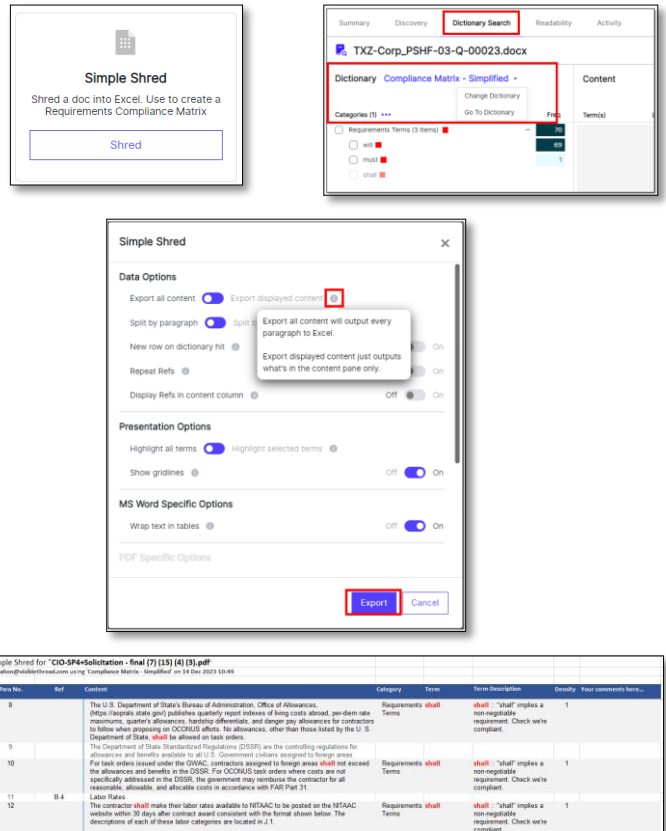## How to create a Simple Shred

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.

4. 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.

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.

3. 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.
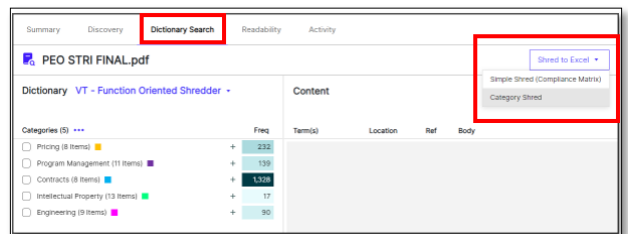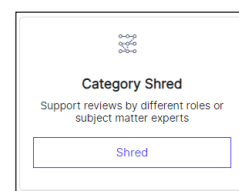
How to use Dictionary Search – Folder View

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.
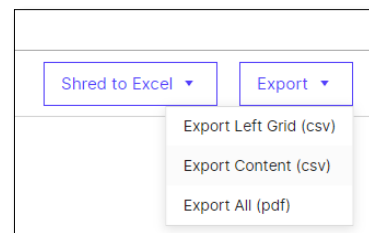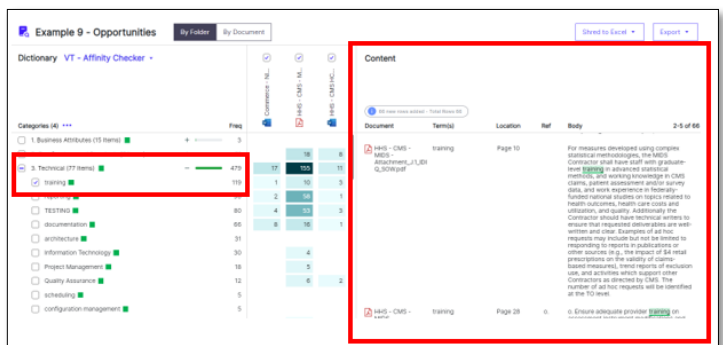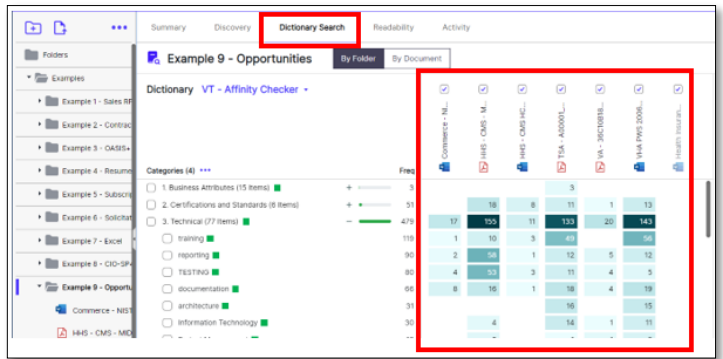
How to Compare Word or PDF documents

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:
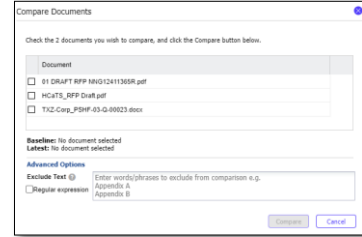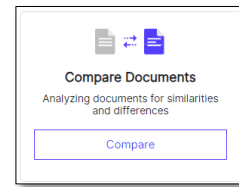
   "IDENTICAL" (no change)

   "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.
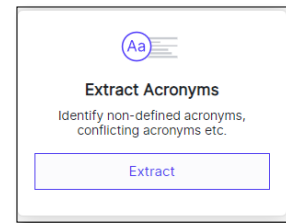
How to Extract a List of Acronyms

Verifying the integrity of Acronyms in your document

1. Click the "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.

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.
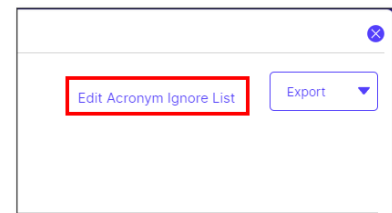
1. Click "Edit Acronym Ignore List" from the Acronym Report.

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"

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)
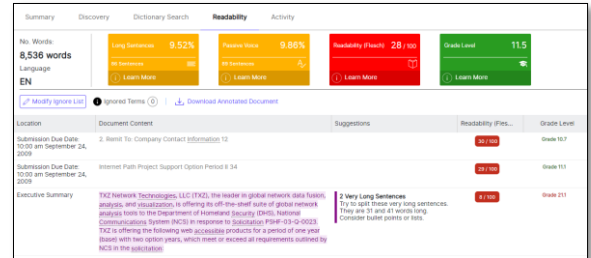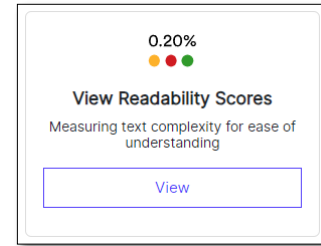
PRO TIP

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.

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.

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.
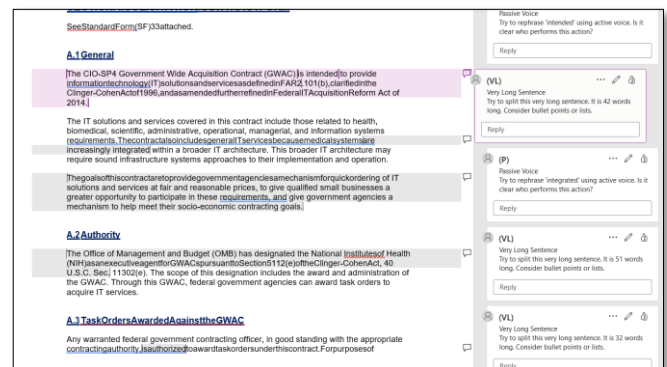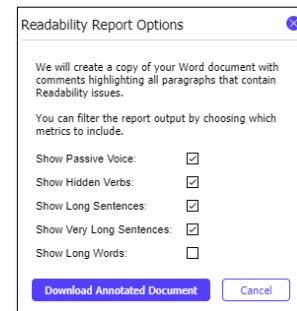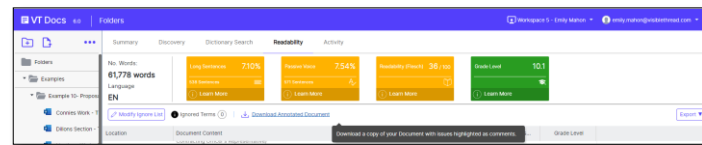
How to use Discovery

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.

5. 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.
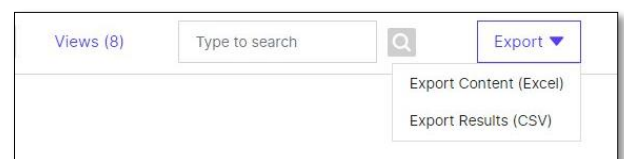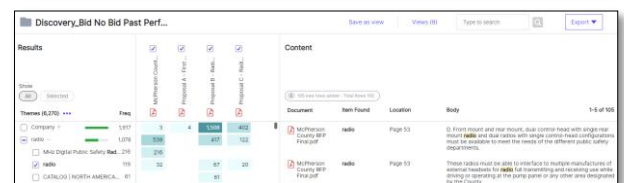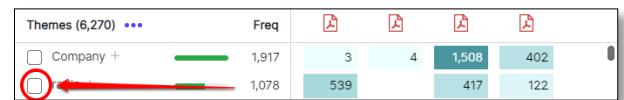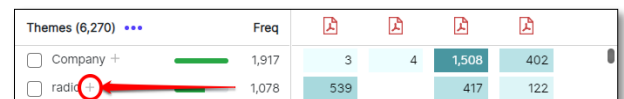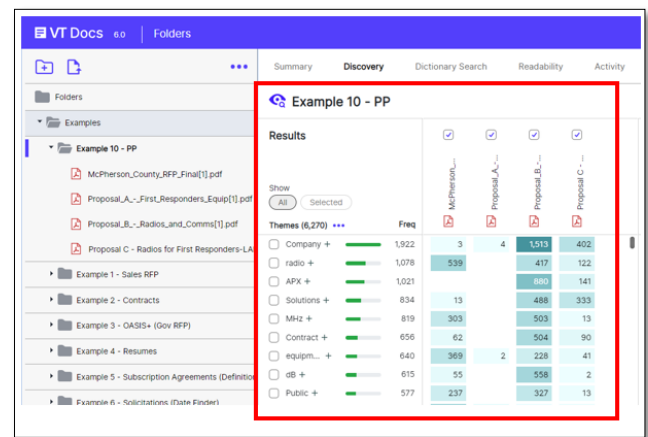
Save your Discovery View

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.
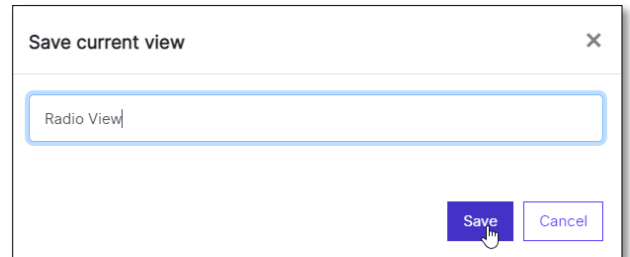
Exit the saved Discovery View

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

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.
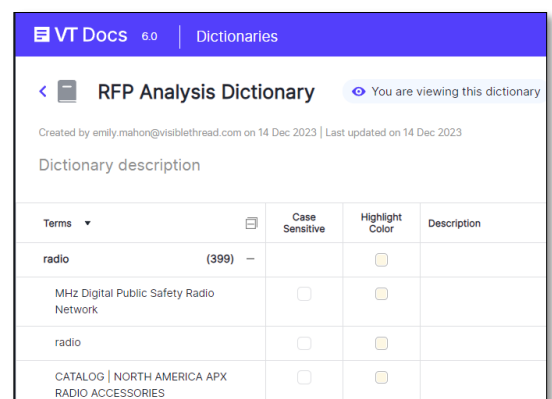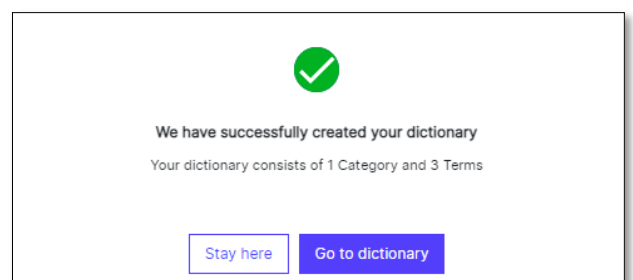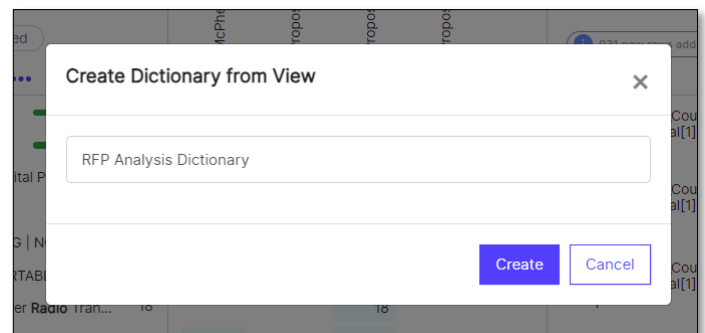
Dictionaries

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.
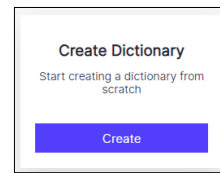
VisibleThread Dictionary Editor

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.

5. 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".

7. 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".
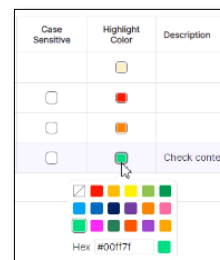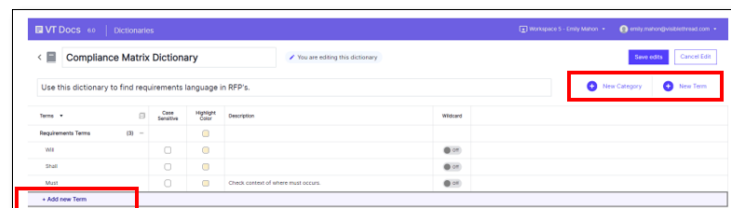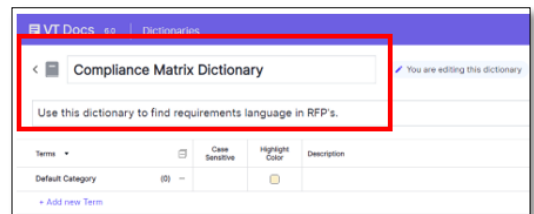
PRO TIP

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.

Import Dictionary
Import a Dictionary from a CSV file or Archive

Import

↑ 📁 Downloads

Responsibility Assignment

CSV (Comma delimited) (*.csv)
Excel Binary Workbook (*.xlsb)
Excel 97-2003 Workbook (*.xls)
CSV UTF-8 (Comma delimited) (*.csv)
XML Data (*.xml)
Single File Web Page (*.mht, *.mhtml)
Web Page (*.htm, *.html)
Excel Template (*.xltx)
Excel Macro-Enabled Template (*.xltm)
Excel 97-2003 Template (*.xlt)
Text (Tab delimited) (*.txt)
Unicode Text (*.txt)
XML Spreadsheet 2003 (*.xml)
Microsoft Excel 5.0/95 Workbook (*.xls)
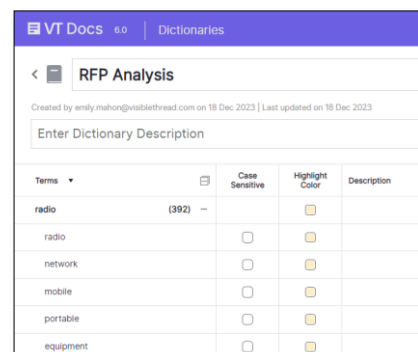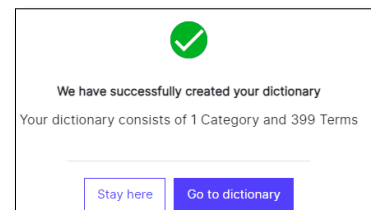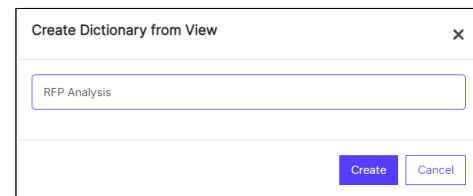CSV (Comma delimited) (*.csv)
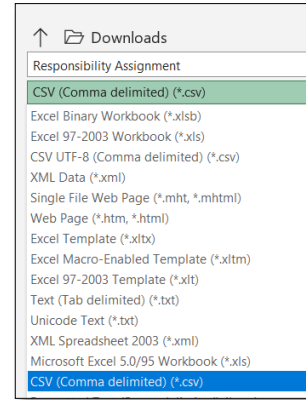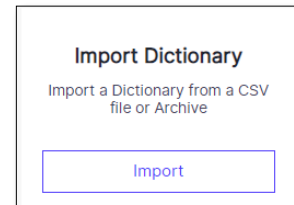
A	B	C	D	E	F
category	term	description	case sensitive	search type	color
Pricing	certified cost and pricing data		FALSE	exact	#ffc000
Pricing	defective pricing		FALSE	exact	#ffc000
Pricing	price		FALSE	exact	#ffc000
Pricing	pricing		FALSE	exact	#ffc000
Pricing	estimat*		FALSE	wildcard	#ffc000
Pricing	$		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] icon.

3. Name your dictionary.

4. Click the "Create" button.

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

Create Dictionary from View ✕

RFP Analysis

Create   Cancel

✅

We have successfully created your dictionary
Your dictionary consists of 1 Category and 399 Terms

Stay here   Go to dictionary

📄 VT Docs 6.0 | Dictionaries

‹ 📖 RFP Analysis

Created by emily.mahon@visiblethread.com on 18 Dec 2023 | Last updated on 18 Dec 2023

Enter Dictionary Description

Terms ▾		Case Sensitive	Highlight Color	Description
radio	(392) —		☑	
radio		☐	☐	
network		☐	☐	
mobile		☐	☐	
portable		☐	☐	
equipment		☐	☐	

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".
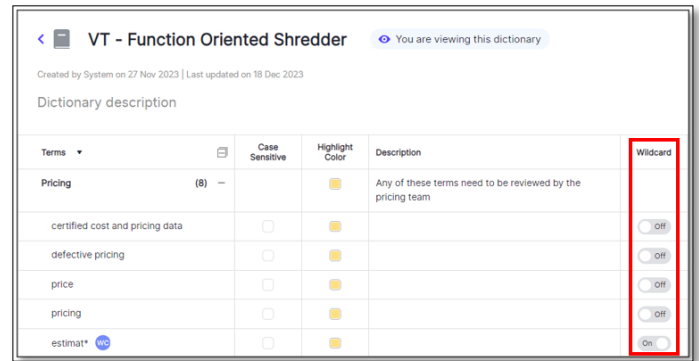
How to use Wildcards in your bulk CSV file import.

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.

3. 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.

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.

1. 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"

5. Save and close your csv file. You are now ready to import your Dictionary terms into VT Docs.