

How to create a Compliance Matrix in 3-clicks!

Log into VT Docs with your credentials.

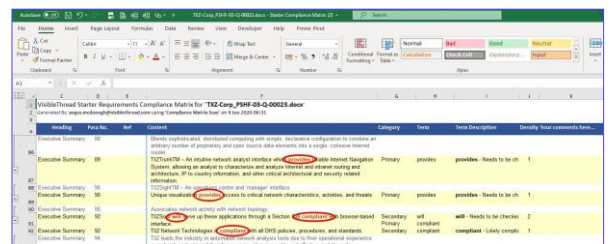
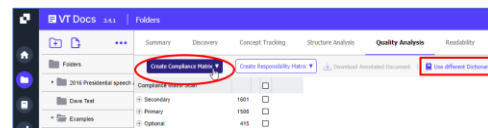
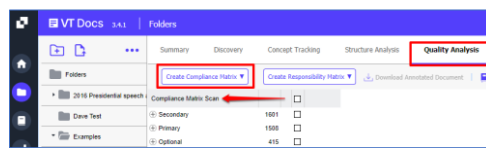
Input your email address and initial password. Change the password after first login.

1. Select the document you want to shred from your folder.
2. Click the **“Quality Analysis”** Tab OR the shortcut on the Summary Tab.
3. A set of search terms is shown on the left.

Use the **“Compliance Matrix Scan”** dictionary to get started. Select ‘Use different dictionary’ to shred using a different dictionary.

4. Click **“Create Compliance Matrix”**.
5. Choose to split the document text by sentence or paragraph.
6. Click **“Generate Matrix”**.
7. Save the Excel file to your local drive.

A full shred of your text by sentence is shown. Keywords are highlighted in Red.

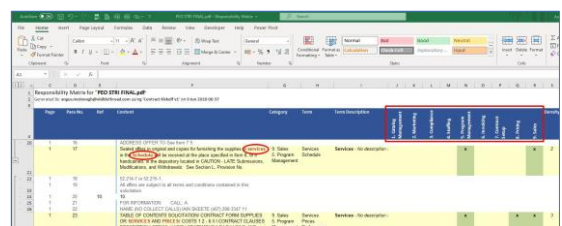
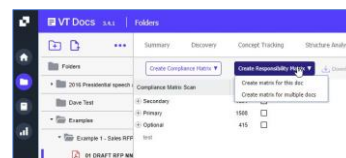


How to create a Responsibility (RACI) Matrix

1. Select the document you want to shred from your folder.
2. Click the **“Quality Analysis”** Tab OR the shortcut on the Summary Tab.
3. A set of search terms is shown on the left. Use the **“Contract Kickoff v1”** dictionary to get started. Select ‘Use different dictionary’ to shred using a different dictionary.
4. Click **“Create Responsibility Matrix”**
5. Select **“Create matrix for this doc”**
6. Choose to split the document text by sentence or paragraph.
7. Click **“Generate Matrix”**.
8. Save the Excel file to your local drive.

The Full text of the document is in Column F. Keyword hits are in red. Categories and teams are flagged against the keywords identified.

9. You can now distribute work across teams or departments.



How to Compare Word or PDF documents

1. Click "Compare Docs" from the Summary tab.
2. Select the 1st and 2nd docs you want to compare.
3. Click "Compare"
4. Review doc compare results in Excel.
5. Column C indicates the type of change that has occurred, if any. There are four possible options in this column:

"IDENTICAL" (no change)

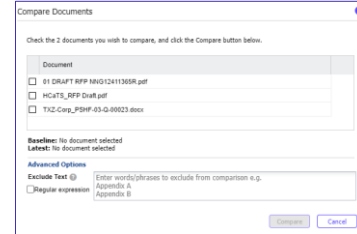
"MODIFIED" (a change to the text within that section)

"ADDED" (a new paragraph or section not in the previous version)

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

PRO TIP

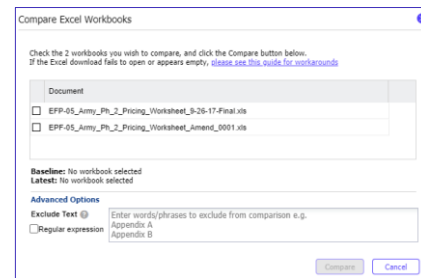
When comparing, always try to compare PDF vs. PDF or Word doc vs. Word doc. Avoid comparing PDF vs. Word doc. This is because the way the docs are stored natively between Word and PDF can distort the results."



Document			
Baseline Document		vs.	Latest Document
HICATS_RFP_FINAL.pdf			HICATS_RFP_Draft.pdf
In turn, HSE Training and Management Assistance Program (TMAP) ensures the development and delivery of customized human resources, human capital and training products and services to Federal agencies by managing private sector contractors in the design, development, and implementation of solutions in the areas of training and human capital in order to improve agency performance against performance metrics at the employee, unit, and enterprise levels. (TMAP is authorized to make these services available via use of these contracts to all Federal agencies under the auspices of 5 U.S.C. 1304 (a)(1)).	IDENTICAL		In turn, HSE Training and Management Assistance Program (TMAP) ensures the development and delivery of customized human resources, human capital and training products and services to Federal agencies by managing private sector contractors in the design, development, and implementation of solutions in the areas of training and human capital in order to improve agency performance against performance metrics at the employee, unit, and enterprise levels. (TMAP is authorized to make these services available via use of these contracts to all Federal agencies under the auspices of 5 U.S.C. 1304 (a)(1)). Learning management systems, which is a subset of training and HR management, will not be addressed in this solicitation.
Many human resources, human capital and training products and services are offered in the commercial market. However, TMAP offers customized solutions that involve significant modifications to commercial products and services that alter the characteristics or purpose of the products or services. The products and services delivered under the TMAP focus on Federal government.	MODIFIED		Many human resources, human capital and training products and services are offered in the commercial market. However, TMAP offers customized solutions that involve significant modifications to commercial products and services that are sufficiently significant as to alter the characteristics or purpose of the products or services. The products and services delivered under the TMAP program focus

How to Compare Excel spreadsheets

1. Click "Compare Excel" from the Summary tab.
2. Select the 1st and 2nd excel docs you want to compare.
3. Review your results in Excel.
4. The excel spreadsheet will open on a Summary sheet followed by detailed sheet by sheet comparison.



Document			
Baseline Document		vs.	Latest Document
EFP-05_Amy_Ph_2_Pricing_Worksheet_8-26-17-Final.xls			EFP-05_Amy_Ph_2_Pricing_Worksheet_Amend_0001.xls
CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE.....	IDENTICAL		CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE.....
Row 3	IDENTICAL		Row 3
Row 4	IDENTICAL		Row 4
Row 5	IDENTICAL		Row 5
Row 6	IDENTICAL		Row 6
Row 7	IDENTICAL		Row 7
Row 8	MODIFIED		Row 8
Row 9	MODIFIED		Row 9
Row 10	MODIFIED		Row 10
Row 11	MODIFIED		Row 11
Row 12	MODIFIED		Row 12
Row 13	MODIFIED		Row 13
Row 14	MODIFIED		Row 14
Row 15	MODIFIED		Row 15
Row 16	MODIFIED		Row 16
Row 17	MODIFIED		Row 17
Row 18	MODIFIED		Row 18
Row 19	MODIFIED		Row 19
Row 20	MODIFIED		Row 20
Row 21	MODIFIED		Row 21
Row 22	MODIFIED		Row 22
Row 23	MODIFIED		Row 23
Row 24	MODIFIED		Row 24
Row 25	MODIFIED		Row 25
Row 26	MODIFIED		Row 26
Row 27	MODIFIED		Row 27
Row 28	MODIFIED		Row 28
Row 29	MODIFIED		Row 29
Row 30	MODIFIED		Row 30
Row 31	MODIFIED		Row 31
Row 32	MODIFIED		Row 32
Row 33	MODIFIED		Row 33
Row 34	MODIFIED		Row 34
Row 35	MODIFIED		Row 35
Row 36	MODIFIED		Row 36
Row 37	MODIFIED		Row 37
Row 38	MODIFIED		Row 38
Row 39	MODIFIED		Row 39
Row 40	MODIFIED		Row 40
Row 41	MODIFIED		Row 41
Row 42	MODIFIED		Row 42
Row 43	MODIFIED		Row 43
Row 44	MODIFIED		Row 44
Row 45	MODIFIED		Row 45
Row 46	MODIFIED		Row 46
Row 47	MODIFIED		Row 47
Row 48	MODIFIED		Row 48
Row 49	MODIFIED		Row 49
Row 50	MODIFIED		Row 50
Row 51	MODIFIED		Row 51
Row 52	MODIFIED		Row 52
Row 53	MODIFIED		Row 53
Row 54	MODIFIED		Row 54
Row 55	MODIFIED		Row 55
Row 56	MODIFIED		Row 56
Row 57	MODIFIED		Row 57
Row 58	MODIFIED		Row 58
Row 59	MODIFIED		Row 59
Row 60	MODIFIED		Row 60
Row 61	MODIFIED		Row 61
Row 62	MODIFIED		Row 62
Row 63	MODIFIED		Row 63
Row 64	MODIFIED		Row 64
Row 65	MODIFIED		Row 65
Row 66	MODIFIED		Row 66
Row 67	MODIFIED		Row 67
Row 68	MODIFIED		Row 68
Row 69	MODIFIED		Row 69
Row 70	MODIFIED		Row 70
Row 71	MODIFIED		Row 71
Row 72	MODIFIED		Row 72
Row 73	MODIFIED		Row 73
Row 74	MODIFIED		Row 74
Row 75	MODIFIED		Row 75
Row 76	MODIFIED		Row 76
Row 77	MODIFIED		Row 77
Row 78	MODIFIED		Row 78
Row 79	MODIFIED		Row 79
Row 80	MODIFIED		Row 80
Row 81	MODIFIED		Row 81
Row 82	MODIFIED		Row 82
Row 83	MODIFIED		Row 83
Row 84	MODIFIED		Row 84
Row 85	MODIFIED		Row 85
Row 86	MODIFIED		Row 86
Row 87	MODIFIED		Row 87
Row 88	MODIFIED		Row 88
Row 89	MODIFIED		Row 89
Row 90	MODIFIED		Row 90
Row 91	MODIFIED		Row 91
Row 92	MODIFIED		Row 92
Row 93	MODIFIED		Row 93
Row 94	MODIFIED		Row 94
Row 95	MODIFIED		Row 95
Row 96	MODIFIED		Row 96
Row 97	MODIFIED		Row 97
Row 98	MODIFIED		Row 98
Row 99	MODIFIED		Row 99
Row 100	MODIFIED		Row 100

How to interpret the changes found.


5. Let's take this example from Row 8 above
6. 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.
7. The entry in column E is **Markup Rates , , , , ,**
8. 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" with two additional columns represented by the commas in red.

How to extract a list of Acronyms

Verifying the integrity of Acronyms in your document

1. Click the Acronym Report shortcut from the Document Summary Screen
2. Review List of Acronyms in the Report Viewer
3. The report identifies
 - I. Well-defined acronyms
 - II. Acronyms with no definition
 - III. Acronyms with multiple definitions
 - IV. Acronyms where usage occurs before the definition
4. Export the report to MS Word or Excel
5. Review and correct any flagged issues in the export document. Update the original document with completed updates.

NOTE: Copy/Paste Columns A & B (Acronym, Definition) of your export following your edit. Use it as an Appendix in your document for an accurate Acronym table.



The screenshot shows the 'Extract Acronyms' button and the resulting 'Acronym Report' table. The table has columns for Acronym, Definition, Status, Location, No. occurrences, and Count.

Acronym	Definition	Status	Location	No. occurrences	Count
APAC	Asia-Pacific	Well-defined	Product Description, 2. TDC's Product Offerings, 1927hrs	Internal registry data from other registries (APAC, APAC, LACBAC, etc.)	2
APR	-	Not defined	6. Post-Performance Information, Any Response	Features of the system including the retrieval of large datasets from numerous data sources, query time information from the unified response, crossplatform capabilities, and multiple host web APIs.	4
ARPA	American Registry for Internet Numbers	Repeated definition	Product Description, 3. TDC's Product Offerings, 1927hrs	Internal Registry Data that was first accessed to internal registry data from the American Registry for Internet Numbers (ARIN). Attributes from internal registry data include the following:	2
ARPA	American Registry for Internet Numbers	Repeated definition	6. Post-Performance Information, Internal Web Project Support Base	Internal Registry Data of a institution, user mail time access to internal registry data from the American Registry for Internet Numbers (ARIN). Attributes from internal registry data include the following:	2

Below the table, there is an 'Export' dropdown menu with options: 'Export to Excel' and 'Export to Word'.

PRO TIP

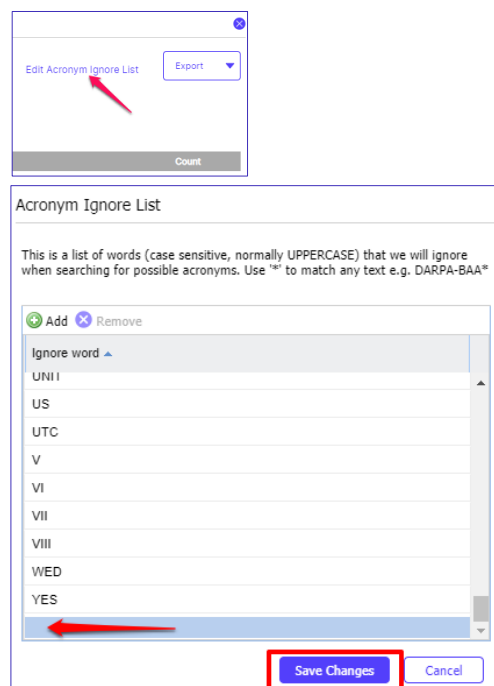
When working with Acronym reports, you may sometimes see 'false positives' that really should not be considered as acronyms. For example, ABOUT, which is capitalized, but is not an acronym.

Use the 'Ignore list' in this case to specify what to ignore. This acronym ignore list applies to all documents in your VT Docs environment.

1. Click "Edit Acronym Ignore List" from the Acronym Report.
2. Click 'Add' to place new items in the list.
3. A new row opens for you to add your term.

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.

4. Click "Save Changes"



The screenshot shows the 'Edit Acronym Ignore List' dialog box with an 'Add' button highlighted by a red arrow. Below it is the 'Acronym Ignore List' table, which contains a list of words to be ignored. The 'Add' button is highlighted by a red arrow, and the 'Save Changes' button is highlighted by a red box.

Ignore word
UNII
US
UTC
V
VI
VII
VIII
WED
YES

How to use Concept Tracking

Concept Tracking searches documents for general words/phrases of interest.

Suggested Use Cases

Check resumes for qualifications

Check for specific qualifications across a collection of Resumes.

Highlight Bid/no-bid factors

Define a concept list that lists your core competencies. Specify no-bid characteristics. For example, if your company does not support “cost plus accounting”, but it’s required, you should ‘no-bid’ it.

Highlight Risk Elements for Program Delivery

Use a concept dictionary to pinpoint potential red flags for program delivery

Past Performance Search

Use Concept tracking to find prior occurrences of content, for extraction and re-use.

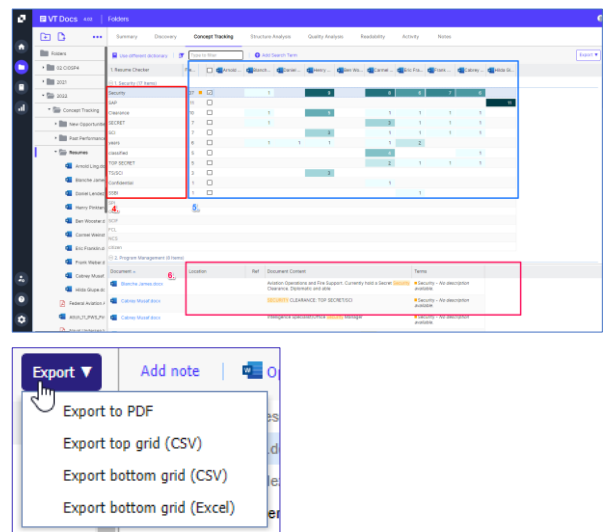
Teaming Partner Capability

Upload partner capability statements. Use Concept Tracking to check for certain key capabilities.

Using Concept Tracking at the Folder Level

A folder can only have one Concept Dictionary set at a time.

1. Select a folder
2. Click **“Use different dictionary”** to select the required dictionary
3. Click **“Set Dictionary”**
4. Terms and phrases from the dictionary, listed by frequency
5. Each column shows a document. The numbers in each column is the hit count for that document.
6. Content surrounding dictionary terms pulled from documents
7. Export the top or bottom grid to a csv or excel file for further review.



How to use the Discovery tab

Discovery searches documents for all noun and noun phrases (Themes) using a natural language processor. There's no dictionary needed. It provides a side-by-side view of single / multiple docs and their nouns and noun phrases.

Suggested Use Cases

Review Past Performance, Resumes, and Capability Statements

Check for specific nouns and noun phrases across a collection of Resumes, or past performance, or capability statements.

Risk Analysis

Check for risk terms in RFPs to read terms fully and red line them appropriately. Make sure you don't miss any risk terms in large customer documents.

Create Win Themes

Review commonly used nouns and noun phrases from the Themes pane and see the frequency of usage.

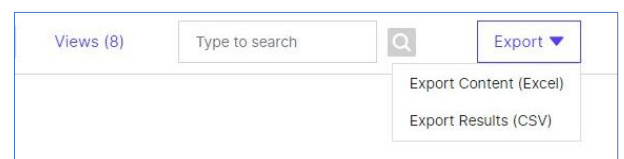
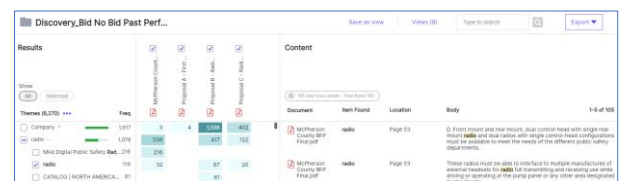
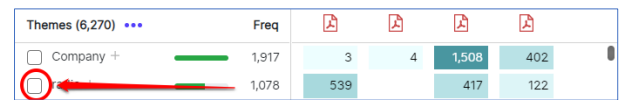
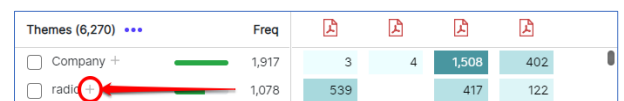
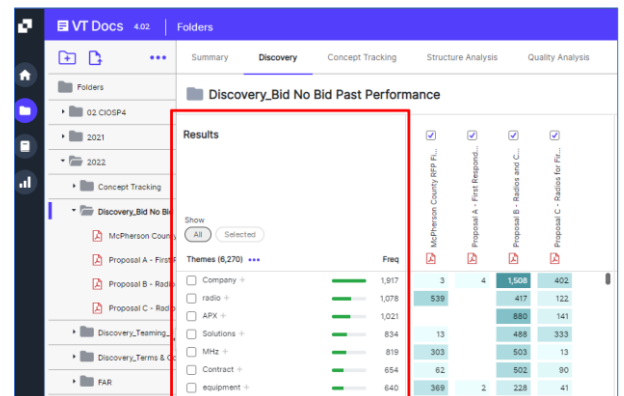
Let Discovery help identify key themes

Discovery automatically extracts the key themes in docs. Use it to understand the core topics in docs, check for gaps or inconsistencies and find terms you can add to "search dictionaries".

1. Select your document OR folder.
2. Select the Discovery tab.

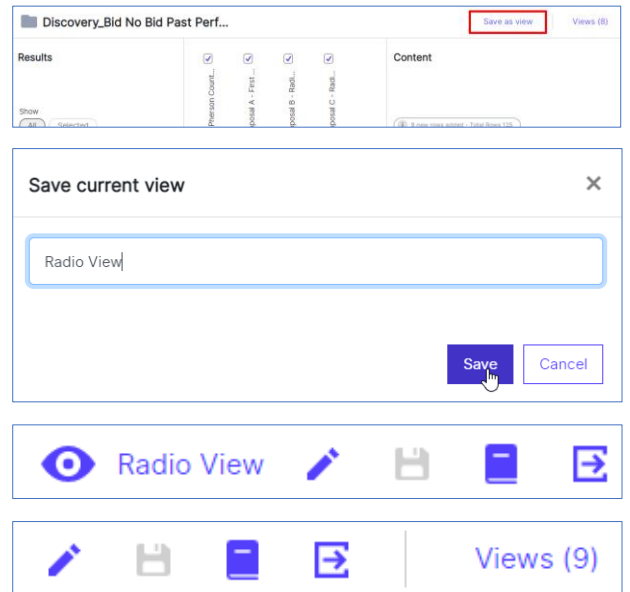
Note: You can also see Discovery for a single document.

3. From the **Results** pane you can review commonly used nouns and noun phrases (Themes) and the frequency of usage.
4. Review some key themes of interest. Click on the "+" sign opposite the Theme to review all the relevant phrases and frequency of use.
5. Click the check box opposite the phrases of interest. The **Content** pane displays the item found, the document, location and body in the context of the document.
6. You can Export the selected content to an Excel or CSV file for further analysis.



Save your Discovery View


- Once you've selected the themes/phrases of interest you can **"Save as view"**. This allows you to return to the selected themes/phrases at a later point, even if you add documents to the selected folder.
- Click the "Save as view" button.
- Insert a View Title and click "Save"
- The view is saved and the View icon displayed.
- Retrieve a saved view by clicking on "Views"
- Select the required view from the list.
- Click the "Open" button.



Exit the saved Discovery View

- Click on the  icon to return to the Folder Discovery view.

How to create a search dictionary from the Discovery View

- Select the required view from the "saved views"
- Click the  icon
- Select a **Quality** or **Concept** Dictionary from the dropdown menu
- Click the **"Create"** button.
- Click the **"Go to dictionary"** button to review your new Search Dictionary.

