VisibleThread

VisibleThread Docs User Help

Version 3.2 (Feb 2020)

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1. Introduction & general notes

VisibleThread Docs is a web based interface to VisibleThread. There is no installation involved in order to use the dashboard. It can be accessed directly from your web browser.

If you are using the cloud version of VisibleThread, go to the VisibleThread website at: http://www.visiblethread.com/ and click on the 'SIGN IN' button at the top right. Sign in using your credentials.
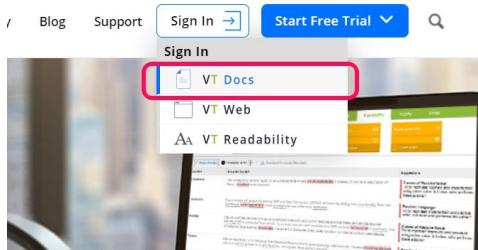
If you are using VisibleThread Docs on-premise, go to the VisibleThread dashboard at the URL that your VisibleThread administrator gave you. Sign in using your credentials.

In both cases, the interface is identical.

1.1. Online Documentation

The most up to date documentation and help is available online here:
http://support.visiblethread.com/forums/21077932-documentation

1.2. Help

For common questions & queries, see our support help portal here: http://support.visiblethread.com

You can also submit help queries or report issues using a form on our support portal. Or contact us via email at support@VisibleThread.com

1.3. General Compatibility

VisibleThread supports the following file types for upload and analysis:

Word 2003 (.doc)

Word 2007 and all subsequent versions (.docx)

RTF (.rtf)

Excel 2003 (.xls)

Excel 2007 and all subsequent versions (.xlsx, .xlsm)

Adobe PDFs (.pdf)

1.4. Browser Compatibility & Settings

The VisibleThread dashboard is a browser-based environment. We support IE 11 (and higher), Edge, Firefox, Chrome and Safari; however, the application should run on all major browsers.

You must enable Javascript in your browser to use the VisibleThread dashboard.

1.5. A note on IE 11 and 'Compatibility View'

VisibleThread supports Internet Explorer 11 (IE 11), but not when IE uses 'Compatibility View' to display VisibleThread.

IE Compatibility View is a way to allow IE to work with older websites that do not conform to standards. VisibleThread adheres to the latest browser standards. If you have enabled Compatibility View, you will see a blank screen or be unable to sign in. See more detail here on how to fix this: https://support.visiblethread.com/hc/en-us/articles/360000537406-VisibleThread-and-Internet-Explorer-11-IE-11-

1.6. A note on browsers

We have found in testing that performance may degrade over time in certain browsers, especially earlier versions of IE. If you notice excessive time lags, refresh your browser using **CTRL + F5**. This will clear your browser cache. Clearing the browser's memory footprint can result in increased performance.

2. Signing into the VisibleThread dashboard

If using the cloud-based offering, go to the VisibleThread website at: http://www.visiblethread.com/

Click 'SIGN IN' at the top right.

If you are using the on-premise offering, go to the VisibleThread dashboard using the URL that was provided to you.

Enter your user credentials. This comprises your user name (e-mail address) and password. After successful sign in, you will see the 'Home' screen.
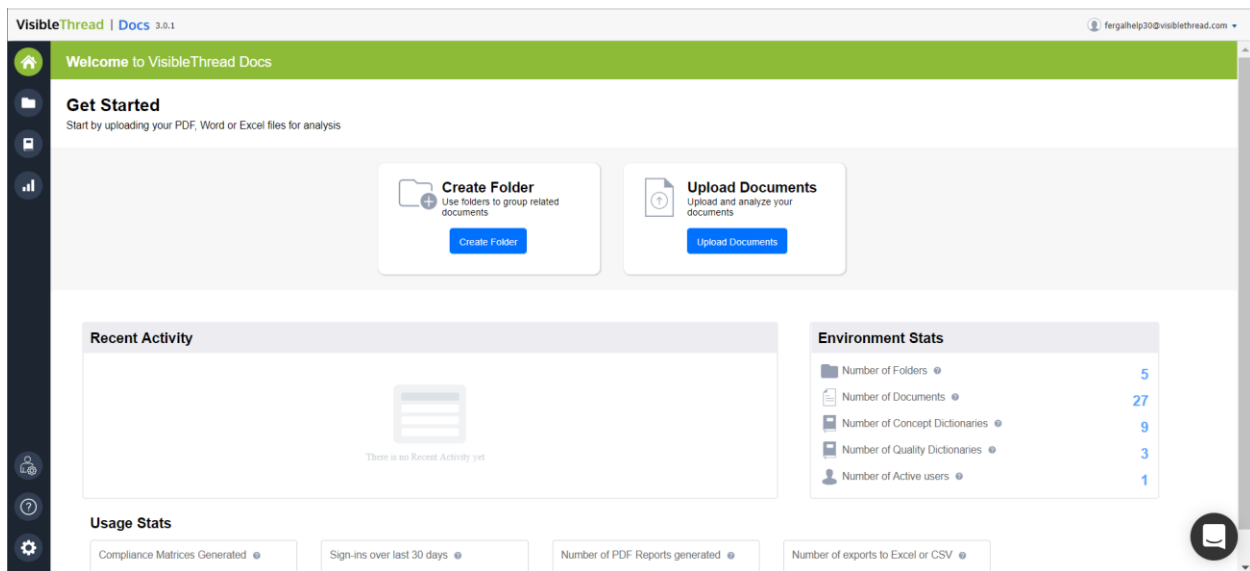
Figure 1 – 'Home' screen showing after a successful sign in

Note for on-premise deployment & security message: VisibleThread uses a secure communication mechanism known as SSL to encode data originating from the VisibleThread server.

VisibleThread ships with what is referred to as a self-signed certificate. Self-signed certificates are generic and do not identify the server in a strong way. As a result, you may get a browser message that says there may be a problem with the certificate. The message in IE shows like the below. Different browsers present it differently.

You are perfectly safe to proceed. If you do want to eliminate this message, contact your IT colleagues and send them this link: http://support.visiblethread.com/entries/23457613-How-to-install-an-SSL-certificate-on-a-deployed-VisibleThread-Server.

Your IT colleagues will then be able to configure your VisibleThread server to use an appropriate 'digital certificate' specific to your organization.
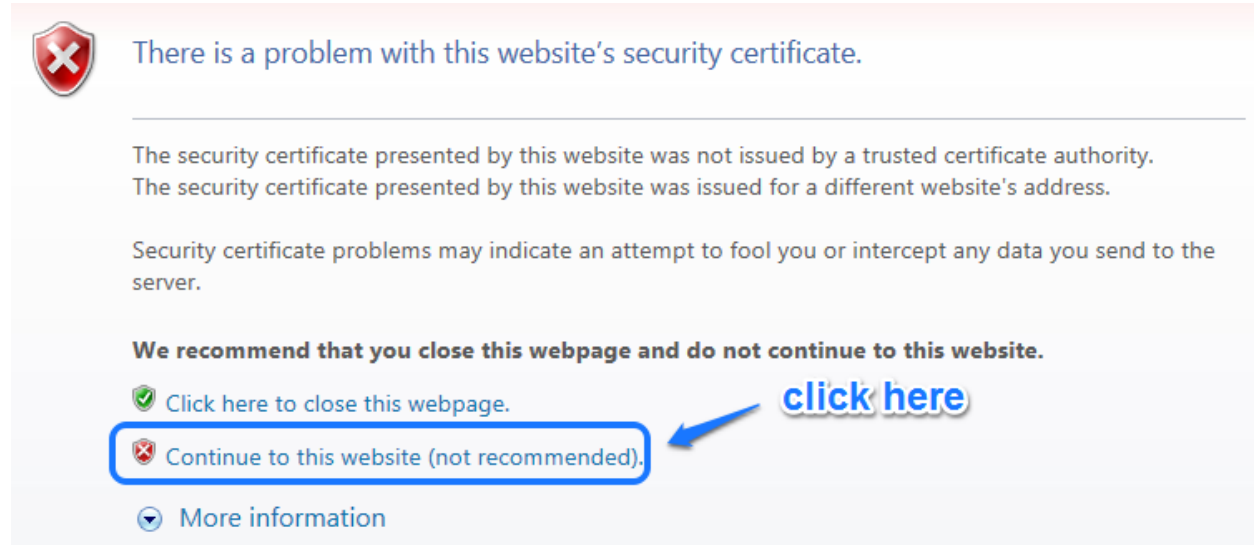
Figure 2 - Warning Message in IE

3.   Getting Started – Navigating the Interface and the Home View

VT (VisibleThread) Docs has a **sidebar** on the left and a **detail** pane to the right. This sidebar provides easy access to your Folders, Dictionaries and Account Settings etc.

The **Home** screen provides quick insights to usage levels and recent activity on your account.

The **Folders** area contains all your folders and documents. In here we have added 'Quick actions' menus to provide easy access to common tasks at each level.

The **Dictionaries** area contains all your dictionaries and structure outlines.

In our new **Help** area you will find links to all our videos and documentation in one place.

Finally, the **Settings** area is the place to go to modify any of your account settings, including Thresholds, Whitelists etc.

The Home view looks like this:

Figure 3 - Welcome Screen for VT Docs

It provides shortcuts to add folders and upload documents. It also shows any recent activity and key metrics around your environment.

4. Folders

The **Folders** area contains all your folders and documents, and reports/analysis. This is the area that you will most likely spend most time in.

When you click on folders you see a view like this:
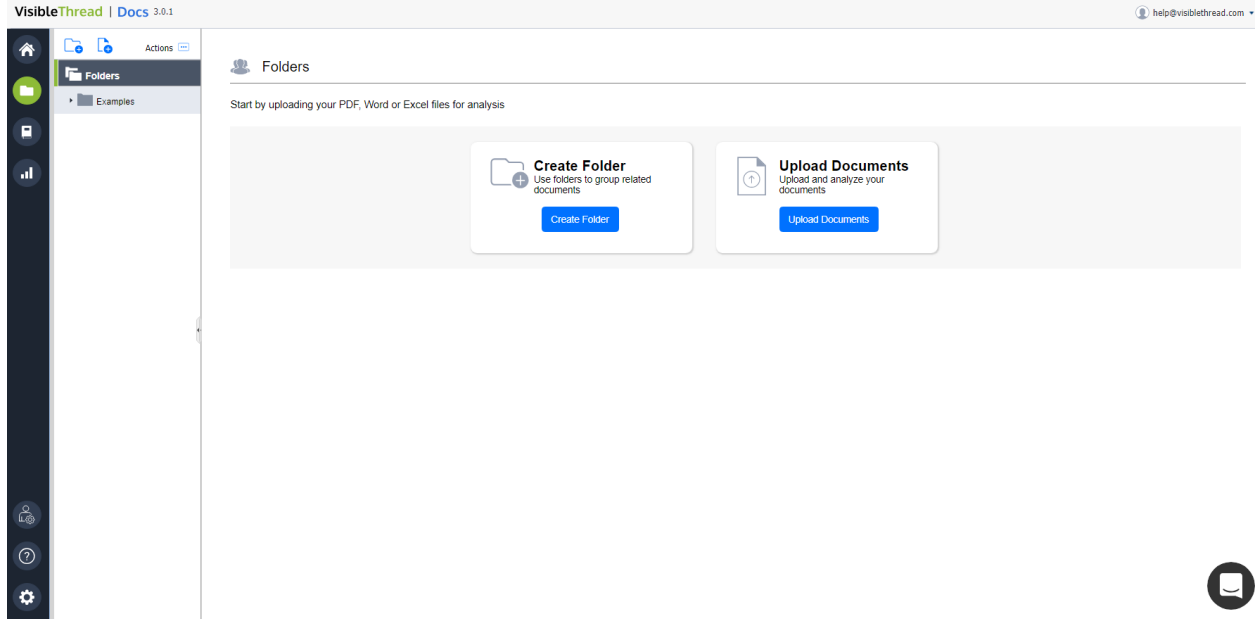
Figure 4 - New Environment Folders Area

If this is your first time using VT Docs, the system populates your environment with an Examples folder. Use this to get a sense of some of the types of content you can analyze.

If you have an existing environment, then you'll see more folders in the navigation area.

5. Selecting a Folder in the navigation area

When you select a folder, you can compare content across multiple documents. Cross-document analysis is very powerful. It provides insights that are not obvious by looking at a single document in isolation.

When you select a specific **folder** in the navigation pane, the system displays tabs to the right. In this example, the user selected the 'Contracts' folder and can see the analysis for all 8 documents on the right.
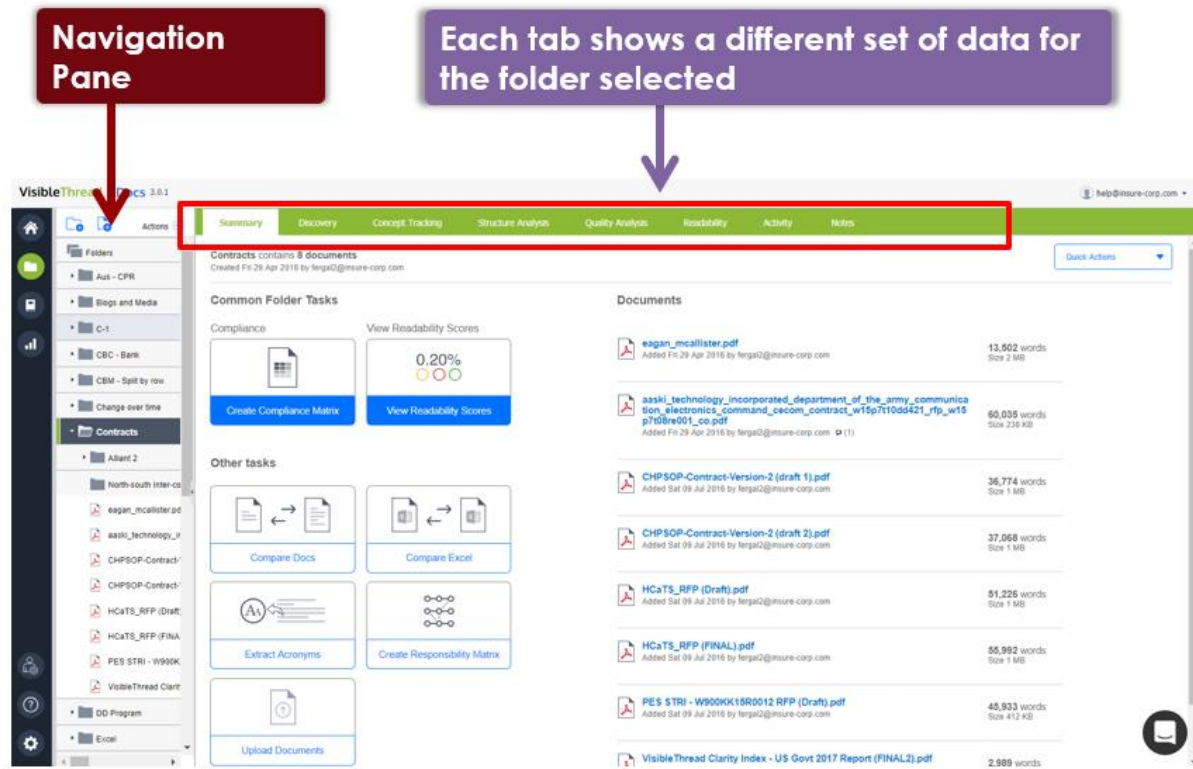
Figure 5 - Folder view with tabs on right

Each tab at the folder view provides different insights into the documents in the folder. The tabs are:

– **Summary**: summary of common tasks you can perform and list of documents in the folder

– **Discovery**: displays themes found across all the documents

– **Concept Tracking**: displays whether specific dictionary concepts are found

– **Structure Analysis**: analyzes MS Word documents for structural consistency

– **Quality Analysis**: displays whether specific dictionary terms are found

– **Readability**: shows summary of language clarity stats for the documents

– **Activity**: tracks all user activity for this folder

– **Notes**: allows team collaboration and notes.

How might you use the folder view?

Let's assume you are reviewing a sales proposal to make sure it is compliant with the requirements from an RFP.

The 'Discovery' and 'Concept Tracking' tabs at the folder level will provide immediate insight, answering questions like 'are we addressing specific requirements around certain referenced concepts'.

5.1. The Document View

With the document level view, you can explore content in one specific document.

Just like the folder level, selecting a document in the navigation tree displays tabs to the right.
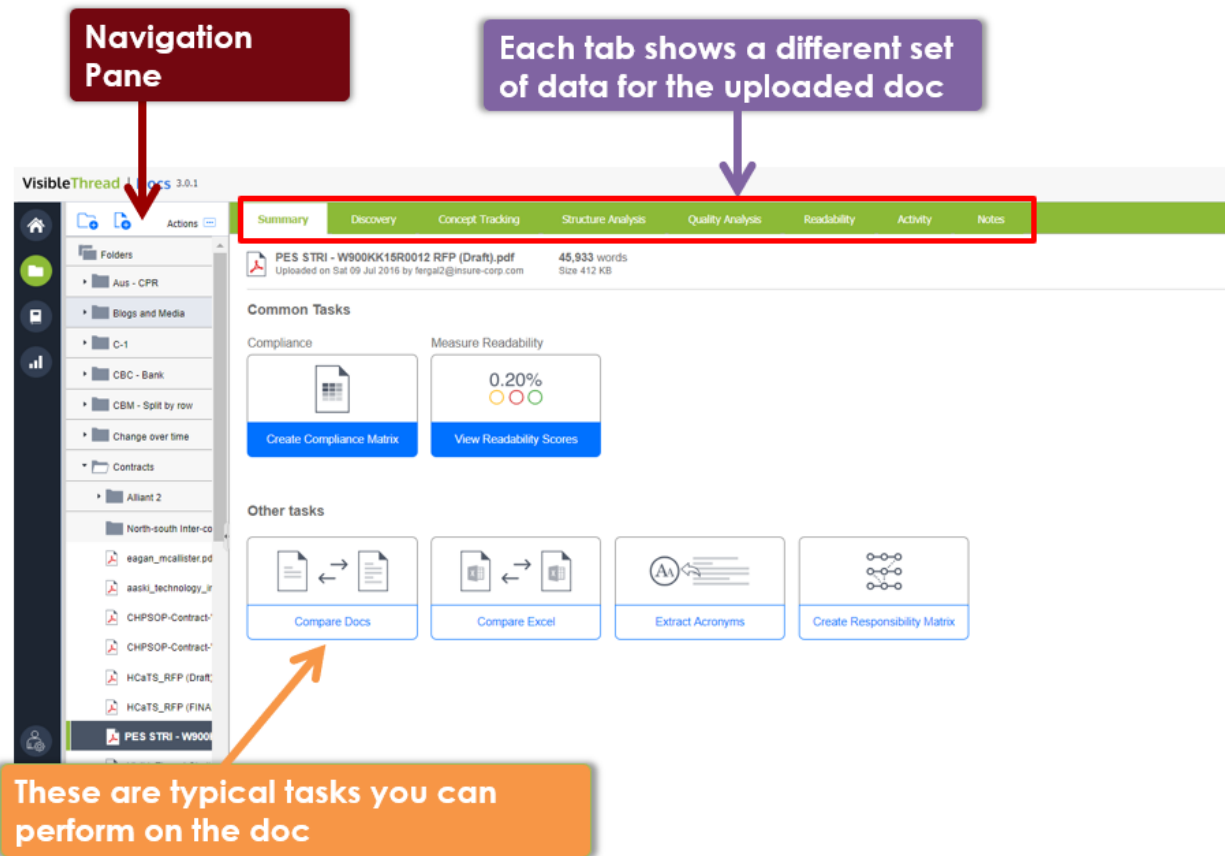
Figure 6 - Document view with tabs on right

Each tab provides different insights into the selected document. The tabs are:

- **Summary**: summary of common tasks you can perform on this document

- **Discovery**: displays themes found across all the document content

- **Concept Tracking**: displays whether specific dictionary concepts are found

- **Structure Analysis**: analyzes MS Word documents for structural consistency

- **Quality Analysis**: displays whether specific dictionary terms are found

- **Readability**: shows summary of language clarity stats for the document

- **Activity**: tracks all user activity for this document

- **Notes**: allows team collaboration and notes

6. Managing folders, uploading docs, reordering docs and moving docs

Sales teams tend to use folders to group the RFP and response documents for a given solicitation. Marketing teams use folders to analyze sales support materials and marketing collateral like product brochures etc.

Start by creating folders and uploading documents for analysis. You can also rename or delete folders and rearrange the order of documents.

6.1. Creating a folder

Step

1. Click the 'Create Folder' button.
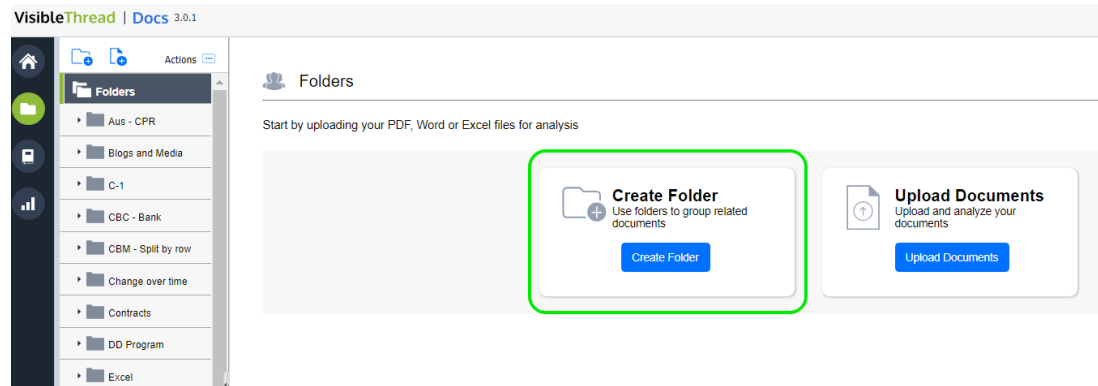
2. Enter the folder name. For instance, we might call it 'RFP – Army' with the intention to upload solicitation and proposal documents associated with a US Army pursuit.

    Then click 'OK'.

3. Now you will see an empty folder, and you're ready to upload documents.

6.2. Creating sub-folders

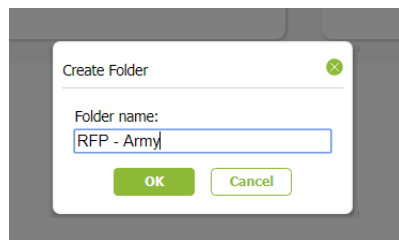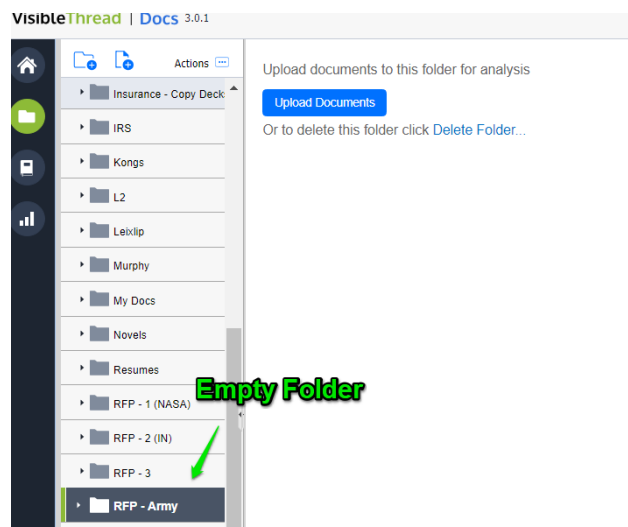VT Docs also provides support for nested sub-folders. This allows for easier grouping and categorization of related documents. For example, you might create a top-level folder for an RFP or contract. And then create sub-folders to group all issuing side documents or response documents together. Or you might also use sub-folders to organize your pink, red or gold team review documents.

Creating folders or sub-folders is straightforward. Click the 'Create New Folder' action from the Quick Actions menu in the folders area, or click on the 'Create New Folder' option on the toolbar or from the right click menu.

Tip: To create a top-level folder, make sure you have selected "Folders" in the navigation pane.

Figure 7 - Creating a New Sub-Folder

Moving items between sub-folders is really easy. Just drag and drop documents or folders into the destination folder. If you prefer to use the menu system, you can also move items by accessing the 'Move Folder' or 'Move Document' menu items from the Quick Actions or right click menus.

6.3. Uploading Documents

You can upload documents from several places depending on the current context. Here for example is the screen available if you have selected a folder with contents:

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Figure 8 - Uploading Documents
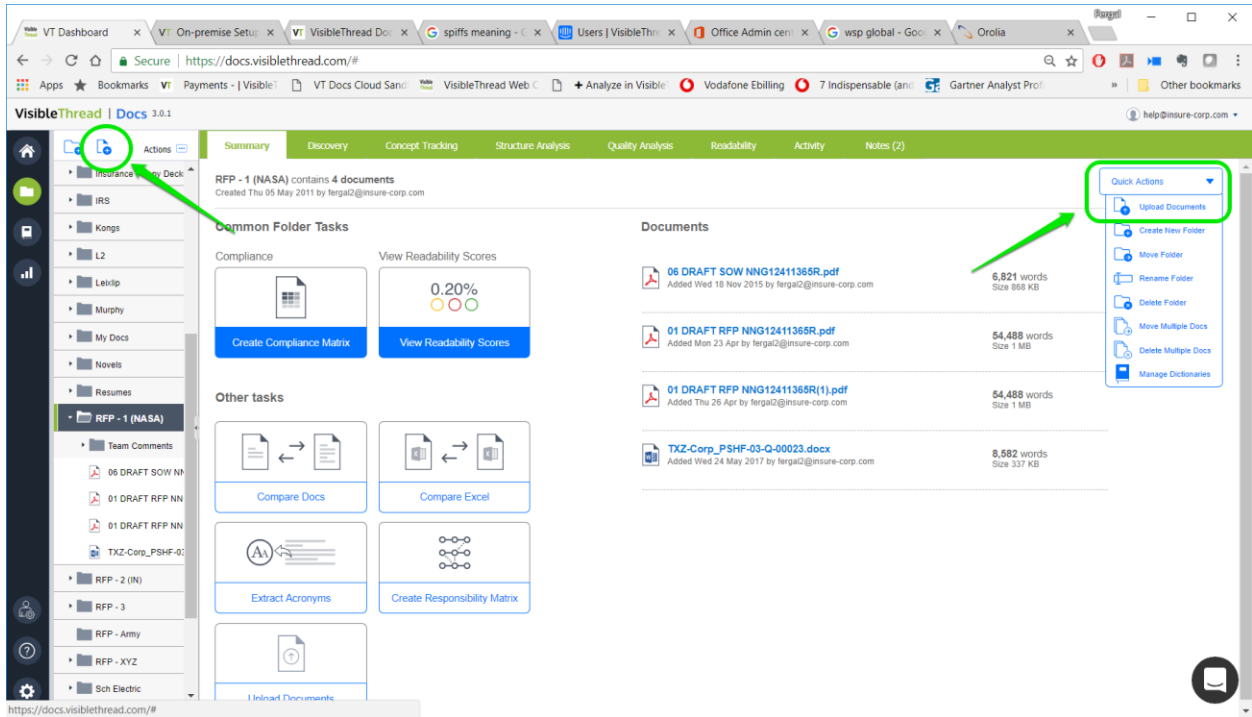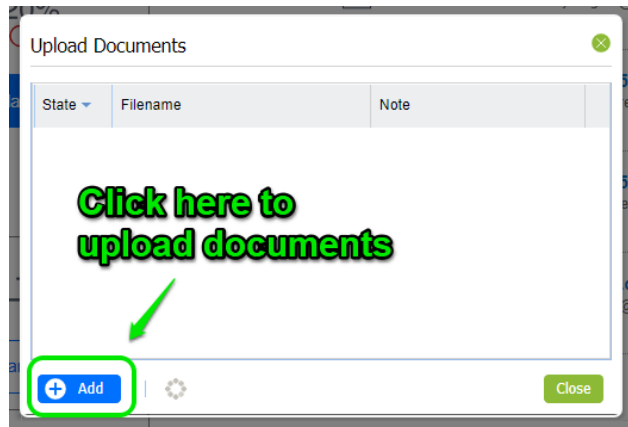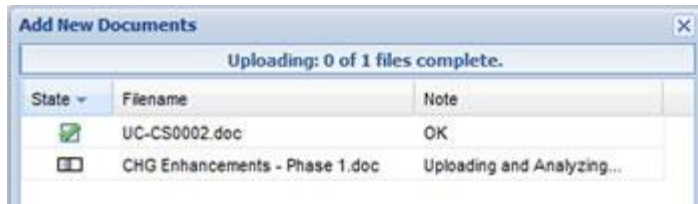
To upload, just follow these steps:

| Step |
| --- |
| 1.   Click the 'Upload Documents' button. |
| 2.   The system then displays a screen where you have the option of adding one or more files. It looks like this: |

Upload each file by clicking the "Add" button at the bottom left. As you add files, you will see the upload progress.

In this case, the user is uploading 2 documents, one is already uploaded; the second is currently being analyzed.

Once the docs are uploaded, click the 'Close' button at the bottom right.
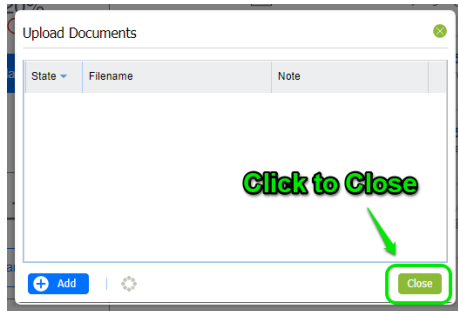
3.   The dashboard will display the new documents.

Tip 1: Multiple file upload: You can upload multiple files in one click from the file dialog. Click the files you want by hitting CTRL + file.

Tip 2: Ordering documents. If you are used to file explorer, you will notice a subtle difference in behavior around the position of uploaded documents after upload.
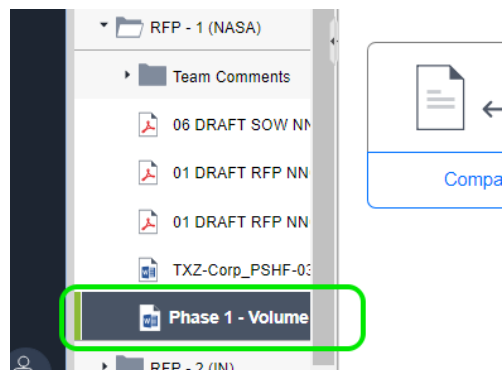
While File Explorer sorts documents alphabetically, in VisibleThread we allow you sort the docs explicitly. The above screenshot shows what happens in VT Docs when you upload a new document.

In this example "Phase 1 – Vol…." was the last doc uploaded and is in position5. If alphabetically ordered it would be the 4th doc.

Why this change?

You can re-order docs in a way that works best for your needs. For more, see section: 6.4 Reordering documents in a folder. For example, you might want to group all government issued docs together.

6.4. Reordering documents in a folder

When documents are uploaded to a folder, they are placed below any previously uploaded documents. You can however change the order of documents.

For example, in a sales context, you might have a folder containing both RFP solicitation documents side by side with your proposal documents. In this case, you might want to have the solicitation documents appear first, followed by your proposal documents.

To re-order a document, select the document in the Navigation Pane and right-click on it, or click the "Quick Actions" drop down menu. Then use the up and down arrows to reposition the documents:
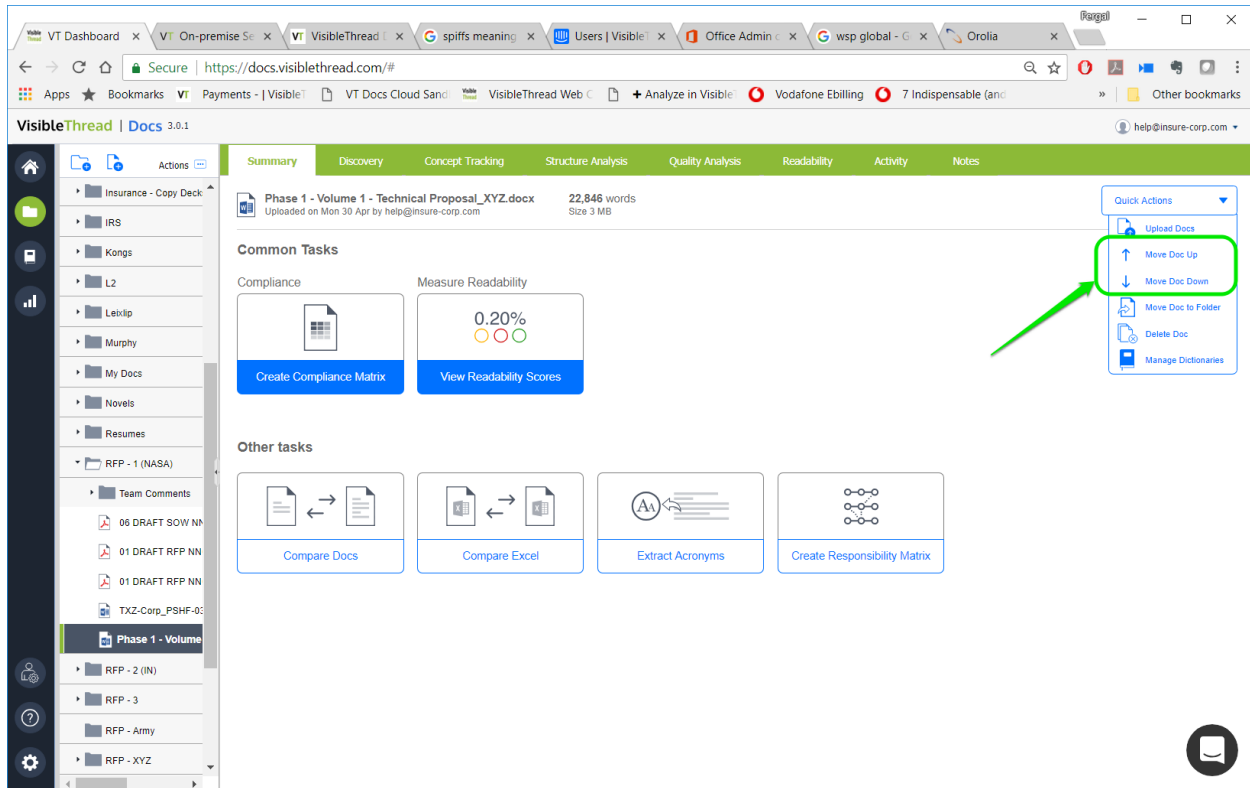

Figure 9 - Move Doc Up or Down Menu Options

6.5. Moving documents to a different folder

VisibleThread also allows you to move documents from one folder to another. For example, if you have multiple folders with different documents for the various sections of a proposal, you can now move them all into the same folder.

To move your documents to a different folder, either right-click on the documents, or select the document and go to the "Quick Actions" drop-down menu. Select "Move Doc to Folder."
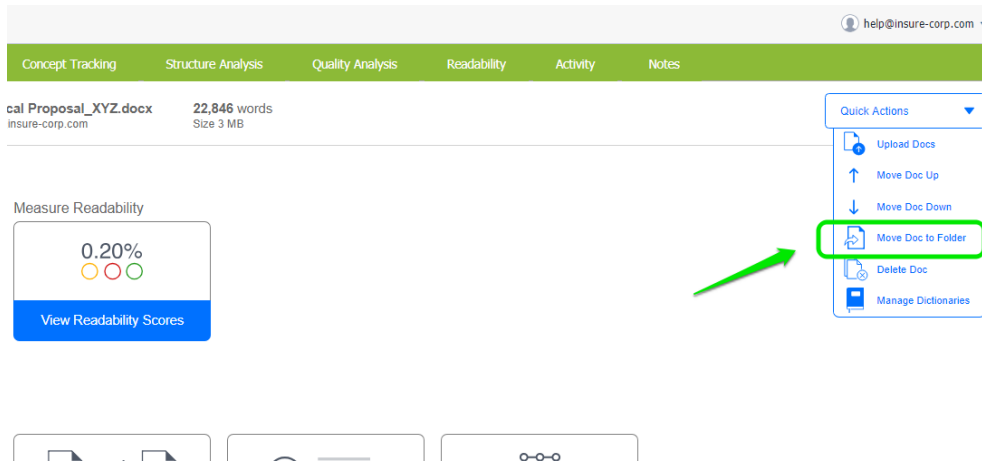
**Figure 10 - Moving Doc to Different Folder Menu Option**

You can also use Drag and Drop to move docs into other folders.

6.6. Renaming folders

You can rename folders if needed. Here's how:

Step

1. Select the Folder on the navigation area. Let's assume we want to rename 'RFP - Army' to 'RFP – Army II'. Click on 'RFP - Army' in the navigation tree.

2. Right-click on the folder (or select the folder and click the "Quick Actions" menu) and select 'Rename folder'.
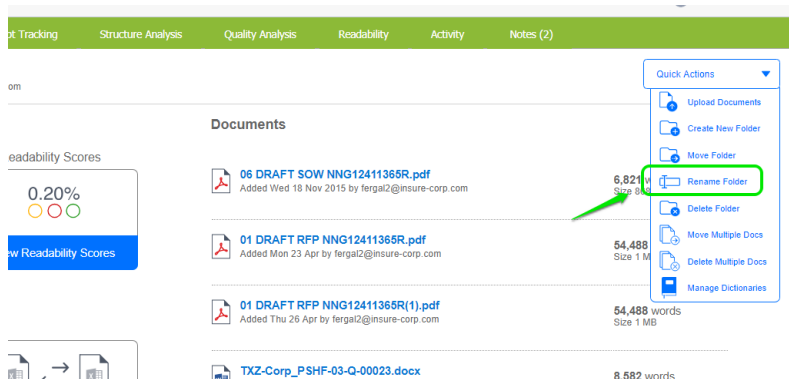
3. Next you will enter the new name and click 'OK'.
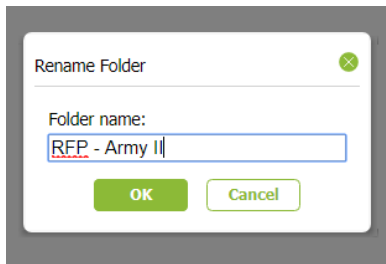
7. Running Acronym Integrity Checks and Extracting Acronyms

For business level documents such as a contracts or legal agreements, you cannot afford inconsistent acronym definitions or undefined acronyms (or initialisms). Manually checking that acronyms are well-formed is a very time consuming activity.

There are 2 core usage scenarios for VisibleThread Doc's acronym checking capability;

- Verifying the integrity of acronyms

- Extracting acronyms.

The first applies to any document you might be writing. It's when you want to check for undefined acronyms etc.

The second means you can take an extract from a 3rd party document, and place it as a glossary or acronym list in your document. This latter usage is especially relevant to contractors wishing to demonstrate alignment with an RFP, by parroting back the terminology of the issuer.
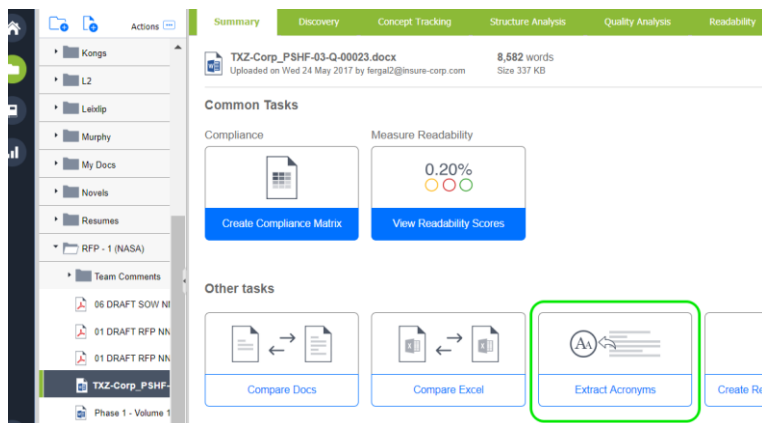
7.1. Verify Acronym Integrity

In this case, your goal is to find acronym related issues in your own document. Here's how:

Step

Select a document in the navigation area.

From the Summary Tab, click 'Extract Acronyms':

You will see a report containing all your document's acronyms, listed in alphabetical order.

This report flags:

1. **Well-defined acronyms**, meaning an acronym with a fully expanded definition provided,

2. **Acronyms with no definition**, for example 'AFNIC' and 'API' are not defined in the document below,

3. **Acronyms with multiple definitions**, for example 'ARIN' below,

4. **Acronyms where usage occurs before the definition**, for example 'ASN' below, and

5. **Acronyms with conflicting definitions.**

Figure 11 - Acronym Report

You can download this report in a spreadsheet by clicking the green "Export to Excel" button in the top right corner.

7.2. Extracting acronyms for use as a list

In this case, you want to extract acronyms from an issuing document, RFP, or other third-party document.

Here's how:

Step

1. Select the document in the navigation area.

2. From the Summary Tab, click 'Extract Acronyms'.

3. You will see the acronym report, as before. This time click 'Export to Excel'.

4. Now you will be able to use the output to populate your own document.

Here is an example extract in Excel. Since this process generates a normal Excel file, you can edit the results to fit your requirements.

7.3. Setting "Acronym Ignore Lists"

When working with Acronym reports, you may sometimes see 'false positives' that really should not be considered as acronyms. An example might be ABOUT, which while capitalized is not an acronym.

VisibleThread Docs has a concept of an 'ignore list'. This list comes pre-populated but you can edit it. It means that the terms listed will be omitted from the acronym analysis. This acronym ignore list applies to all documents in your VisibleThread environment.

The list contains obvious text like 'CONFIDENTIAL' and 'PRIVATE' that should not be considered. It also has items like 'CDT' which is in fact an Acronym (Central Daylight Time), but which you may not want in your report. Time zones, state abbreviations (e.g.: NY) are typical of the type of thing you might want to specify in your ignore list. So, it's important to edit this list if you're seeing too many items flagged.

You can access this list from two places:

1. In the Acronym Report, you'll see it on top left here:

2. Or from the settings area you can see it here:
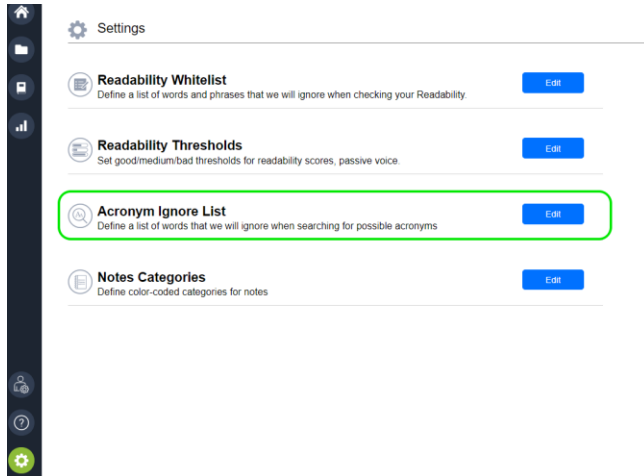
Once you click the option, you will see a screen listing each text item to ignore.

Click 'Add' to place new items in the list. You can also use wildcards when specifying items to ignore. For example, if you want to ignore 'FAR1', 'FAR2' etc., you can specify 'FAR*' in this list.

Figure 12 - Acronym Ignore List

NOTE 1: The acronym ignore terms are **case sensitive**.

Tip: You can use a * to indicate a wildcard match. For example, DARPA-BAA* would match DARPA-BAA1 etc.

Note: Permissions. Only users with 'Settings' permissions can modify the Acronym ignore list. If you do not have settings privileges and you open any of the settings dialogs you will be presented with a Read-Only version of the dialog box.

8. Document Compare

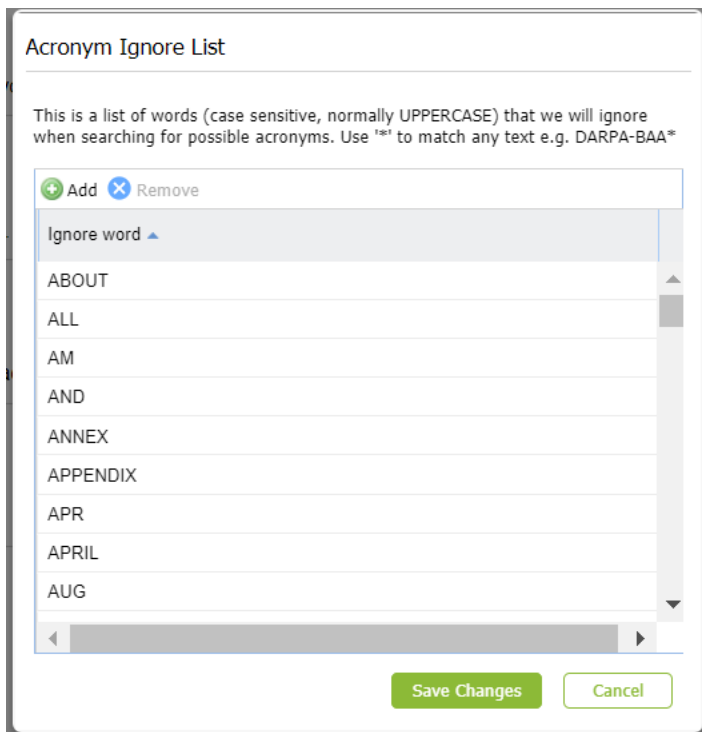The Document Compare feature allows you to easily identify any changes that exist between two versions of a document. It identifies modifications, additions, and deletions—anything from a one-word change to an entire section that has been added or removed.

NOTE: Document Compare will only work with PDF and Word documents.

This feature has three main use cases:

- Comparing a draft RFP to the final RFP and identifying any changes

- Finding differences between two versions of a contract

- Checking a proposal after a revision cycle for any essential information that may have been cut to accommodate page limits, etc.

Document Compare can find the differences between any two versions of a document. VisibleThread will provide a report that clearly identifies any discrepancies, with the full text of each document reproduced side-by-side in Excel format.

8.1. Selecting documents for comparison

In this case, we want to find the differences and changes between two versions of an RFP: the draft and final.

NOTE: To generate a Document Compare report, the two documents you wish to compare must be located in the same folder.

Here's how to compare docs:

1. Select the folder containing the two documents you want to compare. From the Summary tab, select "Compare Docs"
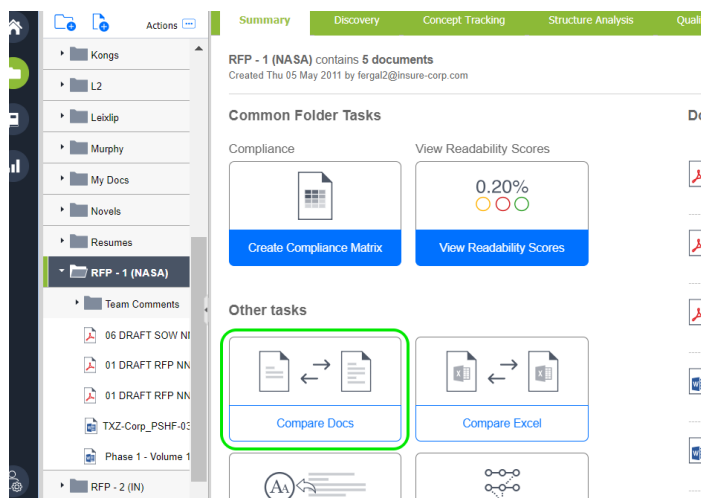
2. In the following pop-up window, select the two documents you want to compare. Select the "draft" (or version 1) first, and the final (or version 2) second:

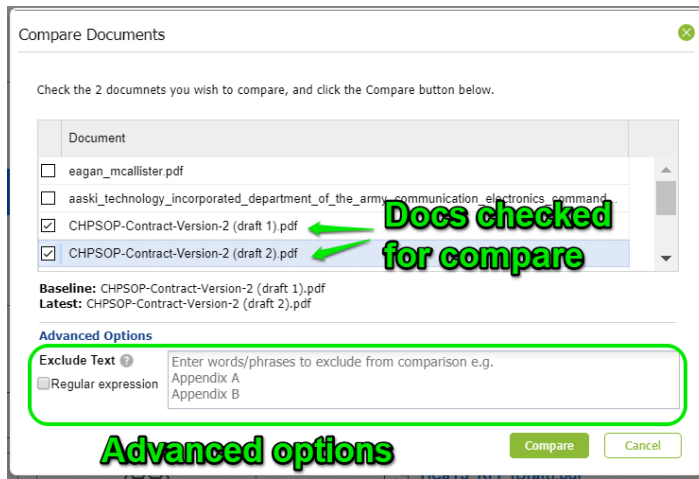Under "Advanced Options," there is a box for "Exclude Text". Text entered into this box will be excluded from the Document Compare report for both documents.

There is also a check box for "Regular Expression." Regular expressions are a sequence of characters (like a formula) that define a search pattern. If the "Regular Expressions" box is checked, any text matching these expressions will be excluded from the Document Compare report for both documents.

For more information on regular expressions, click here.

After selecting your documents and entering any text you wish to exclude or Regular Expressions you wish to find, then click the "Compare" button. This will automatically download the report to your computer in Excel format.

8.2. Document Compare report and identifying changes

After generating the Document Compare report, open the file in Excel. This is a spreadsheet that contains the full text of both documents, side-by-side, with all changes indicated and categorized.

Here are the different parts that make up the report:

1. Column B contains the full text of your first document—in this case, our Draft RFP. Column E contains the full text from your second documents—here, it's the Final RFP.

2.

Figure 13 - Document Compare Report

Column C indicates the type of change that has occurred, if any. There are four possible options in this column:

- IDENTICAL (no change)

- MODIFIED (a change to the text within that section)

- ADDED (a brand new paragraph or section that was not in the previous version)

- DELETED (a section or paragraph from the first version removed from the newest version)

Figure 14 - Doc Compare Report showing types of modifications

Alterations to the text are colored red. Identical text is blue.

9. Excel Compare

Excel Compare feature allows you easily identify any changes that exist between two versions of an Excel Workbook.

It identifies modifications, additions, and deletions between corresponding cells in worksheets. It also provides a useful summary sheet showing diffs across all sheets.

Like Doc Compare, Excel Compare generates a report that clearly identifies any differences between worksheets, with the full text of each row reproduced side-by-side in Excel format.

9.1. Selecting excel workbooks for comparison

NOTE: To generate an Excel Compare report, the two workbooks must be in the same folder.

Here's how to compare:

1. Select the folder containing the two workbooks you want to compare. From the Summary tab, select "Compare Excel"
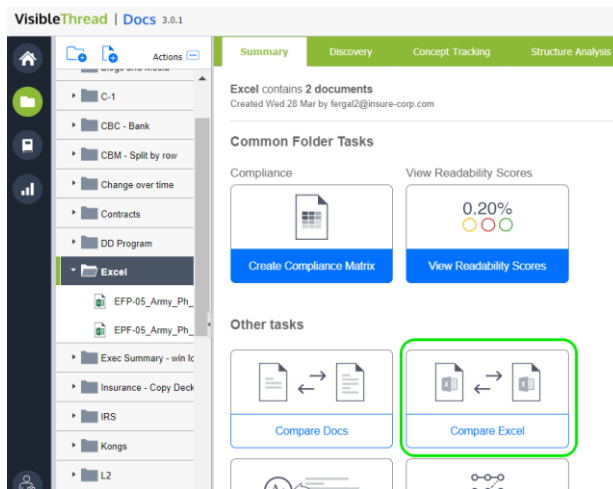
2. In the following pop-up window, select the two workbooks you want to compare:
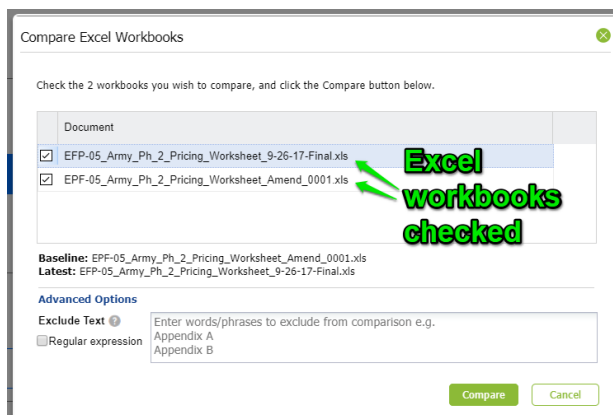
Under "Advanced Options," there is a box for "Exclude Text". Text entered into this box will be excluded from the Compare report for both workbooks.

There is also a check box for "Regular Expression." Regular expressions are a sequence of characters (like a formula) that define a search pattern. If the "Regular Expressions" box is checked, any text matching these expressions will be excluded from the Compare report.

For more information on regular expressions, click here.

After selecting your workbooks and entering any text you wish to exclude or Regular Expressions you wish to find, then click the "Compare" button. This will automatically download the report to your computer in Excel format.

9.2. Excel Compare report and identifying changes

After generating the Compare report, open the file in Excel. This is a spreadsheet that contains the full text of both workbooks, side-by-side, with all changes indicated and categorized. There are two main parts of this report; the summary, and the set of sheet by sheet comparisons.

9.2.1.   The Summary

Here is the Summary View:

Figure 15 - Excel Compare Summary View

It shows a summary of all sheets, and which ones are identical, and which have differences.

Since we are comparing excel worksheets, the report talks in terms of rows, either identical or different. You will see later when we look at sheet level comparison how comparing rows makes it easy to spot differences.

9.2.2.   The Worksheet Comparison

Since workbooks in Excel can have multiple sheets, we take each sheet in turn and show a sheet comparison report. Here's what a report looks like.

Figure 16 - Excel Compare Sheet View

Here is how you can interpret each worksheet comparison report:

- Column B contains the full text of your first sheet.

- Column E contains the full text from the second sheet.

- Column C indicates the type of change that has occurred, if any. There are four possible options in this column:

  - IDENTICAL (no change)

  - MODIFIED (a change to the text within that row)

  - ADDED (a new row that was not in the previous version)

  - DELETED (a row from the first version removed in the newest version)

- Alterations to the text are colored **red**. Identical text is **blue**.

- We compare the full contents of each row from the two contributing sheets.

- **Note on how to interpret commas and change indicators**.

  Let's take this example from Row 8 above

Row 8	Service Order Fee Element , , , ,	MODIFIED	Row 8	Markup Rates , , , , ,

  The entry in column B is "Service Order Fee Element , , , ,". The commas separate the cell values. In this case, there are 5 cells, 4 of which are empty.

  The entry in column E is "Markup Rates , , , ,".

  So, you can see that the 1st cell on row 8 has changed. It was originally "Service Order Fee Element" and changed to "Markup Rates".

10. Discovery at Folder and Document Level

Discovery allows you get an immediate sense of the content in documents. It speaks in terms of themes and items.

- A theme is a collection of related concepts. In the example below, 'Capacity' is a theme

- Items are the specific concepts within a theme. So in our example, items include; 'Average Test Capacity', 'VPP Capacity Factor' etc.

We extract these using NLP (Natural Language Processing) techniques. To focus on the core themes and items, we strip out all verbs, adjectives, etc. This means we can summarize the essence of what is at play in the document(s). Unlike Concept Tracking (see Concept Tracking at Folder and Document Level) and Quality Review (see **Error! Reference source not found.**), Discovery does not require a pre-defined search dictionary. It works automatically on any uploaded documents.

To see this in action, upload one or more document(s) to a folder, click the 'Discovery' tab, and see how the concepts are presented in the discovery area. Look at the screen below. You can see that many of the extracted items are 'security' related. We have 2 occurrences of '**Average Test Capacity**', 4 occurrences of '**VPP Test Capacity**', etc.

By checking the box to the right of each of these, the system shows the document content in the bottom grid. This makes it very easy to review the content in the doc. In our example below, we selected "Average Test Capacity" and one variation of it.

Figure 17 - Exploring Themes in an RFP for a US Government Contract

Here's an explanation of the above:

1. This is the discovery view that shows when selecting a specific document. It shows insights on that one document.

2.   The view automatically pulls out the themes in the doc as a list. It sorts by frequency. But you can re-order this list by name or by items. Do this by hovering over the heading and clicking the appropriate sort order; ascending or descending.

3.   If you select a specific theme in the theme list, then the middle grid displays the items in that theme.

4.   And by clicking the checkbox against certain items, you can extract the content for review in the bottom pane.
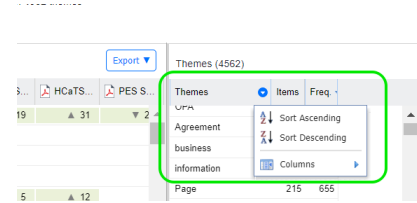
10.1.   Working with Discovery at Folder Level

See below for how the folder level discovery view looks:

Figure 18 - Discovery View at Folder level showing multiple documents and theme/items found

Here's an explanation of the above:

1.   This is the discovery view that shows when selecting a specific folder. It shows insights on the collection of docs in the folder. In the case above , we have 8 documents, so we can see themes and items across those 8 docs.

2.   The view automatically pulls out the themes from all docs in the folder as a list. It sorts by frequency. But you can re-order this list by name or by items. Do this by hovering over the heading and clicking the appropriate sort order; ascending or descending.

3.   If you select a specific theme in the theme list, then the middle grid displays the items in that theme. Each column of the grid shows a specific doc. The grid displays the set of all Items for each theme found across the documents. The number in each column shows the frequency of that item in that doc.

4.   And by clicking the checkbox against certain items, you can extract the content for review in the bottom pane. This content may well be from multiple docs

There are some special visual indicators in the folder discovery view:

1.   If you see a green diamond (♦) beside the frequency and green text, it means that this item occurs across all documents.

2.   When you see an up (▲) or down (▼) trend arrow beside a number, it means that the frequency has increased or decreased relative to the previous document.

10.2.   Reviewing document content

By default, the bottom grid is empty. When you want to review the document content itself, just check the box to the right of the item.

Once you check a box, then the bottom grid shows a content extract for review.

Each row displays the content for the checked items in the top grid.

Figure 19 - Discovery across docs with items checked

If multiple concepts occur in the same paragraph of text, they are shown in the 'Item Found' column. The color to the left of each concept allows for easy visual identification of what that item relates to in the other panes.

Checking multiple items in one action

You can check items one by one. But sometimes you may want to check multiple items at the same time.

You can do this by multi-selecting individual rows using CTRL + click, expanding the 'inline' menu (indicated by the down arrow) and clicking 'Check selected concepts'. A concept is selected when you see the light blue shading. You can see how this works in the screen shot below. In this case, there are four items selected and we want the content extract for all four items.

Figure 20 – Discovery: checking multiple entries

Alternatively, you can multi-select contiguous concepts by selecting one row, hitting SHIFT + click another row, and all of the intervening rows will be selected.

Clearing one or multiple checked items

To clear items one by one, just check the box to the right of the number, or click the 'x' on the Concepts Found pane at bottom right.

To clear multiple checked items at once, click the down arrow indicated in the above screen, then use the '**Clear checked items**' menu option.

An alternate way to clear checked items is by right clicking on the bottom right, right clicking, and clicking 'Remove selected items'.

10.3.   Running Filters and Exporting Data

You can apply filters to the Discovery view. These help you work with the data in a more focused way.
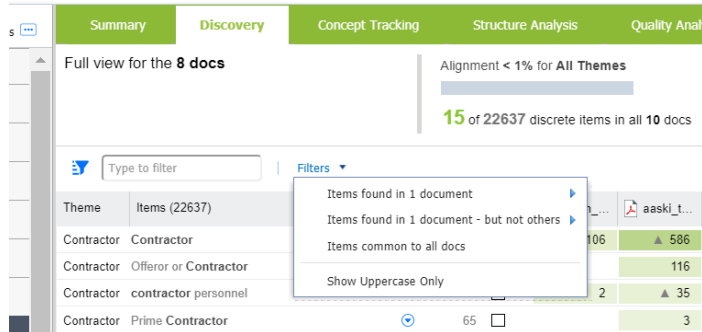
Figure 21 - Discovery showing Filters

Taking each in turn:
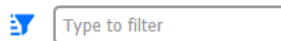
Filter box

If you type into this box, you will see a magnifying glass icon appear, like the image below, where the user typed 'sec'
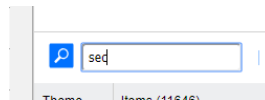
Clicking the magnifying glass icon starts the search.

Predefined Filters

These filter the documents in useful ways. For example, you can restrict the results to only show items in one document and no others.

The following options are available:

- **Show items in one document compared with the others** - This is useful for gap analysis, or if you need to isolate certain concepts that you would expect to occur in other documents and also in your reference document.

- **Show items found in 1 document but not others** - This is useful for explicit gap analysis or if you need to isolate certain concepts that you would expect to occur in other documents. Lack of terminology alignment can lead to compliance issues.

- **Show items common to all docs** – This reveals items that occur in every document in the folder

- **Show Uppercase Only** – Useful when looking to isolate CAPITALIZED words.
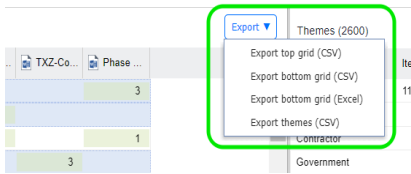
Export

This allows you export the current views to a text format that is comma delimited also known as CSV (Comma separated values). This type of file can be opened directly in MS Excel.

You can export the top grid or bottom grid containing document content extract.

> **Tip**: Export is very useful when used in conjunction with Excel for further analysis. For example, you can very quickly upload a collection of resumes/CVs, then export the top grid to Excel. And then do further filtering around capabilities in Excel.

10.4. Adding to Concept List from Discovery

Later on in Section 11, 'Concept Tracking at Folder and Document Level', we will see how you can define explicit 'search dictionaries'. Concept dictionaries allow you quickly search for predefined dictionaries of terms or phrases of interest across multiple documents.

For instance, in a sales context, you may always want to search for risk terms such as 'indemnification' or 'bond'. These would be in a search dictionary.

In a more general communications context, you may be checking for consistent naming conventions throughout the copy in product brochures, sales collateral etc. Again, you would have these defined as part of a search dictionary.
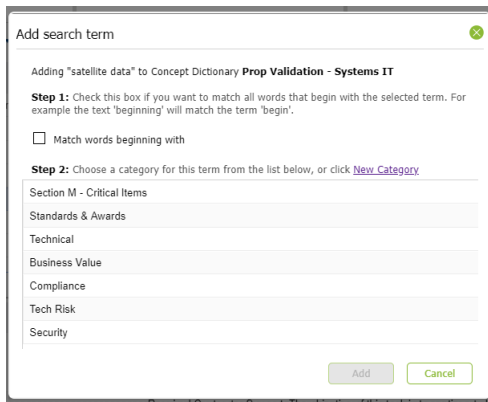
As you use Discovery, you will often see certain discovered concepts that you want to explicitly add to a concept dictionaries. While search dictionaries are normally configured using a dictionary editor, you can also directly add to them while in Discovery. Here's how:

Step

1. Hover over the concept and click the down arrow.
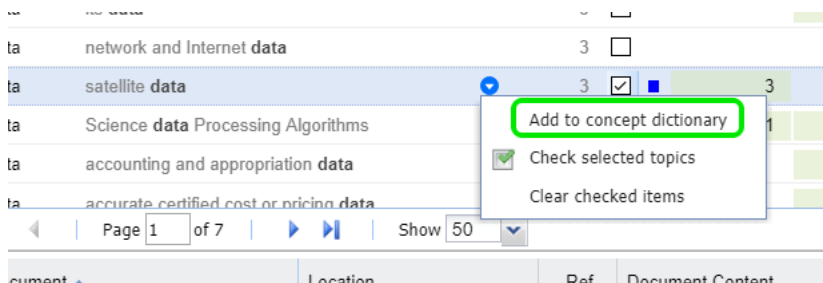
2. Click 'Add to concept dictionary'.
3. The system shows a window listing the categories in this folder's concept list.

Add search term

Adding "satellite data" to Concept Dictionary **Prop Validation - Systems IT**

Step 1: Check this box if you want to match all words that begin with the selected term. For example the text 'beginning' will match the term 'begin'.

☐ Match words beginning with

Step 2: Choose a category for this term from the list below, or click New Category

Section M - Critical Items

Standards & Awards

Technical

Business Value

Compliance

Tech Risk

Security

Add   Cancel

Select the appropriate category from the list presented or you can create a new category by clicking the New Category link.

Note 1: You can also check the 'Match words beginning with' box. This will do a broad match. For example, it is useful for picking up plurals of certain words.

Note 2: You can multi-select a number of concepts and add them in one click. As before, multi-select by using CTRL + click.

10.5.   Discovery View for Documents

Discovery at the document level is very similar to the folder level view. The difference is that the document level view identifies themes/items for the selected document only.

As such, when using this view you're forming an understanding of the document in isolation. Otherwise, the behavior of all views is the same as the folder level.

Figure 22 - Document Level Discovery

11. Concept Tracking at Folder and Document Level

Concept tracking explicitly tracks against a predefined set of terms/phrases. The folder and document views are very similar to Discovery.

But unlike Discovery, Concept Tracking uses a "search dictionary" of defined terms and phrases. VisibleThread ships with several sample concept dictionaries. You can start with one of these or create your own.

> **Tip:** You can also find new dictionaries in our Dictionary Marketplace. It's available here:
> https://www.visiblethread.com/products/dictionary-marketplace/

As you use Concept Tracking, you will specify new dictionaries and customize the dictionaries to suit the domain that your company operates in. For example, a company providing IT solutions has a very different set of dictionaries than a company providing financial services. Equally sales oriented dictionaries can be quite different than marketing dictionaries.

For complex sales & government contractors, uses of concept dictionaries include these use cases:

- **Validate Win Themes** - define a concept list that contains 'win themes' or differentiators. Use the concept dictionary to check your response contains adequate reference to your win themes or differentiation points.

- **Validate compliance with the solicitation** – use a concept dictionary to verify if certain factors/sub-factors in the solicitation occur in your proposal.

- **Highlight Risk Elements for Program Delivery** – use a concept dictionary to pinpoint potential red flags from a program delivery point of view. For example, references to ambiguous terminology such as 'API' with no further definition of what is expected constitutes risk of change orders during delivery phase.

- **High Business or legal risk** – use a concept dictionary to pinpoint legal risk. Examples of terms/phrases to search for are: 'bond', 'indemnification' etc. See more at this blog post: http://www.visiblethread.com/2014/01/how-risky-is-your-rfp-one-way-to-avoid-compliance-disasters/

- **Technical or process factors** - contractors often use concepts dictionaries to check that they reference certain technical concepts. For instance a defense contractor building engineering products might want to check that the phrase: 'mean time between failure' is mentioned often in the Quality Plan. Equally, an IT contractor might check for terms/phrases such as 'SDLC', CMM, 'Agile' or 'ISO'. The intent is to consistently put forward your differentiation.

Marketing teams use concept dictionaries for these use cases:

- **Validate correct brand alignment** – brands have clear guidelines around approved product names and straplines. For instance, if your new strapline is 'be safe with your money', you can check for old references to the previous strapline, and ensure that your copy references the new one. As a second example, the brand "VisibleThread" does not have a space, so a dictionary might include this phrase "Visible Thread" to prevent bad brand references.

- **Validate language elements of your style guide** – many marketing organizations have allowed and disallowed terms. For example, in a medical insurance scenario, you may want to reference 'people with disabilities' rather than 'the disabled'.

- **Support a brand refresh** – as part of a new brand refresh, you will need to update older language references in existing collateral. You can use concept dictionaries to pinpoint these references.

Figure 23 - Using the Concept Folder view to review compliance language

11.1. Working with Concept Tracking at Folder Level

The concept tracking view for folders is shown below:

Figure 24 – Concept Tracking View at Folder level showing multiple documents and tracked concepts

The concept grid displays the set of all concepts identified across documents, the number of occurrences and a color correlating with any checked rows. Each subsequent grid column represents the document in the Folder. The number in each column shows how many times that concept was found in that document.

Behaviorally, the Concept View is very similar to Discovery. By default, the bottom grid is empty. When you want to review the document content itself, just check the box to the right of each dictionary term or phrase.

Once you check a box, then the bottom grid shows a content extract for review.

If multiple concepts occur in the same paragraph of text, they are displayed in the 'Concepts' column. The color to the left of each concept allows for easy visual identification of what that concept correlates to in the other panes.

> **Note: Case Sensitivity** - Matches are case insensitive. For example, the dictionary term 'customer' will match both 'customer' and 'Customer' in the text.

11.2.   Using different concept search dictionaries

Use search dictionaries to perform a certain job or task.

For instance, you might apply a contract or legal dictionary to a government solicitation to check if it has onerous requirements that do not meet our core business competencies. In the earlier introductory section, we gave some more example usages.

When you want to use a different dictionary, just follow these steps.

Step
1.   Click the 'Use different dictionary' button.
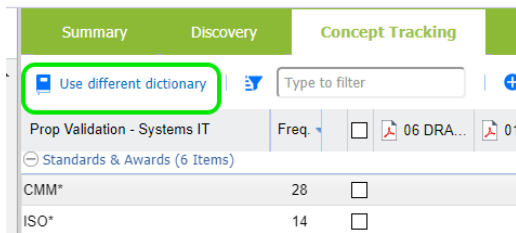
2. The system will show the list of available concept dictionaries.
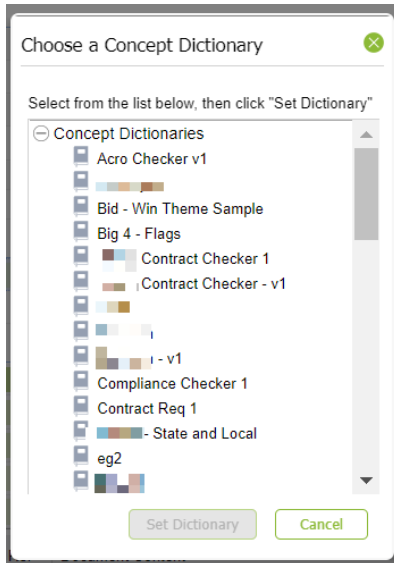
Note: This list is populated from the dictionaries currently in your system, so your list will be dependent on how many customized dictionaries you have created.

3. Select the dictionary you want and click 'set dictionary'. The system will apply the selected dictionary, and your folder view will repopulate with terms from that dictionary.

11.3.   Generating PDF reports and exporting to CSV (Excel)

There are several export options available in the Concept View. These help you work in a more focused way with the data.

Figure 25 - Exports from Concept Tracking

Taking each in turn:

Export to PDF

View PDF Report

Click this to generate a PDF report to share with colleagues.

At the folder level, the report shows the concept grid at top of the view.
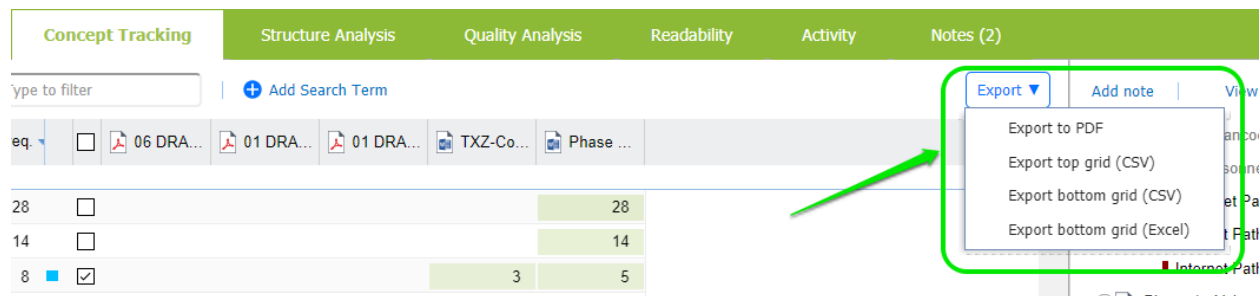
When you click the button you will see a PDF report like this:

Figure 26 - Export to PDF

Export top grid (CSV)

Export bottom grid (CSV)

Export bottom grid (Excel)

Export

This allows you export the current views to a text format that is comma delimited, also known as CSV (Comma separated values). This type of file can be opened directly in MS Excel.

You can also export the bottom grid as native Excel format (.xls) if needed.

Tip: Export is very useful when you want to do further analysis on the data. For example you might open the CSV export in Excel and run more numerical analysis on the numbers.

11.4.   Filtering and 'Add search term'

You can also filter and dynamically modify the current dictionary.
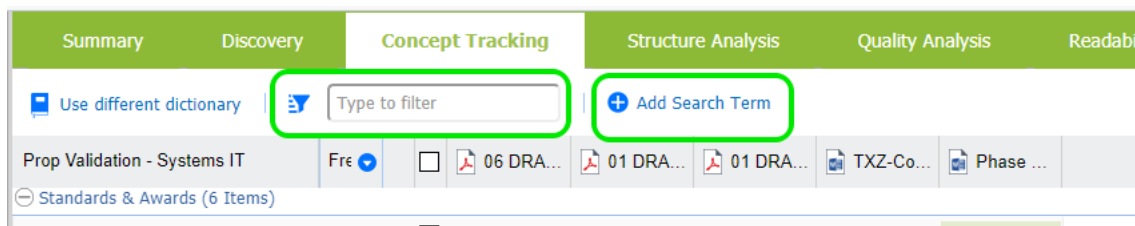
Figure 27 - Filters and Adding Search Term

If you start to type into the filter box, this will dynamically adjust the grid below.

Adding a search term allows you dynamically update the current dictionary terms.

To do so, just follow these steps.

TO HERE

Step

1. Click the 'Add search term' button.

2. The system presents a popup showing the categories from the current dictionary. In this context, a 'category' is a group of terms. In this screenshot, the current dictionary contains seven categories; 'Section M – Critical Items', 'Standards & Awards', 'Technical' etc.

3. Enter the new term or phrase in the top field then select one of the categories.

4. Once you're ready to add the new term or phrase to your dictionary category, click 'Add'.

    Note: 'Match words beginning with' - If you want to match terms that begin with specific text, then check the 'Match words beginning with' box. For example, 'CM' would match occurrences like 'CMM' and 'CMMi' in the content. This can also be useful for picking up plurals. For example, entering 'customer' and checking this box would match both 'customer' and 'customers'.

11.5.   Concept View at Document Level

Document level Concept Tracking is very similar to the folder level view, except that it applies to content in the **document only**.

In this view, your focus is within one document level. Other than that, the behavior of all views is the same as at the folder level.

Figure 28 - Document Level Concept Tracking

11.6.   Exporting data from Concept Tracking at the document level

There are several options for exporting your Concept Tracking results:

- Into PDF,

- Into Excel (".xls" and ".csv" files), and,

- if the original uploaded file is in ".docx" format, into MS Word as an annotated document. More on that later.

Here are how these options look:

Figure 29 - Annotated Docs and Exports

If you export to PDF at the document level, you will get a granular report showing all content extracted. Click "Export to PDF" to see this report.

This report shows the concept followed by all occurrences and the content extracted from the document. This is very useful for detailed risk analysis

You will see a PDF report like this:

Figure 30 - PDF Export

11.7.   Exporting to Excel

The data can also be exported to Excel in different ways.

The first option, "Export top grid (CSV)", will generate a ".csv" file (which will open in Excel) that contains the raw data from the top pane. It will contain the terms from the Concept Dictionary and the number of occurrences. The CSV file will look like this:

	A	B	C
1	Category	Concept	Frequency
2	Section M - Critical Items	user training	6
3	Section M - Critical Items	metrics	4
4	Section M - Critical Items	user account support	
5	Section M - Critical Items	archive data policy	
6	Section M - Critical Items	user community	
7	Standards & Awards	508	3
8	Standards & Awards	ISO	
9	Standards & Awards	CMMI	
10	Standards & Awards	PMP	
11	Standards & Awards	Gartner Quadrant	
12	Standards & Awards	PRINCE2	
13	Technical	training	35
14	Technical	performance	24

Figure 31 - CSV exported results showing in Excel

The second option in the "Export" drop-down is "Export bottom grid (CSV)". This will generate a CSV file of the data in the lower pane.

The last option under the "Export" drop-down is "Export bottom grid (Excel)".
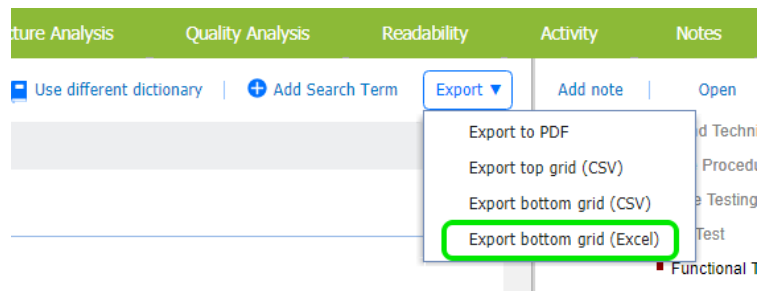
Figure 32 - Export to Excel

This provides a richer output and set of output report format options. As with the previous CSV export, at least one Concept Dictionary term must be selected to enable this option. The Excel file will contain each sentence or paragraph where the selected dictionary keyword(s) appear.

Clicking this will show a screen like this:
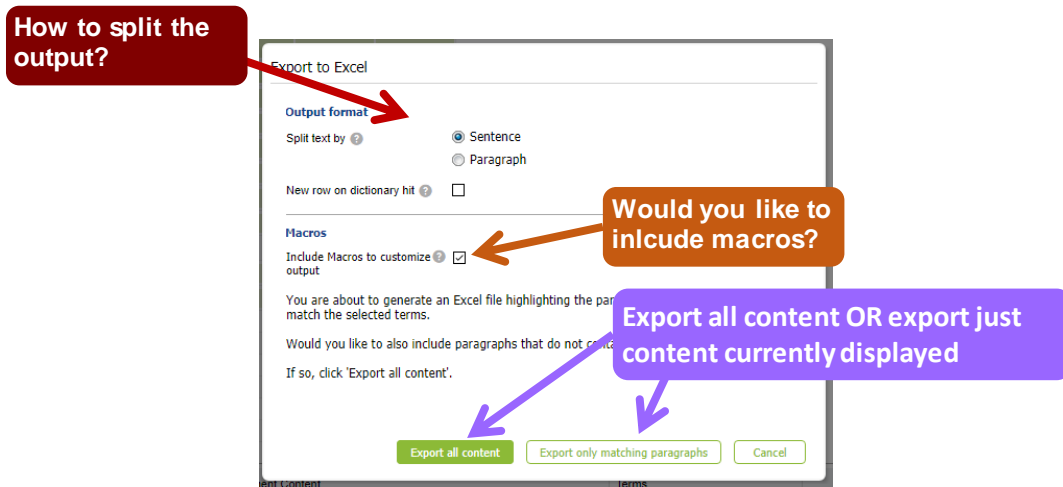
Figure 33 - Format Options for Export

This view has the following options:

- **Split by sentence or paragraph:** This affects the granularity of the generated Excel report.

- **New row on dictionary hit:** Checking this option forces the split each time a new term is found.

  This is often used in conjunction when shredding docs such as POs (Purchase Orders), BOMs (Bill of Materials) or Contracts with FARs (Federal Acquisition Requirements).

- **Include macros to customize output:** This will add macros to the outputted Excel file, that the user can use to further customize the output For more information see section 19.5 Excel Output Customization Options.

- **Export all content OR Export only matching paragraphs**: This allows you to export either the full content of the document with the matches highlighted, or only the paragraphs/sentences where you have a match.

  If you select "Export all content", the full content of the document will be shredded and placed in Excel format. The matches will be bold and highlighted in red, with the surrounding text turned black. Sections where no matches appear will be grey:

Figure 34 - Export all content

If you select "Export only matching paragraphs", you will create an Excel file that only contains content from the document where a match was found. In contrast to the previous output, there will be no grey sections:

Figure 35 - Export with only matching paragraphs

11.8.   Downloading Annotated Documents

The final export option allows you to download an annotated version of an uploaded Word file in ".docx" format. This annotated document is an exact copy of your uploaded document, with the terms flagged using MS Word comments within the document.

This allows you to make changes to your document directly within Word.

This is useful if you are editing content for any type of document. For instance you might want to identify risk terms, and need to review and possibly scrub them directly within the document.

Note: This feature is only available for ".docx" files. If your file has a different format, this option will be disabled.

Click "Download Annotated Document, and the system will create an MS Word document.
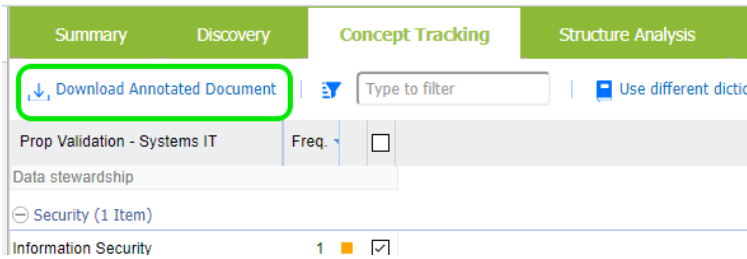
Figure 36 - Download annotated document

You'll see the Concept Dictionary keywords highlighted, with the term descriptions (if available) provided as comments.

NOTE: Leaving all boxes unchecked in the Concept Tracking view and clicking "Download Annotated Document" will generate the annotated document with all dictionary matches included.

If one or more specific boxes are checked, the annotated document export will only flag the selected dictionary terms.

11.9. Managing Concept Dictionaries (Create New, Edit, Copy etc.)

Note: Permissions. Only users with dictionary permissions can create, modify or delete Dictionaries. If you do not have dictionary rights and you attempt to modify dictionaries, you will get this message.
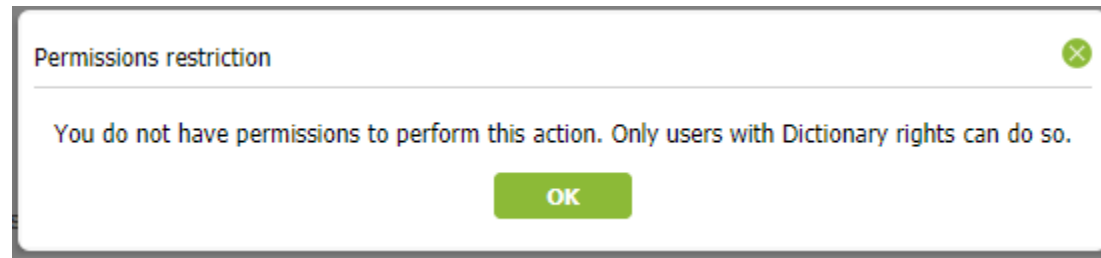
If you need to customize / edit dictionaries, contact your VisibleThread administrator who can grant you dictionary rights.

We use dictionaries to find terms or phrases across a folder of documents in the Concept Tracking view, but where are the dictionaries defined? How do you modify them?

To see the list of dictionaries, click 'Dictionaries' in the sidebar.
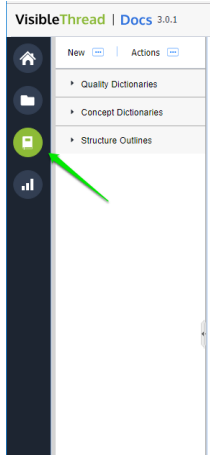
You will see three types of items: Quality Dictionaries, Concept Dictionaries, and Structure Outlines.

To see the full list of concept dictionaries in your environment, click the "Concept Dictionaries" entry.

Then, select a specific dictionary to see what it contains.
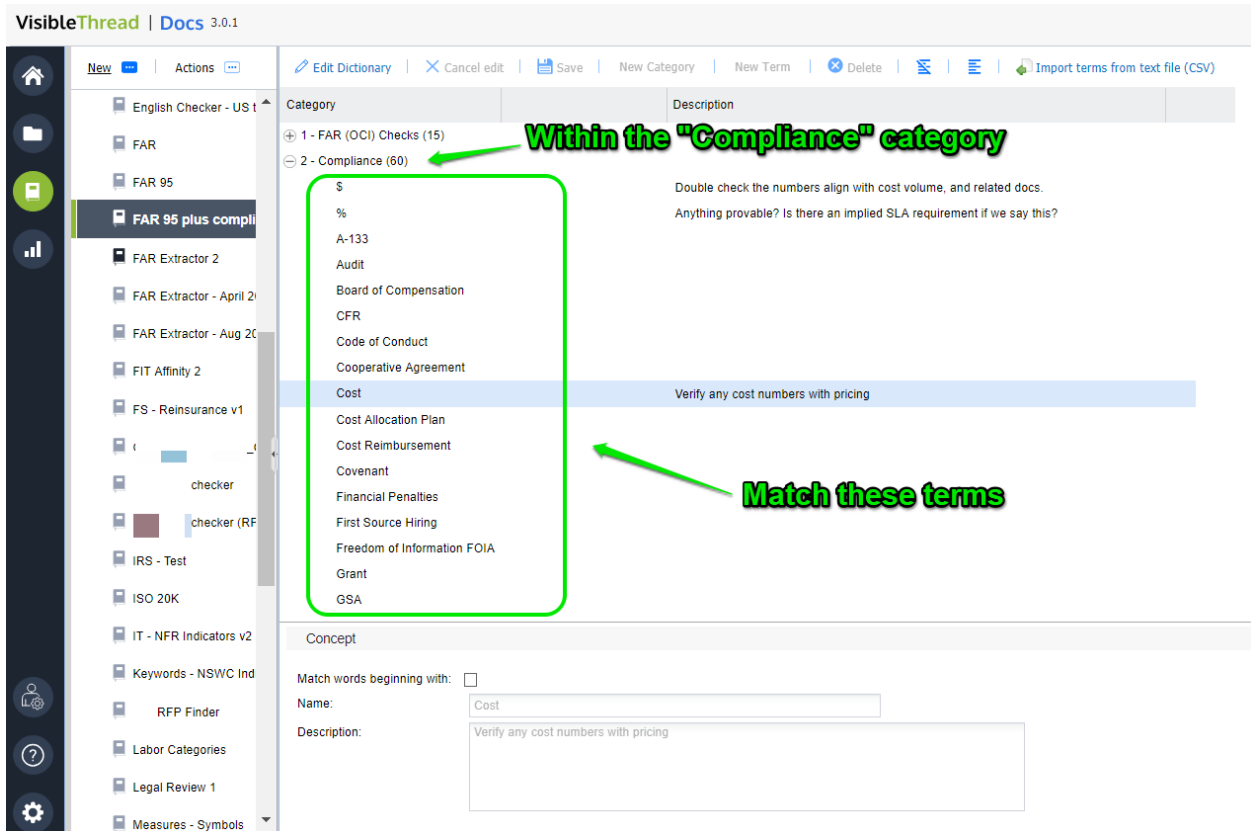
Figure 37 - Exploring a Concept Dictionary with Categories and Terms

Next, let's see how we can create new concept dictionaries. Later, we will show you how to edit the concepts in a specific dictionary.

11.9.1. How to create a new Concept Dictionary

Step

1. Click the 'New >> Concept dictionary…' button.
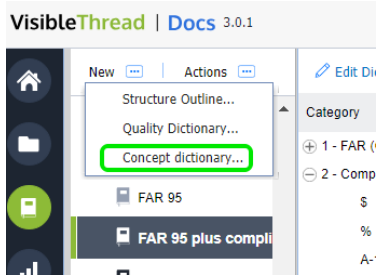
2. Next, enter the name for your new dictionary and click 'OK'. In this case, we are creating a new dictionary called 'New Risk Checker v1'.
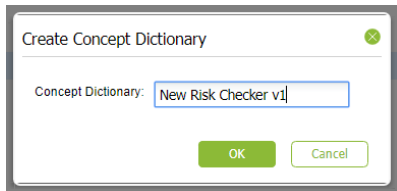
3. Once ready, click 'OK'

4. Now you will see an empty dictionary, ready for editing.

You're now ready to edit the dictionary.

11.9.2. Customizing / Editing Dictionaries

There are two primary ways to customize dictionaries. These are:

1. Using the **VisibleThread dictionary editor**

2. **Bulk import from CSV** (Comma Separated Value) formatted text files.

You will tend to use bulk import when you have quite a few dictionary items, and you want to set them up quickly.

We'll explain these two approaches in the next sections.

Secondary Flows:

You should be aware that these secondary flows result in updated concept dictionaries:

-   Adding a concept from the **Discovery vie**w

-   Adding search terms from the **Concept Tracking view**.

For more on these secondary flows, see sections "10.4 Adding to Concept List from Discovery" & "11.4 Filtering and 'Add search term'".

11.9.3. Customizing - using the VisibleThread dictionary Editor

Once you select a specific concept dictionary, the right-hand side view shows the dictionary details.
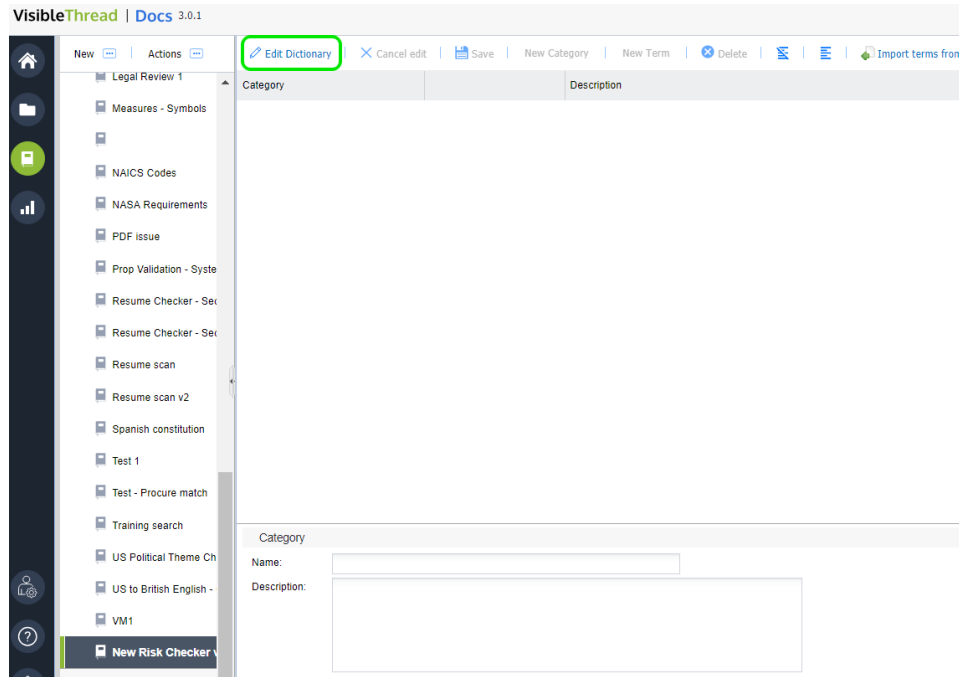
Figure 38 - Editing a dictionary

If the dictionary already has categories and terms, you'll see something like this:
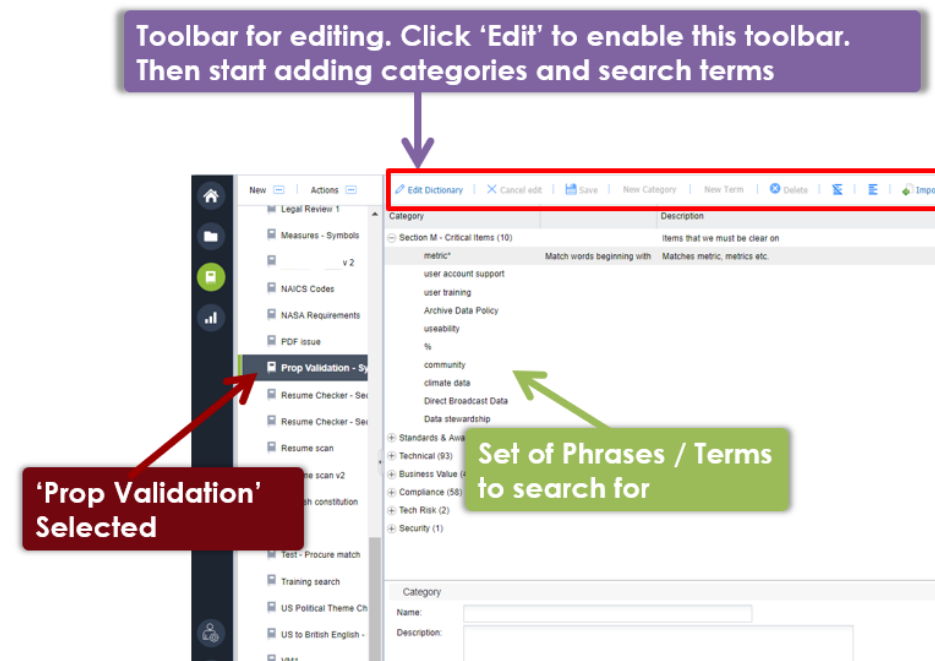
Figure 39 – Concept List with specific list showing terms on right

Let's explain the right-hand view, and then we'll explain how to edit.

Concept dictionaries consist of **categories** and **search terms**. Categories are logical groups. Terms are the search terms or phrases you're searching for.

For instance, the above screen shows a category called "Section M – Critical Items" containing 10 terms to search fo. This user is a US government contractor using concepts to search for pre-defined solicitation terms that qualify the pursuit. They are scanning documentation to ensure adequate coverage of critical items. These reports impact their bid/no-bid and teaming decisions.

When you click a category or term, the category or term attributes are shown in the bottom 'detail' pane. The category detail includes:

- **Name** – name of the category

- **Description** – the description of that category

The standard mode of the dictionary editor is 'read-only'. This means that are initially disabled (indicated by grey button text).

To start editing, click the 'Edit dictionary' button on the toolbar immediately above the detail area.
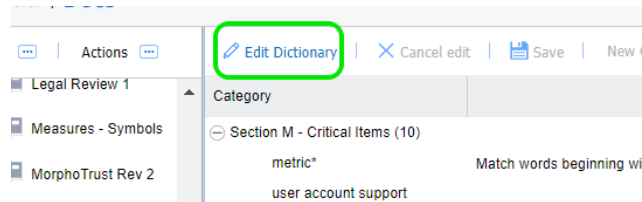
This then enables the other buttons and allows you to edit.
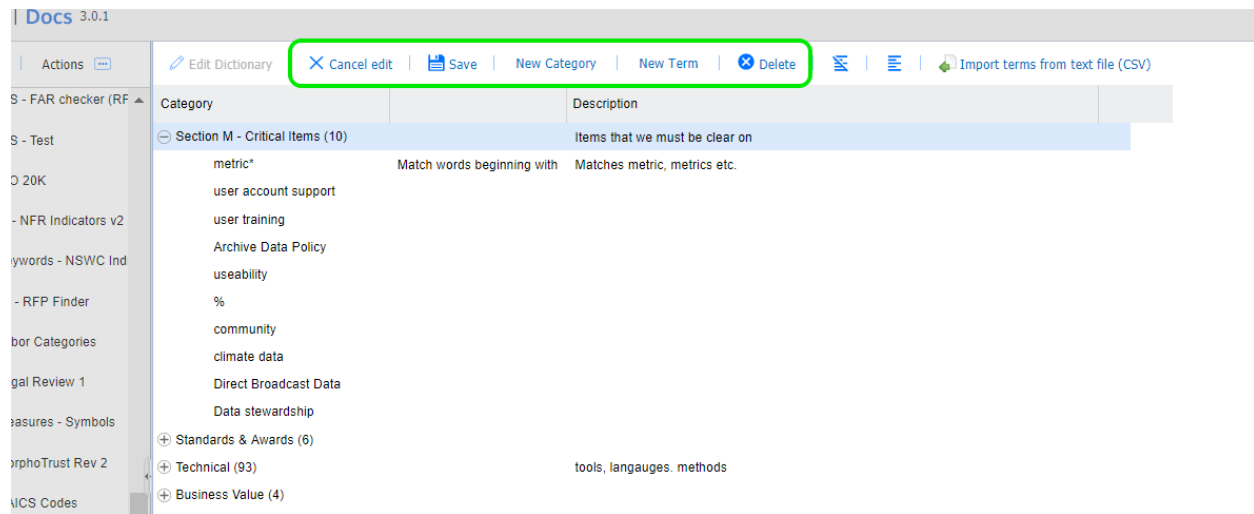
Figure 40 - Enabled buttons in dictionary editor

Here's how you add categories and terms:

New category	This allows you create a new category.
	Clicking this prompts you for a name and optional description. Once you click 'OK', the system creates a new category with the name entered.

New term   This allows you create a new concept term. The concept will be added to the currently selected category.

When you click this, the system shows a screen like this:

```
New Term                                    ⊗

Match words beginning with:  ☐
Name:                      [New Concept]
Description:              ┌──────────────┐
                         │              │
                         │              │
                         │              │
                         └──────────────┘

                         [  OK  ]  [ Cancel ]
```

Enter the concept name and an optional description.

The description will surface later in generated reports so, often is useful as guidance text explaining the significance of the term.

Note – there is also an option to "Match words beginning with" for terms. This supports partial word matching. For example, if you enter the term "CM", checking this option will match "CM" "CMM" and "CMMi" or any other variation starting with "CM". This is also useful when looking for singular and plurals. For example, with this box checked, "customer" will match "customer" and "customers".

Once you click 'OK', the system creates a new concept.

⊗ Delete   This deletes the selected category or selected term.

Other options available on the toolbar are:

✕ Cancel edit   **Cancel Edit**

After making changes, you may want to cancel them. Click this to discard any changes made since the last save. The prior version of the dictionary will be restored.

💾 Save   **Save**

This saves any changes made to the Dictionary. Clicking this will also prompt you to confirm the save.

≣   **Collapse**

This collapses all rows.

≣   **Expand**

This expands all rows.

Tip: You can use drag & drop to move items up or down or into other areas. Position your mouse pointer over the Text area of the node you want to move and drag it to the desired location.

11.9.4. Modifying a Category or Term

You may want to edit the detail for a category or term previously defined. Let's say you want to change the term "community" to "commun" and make it a broad match. By making it a broad match, this will then pick up "community", "communities" etc.

Tip: Make sure you are in Edit mode when modifying terms. Click the 'Edit dictionary' button.

Just follow these steps:

Select the Term

Click the term, so for example in this case we want to edit 'community':

Edit the detail

In the bottom of the screen you will see the term details:

Next, change the text in the name to "commun" and check the box 'Match words beginning with'.

If you want to specify a description, enter it here. The description will surface later in generated reports. This will serve as useful guidance text explaining the significance of the term.

The exact same process applies to category edits.

11.9.5. Customizing – using bulk Import from CSV

In cases where you have multiple terms or phrases, it is often easier to bulk import them into a dictionary, using CSV (Comma Separated Values) import. The easiest way to do this is by editing the file in Excel (or any text editor) and saving as a CSV formatted file from Excel.

To perform an import, follow the steps below.

Step

1. Open Excel with a blank sheet:

2. Next, enter the terms you want to import. The format is simple. Each column maps to the dictionary in this way:

   - Column A maps to the category, so in the screen below, you can see 2 categories; 1. Technical and 2. Business

   - Column B maps to the term. You can see the terms below: CMM, ISO etc.

   - Column C is the description.

Some notes on import logic:

   a) If the term already exists in the dictionary, it will be skipped on import.

   b) You can leave column A empty, in which case the term will go into a 'Default Category' that the importer will create.

   c) If the category already exists in your dictionary, the term will be added to that category.

   d) If the category does not exist, it is created automatically.

   e) Finally, the description field is optional.

3. When you're ready in Excel, click 'Save As'.

NOTE 1: Some versions of Excel may present the 'Save As' option differently.

NOTE 2: The 'Import from CSV' and 'Export to CSV' functions will preserve the 'Match words beginning with' option. If you export, you will see an "*" character to the right of the term. To set the option no an import, just add an "*" to the term.

NOTE 3: If you want to back up dictionaries (perhaps because you're moving to a new environment), use the 'Export as Archive' capability. This will preserve the 'Match words beginning with' attribute and will restore it correctly. For more, see section '11.9.9 Exporting / Importing Dictionaries'.

---

4. Name your file and save as a CSV format to a location you'll remember: your desktop, for example.

NOTE: Be sure to select the right CSV format in Excel. It's the one mid-way down the available list.

5. Once you hit save, Excel will prompt you with a message similar to the below. Sometimes there may be more than one message. Go ahead and click 'Yes'.

Microsoft Excel

New Import Dictionary.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format?

- To keep this format, which leaves out any incompatible features, click Yes.
- To preserve the features, click No. Then save a copy in the latest Excel format.
- To see what might be lost, click Help.

[Yes]   [No]   [Help]

6. Next, we want to import the CSV file.

   Select your dictionary and click the '**Import terms from text file (CSV)**' option to the right.

   New Category | New Term | ⊗ Delete | ≣ | ≣   ⬅ Import terms from text file (CSV)

   Description

   Items that we must be clear on

   tools, langauges. methods

7. You will see a screen like this:

   Import terms From text file (CSV)   ⊗

   File to Import: [   ]   **Browse**

   Each term in the CSV data will be imported into the matching category in the dictionary. If no matching category can be found a new one will be created in the dictionary and the term will be added to the new category

   Format Example:

   ```
   category 1, term1 Name, term description
   category 1, term2 Name, term description
   category 2, term3 Name, term description
   ```

   [Import]   [Cancel]

   .

   Click the 'Browse' button, select the CSV file you created a moment ago, and click 'Import'.

8. Once finished, you will see the contents of the CSV file in the dictionary. Using the dictionary example from step #2 above, it will look like this after the import:

   ✎ Edit dictionary | ↺ Cancel edit | [

   Category
   ⊞ 1. Business (5)
   ⊞ 2. Technical Factors (4)
   ⊞ 3. Bond Terminology (3)
   ⊞ 4. Shares (3 **New terms**
   ⊞ 5. from discovery (voice related) (2)
   ⊟ 1. Technical (4)
      ⊹ CMM
      ⊹ ISO
      ⊹ Agile
      ⊹ API

11.9.6. Copying Dictionaries

If you have existing dictionaries, it's very easy to copy them. Just follow these steps:

Step

1. Select the dictionary you want to copy. In this case, we select 'FIT Affinity 2'.

2. Click 'Actions >> Duplicate selected dictionary'.

3. Enter the name for your new dictionary.

4. You have the option to duplicate the dictionary into the concept or quality folder.

5. Click OK to copy the dictionary.

11.9.7. Deleting a Dictionary

To delete a dictionary, follow these step(s) from the dictionaries accordion:

1. **Select**   Select the dictionary you want to delete, and either click the "Actions" button or right click. You will see a menu like this, in this case we just right-clicked.

2. ⊗ Delete   Click Delete.

3. **Prompt**   Clicking this prompts you to confirm the deletion.

Note 1: If you delete a dictionary that is currently in use by a document or folder, you will be prompted with a message telling you which folders and/or documents are currently using it.

If the dictionary is in use, after deletion the folder will use the 'default' dictionary.

Important Note: This action cannot be undone.

11.9.8. Setting a default dictionary

What is a 'default dictionary'?

When you create folders, the folder always has a concept dictionary associated with it.

Once you start uploading documents, you will always see a concept view with that dictionary. This dictionary is called the default. You can easily tell the default dictionary, since it will have this icon associated with it:
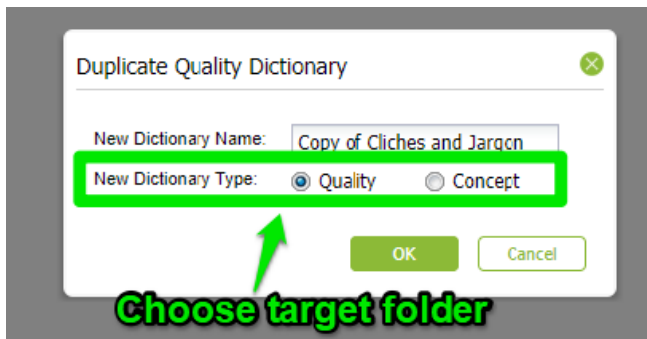
🔖 .

You can change the default. This means that any new folders will use that new default.
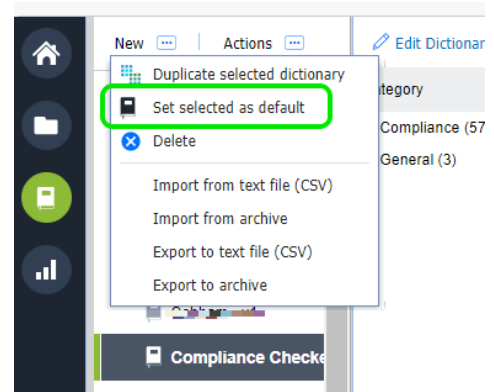
We ship with several stock concept dictionaries out of the box. One of these is the default.

You can easily set the default to one of your other dictionaries.

Here's how:
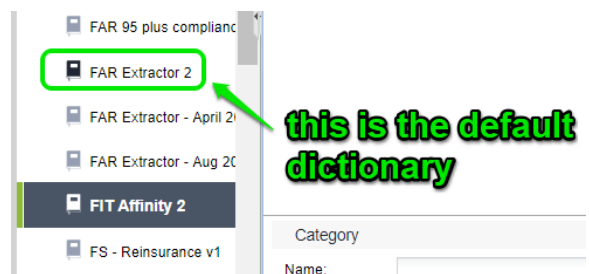
Select   Select the dictionary you want to make the new default. Either click the "Actions" button or right-click.

Click 'Set selected as default'.

11.9.9. Exporting / Importing Dictionaries

Sometimes you may want to export or import dictionaries. You can do so using these options under the "Actions" menu.

There are four options available.

Here's the explanation for when you would use each option:

Import from text file (CSV)

This allows you import a CSV (comma separated values) file as a new dictionary.

You will be prompted to specify:

1. The location of the file— use the 'Browse' button to locate it

2. The name of the dictionary

3. The dictionary type: either a concept or quality dictionary

Import from archive

This option allows for sharing of dictionaries between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'export to archive' to share from one environment to another.

> **Important**: Do not modify the content of the underlying XML file, as it may lead to a bad format.

Export to text file (CSV)

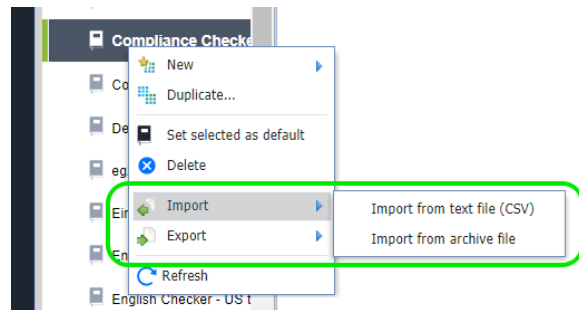This allows you export this dictionary to a CSV (comma separated values) file.

Export to archive

This option allows for sharing dictionaries between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'import from archive' to share from 1 environment to another.

Important: Do not modify the content of the underlying XML file, as it may lead to a bad format.

11.9.10.   Refreshing Concept Tracking view after editing a Concept Dictionary

Once you have finished editing your dictionary, VisibleThread will need to refresh the folder and document(s) to reflect the dictionary changes in the Concept Tracking view.

At the folder level, you will see this screen after editing your dictionary and going back to Concept Tracking. Just click the Refresh button.
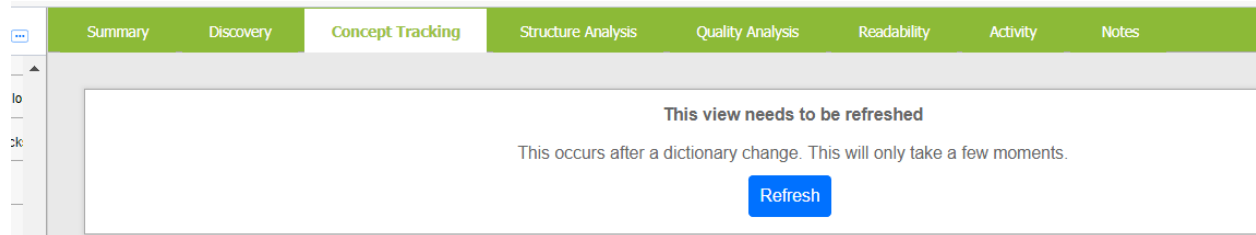

Figure 41 - Refresh view after a dictionary edit

This screen will also appear at the document view in Concept Tracking after any dictionary edits. Again, click the refresh button to re-analyze your document according to the newly modified dictionary.

12. Structure Analysis

The Structure Analysis view only applies to MS Word documents.

Use it to validate that a document complies with a specific heading structure. By headings, we mean MS Word defined headings using MS Word styles— typically Heading 1, Heading 2 etc.

Figure 42 - MS Word showing styles ribbon with headings

Note: Structure Analysis does not apply to PDFs or Excel files.

Use structure analysis when you are concerned that a particular heading structure is always reflected in a document.

The Structure Analysis view changes depending on whether you select a folder or a document. The following sections outline how we handle each.

12.1.   Structure Analysis at document level

You will get a sense of a Structure Analysis view at the document level in the screen shot below.

You can see how the headings found in the MS Word document (listed on the left side) compare with a mandated structure on the right. We call the structure on the right a "structure outline".

Structure Outlines can be customized. We'll see how a little later in section '12.4 Managing Structure Outlines (Create New, Edit, Copy etc.)'.

In this screen shot, we see '**Detail Solution**' and '**Conclusion'** called out in red text on the right. This means that these two required sections are missing from the document.

Figure 43 - Structure Analysis at Document Level

In summary, you are comparing the heading structure in the doc against a required structure.

Some explanations of colors:

> **Black** text in the "Headings Found" or "Compared with" panes means the Structure Analysis found headings in the document corresponding to the Structure Outline.
>
> **Red** text in the "Compared with" pane signifies headings not found in the document.
>
> **Grey** text in the "Headings Found" pane signifies headings found that do not match the Structure Outline showing in the "Compared with" pane.
>
> **Note:** Grey text does not necessarily imply lack of compliance; rather it suggests additional detail above and beyond what was mandated in the Structure Outline.

The size metric in the Structure Pane displays a 0 (with red color) when a given heading is empty. In other words, this indicates that the heading has no body text after it. This can often be the case if a level 3 heading occurs immediately after a level 2 heading.

As you review you will see extracted content for a given heading. Check the (☐) box adjacent to the heading and the bottom content grid will show the extracted content. Once you check these boxes, color coding appears relating the particular heading(s) with the bottom content grid.

Tip: To view all heading content check the box (☐) in the column header.

Below is the set of visual indicators signifying matched/unmatched headings in the "Compared with" pane.

●	Black text	Full Match
		This means that the heading was found in the document, and any sub-headings were also found in the document.
○	Black text	Partial Match
		This means that the heading was found in the document, but that some of the sub-headings were not matched.
◆	Red text	Full Mismatch
		This means that the heading was not found in the document, and no sub-headings were found.
◇	Light Red text	Partial Mismatch
		This means that while the heading was not found in the comparison document, some sub-headings were found.
❗	Light Red text	Optional Mismatch
		This means that an optional Structure Outline heading was not found in the comparison document.
		NOTE: This does not impact the compliance % score.

There are some options available in the toolbar under the left "Headings Found" pane.
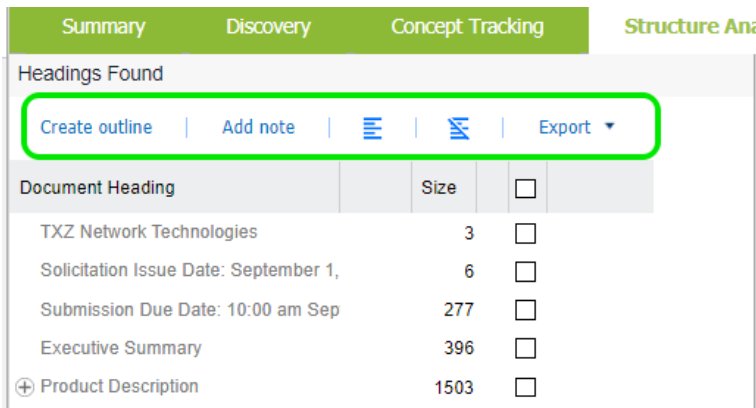

Figure 44 - Options available under "Headings Found"

These are:

Create outline   This allows you create a new Structure Outline for comparison based on the structure of the current document. This is a shortcut approach to creating structure outlines. For more detail, see section '12.4.3 Create a new Structure Outline from an existing document'.

Add note   Select a specific heading and click this to add a note. See later under Discussions for more on notes: 'Section: 17 Team Collaboration with Notes and Discussions'.

Collapse

This collapses all rows.

Expand

This expands all rows to one level of depth.

Export   You can export the structure statistics to a CSV format file for further manipulation.

12.2. How to compare with a different outline

You can easily set the comparison structure to a different structure outline.

Just select the document in the navigation pane and click the 'Structure Analysis' tab. Then click the 'Compare with different outline' button.
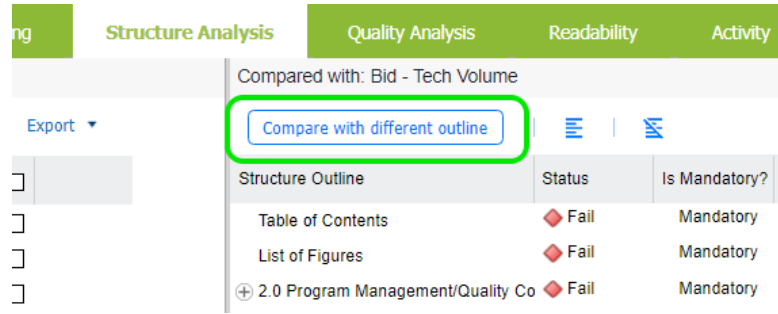

Figure 45 - Compare with different outline

You then select the new structure outline and click 'Run Analysis'.
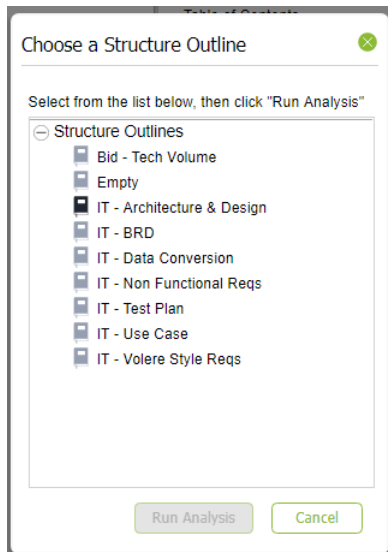

Figure 46 - Selecting an outline to compare against

The system applies the Structure Outline to the document and shows the results. You can also customize and create new structure outlines (used to compare) easily. We'll outline how in the next section.

12.3. Folder level Structure Analysis

At the folder level, the Structure Analysis view shows each MS Word document in the folder. Since Structure Anaysis only applies to MS Word Docs, you will see no structure data for PDF or Excel documents.

**Figure 47 - Structure Analysis at Folder Level**

The view lists each document. You can also Export to CSV. The options available in the Structure toolbar are:

This pane consists of several columns as outlined in this table:

Folder / Document / Heading	This shows the Folder, document, or Heading depending on what row is selected.
Structure Outline	This is the Structure Outline currently associated with the specified folder or document.
Size	This represents the size of the document. For MS Word, it is measured in words. If there are no words in a given heading of the document, you will see '0', indicating that there is no content.
Structure Compliance	This represents the status of documents when analyzed with the associated Structure Outline. At the folder and document level, the percentage (%) indicator is a roll up value arrived at by comparing headings within contained documents against the structure as dictated by the associated Structure Outline. As you review the status of documents, bear in mind that 100% compliance is based on finding all headings in the Structure Outline. The document may have additional headings above and beyond what is specified in the Structure Outline and still be 100% compliant.

12.4.   Managing Structure Outlines (Create New, Edit, Copy etc.)

Note: Permissions. Only users with dictionary permissions can create, modify or delete Structure Outlines. If you do not have dictionary rights and you attempt to modify dictionaries, you will get this message.

Permissions restriction

You do not have permissions to perform this action. Only users with Dictionary rights can do so.

OK
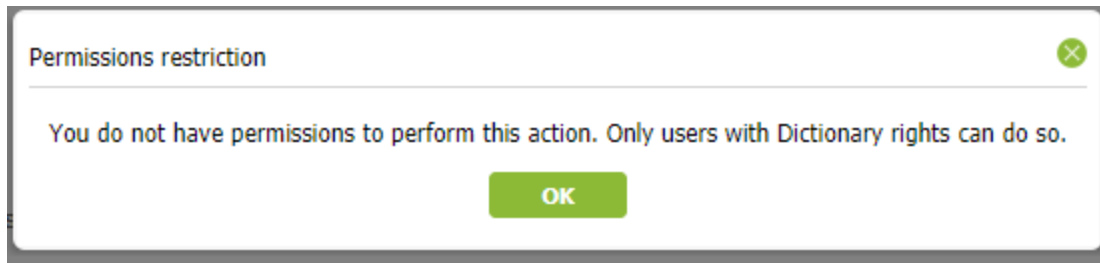
If you need to customize / edit dictionaries, contact your VisibleThread administrator who can grant you dictionary rights.

Structure Outlines verify that specific MS Word headings are present within the document (s). For instance, let's assume you are defining a Quality Assurance plan for an IT program. The absence of performance and security headings would suggest a lack of completeness.

So where are structure outlines stored in VisibleThread Docs? And how do we modify them?

Find them by clicking "Dictionaries" in the sidebar, and clicking "Structure Outlines". You will see a screen like this:
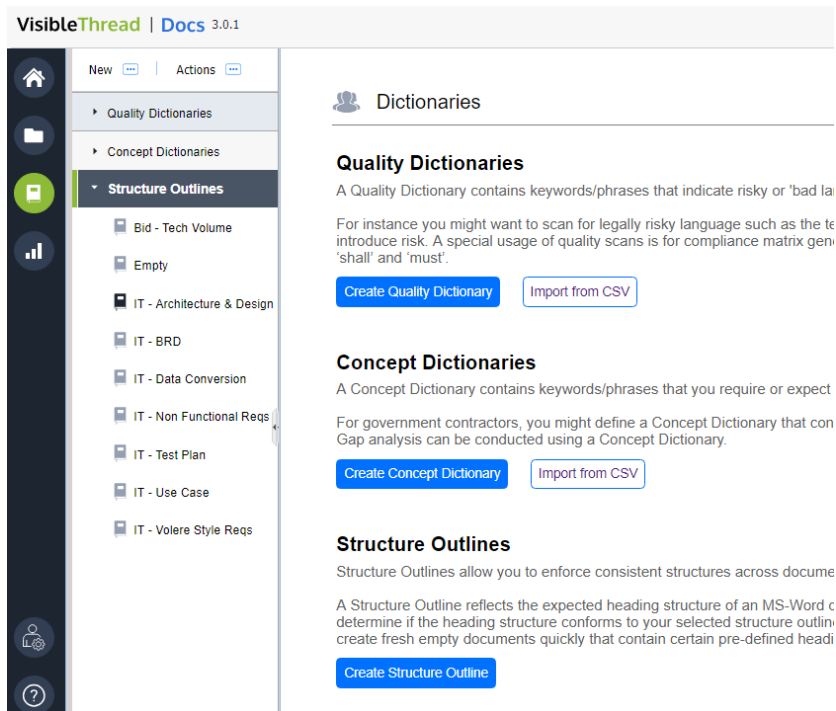

Figure 48 - Dictionaries View

You can see the full list of structure outlines in your environment.

Then, select a specific outline to see headings on the right. Headings are categorized as either 'mandatory' or 'optional'.

Figure 49 - Exploring a Structure Outline

You can create new outlines in three ways:

1. You can **create** a new outline from scratch.

2. You can use a **pre-existing MS Word** doc as a basis for your new outline.

3. You can **copy** an existing outline.

In the next sections, we'll see each of these approaches. Later, we will show how to edit the headings in a specific outline.

12.4.1. Create a new Structure Outline from scratch

Let's consider the basic case of creating an outline from scratch.

Step
1. Click the 'New >> Structure Outline…' button.

2. Next, enter the name for your new outline and click 'OK'. In this case, we are creating a new outline called 'New program outline'.
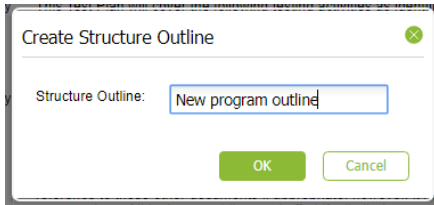
3. Once ready, click 'OK'.

4. Now you will see an empty screen like this:
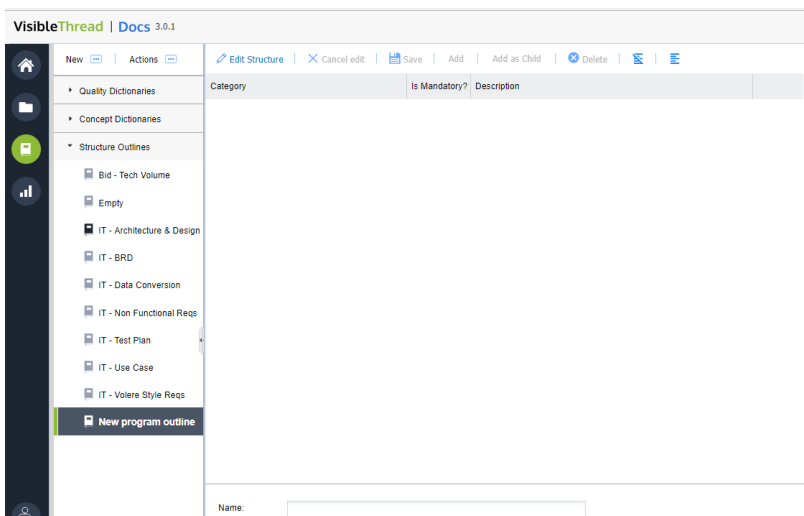
Now we're ready to edit the outline.

12.4.2. Editing a Structure Outline

To start editing, click the 'Edit Structure' button on the toolbar immediately above the detail area.

Figure 50 - Edit structure outline option

This then put you into an 'edit mode', making the remaining menu options clickable.

Here's how you add categories and terms:

Add   This allows you create a new Structure Heading.

Clicking this prompts you for the Heading name and optional description. Once you click 'OK', the system creates the category with the name entered.

Add as child

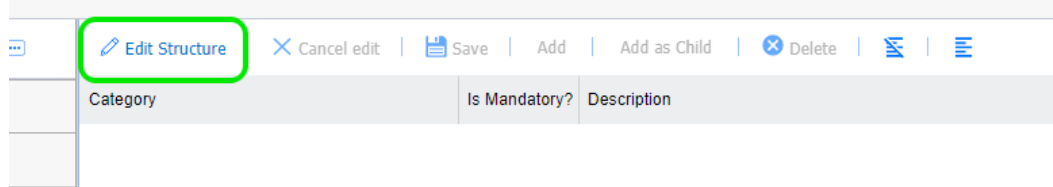This allows you create a new sub-heading as a 'child' of the selected heading.

Clicking this prompts you for the heading text. Once you click 'OK', the system creates a new sub-heading. In this example we're adding a sub-heading called "Past Performance".

Delete

This deletes the selected heading.

Other options available on the toolbar are:

Cancel Edit

After making changes, you may want to cancel them. Click this to discard any changes made since the last save. The prior version of the structure outline will be restored.

Save

This saves any changes made to the outline. Clicking this will also prompt you to confirm the save.

Collapse

This collapses all rows.

Expand

This expands all rows.

Tip: You can use drag & drop to move items up or down or into other areas. Position your mouse pointer over the Text area of the node you want to move and drag it to the desired location.

To give you a better sense, this screenshot shows a more complete structure outline with a number of headings and sub-headings:
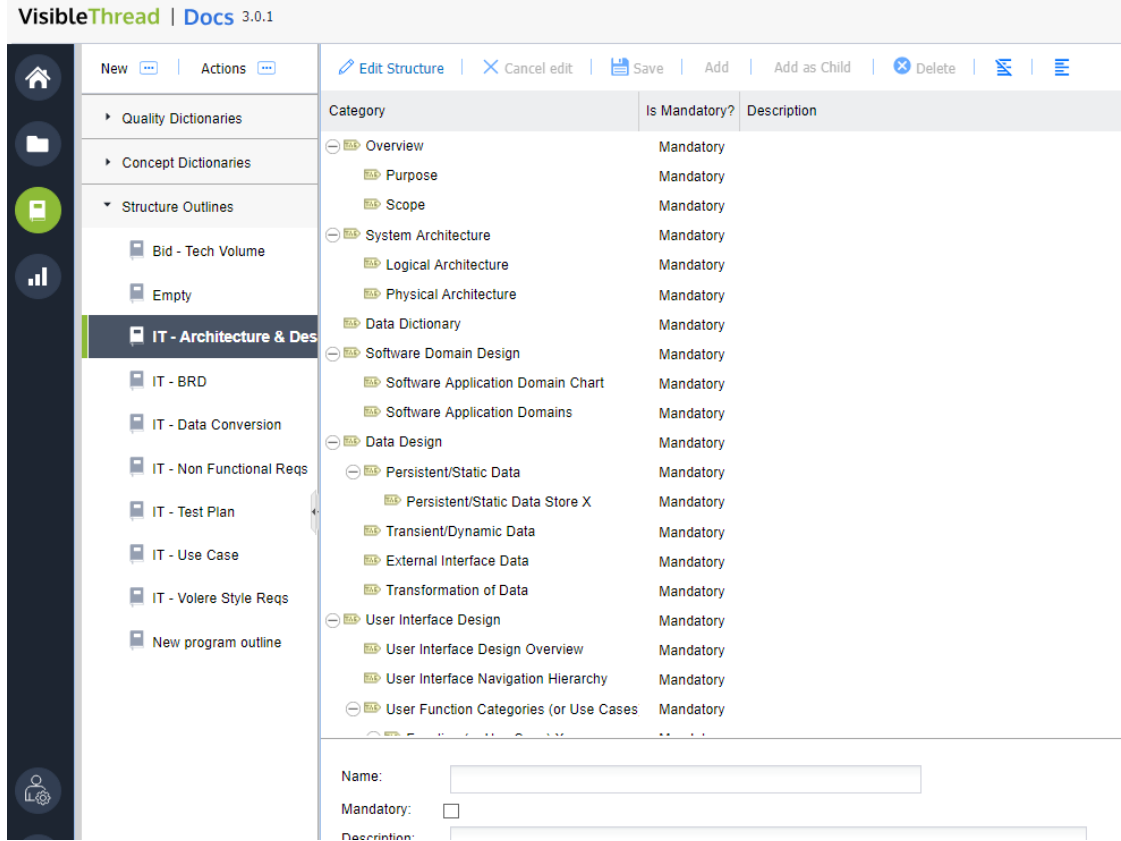
Figure 51 - Screen showing general layout of a populated outline

We compare these Structure Outline headings with the 'headings' in the comparison MS Word document.

Just like an MS Word document can have sub-headings (H2, H3 etc.), you can nest these headings as well. For instance, you might have a top level called 'non-functional requirements' comprising sub-headings 'operational', 'usability', 'legal' etc.

In the example outline above, at the top level, you see 'Data Dictionary', 'Data Design', 'User Interface Design' etc. You can also see many examples of sub-headings, for example the 'External Interface Data' under 'Data Design'.

We premise is to make sure that the documented test plan document conforms to this outline.

As you select each heading, you see detail in the bottom 'detail' pane. Detail includes:

- Name – name of the heading

- Description – the description of the heading (optional)

- A flag indicating whether this heading is mandatory or optional. Marking a heading as optional means that the total compliance calculation % for a document will not consider that heading.

12.4.3. Create a new Structure Outline from an existing document

You may already have MS Word documents that could be used as a good starting point for an outline. For instance, if you produce Quality Plans or Task Orders on a regular basis; you'll already have some good MS Word document templates suitable for use.

In cases like this, where you already have documents with good heading structures, you can easily create a new outline in 1 - click.

Here's how:

Step

1. Let's assume our starting MS Word doc is called 'Plan Template.docx' and you had not already uploaded it. (Skip this step if the good document is already in a VisibleThread folder.)

   Go to 'Folders', and select a folder where you will upload 'Plan Template.docx'. Since our goal here is to use the Plan template as a basis for the new outline, you might even create a temporary folder just to hold 'Plan Template.docx', and later remove it. Next, upload "Plan Template.docx". See section "0

12.5. Creating sub-folders

VT Docs also provides support for nested sub-folders. This allows for easier grouping and categorization of related documents. For example, you might create a top-level folder for an RFP or contract. And then create sub-folders to group all issuing side documents or response documents together. Or you might also use sub-folders to organize your pink, red or gold team review documents.

Creating folders or sub-folders is straightforward. Click the 'Create New Folder' action from the Quick Actions menu in the folders area, or click on the 'Create New Folder' option on the toolbar or from the right click menu.

Tip: To create a top-level folder, make sure you have selected "Folders" in the navigation pane.
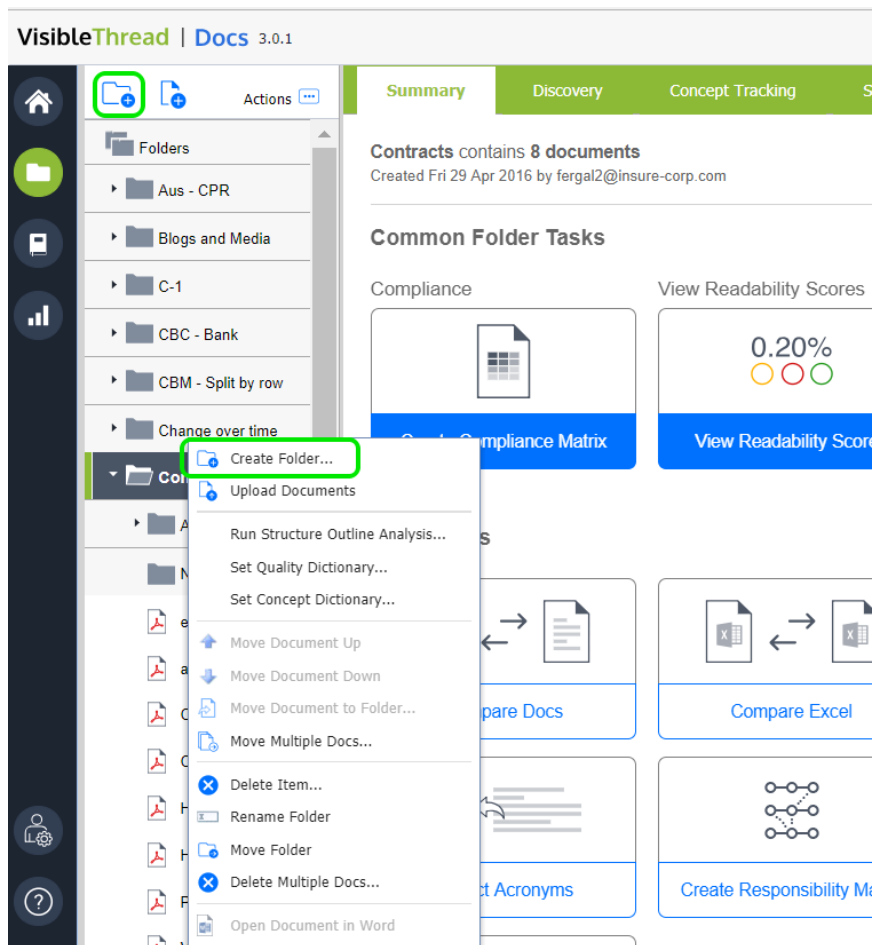

**Figure 7 - Creating a New Sub-Folder**

Moving items between sub-folders is really easy. Just drag and drop documents or folders into the destination folder. If you prefer to use the menu system, you can also move items by accessing the 'Move Folder' or 'Move Document' menu items from the Quick Actions or right click menus.

Uploading Documents" for how to upload documents.

2. With the appropriate document selected in the navigation pane, just select the 'Structure Analysis' tab. You will have a screen like this, with the headings showing on the right side:

3. Next, click the "Create outline" menu highlighted above.

4. You will be prompted for the name of the new outline. Enter the name. In this case, we are creating a new outline called 'New Test Plan Template' from an uploaded MS Word document.
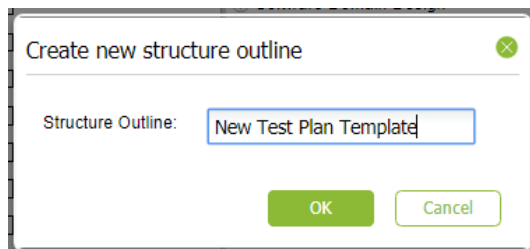
5. Once ready, click 'OK'.

6. You will be asked a final question: whether to apply the new outline to the current document. For the purposes of creating a new structure outline, it doesn't matter, so choose 'yes'.
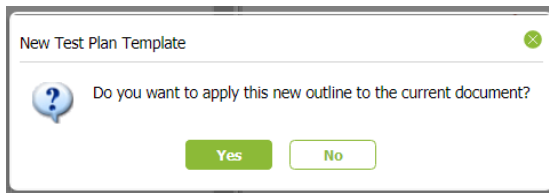
7. Once completed, the new structure outline will be placed under 'Dictionaries'. Click the dictionaries accordion and your new outline will be listed under 'Structure Outlines'. Select it to edit.
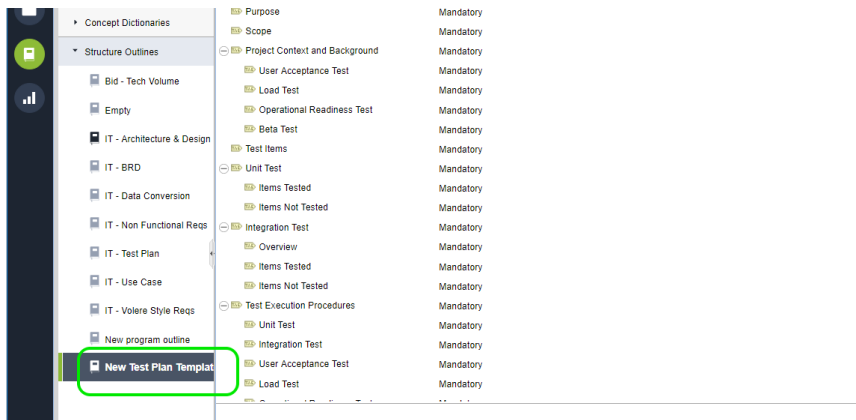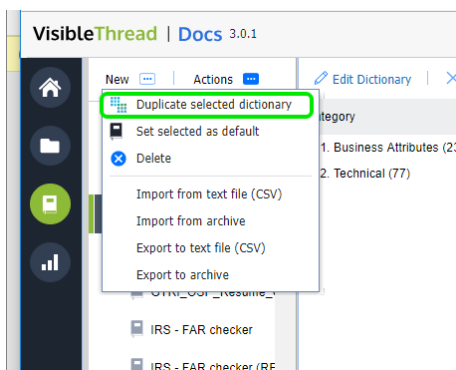

12.5.1. Copying Structure Outlines

If you have existing structure outlines, it's very easy to duplicate them. Just follow these steps:

Step

1. Go to Dictionaries sidebar. Select the outline you want to copy.

2. Click 'Actions >> Duplicate selected dictionary'.

5. Enter the name for your new outline and click 'OK'.

12.5.2. Deleting a Structure Outline

To delete an outline, follow these step(s) from the dictionaries sidebar:

1. **Select**   Select the structure outline you want to delete, and either click the "Actions" button or right click. You will see a menu like this, in this case we just right-clicked.
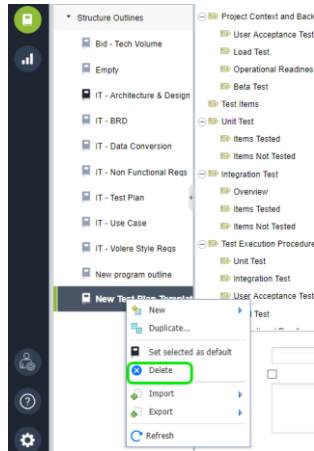
2. **Delete**   Click Delete. In this example, we are deleting the new outline we created in the previous section.

3. **Prompt**   Clicking this prompts you to confirm the deletion.

   Note 1: If you delete an outline that is currently in use by a document or Folder, you will be prompted with a message telling you which Folders and/or documents are currently using it.

   If the outline is in use, the folder will use the 'default' outline after deletion.

Important Note: This action cannot be undone.

12.5.3. Setting a default structure outline

In VisibleThread, when you create folders, every folder always has a default structure outline associated with it.

Once you start uploading MS Word documents, you will always see a Structure Analysis view with a specific outline. This outline is called the default. You can easily tell which the default is, since it will have this icon associated with it: .

You can change the default outline. This means that any new folders will use the new default outline.

Here's how:

| Select | Select the structure outline you want to make the new default. Either click the "Actions" button or right-click. |

| | Click 'Set selected as default'. |

### 12.5.4. Exporting / Importing Structure Outlines

Sometimes you may want to export or import structure outlines. You can do so using these options under the 'Actions' menu.

There are two options available. Here's an explanation for when you would use each option:

| Import from archive | This option allows for sharing of structure outlines between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'export to archive' to share from one environment to another.

Important: Do not modify the content of the underlying XML file, as it may lead to a bad format. |
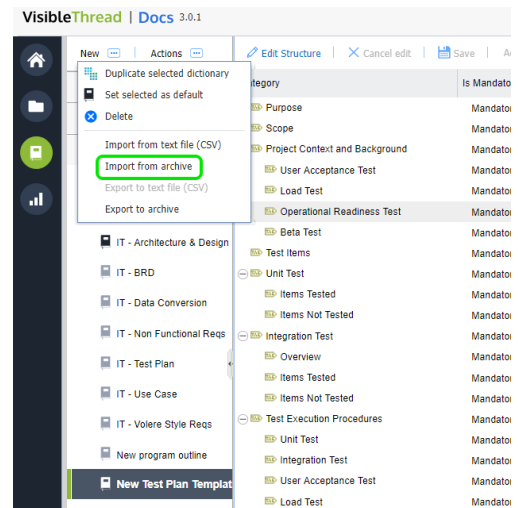
Export to archive	This option allows for sharing of structure outlines between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'import from archive' to share from one environment to another.

> **Important**: Do not modify the content of the underlying XML file, as it may lead to a bad format.
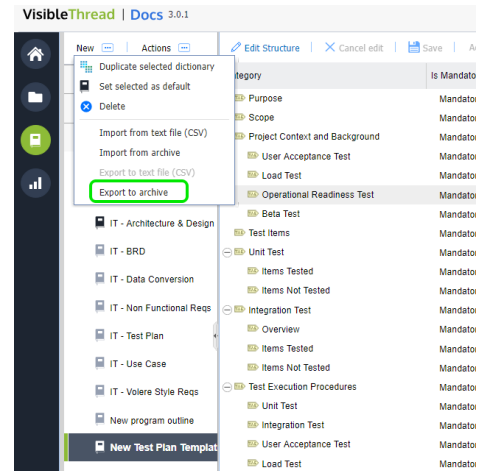
13. Quality Analysis at Folder and Document Level

> **Tip**: If you have not read about Concept Tracking yet, please review Section 11, 'Concept Tracking at Folder and Document Level'.
>
> Don't worry, we'll wait!
>
> Review it because much of the behavior for Quality Analysis is like concept tracking. Rather than duplicating content, we will refer to concept tracking sections when it makes sense.

Quality Analysis is very similar to Concept Tracking. You use it to explicitly track against a predefined set of terms/phrases. These are contained in a "Quality Dictionary".

You may wonder when to use Quality Analysis and when to use Concept Tracking.

Quality Analysis is typically used to identify keywords or phrases in documents that indicate risky or 'bad language'. And it is used when you are focused on the content of one document in isolation.

For instance, you might scan for legally risky language such as the term 'ensure' in a contract document. This term implies a contractual obligation which can often be unintended and introduce risk. Equally, you might use a quality analysis to spot clichéd or open-ended language in a contract that may inadvertently introduce program delivery risk.

Compliance Matrix Generation: A special usage of quality analysis is for compliance matrix generation in the proposal world. In that context, the quality scan identifies language like 'will', 'shall' and 'must', and you can then parse or 'shred' a PDF or MS Word document to get a spreadsheet of requirements. We'll talk about that in the next section.

While both Concepts and Quality use the same dictionary mechanism, here is a summary of the key differences between Concept Tracking and Quality Analysis.

Quality Analysis	Concept Tracking
Dictionary can be set for each document even when they are in the same folder. This means that one document might be using a 'legal risk' dictionary, while another might be using a 'compliance matrix' dictionary.	Dictionary is set at **Folder Level only**. All document views share the same folder level dictionary.
The folder view shows a list of the documents and a summary showing each docs dictionary and occurrences.	Since the folder has just one dictionary, the concept view at folder level is visually different. It is presented as a matrix.

| Allows you create a one-click compliance matrix | Does not offer a 1-click compliance matrix |
| Cannot be populated from Discovery | Can be populated from Discovery |

13.1. Quality Analysis at Document Level

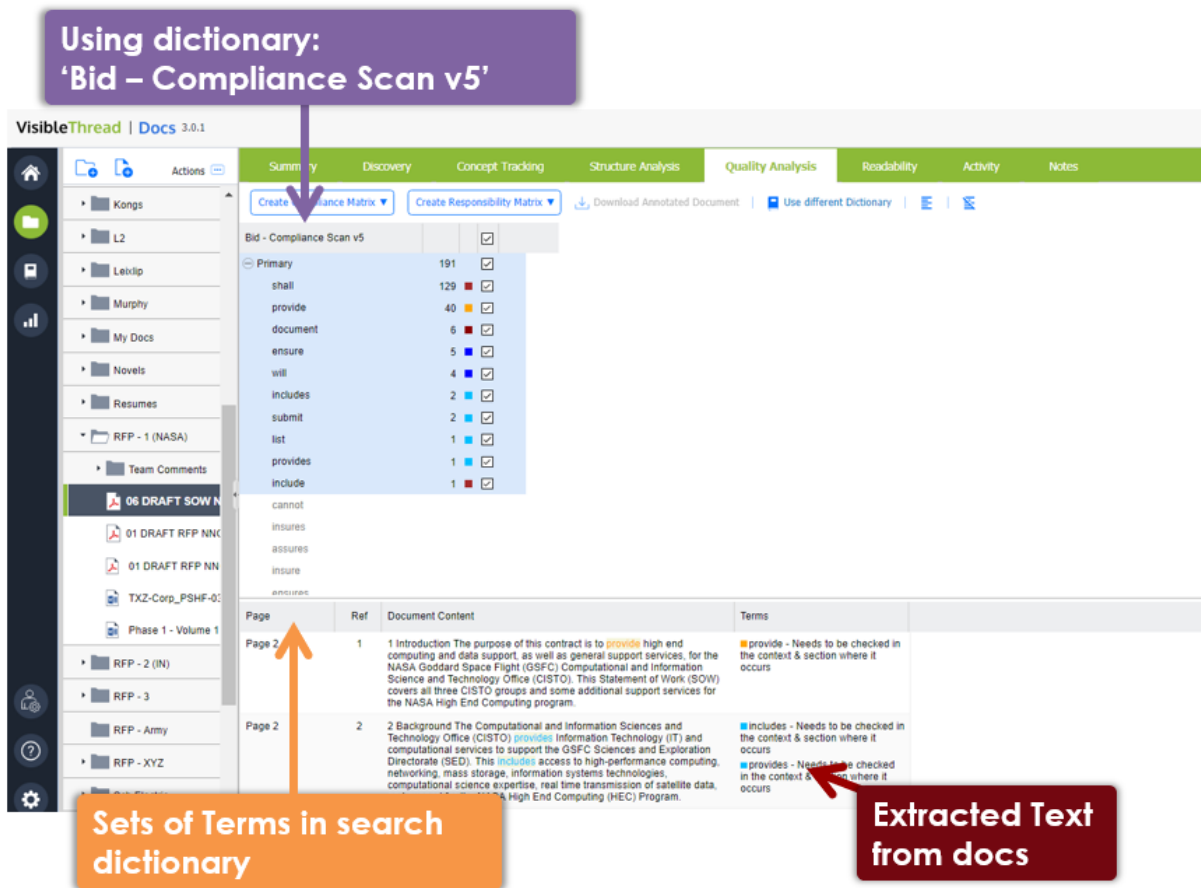When using document level Quality Analysis, you focus on a **specific document**. The view looks like this:

Figure 52 - Document Level Quality Analysis – running a compliance matrix-oriented dictionary

13.2. Reviewing document content

Behaviorally, the Quality View at the document level is very similar to Concept Tracking. However, Quality Analysis carries two additional options not available in Concept Tracking. These are "Create Compliance Matrix" and "Create Responsibility Matrix". We'll see how to use these in subsequent sections. Meanwhile back to the similarities.

Just like Concept Tracking, by default, the bottom grid is empty. When you want to review the document content itself, just check the box to the right of each term or phrase.

Once you check a box, the bottom grid shows a content extract for review.

13.3. Using different Quality Dictionaries

Just like Concept Dictionaries, Quality Dictionaries perform a job or task and you can set different dictionaries at will.

Just follow these steps to set a new dictionary:

Step

1. Click 'Use different dictionary'.
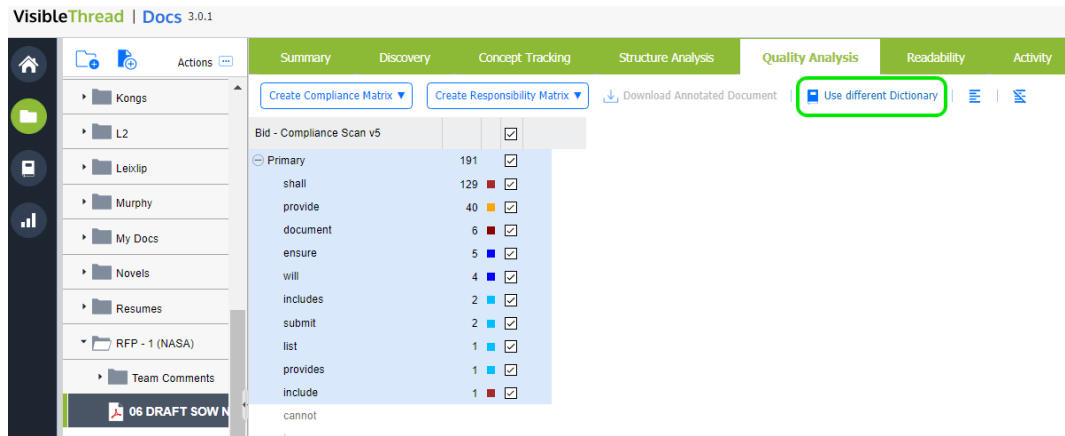
2. The system shows the list of available quality dictionaries:
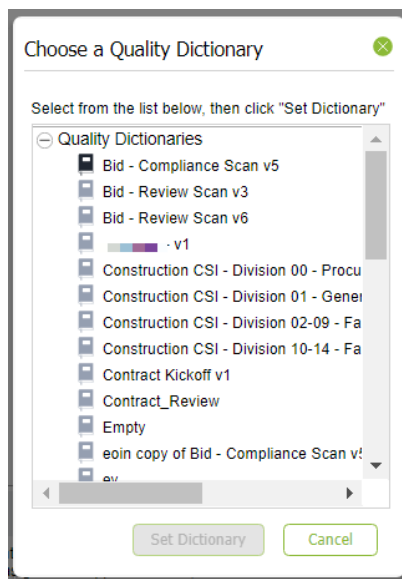
Note: This list is populated from the dictionaries currently in your system, so your list will be dependent on how many customized dictionaries you have created.

3. Click 'Set Dictionary' when ready. The system will apply the selected dictionary and your view will refresh.

13.4.   Generate a compliance matrix for a single doc

One of the first things sales proposal professionals do is to manually 'shred' or 'burst' the solicitation document(s).

The result of this is a 'compliance matrix', typically an MS Excel spreadsheet. The matrix itemizes all requirements. Sometimes it's called a 'requirements compliance matrix'. The purpose of the matrix in the context of a sales proposal is to itemize every requirement and ensure you meet or comply with the requirement.

Without VisibleThread Docs, this would take a lot of time and copy/paste activity as you extract each paragraph or sentence and paste it into a spreadsheet for tracking.

You can create a starter compliance matrix in one click directly from VisibleThread Docs. For sales teams, especially government contractors, this is a huge time saver.

Here's how to create a compliance matrix:

Step

1. Select the document in the navigation pane. Click the 'Create Compliance Matrix…' button. Click "Shred this document".

    NOTE: You can shred multiple docs in one click. We'll show you how in the next section.

2. You will then see a window like this:

This view has the following options:

- **Split by sentence or paragraph:** This affects the granularity of the generated Excel report.

- **New row on dictionary hit:** Checking this option forces the split each time a new term is found.

  This is often used in conjunction when shredding docs such as POs (Purchase Orders), BOMs (Bill of Materials) or Contracts with FARs (Federal Acquisition Requirements).

It also has 3 advanced options:

- **Ignore Text:** You can omit paragraphs in the generated output that contain certain text. For example, headers and footers with recurring copyright statements.

- **Ignore Pages** (only applies to PDFs): You can also omit certain pages if the document is in PDF format. A typical example of this is where you want to omit a page range prior to or after a certain section. US government contractors frequently ignore everything up to the start of section L in a US Government RFP.

- **Include Macros:** This will add macros to the outputted Excel file, that the user can use to further customize the output. For more information see section 19.5 Excel Output Customization Options.

> **Tip 1:** if your doc is in an MS Word format and you want to omit pages, consider saving it as PDF and shredding the PDF version.
>
> **Tip 2:** Normally when you generate a compliance matrix, you will want to highlight terms such as 'will', 'shall', 'must' etc., so you would expect these terms and others to occur in the dictionary. If the current dictionary is not the best one, just cancel and use a more appropriate dictionary by clicking 'Use different dictionary'.

3.

Once complete, you will see a full compliance matrix like this:

13.5.   While VisibleThread ships with a suitable compliance dictionary with terms like 'will', 'shall', 'must' etc., you can easily customize the terms or indeed the dictionary used. See 'Section 13.12 Managing Quality Dictionaries (Create New, Edit, Copy etc.)
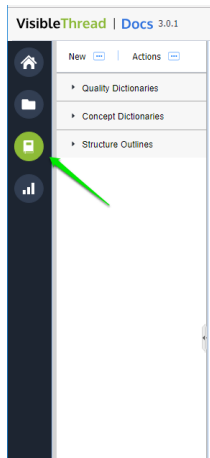

Note: Permissions. Only users with dictionary permissions can create, modify or delete Dictionaries. If you do not have dictionary rights and you attempt to modify dictionaries, you will get this message.

If you need to customize / edit dictionaries, contact your VisibleThread administrator who can grant you dictionary rights.

We use dictionaries to find terms or phrases across a folder of documents in the Quality Analysis view, but where are the dictionaries defined? How do you modify them?

To see the list of dictionaries, click 'Dictionaries' in the sidebar.

You will see three types of items: Quality Dictionaries, Concept Dictionaries, and Structure Outlines.

To see the full list of quality dictionaries in your environment, click the "Quality Dictionaries" entry.

Then, select a specific dictionary to see what it contains.

Figure 60 - Exploring a Quality Dictionary with Categories and Terms

Next, let's see how we can create new quality dictionaries. Later, we will show you how to edit the quality terms in a specific dictionary.

13.5.1. How to create a new Dictionary

Step
1. Click the 'New >> Quality dictionary…' button.
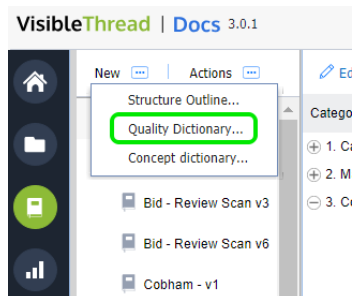
2. Next, enter the name for your new dictionary and click 'OK'.

3. Now you will see an empty dictionary, ready for editing.

You're now ready to edit the dictionary.

13.5.2. Customizing / Editing Dictionaries

There are two primary ways to customize dictionaries. These are:

1. Using the **VisibleThread dictionary editor**

2. **Bulk import from CSV** (Comma Separated Value) formatted text files.

You will tend to use bulk import when you have quite a few dictionary items, and you want to set them up quickly.

We'll explain these two approaches in the next sections.

13.5.3. Customizing - using the VisibleThread dictionary Editor

Once you select a specific quality dictionary, the right-hand side view shows the dictionary details.

Figure 61 - Dictionary Editor

If the dictionary already has categories and terms, you'll see something like this:

Figure 62 – Quality List with specific list showing terms on right

Let's explain the right-hand view, and then we'll explain how to edit.

Quality dictionaries consist of **categories** and **search terms**. Categories are logical groups. Terms are the search terms or phrases you're searching for.

For instance, the above screen shows a category called "Section M – Critical Items" containing 10 terms to search for. This user is a US government contractor using quality to search for pre-defined solicitation terms that qualify the pursuit. They are scanning documentation to ensure adequate coverage of critical items. These reports impact their bid/no-bid and teaming decisions.

When you click a category or term, the category or term attributes are shown in the bottom 'detail' pane. The category detail includes:

- **Name** – name of the category

- **Description** – the description of that category

The standard mode of the dictionary editor is 'read-only'. This means that are initially disabled (indicated by grey button text).

To start editing, click the 'Edit dictionary' button on the toolbar immediately above the detail area.

Figure 63 - Edit dictionary option

This then enables the other buttons and allows you to edit.

| Docs 3.0.1

| Actions ⋯ | ✏ Edit Dictionary | ✕ Cancel edit | 💾 Save | New Category | New Term | ✖ Delete |

Category		Description
⊖ Section M - Critical Items (10)		Items that we must be clear on
metric*	Match words beginning with	Matches metric, metrics etc.
user account support		
user training		
Archive Data Policy		
useability		
%		
community		
climate data		
Direct Broadcast Data		
Data stewardship		
⊕ Standards & Awards (6)		
⊕ Technical (93)		tools, langauges. methods
⊕ Business Value (4)		

Left panel items: S - FAR checker (RF, S - Test, O 20K, - NFR Indicators v2, ywords - NSWC Ind, - RFP Finder, bor Categories, gal Review 1, easures - Symbols, rphoTrust Rev 2, ICS Codes

Figure 64 - Options enabled once in edit mode

Here's how you add categories and terms:

New category — This allows you create a new category.

Clicking this prompts you for a name and optional description. Once you click 'OK', the system creates a new category with the name entered.

New term — This allows you create a new quality term. The quality term will be added to the currently selected category.

When you click this, the system shows a screen like this:

New Term

Match words beginning with: ☐
Name: New Concept
Description:

OK   Cancel

Enter the quality term name and an optional description.

The description will surface later in generated reports so, often is useful as guidance text explaining the significance of the term.

Note – there is also an option to "Match words beginning with" for terms. This supports partial word matching. For example, if you enter the term "CM", checking this option will match "CM" "CMM" and "CMMi" or any other variation starting with "CM". This is also useful when looking for singular and plurals. For example, with this box checked, "customer" will match "customer" and "customers".

Once you click 'OK', the system creates a new quality term.

✖ Delete — This deletes the selected category or selected term.

Other options available on the toolbar are:

 Cancel Edit

After making changes, you may want to cancel them. Click this to discard any changes made since the last save. The prior version of the dictionary will be restored.

 Save

This saves any changes made to the Dictionary. Clicking this will also prompt you to confirm the save.

 Collapse

This collapses all rows.

 Expand

This expands all rows.

Tip: You can use drag & drop to move items up or down or into other areas. Position your mouse pointer over the Text area of the node you want to move and drag it to the desired location.

13.5.4. Modifying a Category or Term

You may want to edit the detail for a category or term previously defined. Let's say you want to change the term "community" to "commun" and make it a broad match. By making it a broad match, this will then pick up "community", "communities" etc.

Tip: Make sure you are in Edit mode when modifying terms. Click the 'Edit dictionary' button.

Just follow these steps:

Select the Term   Click the term, so for example in this case we want to edit 'community':

Edit the detail   In the bottom of the screen you will see the term details:

Next, change the text in the name to "commun" and check the box 'Match words beginning with'.

If you want to specify a description, enter it here. The description will surface later in generated reports. This will serve as useful guidance text explaining the significance of the term.

The exact same process applies to category edits.

13.5.5. Customizing – using bulk Import from CSV

In cases where you have multiple terms or phrases, it is often easier to bulk import them into a dictionary, using CSV (Comma Separated Values) import. The easiest way to do this is by editing the file in Excel (or any text editor) and saving as a CSV formatted file from Excel.

To perform an import, follow the steps below.

Step

1. Open Excel with a blank sheet:

2. Next, enter the terms you want to import. The format is simple. Each column maps to the dictionary in this way:

   -    Column A maps to the category, so in the screen below, you can see 2 categories; 1. Technical and 2. Business

   -    Column B maps to the term. You can see the terms below: CMM, ISO etc.

   -    Column C is the description.

Some notes on import logic:

    f)   If the term already exists in the dictionary, it will be skipped on import.

    g)   You can leave column A empty, in which case the term will go into a 'Default Category' that the importer will create.

    h)   If the category already exists in your dictionary, the term will be added to that category.

    i)   If the category does not exist, it is created automatically.

    j)   Finally, the description field is optional.

3.   When you're ready in Excel, click 'Save As'.

NOTE 1: Some versions of Excel may present the 'Save As' option differently.

NOTE 2: The 'Import from CSV' and 'Export to CSV' functions will preserve the 'Match words beginning with' option. If you export, you will see an "*" character to the right of the term. To set the option no an import, just add an "*" to the term.

NOTE 3: If you want to back up dictionaries (perhaps because you're moving to a new environment), use the 'Export as Archive' capability. This will preserve the 'Match words beginning with' attribute and will restore it correctly. For more, see section '11.9.9 Exporting / Importing Dictionaries'.

4. Name your file and save as a CSV format to a location you'll remember: your desktop, for example.

NOTE: Be sure to select the right CSV format in Excel. It's the one mid-way down the available list.

5. Once you hit save, Excel will prompt you with a message similar to the below. Sometimes there may be more than one message. Go ahead and click 'Yes'.

6. Next, we want to import the CSV file.

   Select your dictionary and click the 'Import terms from text file (CSV)' option to the right.

7. You will see a screen like this:

Click the 'Browse' button, select the CSV file you created a moment ago, and click 'Import'.

8. Once finished, you will see the contents of the CSV file in the dictionary. Using the dictionary example from step #2 above, it will look like this after the import:

13.5.6. Copying Dictionaries

If you have existing dictionaries, it's very easy to copy them. Just follow these steps:

Step
1. Select the dictionary you want to copy. In this case, we select 'FIT Affinity 2'.
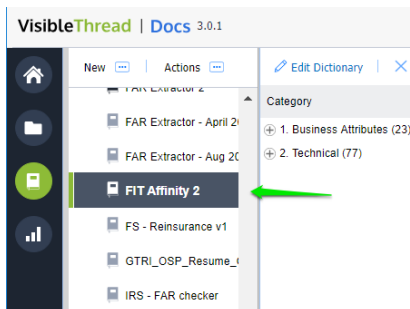
2. Click 'Actions >> Duplicate selected dictionary'.
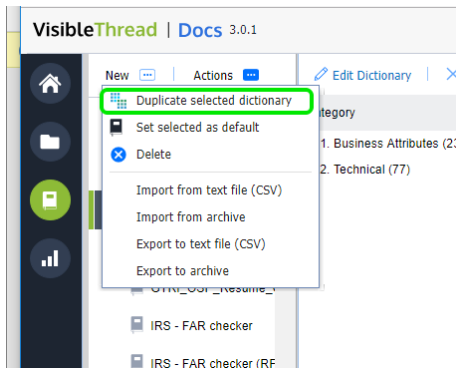
3. Enter the name for your new dictionary.

4. You have the option to duplicate the dictionary into the concept or quality folder.
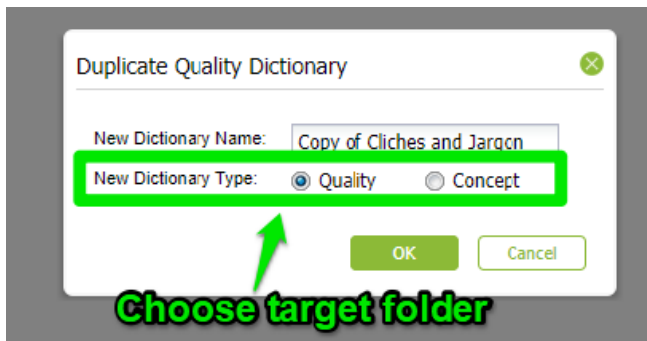
5. Click OK to copy the dictionary.

13.5.7. Deleting a Dictionary

To delete a dictionary, follow these step(s) from the dictionaries accordion:

1.	**Select**	Select the dictionary you want to delete, and either click the "Actions" button or right click. You will see a menu like this, in this case we just right-clicked.

2.	⊗ Delete	Click Delete.
3.	**Prompt**	Clicking this prompts you to confirm the deletion.

Note 1: If you delete a dictionary that is currently in use by a document or folder, you will be prompted with a message telling you which folders and/or documents are currently using it.

If the dictionary is in use, after deletion the folder will use the 'default' dictionary.

Important Note: This action cannot be undone.

13.5.8. Setting a default dictionary

What is a 'default dictionary'?

When you create folders, the folder always has a quality dictionary associated with it.

Once you start uploading documents, you will always see a quality view with that dictionary. This dictionary is called the default. You can easily tell the default dictionary,

since it will have this icon associated with it: 📕 .

You can change the default. This means that any new folders will use that new default.

We ship with several stock quality dictionaries out of the box. One of these is the default.

You can easily set the default to one of your other dictionaries.

Here's how:

Select   Select the dictionary you want to make the new default. Either click the "Actions" button or right-click.

Click 'Set selected as default'.

13.5.9. Exporting / Importing Dictionaries

Sometimes you may want to export or import dictionaries. You can do so using these options under the "Actions" menu.

There are four options available.

Here's the explanation for when you would use each option:

Import from text file (CSV)	This allows you import a CSV (comma separated values) file as a new dictionary. You will be prompted to specify: 4. The location of the file— use the 'Browse' button to locate it 5. The name of the dictionary 6. The dictionary type: either a concept or quality dictionary

Import from archive	This option allows for sharing of dictionaries between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'export to archive' to share from one environment to another. **Important**: Do not modify the content of the underlying XML file, as it may lead to a bad format.

Export to text file (CSV)	This allows you export this dictionary to a CSV (comma separated values) file.
Export to archive	This option allows for sharing dictionaries between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'import from archive' to share from 1 environment to another.

> **Important**: Do not modify the content of the underlying XML file, as it may lead to a bad format.

13.5.10.   Refreshing Quality Analysis view after editing a Quality Dictionary

Once you have finished editing your dictionary, VisibleThread will need to refresh the folder and document(s) to reflect the dictionary changes in the Quality Analysis view.

At the folder level, you will see this screen after editing your dictionary and going back to Quality Analysis. Just click the Refresh button.

Summary	Discovery	Concept Tracking	Structure Analysis	**Quality Analysis**	Readability	Activity	Notes

This view needs to be refreshed

This occurs after a dictionary change. This will only take a few moments.

Refresh

This screen will also appear at the document view in Quality Analysis after any dictionary edits. Again, click the refresh button to re-analyze your document according to the newly modified dictionary.

'.

> **Tip:** For US Government Contractors, many RFP solicitations will contain sections L and M. If you only want to extract requirements for those sections only rather than the full RFP, do this:
>
> 1. Upload the full RFP as a PDF.
>
> 2. Generate the compliance matrix.
>
> 3. Specify the page range to ignore as 1-x, where x is the page prior to section L.

13.6.   Generate a compliance matrix for multiple docs

We have just seen how to shred a single doc. VT Docs also allows you shred multiple docs into one output workbook.

This is useful for these types of scenarios:

1. **Different docs into one output**: Let's say we need to consolidate several different doc shreds into one workbook. For example, shredding a SOW (Statement of Work) and an RFP (Request for Proposal) into one

2. **Same doc shredded in multiple ways**: Sometimes you might use a different search dictionary against the same doc. This is often true when you have different perspectives/roles reviewing the doc.

   In this case upload the doc multiple times and use specific dictionaries against that doc. For example, you might upload an RFP three times. And you might set your dictionaries in this way:

   a. RFP (copy 1) – use a pricing dictionary, with terms like; %, $ dollar etc.

   b. RFP (copy 2) – use a legal dictionary, with terms like; indemnify, warranty etc.

   c. RFP (copy 3) – use a technology oriented dictionary, with terms like; open source, SQL, java etc.

Here's how to shred in both scenarios:

Step

1. Select any document in the navigation pane. Click the 'Create Compliance Matrix…' button. Click "Shred multiple documents in this folder".

2. Next you will see a window where you can select which docs you want to shred. It looks like this:

Check the box against the docs you want to shred. In this case, we've selected 3 docs to shred. Once you hit "Next", you may see a message like this:

This appears when some of the docs use different search dictionaries. Click "Yes" to proceed.

3. You will then see a window like this:

This view has the following options:

- **Would you like a new Excl tab for every shredded file:** check to split output into tabs or uncheck to output all docs contiguously in one sheet.

- **Split by sentence or paragraph:** This affects the granularity of the generated Excel report.

- **New row on dictionary hit:** Checking this option forces the split each time a new term is found.

  This option is often used in conjunction when shredding docs such as POs (Purchase Orders), BOMs (Bill of Materials) or Contracts with FARs (Federal Acquisition Requirements).

It also has 3 advanced options:

- **Ignore Text:** You can omit paragraphs in the generated output that contain certain text. For example, headers and footers with recurring copyright statements.

- **Ignore Pages** (only applies to PDFs): You can also omit certain pages if the document is in PDF format. A typical example of this is where you want to omit a page range prior to or after a certain section. US government contractors frequently ignore everything up to the start of section L in a US Government RFP.

- **Include Macros:** This will add macros to the outputted Excel file, that the user can use to further customize the output. For more information see section 19.5 Excel Output Customization Options.

> **Tip 1:** if your doc is in an MS Word format and you want to omit pages, consider saving it as PDF and shredding the PDF version.
>
> **Tip 2:** Normally when you generate a compliance matrix, you will want to highlight terms such as 'will', 'shall', 'must' etc., so you would expect these terms and others to occur in the dictionary. If the current dictionary is not the best one, just cancel and use a more appropriate dictionary by clicking 'Use different dictionary'.

4. Finally, you will see a single workbook with a tab per file. The output appears like this:

13.7.   Generating a responsibility matrix

When analyzing a contract, managers will often create a "responsibility matrix," also known as a "RACI matrix." This is like the compliance matrix, but instead of only looking for obligations, it can help assign particular responsibilities to specific teams or individuals. It does this by using the categories of the dictionary to automatically populate responsibilities. More on how this works later in this section.

Let's start by showing how to create a responsibility matrix. Follow these steps:

1. Select the document in the navigation pane and click on "Quality Analysis".

2. Assign the correct dictionary (in this case, a contract-focused dictionary) by clicking "Use Different Dictionary":
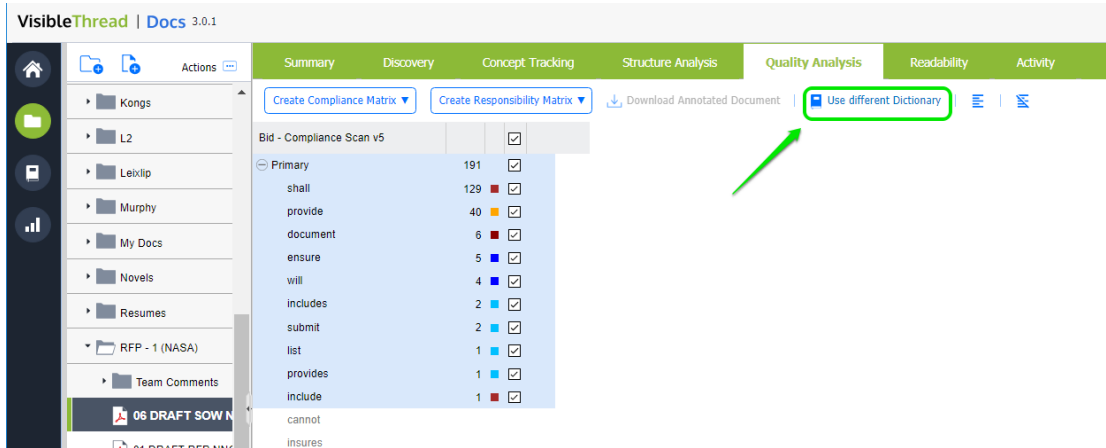
3. Select the dictionary you want to use. Here, we'll choose the "Contract Kickoff V1" dictionary and click "Set Dictionary":
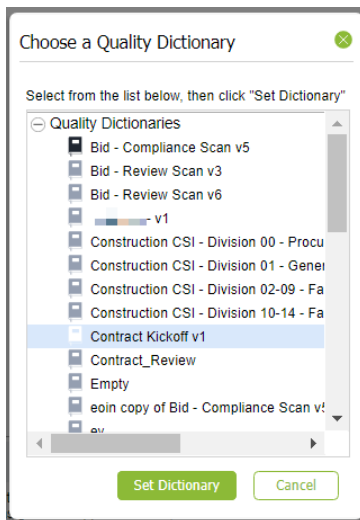
4. The Quality Analysis view will now be populated by the "Contract Kickoff V1" dictionary.

5. Next, click "Create Responsibility Matrix".

6. Like with the compliance matrix, you have the option to exclude text or pages from your responsibility matrix. Clicking "Generate Matrix" in this window will export the matrix to your computer in Excel format.

How to split the output?

Create Responsibility Matrix

We will use this dictionary **FAR (52) DFAR (252) - Care - Dont Care**
To use a different dictionary hit "Cancel", then click "Use different dictionary"

Output format

Split text by ⍰   ⦿ Sentence
                   ○ Paragraph

New row on dictionary hit ⍰   ☐

Content to Omit or Include in the shred

Advanced Options

Ignore Text ⍰   e.g. APPENDIX, COPYRIGHT

Ignore Pages ⍰   e.g. 1,2,3-6,78,79

Would you like to inlcude macros?

Macros

Include Macros to customize ⍰   ☐
output

Generate Matrix   Cancel

This view has the following options:

- **Split by sentence or paragraph:** This affects the granularity of the generated Excel report.

- **New row on dictionary hit:** Checking this option forces the split each time a new term is found.

  This is often used in conjunction when shredding docs such as POs (Purchase Orders), BOMs (Bill of Materials) or Contracts with FARs (Federal Acquisition Requirements).

It also has 3 advanced options:

- **Ignore Text:** You can omit paragraphs in the generated output that contain certain text. For example, headers and footers with recurring copyright statements.

- **Ignore Pages** (only applies to PDFs): You can also omit certain pages if the document is in PDF format. A typical example of this is where you want to omit a page range prior to or after a certain section. US government contractors frequently ignore everything up to the start of section L in a US Government RFP.

- **Include Macros:** This will add macros to the outputted Excel file, that the user can use to further customize the output. For more information see section 19.5 Excel Output Customization Options.

Tip 1: if your doc is in an MS Word format and you want to omit pages, consider saving it as PDF and shredding the PDF version.

Tip 2: Normally when you generate a compliance matrix, you will want to highlight terms such as 'will', 'shall', 'must' etc., so you would expect these terms and others to occur in the dictionary. If the current dictionary is not the best one, just cancel and use a more appropriate dictionary by clicking 'Use different dictionary'.

7.   Open the Excel file saved to your computer, and you'll see a report that looks like this:

How are the columns created?

- In the responsibility matrix, the dictionary categories drive the columns.

- In the above example, the 9 columns I thru Q were automatically created because the dictionary contains those categories.

- The "X" indicates a sentence or paragraph where a term in that category appears. For example, row 107 below has text that contains the word "Comply". As "Comply" is under the Compliance category, the report shows an X in column K labelled "Compliance". The remaining Xs in the matrix follow the same idea.

13.8.   Generate a responsibility matrix for multiple docs

We have just seen how to create a matrix for one doc. VT Docs also allows you shred multiple docs into one output responsibility matrix workbook.

This is useful for these types of scenarios:

1. **Different docs into one output**: Let's say we need to consolidate several different doc shreds into one workbook. For example, shredding a SOW (Statement of Work) and an RFP (Request for Proposal) into one.

2. **Same doc shredded in multiple ways**: Sometimes you might use a different search dictionary against the same doc. This is often true when you have different perspectives/roles reviewing the doc.

    In this case upload the doc multiple times and use specific dictionaries against that doc. For example, you might upload an RFP three times. And you might set your dictionaries in this way:

    a.   RFP (copy 1) – use a pricing dictionary, with terms like; %, $ dollar etc.

    b.   RFP (copy 2) – use a legal dictionary, with terms like; indemnify, warranty etc.

    c.   RFP (copy 3) – use a technology oriented dictionary, with terms like; open source, SQL, java etc.

Here's how to shred in both scenarios:

Step

1. Select any document in the navigation pane. Click the 'Create Responsibility Matrix…' button. Click "Create matrix for multiple docs".

2. Next you will see a window where you can select which docs you want to shred. It looks like this:

Check the box against the docs you want to shred. In this case, we've selected 3 docs to shred. Once you hit "Next", you may see a message like this:

This appears when some of the docs use different search dictionaries. Click "Yes" to proceed.

3. You will then see a window like this:

This view has the following options:

- **Would you like a new Excl tab for every shredded file:** check to split output into tabs or uncheck to output all docs contiguously in one sheet.

- **Split by sentence or paragraph:** This affects the granularity of the generated Excel report.

- **New row on dictionary hit:** Checking this option forces the split each time a new term is found.

    This option is often used in conjunction when shredding docs such as POs (Purchase Orders), BOMs (Bill of Materials) or Contracts with FARs (Federal Acquisition Requirements).

It also has 3 advanced options:

- **Ignore Text:** You can omit paragraphs in the generated output that contain certain text. For example, headers and footers with recurring copyright statements.

- **Ignore Pages** (only applies to PDFs): You can also omit certain pages if the document is in PDF format. A typical example of this is where you want to omit a page range prior to or after a certain section. US government contractors frequently ignore everything up to the start of section L in a US Government RFP.

- **Include Macros:** This will add macros to the outputted Excel file, that the user can use to further customize the output. For more information see section 19.5 Excel Output Customization Options.

Tip 1: if your doc is in an MS Word format and you want to omit pages, consider saving it as PDF and shredding the PDF version.

Tip 2: Normally when you generate a compliance matrix, you will want to highlight terms such as 'will', 'shall', 'must' etc., so you would expect these terms and others to occur in the dictionary. If the current dictionary is not the best one, just cancel and use a more appropriate dictionary by clicking 'Use different dictionary'.

---

4. Finally, you will see a single workbook with a tab per file. The output appears like this:

13.9.   Exporting to Excel

The data can also be exported to Excel in different ways.

The first option, "Export top grid (CSV)", will generate a ".csv" file (which will open in Excel) that contains the raw data from the top pane. It will contain the terms from the Quality Dictionary and the number of occurrences. The CSV file will look like this:

◢	A	B	C
1	Category	# Occurences	
2	5. Program Management	859	
3	5. Program Management / Annual	47	
4	5. Program Management / Annually	4	
5	5. Program Management / Attend	0	
6	5. Program Management / Communicate	2	
7	5. Program Management / Communication	7	
8	5. Program Management / Deliver	11	
9	5. Program Management / Deliverables	9	
10	5. Program Management / Documentation	14	
11	5. Program Management / Email	6	
12	5. Program Management / Immediate	5	
13	5. Program Management / Immediately	11	
14	5. Program Management / Issue	9	
15	5. Program Management / Issues	7	
16	5. Program Management / Meeting	14	
17	5. Program Management / Monthly	25	
18	5. Program Management / Notice	47	
19	5. Program Management / Notify	20	
20	5. Program Management / Performance	240	
21	5. Program Management / Performance Requirement	0	
22	5. Program Management / Problem	0	
23	5. Program Management / Problems	13	
24	5. Program Management / Quality	17	

Figure 53 - CSV Export from Quality

The second option in the "Export" drop-down is "Export bottom grid (CSV)". This will generate a CSV file of the data in the lower pane.

The last option under the "Export" drop-down is "Export bottom grid (Excel)".
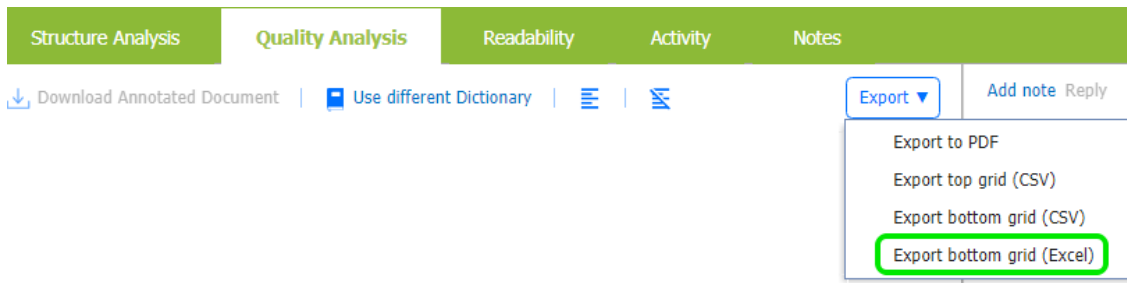
Figure 54 - Export bottom grid to Excel

This provides a richer output and set of output report format options. As with the previous CSV export, at least one Concept Dictionary term must be selected to enable this option. The Excel file will contain each sentence or paragraph where the selected dictionary keyword(s) appear.

Clicking this will show a screen like this:

Figure 55 - Format options for Export

This view has the following options:

- **Split by sentence or paragraph:** This affects the granularity of the generated Excel report.

- **New row on dictionary hit:** Checking this option forces the split each time a new term is found.

    This is often used in conjunction when shredding docs such as POs (Purchase Orders), BOMs (Bill of Materials) or Contracts with FARs (Federal Acquisition Requirements).

- **Include macros to customize output:** This will add macros to the outputted Excel file, that the user can use to further customize the output. For more information see section 19.5 Excel Output Customization Options

- **Export all content OR Export only matching paragraphs**: This allows you to export either the full content of the document with the matches highlighted, or only the paragraphs/sentences where you have a match.

    If you select "Export all content", the full content of the document will be shredded and placed in Excel format. The matches will be bold and highlighted in red, with the surrounding text turned black. Sections where no matches appear will be grey:

Figure 56 - Export with all content

If you select "Export only matching paragraphs", you will create an Excel file that only contains content from the document where a match was found. In contrast to the previous output, there will be no grey sections:

Figure 57 - Export only matching paragraphs

13.10. Downloading Annotated Documents

The final export option allows you to download an annotated version of an uploaded Word file in ".docx" format. This annotated document is an exact copy of your uploaded document, with the terms flagged using MS Word comments within the document.

This allows you to make changes to your document directly within Word.

This is useful if you are editing content for any type of document. For instance you might want to identify risk terms, and need to review and possibly scrub them directly within the document.

Note: This feature is only available for ".docx" files. If your file has a different format, this option is disabled.

Click "Download Annotated Document, and the system will create an MS Word document.
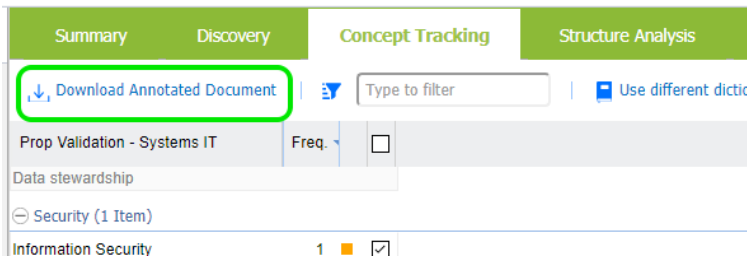
Figure 58 - Download annotated doc option

You'll see the Quality Dictionary keywords highlighted, with the term descriptions (if available) provided as comments.

> **NOTE:** Leaving all boxes unchecked in the Quality Analysis view and clicking "Download Annotated Document" will generate the annotated document with all dictionary matches included.
>
> If one or more specific boxes are checked, the annotated document export will only flag the selected dictionary terms.

13.11.   Quality Analysis at Folder Level

Quality Analysis at the folder level shows an overview of the documents, dictionary used and **search terms and occurrences**. It's a useful way to get an overview snapshot.

Figure 59 - Quality Analysis at Folder level

This view contains these columns:

Folder / Document / Quality	This shows the folder, document, or Quality Category.
Quality Scan	This is the Quality Dictionary currently in use.
Size	This represents the size of the document in terms of words within headings.

# Hits	This shows the number of dictionary terms found. At the document and category level, this is a roll-up value, calculated by summing the number of occurrences found below.

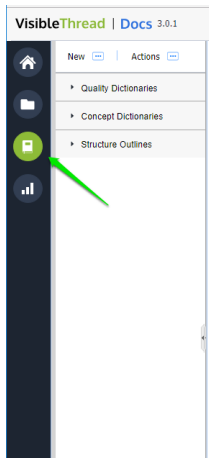### 13.12.   Managing Quality Dictionaries (Create New, Edit, Copy etc.)

Note: Permissions. Only users with dictionary permissions can create, modify or delete Dictionaries. If you do not have dictionary rights and you attempt to modify dictionaries, you will get this message.

If you need to customize / edit dictionaries, contact your VisibleThread administrator who can grant you dictionary rights.

We use dictionaries to find terms or phrases across a folder of documents in the Quality Analysis view, but where are the dictionaries defined? How do you modify them?

To see the list of dictionaries, click 'Dictionaries' in the sidebar.

You will see three types of items: Quality Dictionaries, Concept Dictionaries, and Structure Outlines.

To see the full list of quality dictionaries in your environment, click the "Quality Dictionaries" entry.

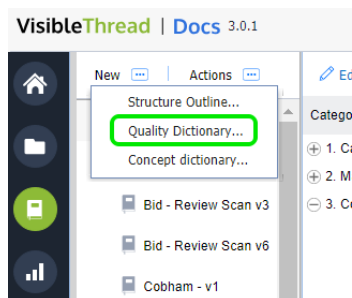Then, select a specific dictionary to see what it contains.

Figure 60 - Exploring a Quality Dictionary with Categories and Terms

Next, let's see how we can create new quality dictionaries. Later, we will show you how to edit the quality terms in a specific dictionary.

13.12.1.   How to create a new Dictionary

Step
4. Click the 'New >> Quality dictionary…' button.

5. Next, enter the name for your new dictionary and click 'OK'.

6. Now you will see an empty dictionary, ready for editing.

You're now ready to edit the dictionary.

13.12.2.   Customizing / Editing Dictionaries

There are two primary ways to customize dictionaries. These are:

3.   Using the **VisibleThread dictionary editor**

4.   **Bulk import from CSV** (Comma Separated Value) formatted text files.

You will tend to use bulk import when you have quite a few dictionary items, and you want to set them up quickly.

We'll explain these two approaches in the next sections.

13.12.3.   Customizing - using the VisibleThread dictionary Editor

Once you select a specific quality dictionary, the right-hand side view shows the dictionary details.

Figure 61 - Dictionary Editor

If the dictionary already has categories and terms, you'll see something like this:

Figure 62 – Quality List with specific list showing terms on right

Let's explain the right-hand view, and then we'll explain how to edit.

Quality dictionaries consist of **categories** and **search terms**. Categories are logical groups. Terms are the search terms or phrases you're searching for.

For instance, the above screen shows a category called "Section M – Critical Items" containing 10 terms to search for. This user is a US government contractor using quality to search for pre-defined solicitation terms that qualify the pursuit. They are scanning documentation to ensure adequate coverage of critical items. These reports impact their bid/no-bid and teaming decisions.

When you click a category or term, the category or term attributes are shown in the bottom 'detail' pane. The category detail includes:

- **Name** – name of the category

- **Description** – the description of that category

The standard mode of the dictionary editor is 'read-only'. This means that are initially disabled (indicated by grey button text).

To start editing, click the 'Edit dictionary' button on the toolbar immediately above the detail area.

Figure 63 - Edit dictionary option

This then enables the other buttons and allows you to edit.

Figure 64 - Options enabled once in edit mode

Here's how you add categories and terms:

New category	This allows you create a new category. Clicking this prompts you for a name and optional description. Once you click 'OK', the system creates a new category with the name entered.
New term	This allows you create a new quality term. The quality term will be added to the currently selected category. When you click this, the system shows a screen like this:

Enter the quality term name and an optional description.

The description will surface later in generated reports so, often is useful as guidance text explaining the significance of the term.

Note – there is also an option to "Match words beginning with" for terms. This supports partial word matching. For example, if you enter the term "CM", checking this option will match "CM" "CMM" and "CMMi" or any other variation starting with "CM". This is also useful when looking for singular and plurals. For example, with this box checked, "customer" will match "customer" and "customers".

Once you click 'OK', the system creates a new quality term.

⊗ **Delete**   This deletes the selected category or selected term.

Other options available on the toolbar are:

✕ Cancel edit	**Cancel Edit**	
	After making changes, you may want to cancel them. Click this to discard any changes made since the last save. The prior version of the dictionary will be restored.	
💾 Save	**Save**	
	This saves any changes made to the Dictionary. Clicking this will also prompt you to confirm the save.	
≦	**Collapse**	
	This collapses all rows.	
≡	**Expand**	
	This expands all rows.	

Tip: You can use drag & drop to move items up or down or into other areas. Position your mouse pointer over the Text area of the node you want to move and drag it to the desired location.

13.12.4.   Modifying a Category or Term

You may want to edit the detail for a category or term previously defined. Let's say you want to change the term "community" to "commun" and make it a broad match. By making it a broad match, this will then pick up "community", "communities" etc.

Tip: Make sure you are in Edit mode when modifying terms. Click the 'Edit dictionary' button.

Just follow these steps:

Select the Term   Click the term, so for example in this case we want to edit 'community':

Edit the detail   In the bottom of the screen you will see the term details:

Concept

Match words beginning with: ☑

Name: commun

Description:

Next, change the text in the name to "commun" and check the box 'Match words beginning with'.

If you want to specify a description, enter it here. The description will surface later in generated reports. This will serve as useful guidance text explaining the significance of the term.

The exact same process applies to category edits.

13.12.5.   Customizing – using bulk Import from CSV

In cases where you have multiple terms or phrases, it is often easier to bulk import them into a dictionary, using CSV (Comma Separated Values) import. The easiest way to do this is by editing the file in Excel (or any text editor) and saving as a CSV formatted file from Excel.

To perform an import, follow the steps below.

Step

9. Open Excel with a blank sheet:
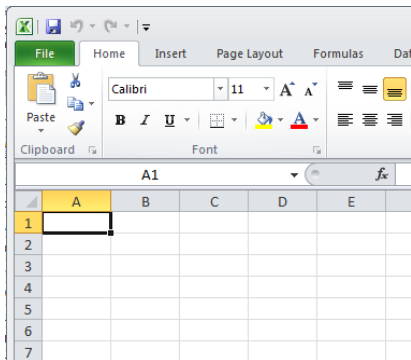
10 Next, enter the terms you want to import. The format is simple. Each column maps to the dictionary in this way:

-    Column A maps to the category, so in the screen below, you can see 2 categories; 1. Technical and 2. Business

-    Column B maps to the term. You can see the terms below: CMM, ISO etc.

-    Column C is the description.
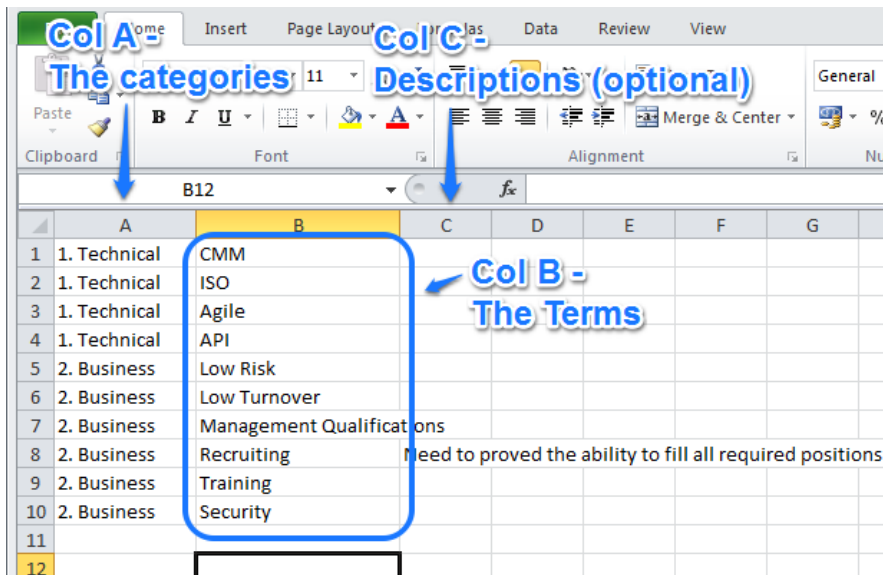
Some notes on import logic:

k) If the term already exists in the dictionary, it will be skipped on import.

l) You can leave column A empty, in which case the term will go into a 'Default Category' that the importer will create.

m) If the category already exists in your dictionary, the term will be added to that category.

n) If the category does not exist, it is created automatically.

o) Finally, the description field is optional.

11 When you're ready in Excel, click 'Save As'.
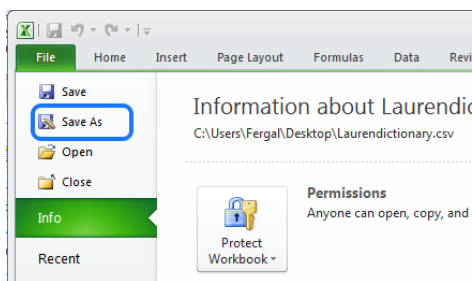
NOTE 1: Some versions of Excel may present the 'Save As' option differently.

NOTE 2: The 'Import from CSV' and 'Export to CSV' functions will preserve the 'Match words beginning with' option. If you export, you will see an "*" character to the right of the term. To set the option no an import, just add an "*" to the term.

NOTE 3: If you want to back up dictionaries (perhaps because you're moving to a new environment), use the 'Export as Archive' capability. This will preserve the 'Match words beginning with' attribute and will restore it correctly. For more, see section '11.9.9 Exporting / Importing Dictionaries'.

12 Name your file and save as a CSV format to a location you'll remember: your desktop, for example.
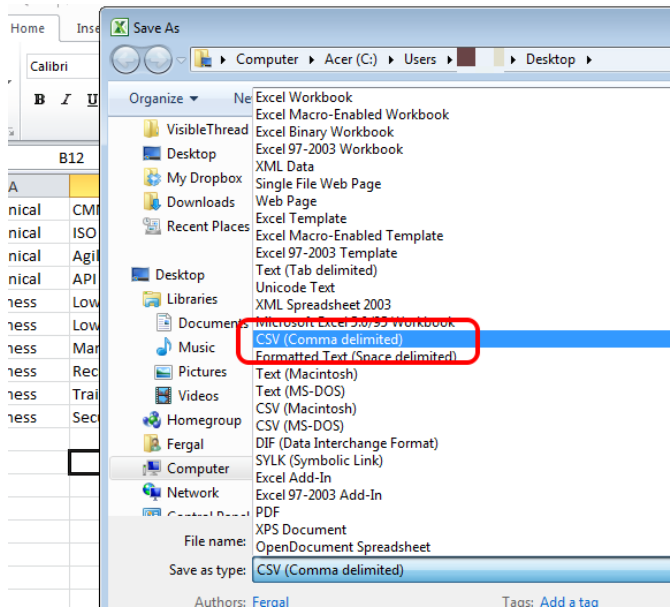
NOTE: Be sure to select the right CSV format in Excel. It's the one mid-way down the available list.

13 Once you hit save, Excel will prompt you with a message similar to the below. Sometimes there may be more than one message. Go ahead and click 'Yes'.
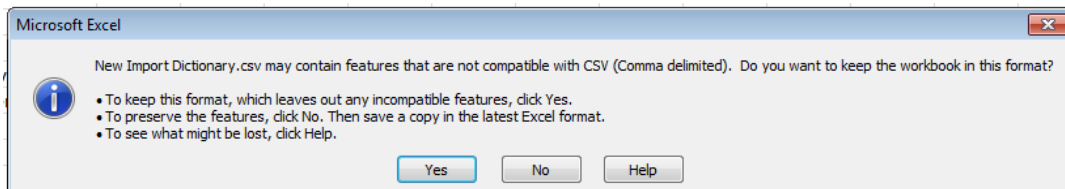
14 Next, we want to import the CSV file.

Select your dictionary and click the '**Import terms from text file (CSV)**' option to the right.
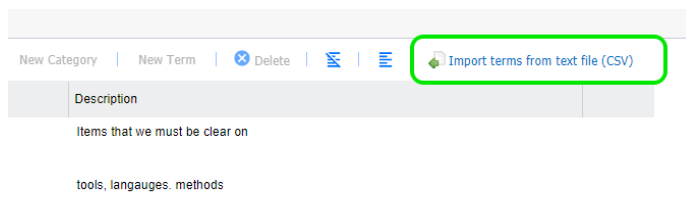
15 You will see a screen like this:
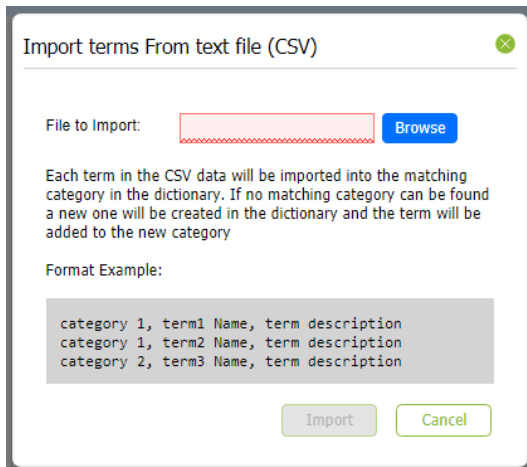
Click the 'Browse' button, select the CSV file you created a moment ago, and click 'Import'.

16 Once finished, you will see the contents of the CSV file in the dictionary. Using the dictionary example from step #2 above, it will look like this after the import:
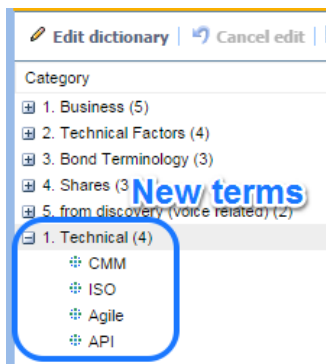
13.12.6.   Copying Dictionaries

If you have existing dictionaries, it's very easy to copy them. Just follow these steps:

Step
6.   Select the dictionary you want to copy. In this case, we select 'FIT Affinity 2'.
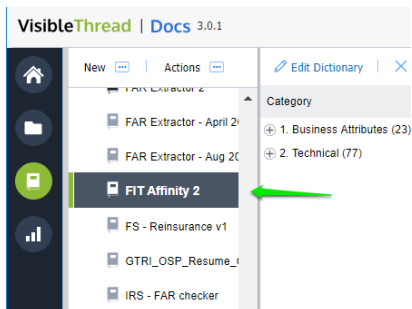
7.   Click 'Actions >> Duplicate selected dictionary'.
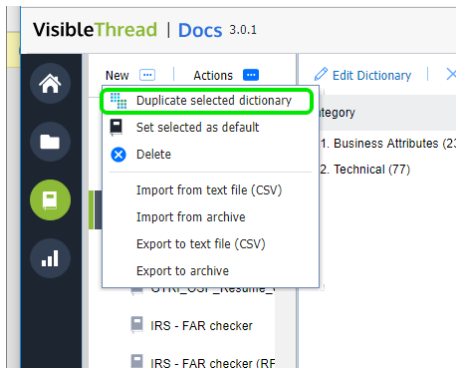
8. Enter the name for your new dictionary.

9. You have the option to duplicate the dictionary into the concept or quality folder.
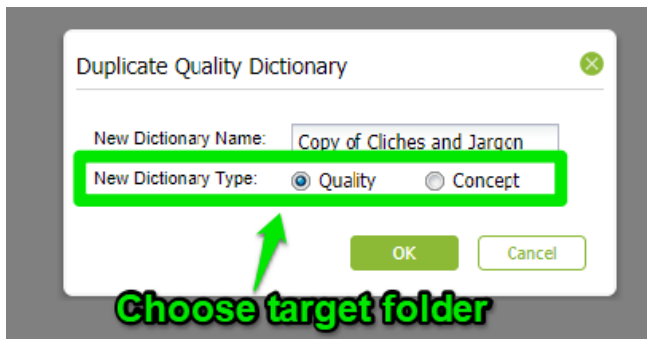
10 Click OK to copy the dictionary.

13.12.7.   Deleting a Dictionary

To delete a dictionary, follow these step(s) from the dictionaries accordion:

4.   Select   Select the dictionary you want to delete, and either click the "Actions" button or right click. You will see a menu like this, in this case we just right-clicked.
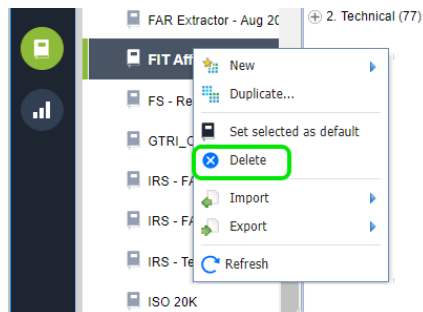
5. ✖ Delete   Click Delete.

6.   Prompt   Clicking this prompts you to confirm the deletion.

Note 1: If you delete a dictionary that is currently in use by a document or folder, you will be prompted with a message telling you which folders and/or documents are currently using it.

If the dictionary is in use, after deletion the folder will use the 'default' dictionary.

Important Note: This action cannot be undone.

13.12.8.   Setting a default dictionary

What is a 'default dictionary'?

When you create folders, the folder always has a quality dictionary associated with it.

Once you start uploading documents, you will always see a quality view with that dictionary. This dictionary is called the default. You can easily tell the default dictionary,

since it will have this icon associated with it: 🔖.

You can change the default. This means that any new folders will use that new default.

We ship with several stock quality dictionaries out of the box. One of these is the default.

You can easily set the default to one of your other dictionaries.

Here's how:

Select	Select the dictionary you want to make the new default. Either click the "Actions" button or right-click.

🔖   Click 'Set selected as default'.

13.12.9.   Exporting / Importing Dictionaries

Sometimes you may want to export or import dictionaries. You can do so using these options under the "Actions" menu.

There are four options available.

Here's the explanation for when you would use each option:

Import from text file (CSV)	This allows you import a CSV (comma separated values) file as a new dictionary. You will be prompted to specify: 7. The location of the file— use the 'Browse' button to locate it 8. The name of the dictionary 9. The dictionary type: either a concept or quality dictionary

Import from archive	This option allows for sharing of dictionaries between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'export to archive' to share from one environment to another. **Important**: Do not modify the content of the underlying XML file, as it may lead to a bad format.

Export to text file (CSV)	This allows you export this dictionary to a CSV (comma separated values) file.
Export to archive	This option allows for sharing dictionaries between VisibleThread sandbox environments. The underlying format is a proprietary XML structure. Use this in conjunction with 'import from archive' to share from 1 environment to another.

> **Important**: Do not modify the content of the underlying XML file, as it may lead to a bad format.

13.12.10.   Refreshing Quality Analysis view after editing a Quality Dictionary

Once you have finished editing your dictionary, VisibleThread will need to refresh the folder and document(s) to reflect the dictionary changes in the Quality Analysis view.

At the folder level, you will see this screen after editing your dictionary and going back to Quality Analysis. Just click the Refresh button.

Summary	Discovery	Concept Tracking	Structure Analysis	**Quality Analysis**	Readability	Activity	Notes

This view needs to be refreshed

This occurs after a dictionary change. This will only take a few moments.

Refresh

This screen will also appear at the document view in Quality Analysis after any dictionary edits. Again, click the refresh button to re-analyze your document according to the newly modified dictionary.

14. Readability

Anything that makes text more difficult to understand hinders communication. This includes long, run-on sentences, passive voice, over use of jargon etc. Complex language puts a greater cognitive burden on your readers.

Readability analysis provides an instant clarity report for any document or collection of documents.

14.1.   The Readability View at Folder Level

The folder level Readability tab is a great way to see language statistics across multiple documents.

Use it to compare and focus on difficult copy. If your folder contains documents authored by different writers with different styles, it helps to identify style anomalies.
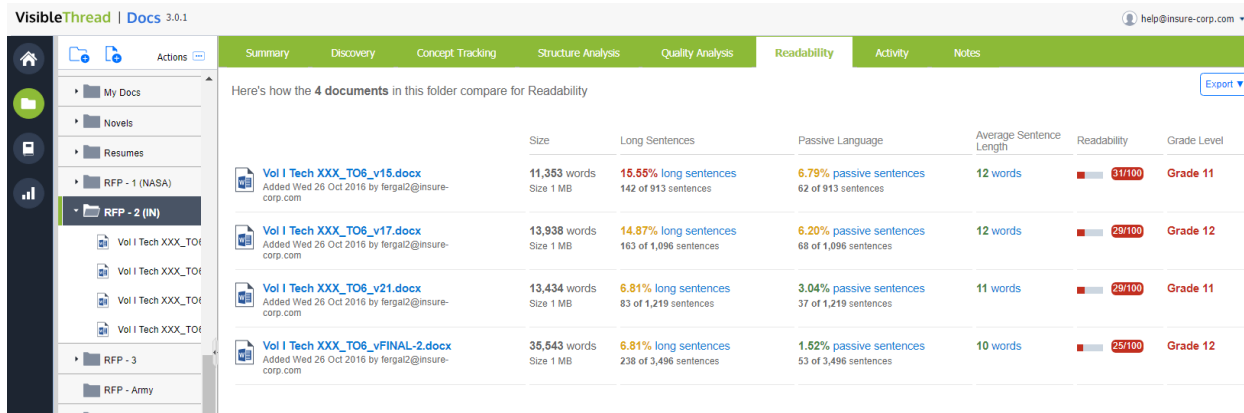
Figure 65 - Four documents with readability metrics - evolving over time

You can export this view to a PDF report by clicking on the "Export" button at the top right of the pane. The PDF report will then be saved to your downloads folder.
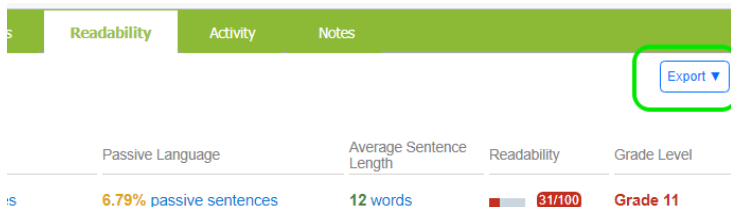
Figure 66 - Folder level readability export option

This report contains all the scores and metrics.
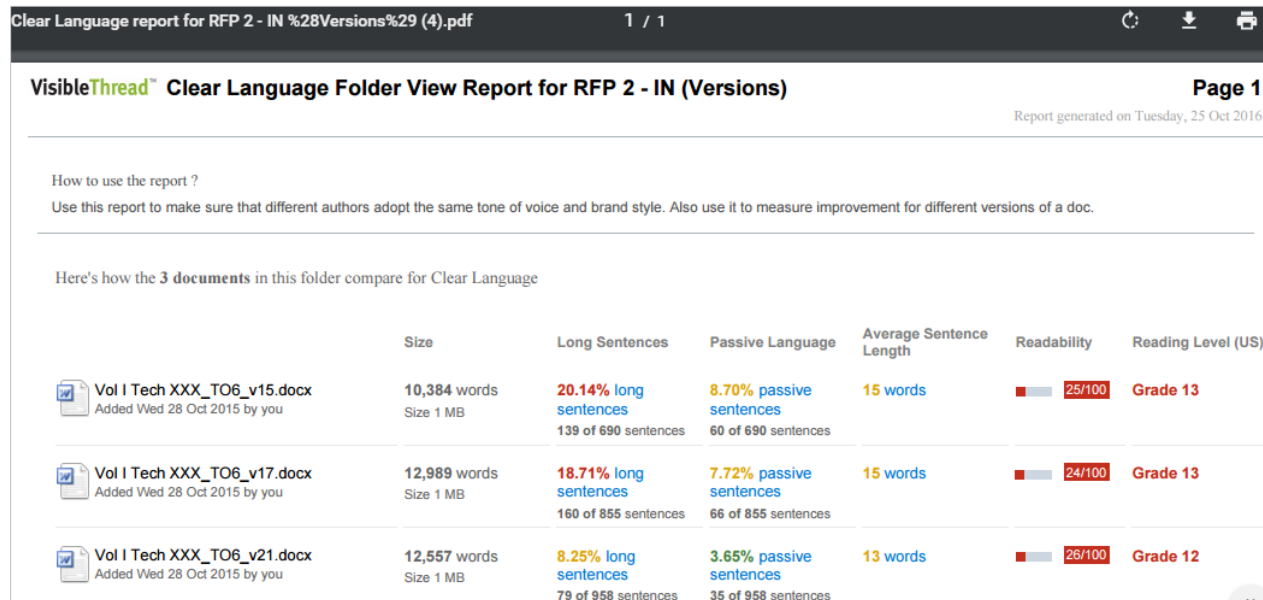
Figure 67 - Readability folder level PDF report

This table explains each Clear Language metric:

Metric	Formula

1. Readability (Flesch Reading Ease)

Readability ranges from 0 to 100. 100 is the top mark. If communicating with citizens, aim for at least 50.

This is based on the Flesch Reading Ease index.

You can interpret scores based on this table.

Score   Notes

- 90.0–100.0, easily understood by an average 11-year-old student
- 60.0–70.0, easily understood by 13 to 15-year-old students
- 0.0–30.0, best understood by university graduates

See here for more detail on Flesch scoring: http://en.wikipedia.org/wiki/Flesch%E2%80%93Kincaid_readability_tests#Flesch_Reading_Ease

(206.835 – (1.015 x Average Sentence Length) – (84.6 x Average Syllables per Word))

2. US Grade Level

This is the level of education your reader needs to have to comfortably understand the copy.

Tip: For non-US readers, add 5 years to the grade level as a rough guide to the age a person must be in education until. For example, if you see grade 18, then a person must have been in full time education till age 23. This would roughly equate to a primary degree followed by a masters level education in the UK and elsewhere.

See here for more detail on Flesch scoring: http://en.wikipedia.org/wiki/Flesch%E2%80%93Kincaid_readability_tests#Flesch_Reading_Ease

Uses the Flesch-Kincaid Grade level algorithm

3. Long Sentences

The % rating is the proportion of sentences that are long. Long sentences are greater than 25 words. Long sentences mask multiple concepts. Splitting them results in a clearer, easier to digest message. Multi-clause sentences can also hide valuable detail.

(Long Sentences / Total Sentences * 100)

4. Average Sentence Length

The average sentence length expressed as number of words. While occasional long sentences are fine, a high number here indicates overall tone is too complex for accessible text.

(Number of words / Number of Sentences)

5. Passive Voice

You have a passive construct when the verb acts on the noun.

(Passive Sentences / Total Sentences * 100)

This is passive: "The meeting was held". This is active: 'We held the meeting'. Active voice distinguishes the actor and generally makes the text more understandable.

The document level view shows a more detailed report, pinpointing the content flagged. We'll cover that in the next section.

14.2.   The Readability View at Document Level

As you drill down to the document level, the Readability view shows a detailed breakout of content for that document. It looks like this:
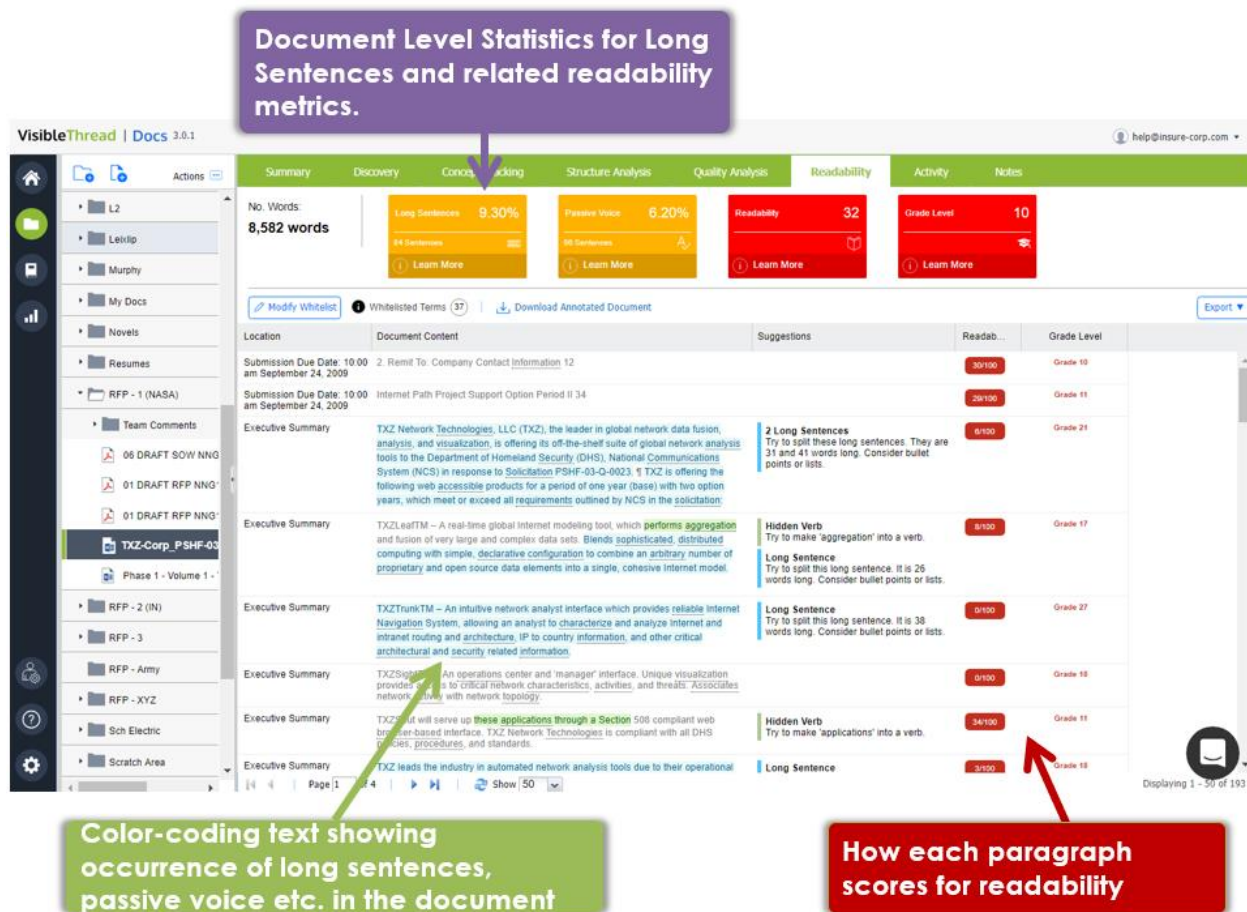
Figure 68 - An example document level Readability analysis

The dominant part of the view shows content extracts for long sentences, passive voice and hidden verbs, and each paragraphs readability score. These extracts are cross referenced by heading for MS Word documents or page number for PDF documents.

The top area shows overall statistics for the document. In addition to the metrics already explained, this view also flags nominalizations (sometimes called hidden verbs).

When you use a verb in noun form, it is called a 'hidden verb' or nominalization. For example: "Please make an **application**" vs. "Please apply"

The hidden verb is contained in the noun 'application'. It hides the verb 'apply'. Reducing hidden verbs makes copy clearer and reduces word count.

14.3.   Exporting the Readability report

In many cases you may want to share Clear Language reports with colleagues or other third parties. You can export the report in two ways: "Export to PDF" generates a PDF file of your Readability Report, "Export to Excel Report" exports the report to an Excel spreadsheet.

You can find the export options here:
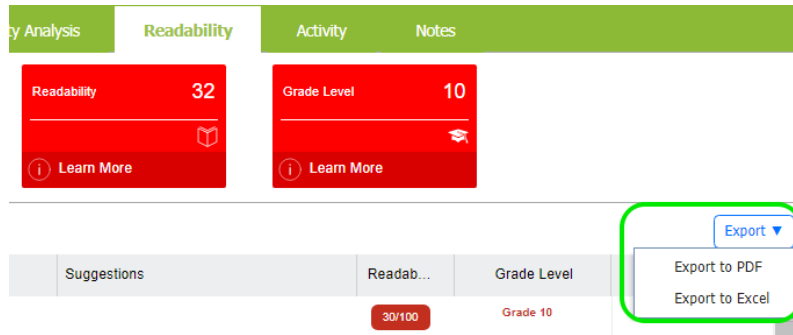
Figure 69 - Readability export options

Clicking this button will download the report to your downloads folder.

The PDF report will look like this:

Figure 70 - Readability PDF report

The Excel report will look like this:

Ms Word Heading	Category	Doc Content	Readability	Grade Level	Suggestions	
VisibleThread Generated on 8 May 2018 15:03	Number of Long Sentences: 81 (8.97%) Number of Passive Sentences: 56 (6.20%) Readability: 29. Grade Level: 11.					
Executive Summary	Hidden Verb Long Sentence	TXZLeafTM – A real-time global Internet modeling tool, which performs aggregation and fusion of very large and complex data sets. Blends sophisticated, distributed computing with simple, declarative configuration to combine an arbitrary number of proprietary and open source data elements into a single, cohesive Internet model.	8/100	Grade 17	Try to make 'aggregation' into a verb. Try to split this long sentence. It is 26 words long. Consider bullet points or lists.	
Executive Summary	Long Sentence	TXZTrunkTM – An intuitive network analyst interface which provides reliable Internet Navigation System, allowing an analyst to characterize and analyze Internet and intranet routing and architecture, IP to country information, and other critical architectural and security related information.	0/100	Grade 27	Try to split this long sentence. It is 38 words long. Consider bullet points or lists.	
Executive Summary	Hidden Verb	TXZSout will serve up these applications through a Section 508 compliant web browser-based interface. TXZ Network Technologies is compliant with all DHS policies, procedures, and standards.	34/100	Grade 11	Try to make 'applications' into a verb.	
Executive Summary	Long Sentence	TXZ leads the industry in automated network analysis tools due to their operational experience as network analysts and their focus on providing a useable and effective analytic suite. TXZ's complete solution includes operational experience, a commercial-off-the-shelf-product, a flexible platform, and a usable suite of software tools.	3/100	Grade 18	Try to split this long sentence. It is 28 words long. Consider bullet points or lists.	
Executive Summary	Hidden Verb	Their knowledge of network protocols is critical to development of such products. In fact, in order to develop the product they have to first be able to perform the analysis. Therefore they are also available to provide analytic support to advise on the best and most appropriate data sources to use for the mission.	45/100	Grade 11	Try to make 'development' into a verb.	
Executive Summary	Passive Long Sentence	TXZ developers have spent years re-engineering and automating the network analysis process and have built a product that reduces the time spent in characterizing networks from weeks to seconds. TXZTrunk combines router protocol, trace route, and geo-location data with proprietary information to overlay network logical topology to identify major routes of interest. Additional opportunities and capabilities relate to	2/100	Grade 18	Try to rephrase 'conducted' using active voice. Is it clear who performs this action? Try to split this long sentence. It is 29 words long.	

Readability | Long Words

Ready   80%

Figure 71 - Readability Excel report

14.4.   Downloading Annotated Documents

The final export option allows you to download an annotated version of an uploaded Word file in ".docx" format. This annotated document is an exact copy of your uploaded document, with the readability issues flagged using MS Word comments within the document.

This allows you to make changes to your document directly within Word.

This is useful if you are editing content for any type of document. For instance, you might want to identify complex language.

Note: The "Download Annotated Document" export option is only available for Word docs using the ".docx" file extension. If you have an older Word file (".doc"), open the document in Word and save it as a ".docx" file. Then upload this new version to your VisibleThread environment.

For files that do not have the ".docx" extension, the "Download Annotated Document" button will be disabled:

Figure 72 - Disabled Download Annotated Document option

After clicking any of the three export options, the following window will appear, allowing you to customize your report by including or excluding the four Clear Language issues. This can be helpful if, for example, your document contains a large amount of complicated technical language and you want to exclude Long Words from the report.

Note: This will not change the overall scores; it will only exclude them from being flagged in the exported report.

After selecting the appropriate options, click "Generate Report."

Figure 73 - Readability report options

And the Word "Annotated Document" report will look like this:

Figure 74 - Generated MS Word doc with annotations as comments

In the Annotated Word doc export, as seen above, the suggested changes are inserted as comments into an identical copy of your original document. This allows you make changes directly within the document report.

14.5.   Readability Whitelisting

Readability Whitelisting allows you exclude certain phrases from the Readability and Grade Level calculations. Let's assume you are an organization operating in a technical domain, you might have complex phrases that you must use.

For example, let's say you need to use the phrase 'electromagnetic conduction'. Or perhaps your brand name is a complex multi-syllable word. Since Readability calculations are based on average syllable per word as one of two major factors, then using these terms may skew your results negatively.

Here's another example; let's say the name of your organization has lots of syllables in it (which will skew the readability scores). For example; the 'Department of Immigration and Naturalization'. If you whitelist that full phrase, then 'Immigration' does not count as 4 syllables and 'Naturalization' does not count as 6 syllables. Instead, if you whitelist these phrases, we will count each word as 2 syllables only.

The net effect is that if you have a lot of heavily tech content, without whitelisting, your readability scores will tend to skew negatively. Whitelisting neutralizes that, allowing you focus on the areas where you can simplify.

Figure 75 - Readability whitelisting options

14.5.1. How to modify the whitelist?

Just click the "Modify Whitelist" button. The system will show the current whitelist. It will look a little like this:

Figure 76 - Modifying the whitelist

You can add and remove items from the list. Or if you already have a list and want to modify the whitelist in bulk, you can import using content from a CSV formatted file.

Note: Permissions. Only users with 'Settings' permissions can modify the whitelist. If you do not have settings privileges and you open the whitelist settings dialogs you will be presented with a Read-Only version of the dialog box.

Tip: If you find it easier to work in Excel, just export the current whitelist and make changes in Excel. Then re-import the revised whitelist as a CSV formatted file.

Where is the whitelist maintained?

We manage the whitelist at the environment level (i.e. at sandbox level). This means that the same whitelist applies to all folders in your environment.

14.5.2. What happens when you make changes to the whitelist?

If you edit the whitelist, you will need to re-analyze all folders. You will see this message when you select the 'Readability' tab:

Figure 77 - Re-analyze option, when whitelist has changed

Re-analysis will be very fast.

15. Reports - Summary report

The summary report shows all folders and files in your environment. It also shows the statistics for each doc and folder. This is a useful view to compare how certain docs are from a clear language or quality/comcept hits perspective.
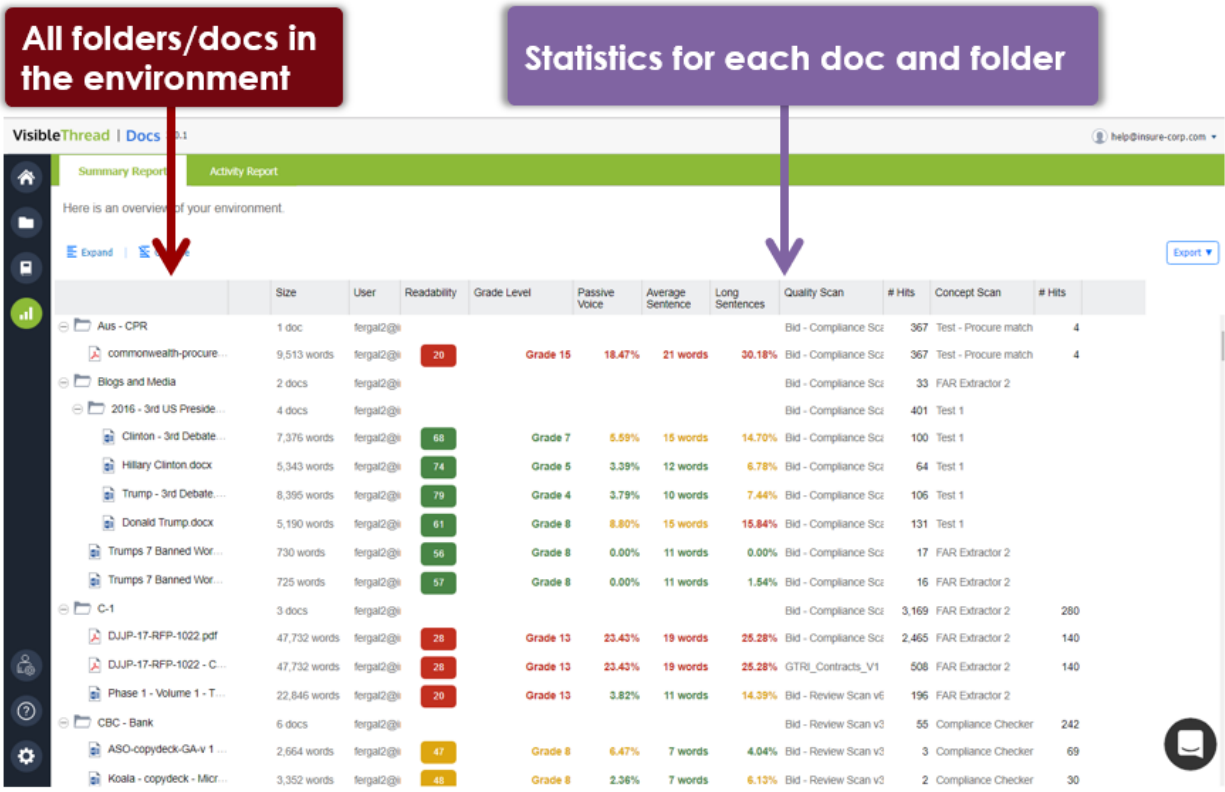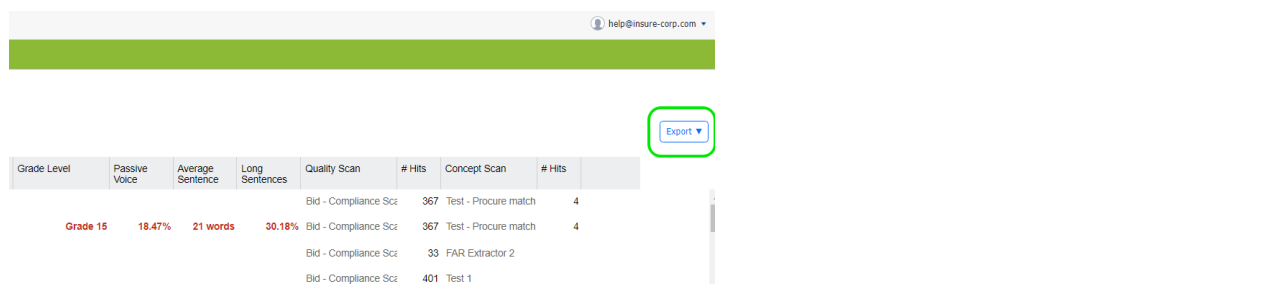
Figure 78 - Summary view showing environment scores

Tip: Use Export from the Summary View to perform further analysis in Excel.

Access it here:

16. Reports – Activity report

VisibleThread tracks all activity, including uploading documents, creating folders etc.

So when you or anyone in your environment perform any actions, the activity view will track it. The system also tracks details of **when** the action happened and **who** performed the action.

These actions are tracked:

1. On Folders -

    a. Creating Folders

    b. Renaming Folders

      c.   Deleting Folders

2.   On Documents -

      a.   Adding documents (Word, Excel, PDF)

      b.   Creating new MS Word documents

      c.   Deleting documents

3.   Reviews made from within the Quality Analysis view including any whitelisting activity

4.   On Dictionaries & Structure Outline usage -

      a.   Setting different dictionaries or structure outlines.

5.   On Notes -

      a.   Creating a note

      b.   Replying to a note

Here is a sample Activity pane showing activity for a folder:

Figure 79 - Activity for a sandbox environment

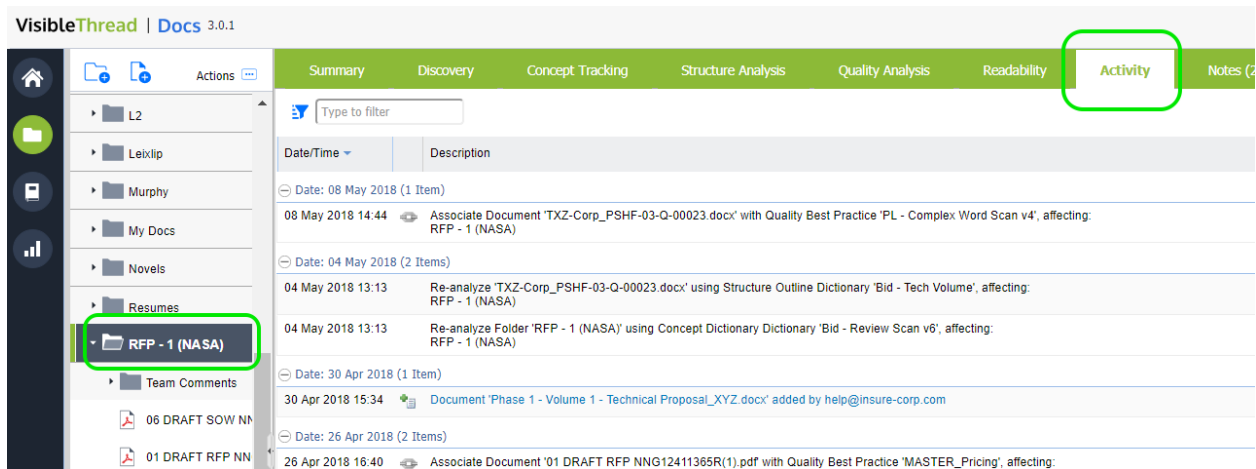When reviewing the change List, the following types of changes are tracked.

              A folder with the specified name was added

              A document with the specified name was added

	A document with the specified name was created
	A Dictionary or Structure Outline was associated with the specified document or folder
	Changes were made to a given document
	Changes were made to a given dictionary or Structure Outline.
	The specified folder was renamed

Activity views also exist at both document and Folder level.

Figure 80 - Activity for a folder

17. Team Collaboration with Notes and Discussions

When reviewing document content in a team setting, you will often make observations and want to record those in the context of a review. You use 'Notes' for exactly this purpose.

You can add these at the folder, document or heading level (in the case of MS Word docs). Notes provide a useful way to record observations and allow teams to collaborate. They are a single point of reference, centrally stored and can be viewed by others in your environment.

Notes can also be useful to handle lightweight task management and concerns.

All document and folder level screens provide the ability to add and reply to notes as well as close / re-open notes.
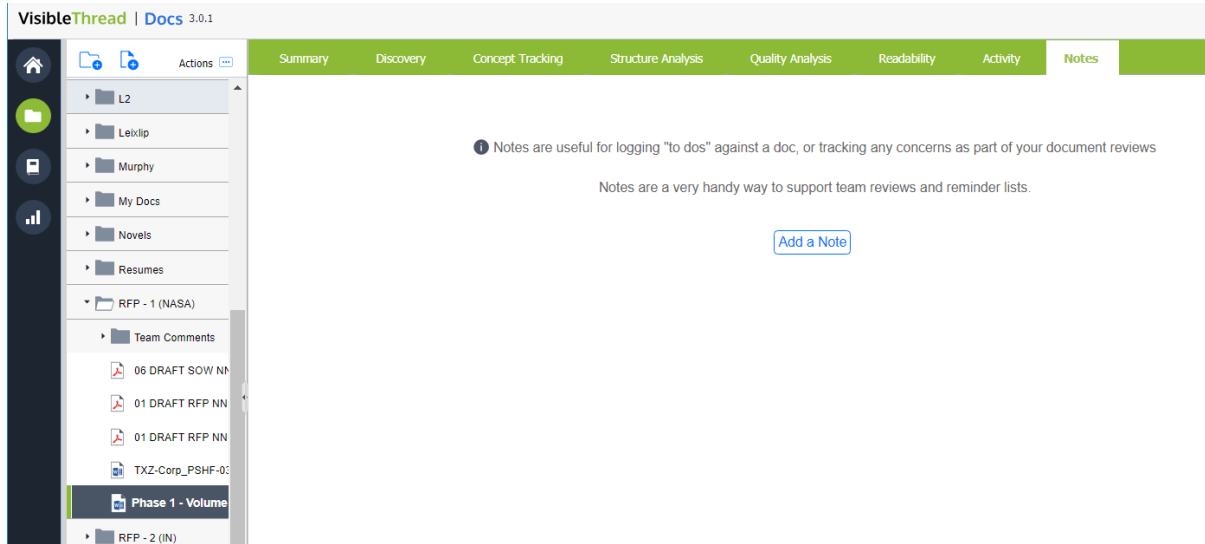
Figure 81 – A document with no notes created

To add a note, follow these steps:

Step

1. Click the 'Notes' tab and click 'Add a note'

2. Next, you will see this screen allowing you enter the note details:

Enter your note, an optional description and set the type. Click 'OK' when done.

17.1.   NOTE 1: Note Types - You will see a list of Note types. You can customize these to suit your process. For more, see section '19.1 Readability Whitelist

We saw earlier how you can whitelist terms or phrases to adjust your readability score. See section 14.514.5 Readability Whitelisting, for full detail on customizing this list. Access this option here:
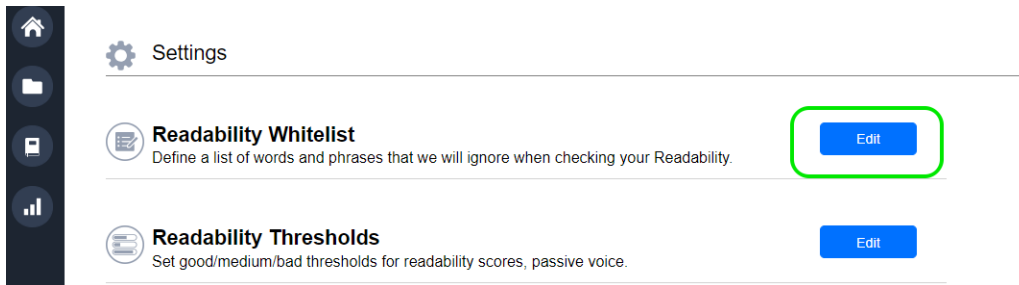
Figure 86 - Readability whitelist setting

17.2. Readability Thresholds

We also saw in section 14 Readability how the results are color-coded depending on certain thresholds.

These settings dictate what results are deemed **Good**, **Average** or **Bad**. You can modify these readability thresholds here.

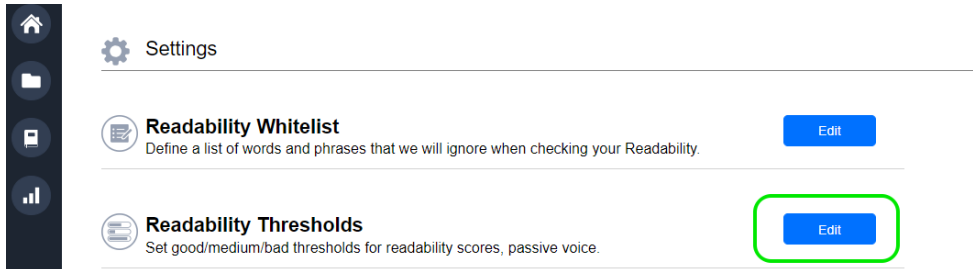This setting affects % levels etc. Access this option here:

Figure 87 - Readability thresholds setting

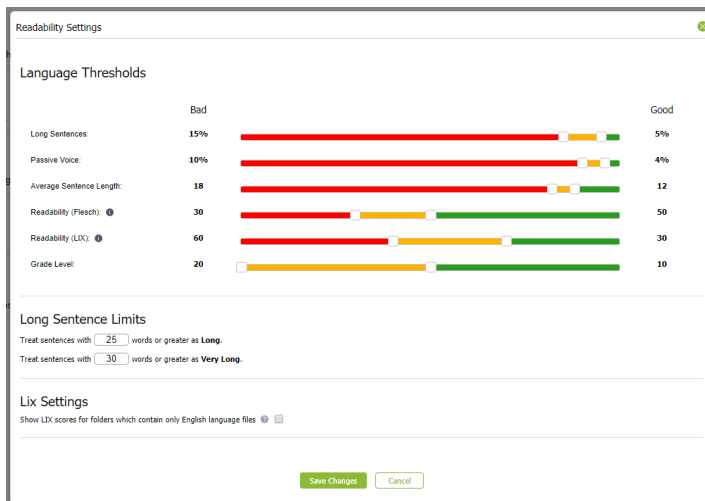And here is the screen allowing you make changes:

Figure 88 - Readability thresholds

NOTE: Adjusting Readability Thresholds will apply to the full environment. All other users will see these new thresholds

After adding notes, you will see them in the 'Notes' tab. Your new note and any other notes are listed along with any replies.
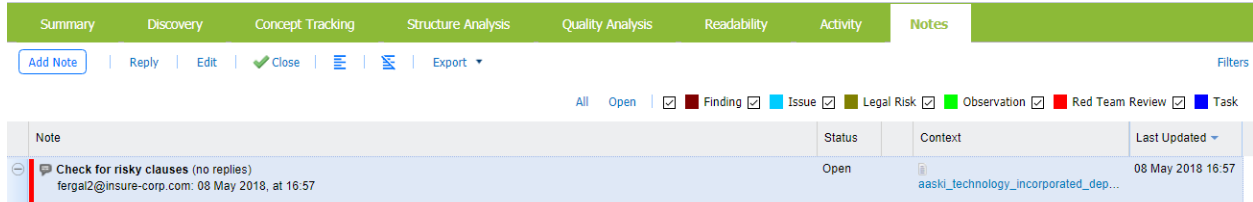
The view looks like this:

Figure 82 – Notes defined against a document

These options are available on the Notes screen at document and folder level.

Add note	This allows you add a new note directly in the discussions pane.
	Edit
	This allows you modify the attributes of a selected note.
Reply	This allows you reply to the currently selected note. Replies are added to the note and presented below it, slightly indented.
Close / **Re-open**	Notes can be marked as closed. In this case, you will see a strike out line on the note title. Closed notes can be re-opened if needed.

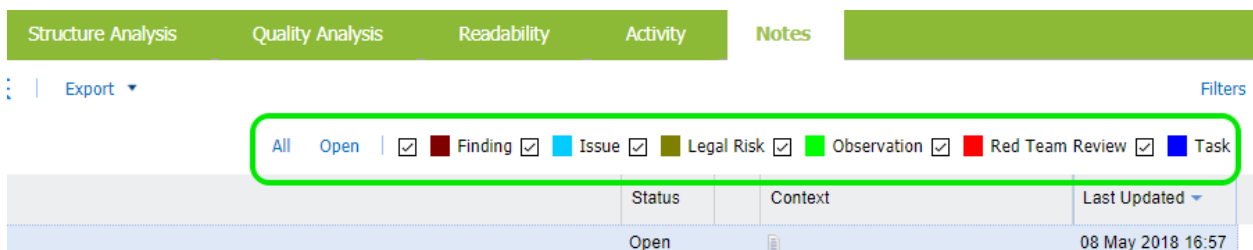You can also filter notes:

Figure 83 - Notes filters

Available filters are:

- By discussion type. Click the check box adjacent to each type to filter

- By All / Open

18. The user menu and changing passwords

The user menu is available by clicking on your user name at the top right of the dashboard.
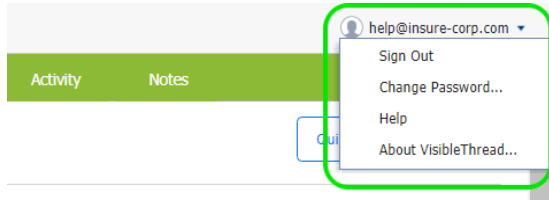
Figure 84 - User Options

The options available on the user menu are:

Sign Out

Use this to sign out of your current dashboard session.

Change password…

Use this to change your password.

Note: new passwords must have at least eight characters and include at least one digit.

Help

Use this to see the most up to date documentation on our support forum.

About VisibleThread…

This displays legal notices. It also links you to the VisibleThread support forum where you can see up to date support materials.

19. Settings

There are several Settings available in VisibleThread. Click 'Settings' in the sidebar.

> **Note: Permissions.** Only users with 'Settings' permissions can modify any settings listed below. If you do not have settings privileges and you open any of the settings dialogs you will be presented with a Read-Only version of the dialog box.
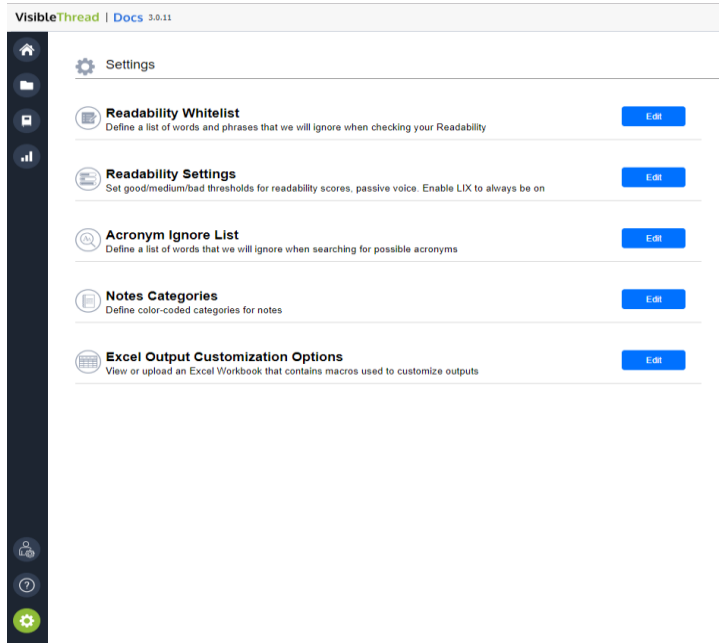
Figure 85 - Settings view

19.1.   Readability Whitelist

We saw earlier how you can whitelist terms or phrases to adjust your readability score. See section 14.514.5 Readability Whitelisting, for full detail on customizing this list. Access this option here:
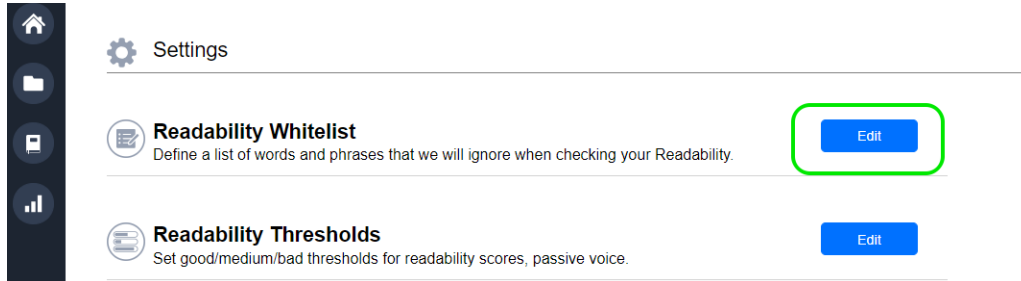

Figure 86 - Readability whitelist setting

19.2.   Readability Thresholds

We also saw in section 14 Readability how the results are color-coded depending on certain thresholds.

These settings dictate what results are deemed **Good**, **Average** or **Bad**. You can modify these readability thresholds here.

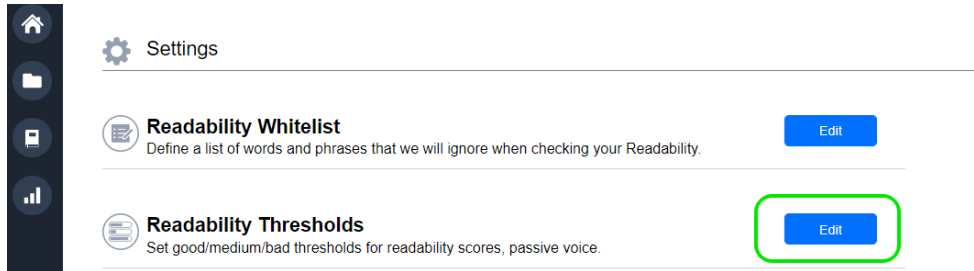This setting affects % levels etc. Access this option here:

Figure 87 - Readability thresholds setting

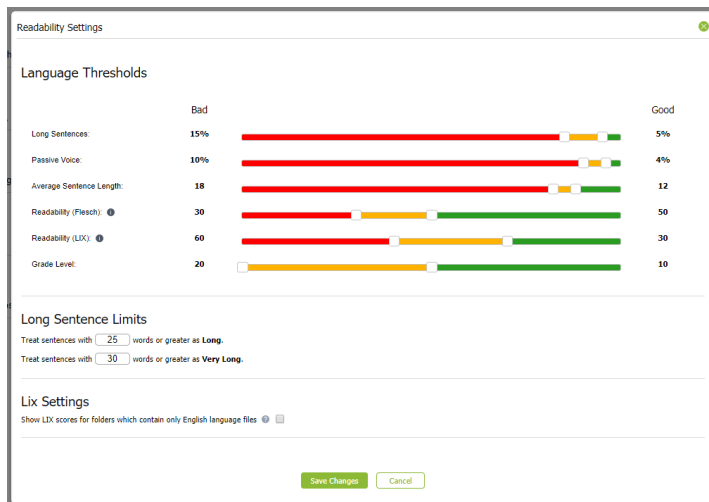And here is the screen allowing you make changes:

Figure 88 - Readability thresholds

NOTE: Adjusting Readability Thresholds will apply to the full environment. All other users will see these new thresholds

---

19.3.   Acronym Ignore Lists

When creating acronym lists you can specify text that will be omitted from the analysis. Access this option here:
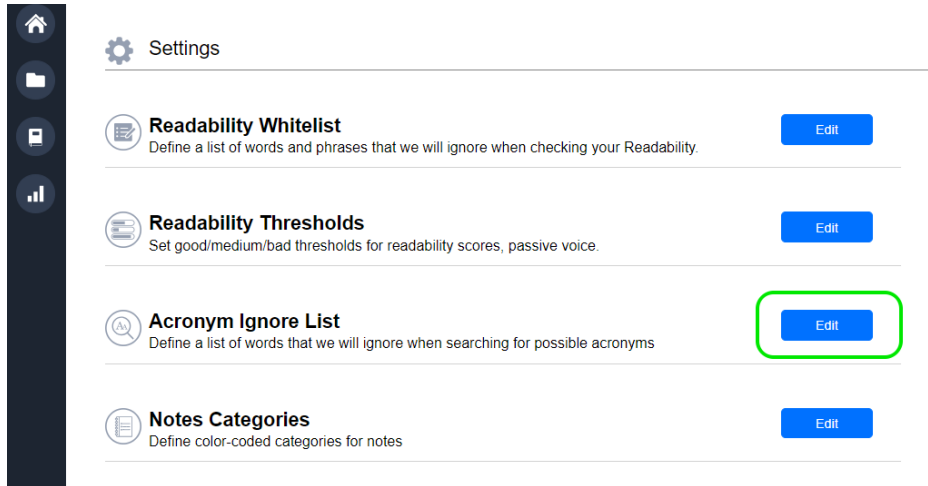
Figure 89 - Acronym ignore list setting

The system will show a screen listing each text item to ignore. For more detail on setting the ignore list, see section 7.3 Setting "Acronym Ignore Lists".
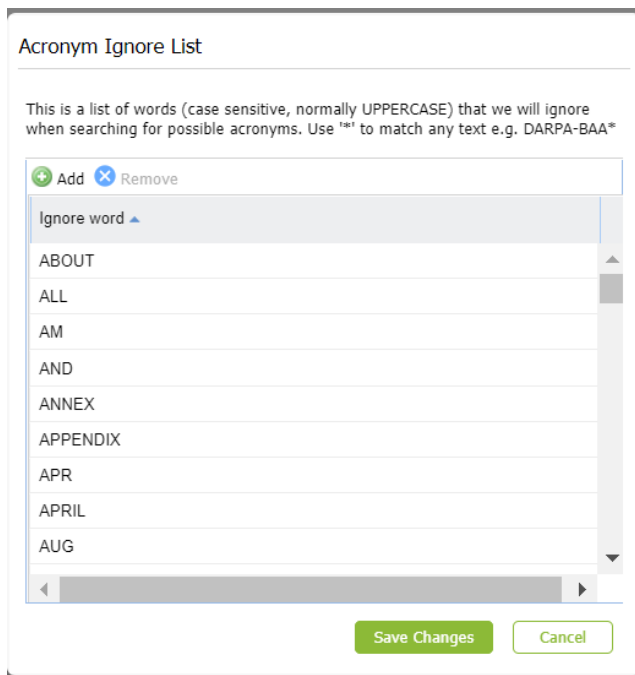

Figure 90 - Editing the acronym ignore list

NOTE: You can also use wildcards when specifying items to ignore. For example if you want to ignore FAR1, FAR2 etc. you can specify 'FAR*' in this list.

19.4.   Changing "Notes Categories…"

We saw earlier how notes can be categorized using a 'type'. You can customize this and set your own categories. For more on creating and managing notes, see section '17 Team Collaboration with Notes and Discussions'.
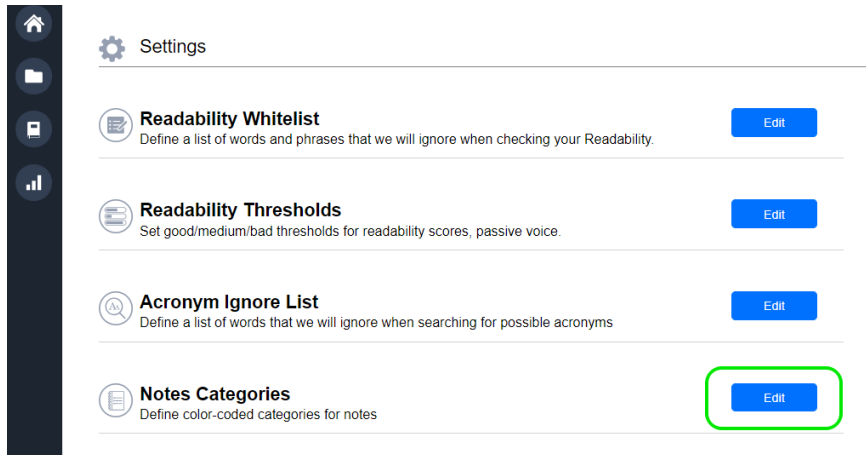
Access this option here:

Figure 91 - Notes categories setting

The system then shows a dialog box listing the discussion types.
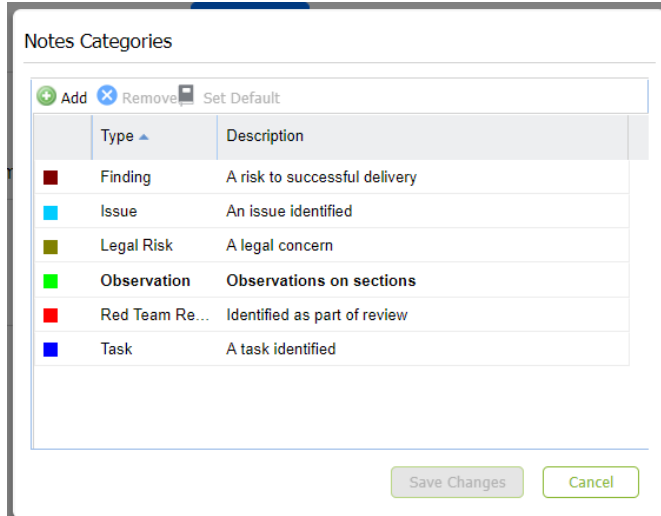

Figure 92 – Editing notes categories

You can set the default for new notes by selecting from the list and clicking the 'Set Default' button. Types can be added or removed by clicking the 'Add' or 'Remove' buttons respectively.

19.5.   Excel Output Customization Options

Many of the views within VisibleThread Docs allow the export of data to Excel. There may be occasions where you would like to change or customize the format of these outputs.

To enable this, we support the injection of Excel macros in the generated Excel file. These macros can be coded to modify the generated output in any way you require.

Each sandbox in VisibleThread Docs contains a 'template' set of macros. When generating an excel export you have the option to inject these macros into the generated output. If you enable this option, upon opening the Excel file the list of available macros will appear allowing you to run any macro required.

Figure 93 Customizing Excel Outputs Using Macros

To modify the list of Macros that are injected to your outputs, you can download the template Excel macro file stored in your account, modify the macros in the file, and re-upload it to your account.

1. First navigate to the Settings area and click on "Excel Output Customization Options"

Figure 94 Excel customization settings

2. The system then shows a dialog box allowing the user to download / upload macros along with some basic editing instructions.
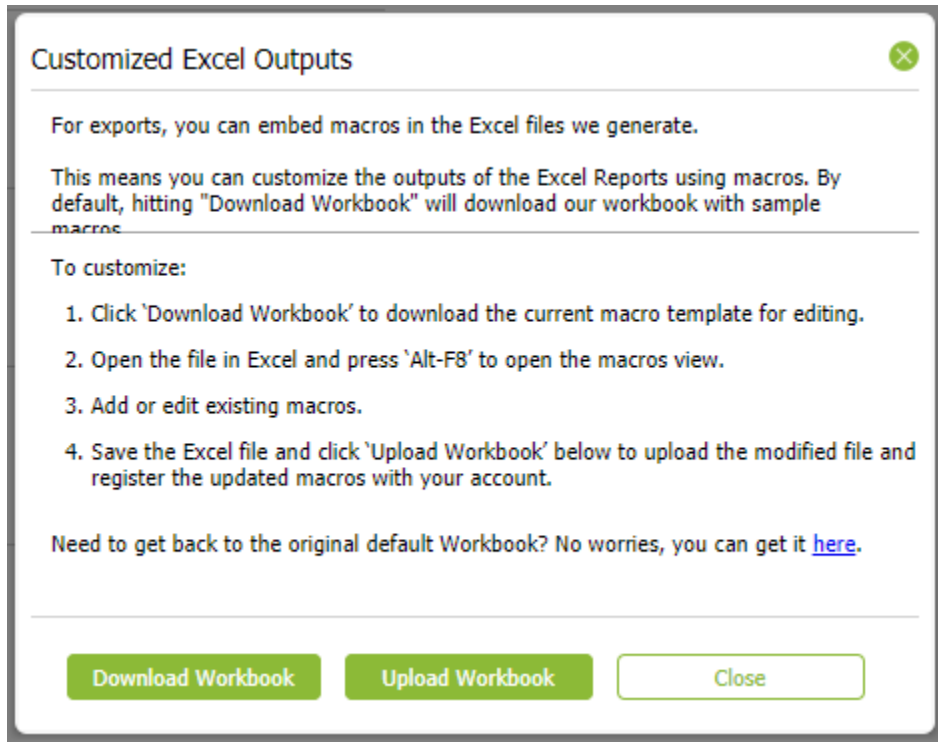

Figure 95 – Upload/Download custom macros

To change a Macro in this template or add a new Macro:

1. Click 'Download Workbook' to download the base template to your PC.

2. Open the workbook in Excel and modify the Macro's using the Excel Developer tools.

3. When you are happy with the macros, save the changes to the Excel file

4. Click 'Upload workbook' to upload your modified Excel workbook to your account.

From this point on any Excel reports you export from VisibleThread Docs will have your modified set of Excel macros injected.

20. User Administration

VisibleThread supports multiple users.

To add, delete or modify users in the system, click 'User Admin' located in the sidebar. The User Admin screen appears displaying the users currently set for this account. Here's what it looks like:

Figure 96 - Administering users

Note 1: For all trial accounts created on VisibleThread Servers, users are given dictionary and settings privileges by default. This means that they can edit those two areas.

Note 2: If you do not see this link appear, this indicates you are not an 'admin' user. Contact your VisibleThread administrator if you need administrator privileges.

The options available on the toolbar are:

Add

This allows you create a new user.

Clicking this prompts you for the user's details. Once you click ok, the system creates the user with the details entered.

Delete

This allows you delete a user. You must always have at least one user per account. The system will prevent you from removing all admin users with an appropriate message.

License

Click here to check the number of licenses currently available, as well as active users.

Import Users from CSV

You can add multiple users by importing a CSV file that contains a list of users:

User Administration

User Name	First Name	Last Name	Is Active	Can Administer Users	Can Edit Settings	Can Edit Dictionaries	Signed In	Actions
luke.goslin	luke	goslin	☑	☑	☑	☑	☑	✎ Click to Edit user

Import users from CSV

File to Import: Browse

Format Example:

```
CSV columns: email, name, surname, active, admin, settingsAdmin, dictionaryAdmin

john.doe@example.com, John, Doe, true, false, true, true
jane.doe@example.com, Jane, Doe, false, true, false, false
```

Import   Cancel

To modify details for an existing user, click the link "Click to Edit User" in the row of the user you wish to edit. A dialog box will appear that will allow you to edit the user details.

The following fields are available for each user:

First Name	First name of the user
Last Name	Last name of the user
User Name	The sign in user name, corresponding with the users e-mail address.
Password	The password for this user. **Note**: passwords must be 8 characters minimum and have at least 1 number.
Admin checkbox	Yes/No. This specifies whether this user has admin privileges in the system. Admin privileges allow a user to create and configure other users.
Active checkbox	Yes/No. In a pooled license scenario, you have the option of assigning certain users to be able to draw from the pool. This setting offers you the flexibility to switch users as needed.

Settings Checkbox	Yes/No. This specifies whether the user has settings privileges in the system. Settings privileges allow a user to edit the Settings for the account.
Dictionary Checkbox	Yes/No. This specifies whether this user has dictionary privileges in the system. Dictionary privileges allow a user to create, modify or delete Dictionaries.

Note: Administrators can control users and permission through https://your.domain.example/sandboxAdmin

You will be prompted for credentials, the default credentials are;
Username: visiblethread

Password: password

Once you have access to the sandboxAdmin area the flow of administration is the same as above inside the application U.I.

21. Security Settings

The Security Settings area is a new feature that allows a system administrator for the VisibleThread application to configure SSO with SAML 2.0. To navigate to this area visit https://yourdomain/sandboxAdmin once here you should notice a tab called "Security Settings"(see screenshot below). By default VisibleThread is setup to use Username and Password after enabling and configuring SSO you do have the ability to switch back to Username and Password. The default view of the "Security Settings" area looks like this: (Note that it shows that you are currently using VisibleThread Username/Password).

If you wish to enable and configure SSO follow our online support article:
https://support.visiblethread.com/hc/en-us/articles/360038695431-Getting-Started-with-Single-Sign-On-SSO-

To setup SSO for Active Directory and VisibleThread Docs on-prem:
https://support.visiblethread.com/hc/en-us/articles/360038784951-Setup-Single-Sign-On-for-Active-Directory-and-VisibleThread-Docs-on-prem
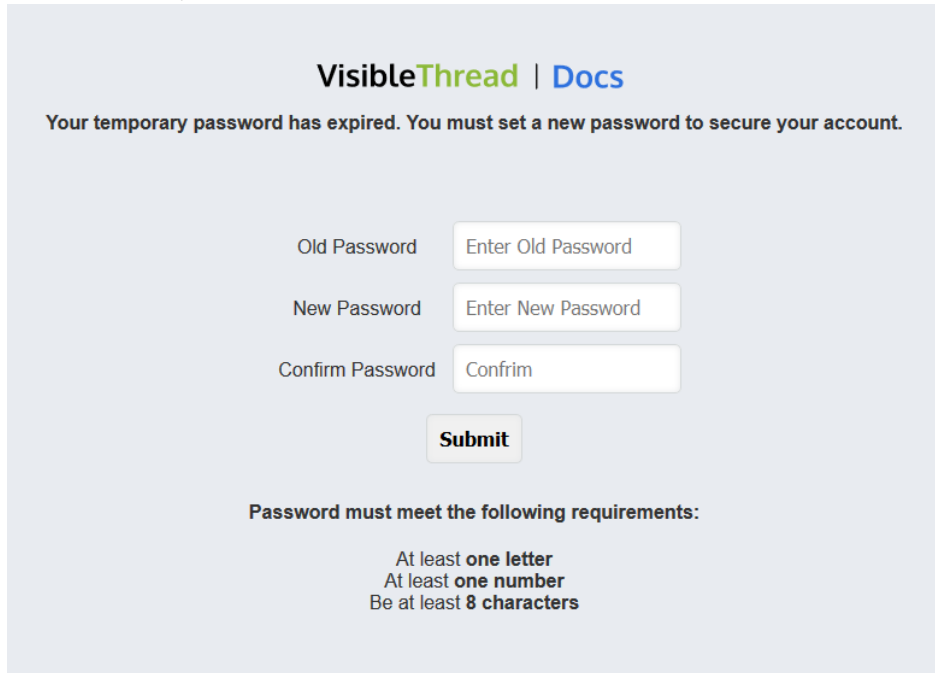
Switching Back to Username/Password

If for any reason you wish to return to Username/Password navigate to https://yourdomain/sandboxAdmin and click on "Security Settings" > VisibleThread Username/Password. In here, before enabling you need to create a One Time Password off all users. This password will have to be delegated to users by the admin of the application.

After enabling Username/Password the next time a user logs in they will be prompted to enter the One Time Password you setup and also create a new password.

Once the above step is complete the user will be able to log in again!

21. Troubleshooting

If you have any issues or need help, please check our support forum at: http://support.visiblethread.com/home

Or mail us directly by sending a mail to: support@visiblethread.com This alias is monitored 24x7 and will automatically create a trouble ticket in our help systems. Forward any usage queries or bugs also to the same address.