Optional.) In the **Priority** field, select whether the priority is high, medium, or low.

7. Click **Create**.

▶ **To create a category**

1. From within the project, click the **Settings** tab.

2. Click **Categories**.

3. Click **Add Category**.

4. In the **Category Name** column, enter a descriptive name for the.category.

5. In the **Default Checklist Assignee** column, select the user that will be assigned to all checklist items in this category. Note that if a different user has explicitly been assigned to a checklist item on the **Checklist** tab, the default checklist item assignee will not be assigned to that item.

6. Click the check mark button at the end of the row.

7. Repeat steps 3-6 to create additional categories.

▶ **To rename a category**

1. Click the **Settings** tab.

2. Click **Categories**.

3. Click the category name that you want to rename.

4. Enter the new name.

5. Click the check mark button at the end of the row.

▶ **To delete a category**

1. Click the **Settings** tab.

2. Click **Categories**.

3. Click the **trashcan** icon at the end of the row of the category you want to delete.

   If there are checklist items, findings, or questions associated with the category, the number of items is displayed. When you delete the category, these items will not be deleted. They will be marked as unassigned.

4. Click **Delete Category**.

▶ **To create a checklist item**

You can add a checklist item to a category when you create it, or you can create an uncategorized item that you can assign to a category at a later time. View uncategorized item by clicking **Uncategorized** in the **View by Category** pane.

Uncategorized items can explicitly be assigned to a user. When you assign a category to the checklist item, the default category assignee will not be assigned to that item. The default category assignee is only assigned to checklist items that have not been explicitly assigned to another user.

1. Click the category to which you want to add checklist items.

2. Click **Create Checklist item**.

3. In the **Checklist Item Description** field, enter the checklist item.

4. In the **Category** field, select the category to which this checklist item belongs.

5. (Optional.) In the **Due Date** field, enter the date when the checklist item should be completed.

6. (Optional.) In the **Priority** field, select whether the priority is high, medium, or low.

7. Click **Create**.

Filtering the checklist

You can narrow down the number of checklist items displayed by filtering the list. You can filter by status, properties, due date, priority, and category. You can apply one or more filters.

▶ **To filter checklist items**

1. Click the **Checklist** tab.

2. Click **Filters**.

3. In each filter that you want to use, select the filter criteria.

4. Click **Apply**.

The checklist displays only those items that match the configured filters. The filters are displayed at the top of the checklist. Click the **x** in a filter to remove it or click **Clear all** to remove all filters.

Maintaining a checklist

▶ **To view checklist details and update checklist item status and priority**

You can view the status, due date, and the person that the checklist item is assigned to. In addition, you can view associated findings, files and questions, associate and dissociate findings and files, creating findings, create and associate questions, download files, assign a due date, and change the status of the item.

You can also change the status for individual checklist items.

1. From within the project, click the **Checklist** tab.

2. In the **Checklist Item** column, click the checklist description.

3. (Optional.) To change the status of a checklist item, click the status column in the row of the item you want to update and select the status.

4. (Optional.) To change the priority of a checklist item, click the priority in the row of the item you want to update and select the priority.

▶ **To edit a checklist item**

You can update a checklist description, change its category, and add or edit the due date.

1. From within the project, click the **Checklist** tab.

2. In the **Checklist Item** column, click the item that you want to change.

3. Make any updates and exit the slider panel.

▶ **To delete a checklist item**

You can delete checklist items that you no longer need. Deleted items cannot be recovered.

1. From within the project, click the **Checklist** tab.

2. Click the **Delete Checklist Item** icon in the row of the item that you want to delete.

3. Click **Delete Item**.

Exporting a checklist

You can export a checklist to Microsoft Excel so that you can easily share the project status with others. You can export only checklist items, or the checklist items along with the questions, and findings related to the checklist items.

▶ **To export a checklist**

1. From within the project that contains the checklist you want to export, click the **Checklist** tab.

2. From the **Export/Import** menu select one of the following options.
   - **Export Checklist** – exports only the checklist items.
   - **Export Checklist with Details** – exports the checklist items and the related questions and findings.

Inviting users to the project

When you add users to the project, the user receives an email notification.

▶ **To add users to the project**

1. In the project, click **Settings**.
2. Click **Manage Users**.
3. Click **Add User**.
4. In the **Email Address** field, enter the email address of the user you want to invite to the project.
5. Click **Add**.

   An email is sent to the user inviting the user to the project and the user is added to the project.

▶ **To remove users from the project**

1. In the project, click **Settings**.
2. Click **Manage Users**.
3. Search for the user you want to remove or locate the user in the list.
4. Click the trashcan icon in the **Actions** column.
5. Click **Remove**.

Explicitly assigning checklist items to users

If a default user has been assigned to a category, all checklist items assigned to that category are assigned to the default category assignee, except checklist items that have explicitly been assigned to another user.

You can explicitly assign checklist items to one user or several users at the same time. Users can view items assigned to them by clicking **My Items** on the **Checklist** tab.

▶ **To assign a single checklist item to a user**

1. From within the project, click the **Checklist** tab.
2. Click **Filters**, select the category that contains the items you want to assign, and click **Apply**.
3. In the row of the item you want to assign, click the **Assign checklist item to user** icon.
4. Enter the email address of the user to which you want to assign this item or click in the row of the user to which you want to assign this item.
5. Click **Assign**.

▶ **To assign multiple checklist items to a user**

1. From within the project, click the **Checklist** tab.

2. Click **Filters**, select the category that contains the items you want to assign, and click **Apply**.

3. Select the items that you want to assign by clicking the checkbox at the beginning of each row.

4. Click **Assign to user** at the top right of the grid.

5. Enter the email address of the user to which you want to assign this item or click in the row of the user to which you want to assign this item.

6. Click **Assign**.

Sending checklist items to sellers as questions

You can select checklist items and send them to the seller in the form of a question. Only the checklist question is sent. Findings and other information associated with the checklist item are not included.

The questions are sent to the seller and are also added to the **Questions** tab in DealVision where you will be able to view the answers. The questions are linked to the checklist items to which they belong.

▶ **To send checklist items to the seller**

1. From within the project, click the **Checklist** tab.

2. Click **Filters**, select the category that contains the items you want to send to the seller, and click **Apply**.

3. Select the checklist items that you want to send as questions.

4. Click **Share with Seller**.

   If the selected number of checklist items exceeds the seller limit for the number of questions that can be asked, you will not be able to send the questions. A message is displayed showing the maximum number of items that can be sent to the seller. Decrease the number of items selected and try again.

5. For each checklist item, select the seller category to which the item applies, for example, Finance. The system automatically selects the category if there is a seller category that matches the buyer category.

   To bulk assign a category, select the items that you want to assign to the same category, and select the category from the **Change Seller Category** menu.

6. Click **Share items**.

   A progress bar is displayed showing the number of questions created. If questions could not be shared, a message is displayed explaining why and what to do next.

7. Click **Close**.

Closing projects

Users that have the Project Administrator role can close projects. Closed projects cannot be accessed or reopened. If your company has a transactional contract type with Intralinks, billing is stopped for the project. Billing is not affected if your company has a subscription type contract.

Before the project is closed, you will have the option to download checklist items, findings, and information from the Dashboard.

Note: The Project Administrator role is assigned to users by Intralinks. If you need to change your project administrator or add project administrators, contact Intralinks Buyside support at buysidesupport@intralinks.com.

▶ **To close a project**

1. From within the project you want to close, click **Settings**.

2. Click **Project Details**.

3. Click **Close Project**.

4. (Optional.) Use the following options to download an Excel spreadsheet that contains information from your exchange:

    • To download checklist items or findings, click **Download** next to that item.

    • To download status, checklist items with files, and progress by category data from the Dashboard, click **Go to Dashboard**.

5. Click **Close Project**.

Chapter 3: Performing due diligence

Review checklist items and related files and make findings that will help your organization make an informed decision about whether to pursue an acquisition.

Viewing checklist items that are assigned to you

Your organization's corporate development officer assigns checklist items to people based on their area of expertise. To view the checklist items that are assigned to you, click the **Checklist** tab, and then click **My Items** on the left.

Click the description in the Checklist Item column to view and update details about the checklist item, including status, due date, associated findings and files

Finding files and associating them to checklist items

You can find files relevant to checklist items either by using the suggestions feature or by manually searching all files in the data room.

Associate files to checklist items using suggestions

The suggestions feature is available for all exchanges except DCN exchanges.

The suggestions feature makes suggestions about which files might be relevant to checklist items. As you associate files to checklist items, you will get better suggestions, that is, you will get files that are similar to the ones you associate with the checklist item.

▶ **To view suggested files and associate them to the checklist item**

1. Click the **Checklist** tab.
2. Open the checklist item.
3. In the **Associated Files** section, click **View Suggestions**.

   The Associate Files to Checklist Item dialog box is displayed listing the suggested files. To view all files, toggle the **Show only suggested files** option to off.

4. Select the files that you want to associate to this item and click **Associate Files**.

   Use the **Find Files** field to search for files, or filter the list by **Date Added** and/ or **Last Modified** by clicking **Filters**. The date added and last modified dates are the dates that the files were shared with the buyer, not the dates that the files were added to the data room.

5. (Optional.) To see a refined list of suggestions, click **View Suggestions**.

   Note: Click **Associate Files** to view a list of all files in the exchange. You can toggle between suggested files and all files using the toggle at the top right of the screen.

6. Repeat steps 4 and 5 until you are finished associating files to this checklist item.

Associate files to checklist items manually from the Files tab

You can search files by file name, file folder, and index number.

▶ **To search for files and associate them to a checklist item**

1. Click the **Files** tab.

2. Search for relevant files or filter the list to find files by date or last modified.

   You can filter the list using one or both of the filters, then search the results by file name.

   You can also sort by index number or file name by clicking in the header row of the column you want to sort by.

   Note: The date added and last modified dates are the dates that the files were shared with the buyer, not the dates that the files were added to the data room.

3. Click in the row of the file that you want to associate.

4. Click the three dots menu at the end of the row and click **Associate with Checklist Item**.

5. Select the checklist item to which you want to associate the file.

6. Click **Associate**.

Viewing and downloading files

You can view the following types of unprotected files from within DealVision: DOCS, SLSX, PPTX, PDF, JPEG, and PNG. All other files must be downloaded. To view a file, click its name in any part of the application that shows files. Use the following toolbar buttons to adjust the display.

- **Expand/Collapse** – Lets you toggle between full screen mode and preview mode.

- **Search** – Searches for text in the document.

- **Quick Access Panel** – Displays the document pages as icons. Click on a page to display it.

- **Comment tool** – This tool is available in full screen mode. It lets you add a general comment or a comment on specific text.

- **Findings tool** - This tool is available in full screen mode. It lets you add findings to the document.

- **Scroll Document** – Lets you scroll through the document.

- **Select** – Lets you select text that you want to copy. This option is only available in full screen mode.

- **Zoom Out** – Makes the page smaller. This option is only available in full screen mode.

- **Zoom In** – Makes the page larger. This option is only available in full screen mode.

- **Percent** – Makes the page larger or smaller.

Click the **Download** button to download the file from the viewer.

Adding comments and @mentions to documents

Comments and @mentions let you easily collaborate with colleagues. When you include an @mention in a comment, that colleague is sent an email with a link to the comment.

Comments are only available in full screen mode, not in preview mode. Comments are displayed in the left pane. Click on a comment to view that section of text or click in the text to view any comments on it. You can add a comment in the following ways:

- Select the comment tool and add a comment.

- Right click in the document and select **Comment**.

- Select text using the **Select** tool, select **Comment** and add a comment.

To @mention a colleague, type **@** and start typing the person's name. A matching list is displayed and you can pick the appropriate person.

Note that only the user that created the comment can edit or delete it, however, all users can view comments if they have access to the file.

To edit or delete a comment, from the three dots menu in the comment, select **Edit** or **Delete**.

Adding findings to documents

You can add findings directly to documents. These findings can be viewed from the document or the **Findings** tab.

Note that all project members have the ability to create a finding and edit and delete any finding regardless of who created it.

▶ **To add a finding to a document**

1. Click the **Findings** tool. An icon appears in the document indicating that there is a finding and the fields for creating the finding are displayed in the left panel.

2. In the **Finding Details** field, enter your finding.

3. In the **Category** field, select the category to which this finding applies.

4. In the **Type** field, select whether the finding is a risk, synergy, or neither of those two options.

5. In the **Priority** field, select the importance of the finding.

6. (Optional.) To configure optional fields (**Impact**, **Monetary Impact (USD)**, **Probability**, and **Mitigation Strategy**), click the down arrow to the right of **Optional Information**.

7. (Optional.) In the **Impact** field, select the severity of the impact: High, **Medium**, or **Low**.

8. (Optional.) In the **Monetary Impact** field, enter the impact amount.

9. (Optional.) In the **Probability** field, select the probability: **High**, **Medium**, or **Low**.

10. (Optional.) In the Mitigation Strategy field, select the strategy: **Accept**, **Avoid**, **Reduce**, or **Transfer**. This field is only displayed if the type of finding is not **Synergy**.

11. Click **Save**.

▶ **To edit, close, or delete a finding**

From the three dots menu in the finding, select **Edit**, **Close Finding**, or **Delete**.

Working with findings

You can create findings for the project, checklist item, or a file. Findings can be assigned a type of risk, synergy, or none, and a priority of high, medium, low, or none. Once created, you can associate a finding to a checklist item or file.

Note that all project members have the ability to create a finding and edit and delete any finding regardless of who created it.

▶ **To create a finding**

1. Click the **Findings** tab.

2. Click **Create Finding**.

3. In the **Finding Name** field, enter a descriptive name for the finding.

4. In the **Finding Details** field, enter a description of what you found.

5. In the **Category** field, select the category to which this finding applies.

6. In the **Type** field, select whether the finding is a risk, synergy, or neither of those two options.

7. In the **Priority** field, select the importance of the finding.

8. (Optional.) In the **Impact** field, select the severity of the impact: High, **Medium**, or **Low**.

9. (Optional.) In the **Monetary Impact** field, enter the impact amount.

10. (Optional.) In the **Probability** field, select the probability: **High**, **Medium**, or **Low**.

11. (Optional.) In the Mitigation Strategy field, select the strategy: **Accept**, **Avoid**, **Reduce**, or **Transfer**. This field is only displayed if the type of finding is not **Synergy**.

12. Click **Create Finding**.

You can now associate the finding to a checklist item and to files.

▶ **To associate the finding to a checklist item**

1. In the **Associated Checklist Item** section, click **Associate Checklist Item**.

2. Search for or scroll to the checklist item you are looking for.

3. Click the checklist item

4. Click **Associate**.

The checklist item's status is changed from **Not started** to **In progress**.

▶ **To associate the finding to files**

1. In the **Associated Files** section, click **Associate Files**.

2. Search for or scroll to the files you want to associate.

3. Mark the files that you want to associate.

4. Click **Associate**.

▶ **To edit a finding**

You can change the finding name, description, category, type, status, and priority of a finding.

1. Click the **Findings** tab.

2. At the end of the row of the finding that you want to change, click the **Edit Finding** icon.

3. Make any changes.

4. Click **Save**.

▶ **To delete a finding**

1. Click the **Findings** tab.

2. At the end of the row of the finding that you want to delete, click the **Delete Finding** icon.

Closing a finding

Close a finding to indicate that it no longer requires attention. You can close a finding from the **Findings** tab or when you are previewing a document.

▶ **To close a finding from the Findings tab**

1. Click the **Findings** tab.

2. Use one of the following methods:

   • In the **Status** column of the finding that you want to close, click the status and select **Closed**.

   • Open the finding you want to close and move the slider to **Close Finding**.

▶ **To close a finding from document preview**

1. From within a document, click on a finding.

2. From the three dots menu, select **Close Finding**.

To dissociate findings from the Findings tab

▶ **To dissociate a finding from a checklist item**

1. Click the **Findings** tab.

2. In the **Finding Name** field, click the name of the finding that you want to dissociate.

3. In the **Associated Checklist Item** section, in the **Actions** column, click the **Remove association** icon.

4. Click **Remove checklist item**.

▶ **To dissociate a finding from a file**

1. Click the **Findings** tab.

2. In the **Finding Name** field, click the name of the finding that you want to dissociate.

3. In the **Associated Files** section, in the **Actions** column, click the **Remove association** icon.

To dissociate findings from the Checklist tab

▶ **To dissociate a finding from a checklist item**

1. Click the **Checklist** tab.

2. In the **Checklist Item** column, click on the description of the finding you want to dissociate.

3. In the **Associated Findings** section, click the **Remove association** icon.

▶ **To dissociate a finding from a file**

1. Click the **Checklist** tab.

2. In the **Checklist Item** column, click on the description of the finding you want to dissociate.

3. In the **Associated Files** section, in the **Actions** menu, click **Remove association.**

Chapter 4: Asking Questions and Viewing the Seller's FAQ

You can add questions for sellers about checklist items and documents, for example, when you want additional details or clarification. Answers can provide context or other insights that help you to extract maximum value from the documents and make fully informed buying decisions.

If your project is linked to a data room that is using Q&A, you can send questions directly to sellers. After a question is sent to the seller, you cannot make changes to the question, however, you can add replies. When the seller answers a question, you can then view the answer in DealVision.

If your project is linked to a data room that is not using Q&A, you can export questions to a Microsoft Excel spreadsheet and send them to sellers to answer. Once answered, the answers can be imported into DealVision. If your data room is not using Q&A, the message **Seller Q&A Not Available** is displayed at the top right of the **Questions** tab.

Filtering the list of questions

Use the Quick Filters on the left to filter questions by status: proposed, submitted, withdrawn, answered, followup, or closed. You can also filter by status, submitted by, properties, due date, and responses by clicking **Filters**.

▶ **To filter questions**

1. Click the **Questions** tab.

2. Click **Filters**.

3. Click in the filter you want to use and select the appropriate option.

4. (Optional.) Repeat step 3 to use additional filters.

5. Click **Apply**.

   The question list is updated to show questions that match the selected filters and the filters you selected are displayed at the top of the question list.

6. Click the **x** in a filter to remove it or click **Clear all** to remove all filters.

Adding a question

▶ **To add a question**

1. Click the **Questions** tab.

2. In the **View by Category** section, click the category to which the question belongs. For information about creating categories, see Chapter 2, *To create a category*, on page 11.

3. Click **Create Question** on the right.

4. In the **Title** field, enter the question.

5. (Optional.) In the **Description** field, enter additional details about the question.

6. (Optional.) In the **Category** field, select a category.

7. (Optional.) To send the question to the seller if the data room is using Q&A, toggle **Send Question to Seller** on.

   Additional fields are displayed as well as details about the number of questions submitted and remaining, and the number of high priority questions submitted and remaining.

8. If you have selected to send the question to the seller, complete the following fields:

   • In the **Seller Category** field, select the sellers category that corresponds with the DealVision category.

   • (Optional.) Select **Mark as High Priority** if you want to alert the seller that this is an important question.

   • Select that you understand that you cannot make changes to the question after the question is sent to the seller.

9. Click **Create Question** or **Create Question & Send to Seller**.

   The status of the question is changed to **Submitted**.

▶ **To link a document to a question**

1. Click the **Questions** tab.

2. Locate and click the question to which you want to associate a document.

3. In the **Question Description** section, click **Link Document(s)**.

4. Mark the files that you want to associate to the question. Use the **Find Files** field to search documents by name.

5. Click **Associate**.

▶ **To download a linked document**

1. Click the **Questions** tab.

2. Locate and click the question associate with the document.

3. In the **Question Description** section, click the **Download** icon next to the document name.

▶ **To remove a link to a document**

1. Click the **Questions** tab.

2. Locate and click the question from which you want to remove a linked document.

3. In the **Question Description** section, click the **Dissociate item** icon next to the document name.

4. Click **Yes**.

▶ **To add an internal comment**

You can add an internal comment to a question, which is useful for providing additional information or gathering information from colleagues. Sellers cannot see internal comments.

1. Click the **Questions** tab.

2. Locate and click the question to which you want to add an internal comment.

3. In the **Internal Comments** section, click **Add comment**.

4. Enter your comment. To tag a colleague, enter the at sign (@) and begin typing the colleague's name. From the list of people that match what you have entered, select the colleague that you want to tag.

5. (Optional.) To link a document to the comment, click **Link Documents**. Select the document(s) you want to link to and click Associate.

6. Click **Add**.

▶ **To reply to a comment**

1. Click the **Questions** tab.

2. Locate and click the question that has the comment to which you want to reply.

   If you have been tagged in a comment and have received an email notification, click on the link in the email.

3. Click **Reply**.

4. Enter your reply. To tag a colleague, enter the at sign (@) and begin typing the colleague's name. From the list of people that match what you have entered, select the colleague that you want to tag.

5. (Optional.) To link a document to the comment, click **Link Documents**. Select the document(s) you want to link to and click Associate.

6. Click **Reply**.

▶ **To edit a question**

You can edit questions that have not been sent to the seller.

1. Click the **Questions** tab.

2. Locate and click the question you want to edit.

3. Click the **Edit Question** icon to the right of the question.

4. Make any changes. Note that internal comments are not shared with the sellers if the question is sent to the seller.

5. Click **Save**.

▶ **To view seller's answers**

On the **Questions** tab, questions that have been answered have a status of **Answered**.

1. Click the **Questions** tab.

2. Locate and click the question you want to view.

3. Scroll down to view the answer.

▶ **To ask a follow-up question**

After you have received an answer, you can ask a follow-up question.

1. Click the **Questions** tab.

2. Locate and click the question for which you want to ask a follow-up questions.

3. Scroll down to the answer.

4. In the **Send a Reply** field, enter your question.

5. Click **Reply**. The question is sent directly to the seller.

Withdrawing an unanswered question

You can withdraw a question that has been submitted but not answered. The question will remain in the question list and cannot be deleted. The number of available questions is automatically adjusted to reflect withdrawn questions.

▶ **To withdraw an unanswered question**

1. Click the **Questions** tab.

2. Highlight the question that you want to withdraw.

3. In the row of the question that you want to withdraw, click the **Withdraw Question** icon.

4. Click **Withdraw Question** to confirm.

Closing or deleting a question

Close a question when it has been answered. The question remains visible and is read-only. You cannot reopen it. Delete a question if you do not need it. The question is deleted from DealVision.

▶ **To close a question**

1. Click the **Questions** tab.

2. Locate and click the question you want to close.

3. Click **Close Question**.

4. Click **Yes**.

▶ **To delete a question**

1. Click the **Questions** tab.

2. Locate and click the question you want to withdraw.

3. Click **Delete Question**.

4. Click **Delete Question** to confirm.

Exporting questions

If your project is linked to a data room that does not use Q&A, you can send questions to sellers by exporting the questions to an Excel file and sending them the file. Sellers can answer the questions by completing the **Response** column of the spreadsheet. Once answered, you can import the file back into DealVision.

▶ **To export questions**

1. Click the **Questions** tab.

2. Click **Export Questions**. The questions are downloaded to an Excel file on your computer.

Importing questions and answers

You can import questions into DealVision. For projects linked to a data room that is not using Q&A, you can also import seller's answers into DealVision. Answers must be in the **Response** column of the spreadsheet and can only be imported once.

If your project is linked to a data room that uses Q&A, the **Response** column is not imported even if there is data in it.

▶ **To import answers**

1. Click the **Questions** tab.

2. Click **Import Questions**.

3. Click **Select File**.

4. Navigate to the file and click **Open**.

5. Review the information about what will be imported, and click **Import**.

Viewing the seller's FAQ

You can view the seller's FAQ (Frequently Asked Questions), including attachments associated with a particular question. In addition, you can export the FAQ to a Microsoft Excel file.

▶ **To view the seller's FAQ**

1. Click the **Questions** tab.

2. Click **Seller FAQ**.

3. (Optional.) To view attachments, click the paperclip icon in the row of the question for which you want to view attachments. Click on the attachment you want to view to open it in full screen mode.

▶ **To export the seller's FAQ to an Excel file**

1. Click the **Questions** tab.

2. Click **Seller FAQ**.

3. Click **Export**.

Chapter 5: Tracking the deal

The project dashboard shows the overall status of the project helping you to quickly understand the project's progress. Access the dashboard by clicking the Dashboard tab. The dashboard consists of the following sections:

- Overall Project Status – Shows the percentage of checklist items that are in progress, completed, and not started. Click on a percentage under the graph to display the checklist items with this status.

- Checklist Item File Associations – Shows the percentage of checklist items that have files associated with them and the percentage of checklist items that do not have files associated with them. Click on an area of the graph or a percentage under the graph to display the checklist items with this status.

- Progress by Category – Shows the percentage of completeness for each category in the checklist. Click on a category to display all of the checklist items in that category.

- High Priority Findings – Displays a list of findings. You can view only risks, only synergies, or all findings.

Exporting the dashboard

All sections except for High Priority Findings can be exported to either a PNG or PDF file so that you can easily share the project status with others. Findings can be exported to a Microsoft Excel spreadsheet from the Findings tab.

▶ **To export a dashboard section**

Click **Export** in the section you want to export and select **PNG** or **PDF**.

The file is downloaded to your downloads folder.

Exporting findings

You can export findings to a Microsoft Excel spreadsheet that you can then share with others.

▶ **To export findings**

1. Click the **Findings** tab.

2. In the **View by Category** section, select the category you want to export.

3. Click **Export Findings**.

   The file is downloaded to your downloads folder.

Exporting a checklist

You can export the checklist to a Microsoft Excel spreadsheet that you can then share with others or use as a starting point for another project.

▶ **To export findings**

1. Click the **Checklist** tab.

2. In the **View by Category** section, select the category you want to export.

3. Click **Export Checklist**.

   The file is downloaded to your downloads folder.