VT Docs

QUICKSTART GUIDES

How to create a Simple Shred

Log into VT Docs with your credentials.

- 1. Select the document you want to shred from your folder.
- 2. Click the "Dictionary Search" Tab OR the "Simple Shred" shortcut on the Summary Tab.
- 3. A set of dictionary search terms is shown on the left.

Use the "RFP Compliance Matrix" dictionary to get started. Select the name of the dictionary (purple writing) to change to a different dictionary.

- Click "Shred to Excel" and select "Simple Shred (Compliance Matrix)" from the drop-down menu.
- 5. Choose your preference options from the pop-up window. Hover over the "i" to see an explanation of each option.
- 6. Click "Export".
- 7. Save the Excel file to your local drive.

A full shred of your document is shown. Dictionary hits are bolded.



Summary Discovery	Dictionary Search	Readability	Activity
TXZ-Corp_PSHF-	03-Q-00023.docx		
Dictionary Compliance	Matrix - Simplified +		Content
	Change Dictionary		
Categories (1) ····	Go To Dictionary	Frida	Term(s)
Requirements Terms (3 items)		70	
🗌 will 📕		69	
🗌 must 📕		1	
shall			

Data Options		
Export all content 💽 Expo	rt displayed content	
Split by paragraph 💽 Split	Export all content will output every paragraph to Excel.	
New row on dictionary hit	Export displayed content just outputs	On
Repeat Refs 🔘	what's in the content pane only.	On
Display Refs in content column	of	On
Highlight all terms 💽 High Show gridlines 🔘	light selected terms (1)	On
MS Word Specific Options		
Wrap text in tables	Off 💽	On

12	8		The U.S. Department of State's Bureau of Administration, Office of Allowances, (http://ideprais.state.gov/) publishes quartery report indexes of living costs alread, per-dem rate maximumo, quarte's allowances, harding officeratiks, and dange pay allowances for contractors to follow when proposing on OCCPUUS efforts. No allowances, other than those listed by the U.S. Department of State, shall be allowed on task orders.	Requirements Terms	shall	shall = "shall" implies a non-negotiable requirement. Check we're compliant.	1	
12	9		The Department of State Standardized Regulations (DSSR) are the controlling regulations for allowances and benefits available to all U.S. Government civilians assigned to foreign areas					
12	10		For task orders issued under the GWAC, contractors assigned to foreign areas shall not exceed the allowances and benefits in the DSSR. For OCONUS task orders where costs are not specifically adtressed in the DSSR, the government may mimburse the contractor for all reasonable, allowable, and allocable costs in accordance with FAR Part 31.	Requirements Terms	shall	shall = "shall implies a non-negotiable requirement. Check we're compliant.	1	
12		B.4	Labor Rates					
12	12		The contractor shall make their labor rates available to NITAAC to be posted on the NITAAC website within 30 days after contract award consistent with the format shown below. The descriptions of each of these labor categories are located in J.1.	Requirements Terms	shall	shall = "shall implies a non-negotiable requirement. Check we're compliant	1	

How to create a Category Shred

- 1. Select the document you want to shred from your folder.
- 2. Click the "Dictionary Search" Tab OR the "Category Shred" shortcut on the Summary Tab.
- A set of dictionary search terms is shown on the left. Use the "Function Orientated Shredder" dictionary to get started. Select the name of the dictionary (purple writing) to change to a different dictionary.
- 4. Click "Shred to Excel" and select "Category Shred" from the drop-down menu.
- 5. Choose your preference options from the pop-up window. Hover over the "i" to see an explanation of each option.
- 6. Click "Export".
- 7. Save the Excel file to your local drive.

The content of your document is in Column D. Dictionary hits are bolded. Categories are given their own columns from column H onwards.





	I Category Shred mity.mahon@visible		sing VT - Function Oriented Shredder' on 14 Dec 2023 10:53									
Page	Para No.	Ref	Context	Category	Term	Term Description	Getrads	Inducering	telected Poperty	Traini	Program	Dem
35	19		List of Government Furnished Property, in accordance with PGI 245.201-71									
36	20		Invoice and payment provisions to the extent not covered by the contract to include selection of appropriate payment clause from PGI 204.7108	Contracts	contract*		×					1
35	21		Accounting and Appropriation Data									
35	22		Delivery location and schedule	Program Management	schedule						×	
35	23		O Organizational Conflict of Interest provisions									
36	24		C Data Rights	Intellectual Property	data rights				×			
36	25		Contract financing method	Contracts	contract*		x					
36	26	(c)	Delivery Orders/Task Orders shall be placed in writing and distributed to the contractor by facsimile or by electronic commerce methods.	Contracts	contract*		×					
35	27		(End of Clause)									
36	1		W900KK-15-R-0012									
36	2		Page 36 of 106									
36	3		6152.228-5001 LIABILITY INSURANCE (ACC-ORL) (JUN 2015)	Contracts	liab*		x					
36	4		The following types of insurance are required in accordance with the clause entitled, FAR 52 228-5, "Insurance-Work on a Government Installation" and '52 228-7, "Insurance-Liability to Third Person" and shall be maintained in the minimum amounts shown:	Contracts	liab*		×					
36	5	(a)	Comprehensive General Liability: \$200,000 per person and \$500,000 per accident for bodily injury.	Pricing Contracts	\$ liab*		×			*		

How to use Dictionary Search – Folder View

Suggested Use Cases

Check resumes for qualifications Check for specific qualifications across a collection of Resumes.

Guide Bid/no-bid decisions

Define a dictionary that lists your core competencies and no-bid characteristics. For example, if your company does not support "cost plus accounting", but it's required and mentioned in a document, you should 'no-bid' the opportunity.

Highlight Risk Elements for Program Delivery

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

Past Performance Search Use the folder view in dictionary search to find prior occurrences of content, for extraction and re-use.

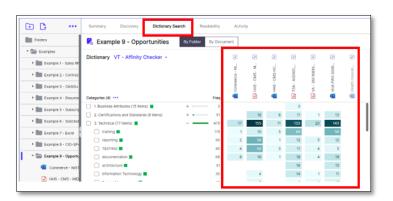
Teaming Partner Capability Upload partner capability statements. Use a dictionary to check for certain key capabilities.

Using Dictionary Search – Folder View

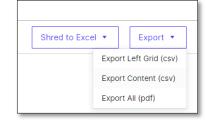
- 1. Select a folder.
- 2. Click "Dictionary Search".
- 3. A set of search terms is shown on the left.

Use the "Affinity Checker" dictionary to get started. Select the name of the dictionary (purple writing) to change to a different dictionary.

- 4. Each document has its own column on the right. The numbers in each column is the number of times the search term is found in that document.
- 5. You can check any search term to read where that term was found in your documents. The content pane on the right will be populated once a check box is selected.
- 6. You can export the left grid, content or all. Check "Export" from the top right corner.



Dictionary VT - Affinity Checker -		emoce - N	s-CMS-M.	6 - CMSHC.	Content						
Categories (4) ***	Freq	8	SH A	4	Document	Term(s)	Location	Berl	Body 2-5 of		
1. Business Attributes (15 Items) 3. Techvical (77 Items)	+ - 3	17	18	8	HHS - CMS - MDS - Attachment_11,00 9,5000.04f	training	Page 10		For measures developed using complex statistical methodologies, the MIDS Connactor shall have staff with graduate- level trading in anapaced statistical		
🖌 training 🔳	119	1	10	3					methods, and working knowledge in CMS claims, patient assessment and/or survey data, and work experience in federally-		
	80	2	58	1					funded national studies on topics related to health outcomes, health care costs and utilization, and quality. Additionally the		
documentation	60		16	1					Contractor should have technical writers to ensure that requested deliverables are wel-		
architecture	31								written and clear. Examples of ad hoc requests may include but not be limited to		
 Information Technology 	30		4						responding to reports in publications or other sources (e.g., the impact of \$4 retail prescriptions on the validity of claims-		
Project Management	15		5						based measures), trend reports of exclusion use, and activities which support other		
Quality Assurance	12		6	2					Contractors as directed by CMS. The number of ad hoc requests will be identified		
scheduling	5								at the TO level.		



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.
- 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.
- 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 , , , , , ,
- 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.

		i ⇄ 📄 re Documen	te		
	Analyzing doo	cuments for sim I differences			
	(Compare			
ompare Documents					•
Check the 2 document	you wish to compare, and	click the Compare button I	belaw.		
O1 DRAFT RFP 1 HCaTS_RFP Dra	ft.pdf				
HCaTS_RFP Dra TX2-Corp_PSHP Baseline: No docume	ft pdf -03-Q-00023.docx nt selected				
HCaTS_RFP Dra TXZ-Corp_PSHP	ft pdf -03-Q-00023.docx nt selected	exclude from comparise	n e.g.		
HCaTS_RFP Dra TX2-Corp_PSHP Baseline: No documet Latest: No document Advanced Options Exclude Text @	ft pdf -03-Q-00023.docx et selected selected Enter words/phrases to Appendix A	exclude from compariso	n e.g. Compare	Cancel	
HCaTS_RFP Dra TX2-Corp_PSHP Baseline: No documet Latest: No document Advanced Options Exclude Text @	ft pdf -03-Q-00023.docx et selected selected Enter words/phrases to Appendix A	exclude from compariso		Cancel	
HCaT3_RFP Dia TX2-Corp_PSH [®] Baseline: No docume Latest:	ft pdf -03-Q-00023.docx et selected selected Enter words/phrases to Appendix A	I		Cencel	

		1569 parag	apits di			
	Baseline Document			Latest Document		
	HCaTS_RFP FINAL.pdf			HCaTS_RFP Draft.pdf		
1	Content	¥5.	Ref	Content		
	In turn, TRUT Training and Measuremet Resistance Program (TMAP) excesses the development and directly of activated human servorus, human cashad and training plotteds and services to Meaning aprices by managing provide sector services of harming and human cashad in partice time inservice approx participants excess of harming and human cashad in partice time inserve approx participants against performance metrics at the employee, with, and emproyae faces. Will in advertised and them anyoare analysis in service approx participants with financial sectors and the managing and the values of these contracts to all hermit agences under the wappress and the values of the sectors.	MODIFIED		In turn, 1967. Training and Management Associators Program (TMAP) ensures the development and development and and an and and		
	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 after the characteristics or purpose of the products eremines. 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, TMA offers outcomized solutions that involve modifications to commercial products and services that are sufficiently significant as to allor the characteristics or purpose of the product on services. The conducts and services delivered under the TMA program focus		

1

Document Comparison Repo

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a constant at the star			
Compare Excel Workbooks			
Check the 2 workbooks you wish to compare, and clic If the Excel download fails to open or appears empty,	ck the Com	pare but	ton below. ide for workarounds
Document			
EFP-05_Army_Ph_2_Pricing_Worksheet_9-26-	17 Einal vi		
EPF-05_Army_Ph_2_Pricing_Worksheet_Amer			
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and the difference of the d	c	D	
nerated 28 Mar 2018 02:34 Baseline Sheet 6: Laber Markup	50 rows chara	ged .	Latest Sheet 6: Labor Markup
intent	VS.	Ref Row 1	Content
INTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE	IDENTICAL	Row 2	CONTRACTOR PRICING WORKSHEET FOR MINOR REPARS SERVICE ORDER FEE ,
P Number: , Location: , ,	IDENTICAL IDENTICAL	Rev 4	RFP Number: , Location: , , , ,
whactor: , Project Name: , ,	IDENTICAL IDENTICAL	Row 5 Row 6	Contractor: , , Project Name: , , , ,
Save Year ,Option Year 1 ,6 - Month Ext.	IDENTICAL	Row 7	"Base Year, "Option Year 1, ,6 - Month Est.
rvice Order Fee Element , O Fee Element 1 O Fee Element 2	MODIFIED MODIFIED	Row 9	Markup Rates
O Fee Element 2 O fee Element 3	MODIFIED	Row 10 Row 11	M&H Handling Charge Rate:
	MODIFIED	Row 12	
	MODIFIED	Row 13 Row 14	Profit on Subcontractor:
O Fee Element 6 , , , O Fee Element 7 , , , tal Service Order Fee (Element 1 + Element 2 + Element 3+) , ,0.00% ,0.00% ,0.00%	MODIFIED	Row 15	.G&A Rate:
			Jozal Service Order Fee (0.00% , 0.00% , 0.00%
te: Total Service Order Fee is the ONCY allowable markup on service orders, with the ception of the emergency SO fee where applicable			
	IDENTICAL IDENTICAL		
Sheet 4 vs Sheet 4 Sheet 5 vs Sheet 5 Sheet 6 vs Sheet 6 Sheet	7 vs Sheet		

How to Extract a List of Acronyms

Verifying the integrity of Acronyms in your document

- 1. Click the "Extract Acronyms" button from the 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, Excel or Annotated Document (Word Documents Only).
- 5. Review and correct any flagged issues in the export document.

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.



TXZ-Carp	2_P\$HF-03-Q-00023.docx	Total likely boro		with Conflicting Definitions	24 Edit According right to be 0 4	Eport	*
Aineyn	Definition	Pate	Louter	fall and dramate		Court	
APRIC		Not defined	Product Dearription ; 2, TX2's Product Offerings ; TX2'hure	Internal regarity state from other registrices (RIPE, APINC,	LACIAC, etc.)	2	
-		Nor artised	é, Pait Performance Information , Key Personnel	Pratures of the system including the retrieval of large dat fastar into a unified response, evoluation logic modules,	taleto hon numerosi data sources, overy-time information and matigae front-and APIa.		
4001	American Regarity for Informet Naviders	Reported Colorison	Product Description, 3, 7X2's Product Offerings, T32Trunk	Internet Repairly Date Near real-firms access to Internet Namers (ARIN: Articulars from Internet regains data in	regarity data from the American Regarity for Internet could the following	1	
ABN	American Registry for Internet Nambers	Repeated defention	6. Past Pachomenea Information , Intervet Path Propert Support Sear	Internet Registry Data III.a minimum, near real-time acco Internet Numbers (ARN), Attributes from Vournet registr	ana to ottamat registry data from the Amateon Registry for ry mite include the following	3	

Accorpts Report To 2: Corp./P3PE-03-0-00223.dbox To 4: Universe Tupot T

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.

Edit Acronym	anore Lis	+ Expo	ort
Edit Acronym	gnore Lis	t	

Acronym Ignore Li	st		
This is a list of words (ignore when searching DARPA-BAA*			
🗿 Add 😣 Remove	Export to CSV	Import from CSV	
Ignore word 🔺			
ABOUT			1
ALL			
AM			
AND			
ANNEX			
APPENDIX			
APR			
APRIL			
AUG			
		Save Changes	Cancel

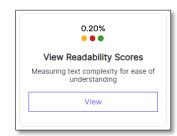
- 1. Click "Edit Acronym Ignore List" from the Acronym Report.
- 2. Click 'Add' to place new items in the list.
- 3. A new row opens for you to add your term.

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

- 1. Select your document.
- 2. Click on the 'Readability' tab or select "View Readability Scores" from the summary tab.
- 3. Readability shows Long Sentences, Passive Voice, Readability and Grade Level statistics at the top. You can also see:
 - V. Long sentences (Purple)
 - Long Sentences (Blue)
 - Long Words (dotted underline)
 - Passive Voice (Red)
 - Hidden Verbs (Green)





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.

🗈 🗅 🚥	Summary Discovery Dictionary Search	keadability /	Lativity				
Folders	Here's how the 5 documents in this folder compare for	r Readability					Export ¥
* 🗁 Examples							
* 🔚 Example 10- Proposal		Size	Long Sentences	Passive Language	Readability (Flesch)	Grade Level	Average Sentence Length
Connes Work - TX	Connies Work - TXZ Response.docx	1,511 words Size 34 K5	3.60% long sentences 9 of 250 sentences	3.20% passive sentences 8 of 250 sentences	30/100	Grade 10.5	6 words
Dillons Section - T.							
Heathers Work - T.	Added Thu 14 Dec by you	1,826 words Size 35 KB	22.31% long sentences 29 of 130 sentences	30.00% passive sentences 39 of 130 sentences	307100	Grade 12.5	14 words
Justins Part - TXZ	Heathers Work - TXZ Response (18).doc	1,913 words	10.00% long sentences	4.76% passive sentences	24 / 100	Grade 12.1	9 words
Bobs Document -	Added Thu 14 Dec by you	Size 36 KB	21 of 210 sentences	10 of 210 sentences			
 Example 1 - Sales RF+ 	Justins Part - TXZ Response.docx	2,510 words	9.96% long sentences	12,45% passive sentences	28 / 100	Grade 11.8	10 words
Example 2 - Contract	Added Thu 14 Dec by you	Size 308 KB	24 of 241 sentences	30 of 241 sentences			
Example 3 - OASIS+ (Bobs Document - TXZ Response (1).doc	1,110 words 522 31 KB	12.04% long sentences 13 of 108 sentences	2.78% passive sentences 3 of 108 sentences	23 / 100	Grade 12.4	10 words
Bill Exercise 4 - Recorder	Added Thu 14 Dec by you	state of RE	ta de tote anno 1005	a ter man service.DEs			

How to Improve the Readability of your MS Word Document

To edit a word document, you can download the readability results into MS Word as "Word comments". Then, you can work directly in Word to make your changes. Once done, re-upload the document to check your analysis results.



We will create a copy of your Word document with comments highlighting all paragraphs that contain Readability issues.

You can filter the report output by choosing which

2

4

~

 \checkmark

Readability Report Options

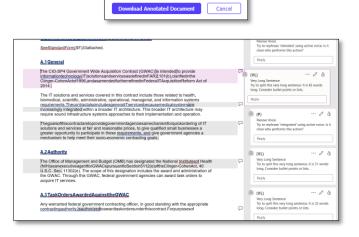
Show Passive Voice

Show Hidden Verbs

Show Long Words:

Show Long Sentences: Show Very Long Sentences:

- 1. Select "Download Annotated Document".
- 2. A pop-up will appear. Select the types of results you want by ticking the boxes. Then click "Download Annotated Document".
- 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 Discovery

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".

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.

Compliance Gap Analysis

Check for nouns and noun phrases mentioned in one document, but not the other. E.g. SOW and Proposal Response

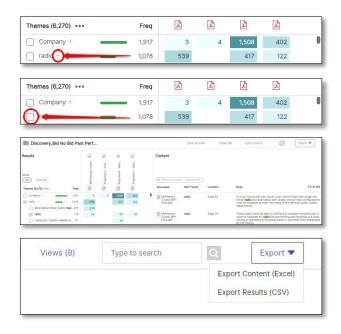
Let Discovery help identify key themes

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

Note: You can also use 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.
- Click the check box opposite the phrases of interest. The Content pane displays the item found, the document name, location and the body of text where you can find the term in the document.
- 6. You can Export the selected content to an Excel or CSV file for further analysis.

	Summary Discov	ery D	ictionary Sea	irch	Readabilit	y Ad	ctivit
Folders	😪 Example 10 -	PP					٦
Examples	Results						
* 🚞 Example 10 - PP	Results		•			 . 	
McPherson_County_RFP_Final[1].pdf			- UO	÷	-8	-01	
Proposal_AFirst_Responders_Equip[1].pdf All Selected		McPherson,	Proposal,	Proposal_B.	Proposal C	
Proposal_BRadios_and_Comms[1].pd	if Themes (6,270) ••••	Freq	A			A	
Proposal C - Radios for First Responde	rs-LA Company +	1,922	3	4	1,513	402	
Example 1 - Sales RFP	🗌 radio +	1,078	539		417	122	
Example 1* Sales RPP	APX +	1,021			880	141	
Example 2 - Contracts	Solutions +	834	13		488	333	
Example 3 - OASIS+ (Gov RFP)	MHz +	819	303		503	13	
	Contract +	656	62		504	90	
Example 4 - Resumes	equipm +	640	369	2	228	41	
Example 5 - Subscription Agreements (De	finition 🗌 dB + 🛛 💻	615	55		558	2	
		577	237		327	13	- 1



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" in the top right corner.
- 6. Select the required view from the list.
- 7. Click the "Open" button.

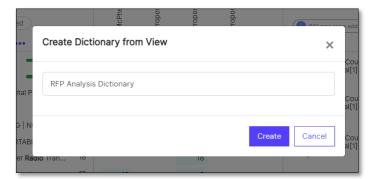
Exit the saved Discovery View

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

Discovery_	Bid No Bid Pas	t Perf				Save as view	Views (8)
Results			1. 1		Content		
		herson Count	oosal A - First oosal B - Radi	osal C - Radi.			
All Selected		Phers	prood	resod	(tom our	attint - Total Roses 125	
Save cur	rrent view						×
Radio Vi							
	ew						
	ew						
	ewi					Save	Cancel
•	Radio	o Viev	N	 * 	B	Save	Cancel
) Viev	N	/	8	Save C	€

How to create a search dictionary from the Discovery View

- 1. Select the required view from the "saved views".
- 2. Click the 📃 icon.
- 3. Name your dictionary and click "Create".
- 4. Click the "Go to dictionary" button to review your new Search Dictionary.



We have successfully created your dictionary
Your dictionary consists of 1 Category and 3 Terms
Stay here Go to dictionary

E VT Docs 6.0 Di	ctionarie	es		
< 🔲 RFP Analysis	s Dictio	onary	• You are	viewing this dictionar
Created by emily.mahon@visiblethrea	ad.com on 14	Dec 2023 Las	t updated on 14	Dec 2023
Dictionary description				
Terms 🔻		Case	Highlight	Description
Terms •		Sensitive	Color	Description
	399) —	Sensitive	Color	Description
	399) —	Sensitive	Color	Description
radio (MHz Digital Public Safety Radio	399) —			Description

VT Docs

QUICKSTART GUIDES
Dictionaries

What are Dictionaries?

Dictionaries are groups of phrases and terms that we want to search for within documents. Dictionaries are helpful for flagging terms and phrases in a document or sets of documents, to reduce manual effort of locating these terms and reduce margin for error.

In a proposal or contracts context, dictionaries can help validate compliance with instructions and lower risk.

Common uses for dictionaries include identifying:

- "Bad language" (clichés, jargon) in proposals.
- Risky or business critical language in contracts (indemnification & bond clauses)
- · Appropriate technical terminology in proposals.

- Flow downs and flow ups clauses in contracts.
- Suitable qualifications in resumes or teaming partner capability statements for proposals.
- Requirements language in RFP's, e.g. will, shall and must.
- Bid no bid review

How to create your New Dictionary

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

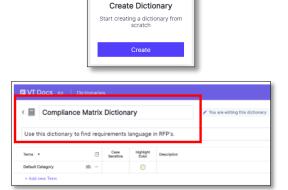
- A Bulk import from .CSV (Comma Separated Value) formatted text file.
- Using the VisibleThread Dictionary Editor.

VisibleThread Dictionary Editor

- 1. Select the Dictionary icon from the navigation pane.
- 2. Select "Create" from "Create Dictionary" tab.
- 3. Enter your New Dictionary Name.
- 4. You can enter a dictionary description; this option is not mandatory.
- You must have at least one category in a dictionary. Categories are used to group dictionary terms. To add a new category, click "New Category".
- 6. You can then add search terms by clicking "add new term".
- You can also choose to add case sensitive terms, change the color for search terms, description and wildcards (all options are not mandatory).
- 8. To save your dictionary, click "Save edit".

PRO TIP

For a new (empty) dictionary, you must create a new category before you can add new terms.

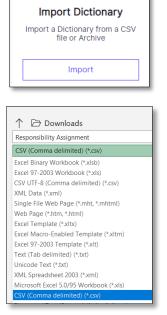






Bulk Import from .CSV

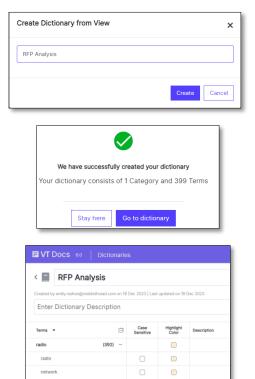
- 1. Open an Excel workbook.
- 2. Enter your Category name in Column A. Enter your dictionary search term in Column B.
- 3. The following columns are not mandatory:
 - Column C Term Description
 - Column D Case sensitive. "TRUE" if you want the term to be case sensitive. "FALSE" if you don't.
 - Column E Search Type. "Exact" if you want no wildcard entered. "Wildcard" if you do.
 - Column F Color you want to align to the term.
- 4. Save your Excel file in CSV format. The name of your file will be the dictionary name.
- 5. Select "Import" from the Dictionary homepage.
- 6. Toggle to "Import from CSV" and browse to find your CSV dictionary file.
- 7. Select "Import". You dictionary is created.



А	В	C	D	E	F
category	term	description	case sensitive	search type	color
Pricing	certified cost and pricing data		FALSE	exact	#ffc000
Pricing	defective pricing		FALSE	exact	#ffc000
Pricing	price		FALSE	exact	#ffc000
Pricing	pricing		FALSE	exact	#ffc000
Pricing	estimat*		FALSE	wildcard	#ffc000
Pricing	\$		FALSE	exact	#ffc000
Pricing	£		FALSE	exact	#ffc000
Pricing	€		FALSE	exact	#ffc000
Program Management	schedule		FALSE	exact	#7030a0
Program Management	scope		FALSE	exact	#7030a0
Program Management	change*		FALSE	wildcard	#7030a0

How to create a search dictionary from the Discovery View

- 1. Select the required view from the "saved views"
- 2. Click the 📃 icon.
- 3. Name your dictionary.
- 4. Click the "Create" button.
- 5. Click the "Go to dictionary" button to review your new Search Dictionary.



portable

Editing Dictionaries using Wildcards

This method avoids having to insert word variations in your dictionary. You can manually do this in VT Docs Dictionary Editor.

- 1. In the dictionary editor, toggle "Wildcard".
- 2. A pane on the right will appear with wildcard options.
- 3. A preview of the options the wildcard you entered will appear.
- 4. Once complete, click "Confirm".

How to use Wildcards in your bulk CSV file import.

This method avoids having to insert word variations in your dictionary. The steps below show how to complete with a bulk import.

- 1. Open your saved .csv file
- 2. In Column E enter "Wildcard" to make the search term a wildcard term.
- In Column A, enter the term with your wildcard. E.g., #" x #" would capture every numerical value to replace the # sign. This entry would find 1" x 2", 3" x 3", 4" x 7" etc.
- 4. Save your .csv file.
- 5. Select "Import" from the Dictionary homepage.
- 6. Toggle to "Import from CSV" and browse to find your CSV dictionary file.
- 7. Select "Import". You dictionary is created.

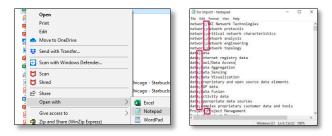
Created by System on 27 Nov 20 Dictionary descriptio	23 Last updated			• You are viewing this dictionary	
Terms 💌	Θ	Case Sensitive	Highlight Color	Description	Wildcard
Pricing	(8) —			Any of these terms need to be reviewed by the pricing team	
certified cost and pricing d	ata				Off
defective pricing					Off
price					Off
pricing					Off
estimat* 🚾					On

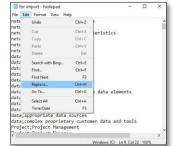
More about wildcards Here are the special characters you can use Character Description Example Matches any number of characters. You can use asterix (*) anywhere in the character wh* finds what, while and why, but not awhile or watch. string. b?II finds ball, bell and bill. ? Matches a single alphabetic character in a specific position. # Matches any single numeric character. 1#3 finds 113, 123, and 133 etc. ISO#+ finds ISO900, ISO14001, but not ISO/TR19033. #+ Matches any number of numeric characters. [] Matches any character inside the square b[ae]II finds ball and bell, but not brackets Matches a range of characters. Only used within square brackets. b[a-c] finds bad, bbd, and bcd. **b[!ae]II** does not find ball and bell. But it does find bill and bull. Excludes characters inside the square [!a]* finds any word not beginning with the letter a.

Saving a .csv in Regional versions of Excel (France, Germany, Spain)

MS Excel will save your .csv export using semi-colons instead of commas. This is due to the regional language setting in the Windows OS. Correct this using the following steps.

- Open your saved .csv file in Notepad The column separation uses a semi-colon (;) instead of a comma (,). Change this for VT Docs.
- 2. Click the "Edit" button and select "Replace"
- 3. Find the (;) semi-colon and replace with a (,) comma.
- 4. Select "Replace All"
- Save and close your csv file. You are now ready to import your Dictionary terms into VT Docs.





Replace	
Find what:	Find Next
Replace with:	Replace
	Replace All
Match case	Cancel
Wrap around	