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.
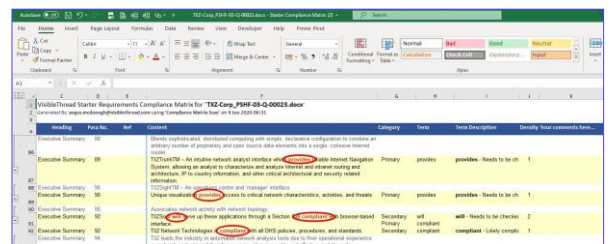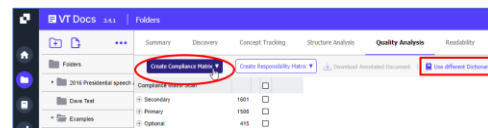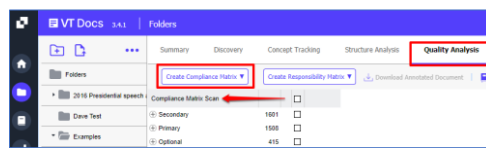
How to create a Responsibility (RACI) Matrix

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.
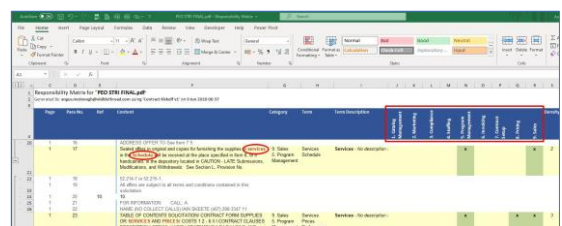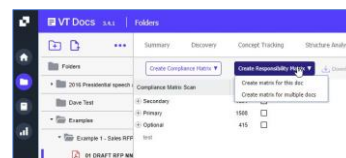
How to Compare Word or PDF documents

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:
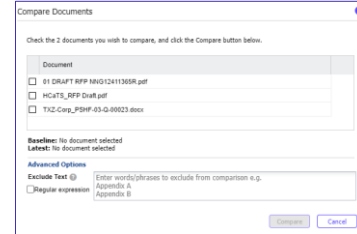
   "**IDENTICAL**" (no change)

   "**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)
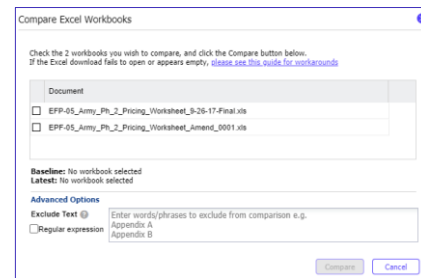
   PRO TIP

   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."

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.

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.

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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"**

How to measure your documents Readability

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 a sample document.

2. Click on the **'Readability'** tab. You will see this view.

3. It shows overall Grade Level and Readability stats on top. You can also see:

   - V. Long sentences (Purple)
   - Long Sentences (Blue)
   - Long Words (dotted underline)
   - Passive Voice (Red)
   - Hidden Verbs (Green)

<div style="background:#5b52e0;color:#fff;padding:1em;">

PRO TIP

Comparing Readability of Multiple Docs
You can also see the readability for groups of docs. Just click the folder, and then the Readability tab. Useful to maintain single tone of voice with different authors.

</div>

How to improve the readability of your MS Word Doc

To edit a doc, you just push the analysis results into MS Word as "Word comments". Then, you can work directly in Word to make your changes. Once done, re-upload the doc to get fresh analysis results.

1. Select **"Download Annotated Document".**

2. Select the types of results you want by ticking the boxes. Then click **"Download".**

3. Open your MS Word doc and start editing based on the guidance suggested.

4. Once finished, save and re-upload your new document version to see the latest analysis.

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.
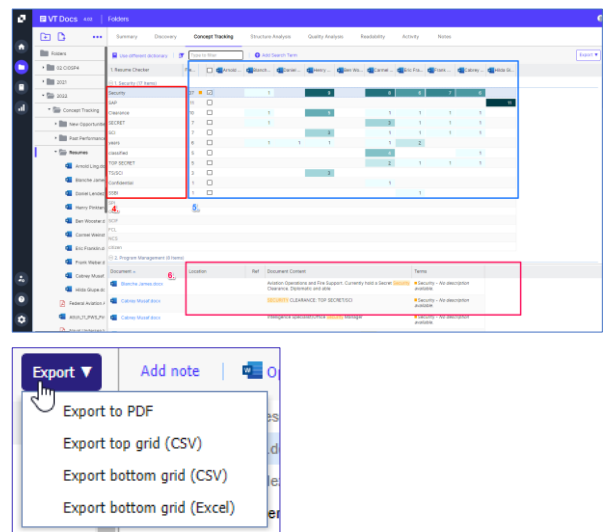
How to use the Discovery tab

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.
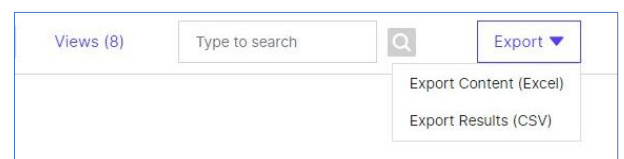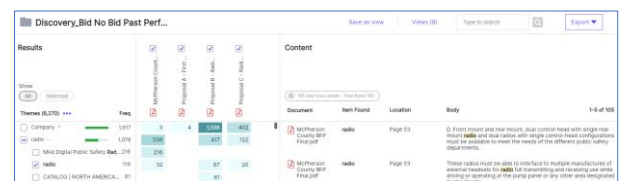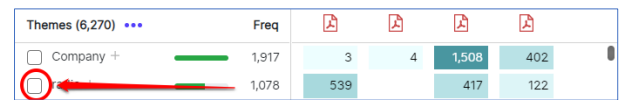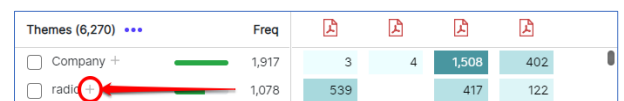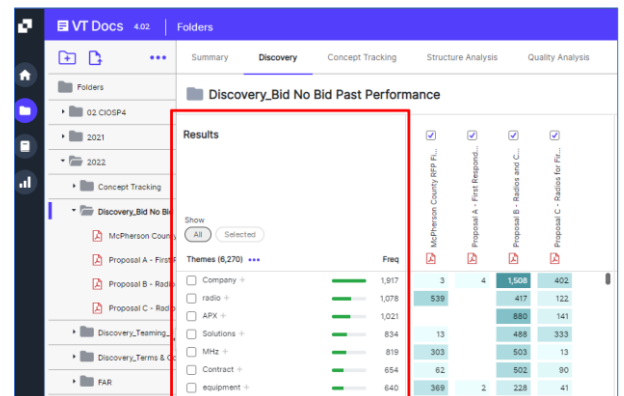
Save your Discovery View

1. 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.

2. Click the "Save as view" button.

3. Insert a View Title and click "Save"

4. The view is saved and the View icon displayed.

5. Retrieve a saved view by clicking on "Views"

6. Select the required view from the list.

7. Click the "Open" button.
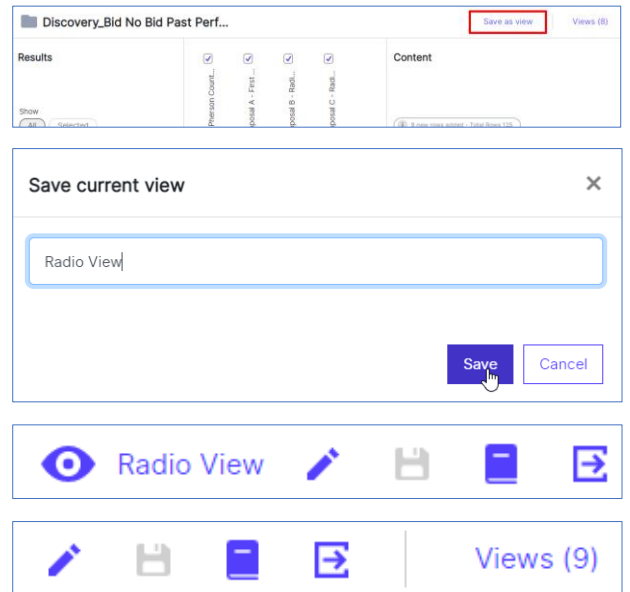
Exit the saved Discovery View

1. Click on the ➡ icon to return to the Folder Discovery view.

How to create a search dictionary from the Discovery View

1. Select the required view from the "saved views"

2. Click the 📕 icon

3. Select a **Quality** or **Concept** Dictionary from the dropdown menu

4. Click the **"Create"** button.

5. Click the **"Go to dictionary"** button to review your new Search Dictionary.