

How to create a Simple Shred

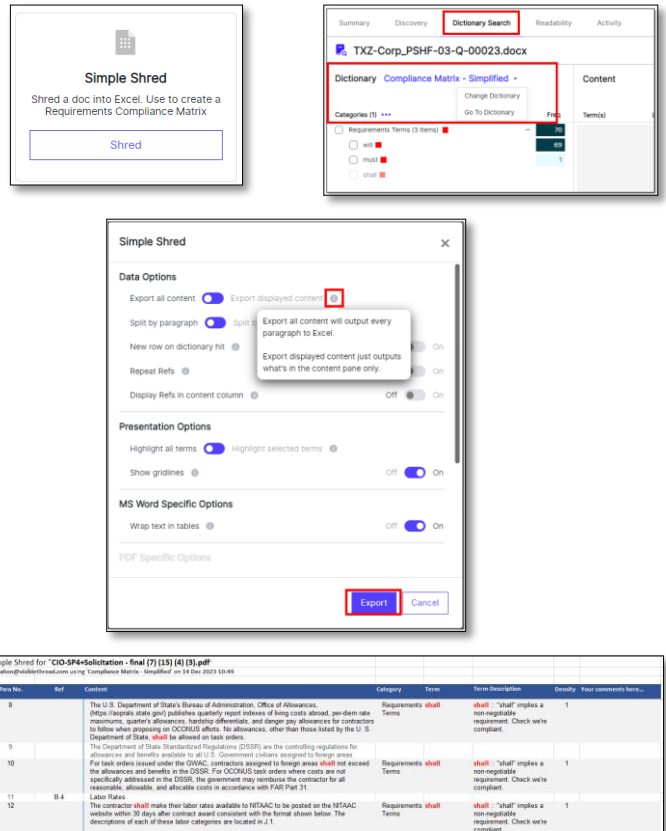
Log into VT Docs with your credentials.

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.

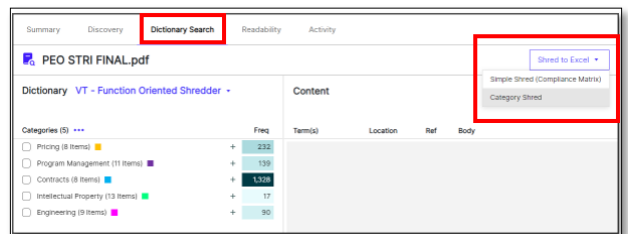
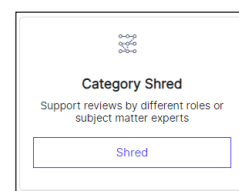
A full shred of your document is shown. Dictionary hits are bolded.



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

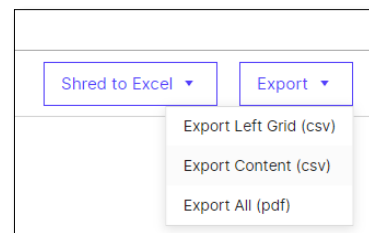
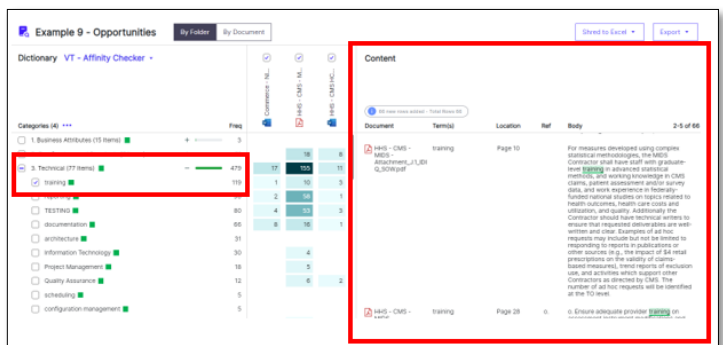
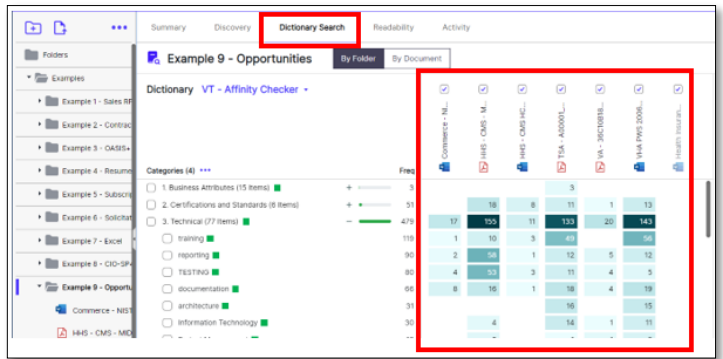
Upload partner capability statements. Use a dictionary to check for certain key capabilities.

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)

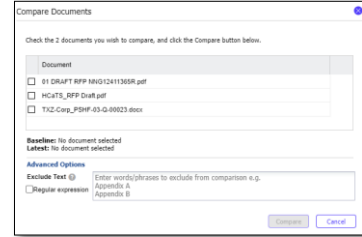
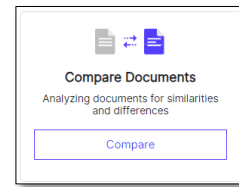
"MODIFIED" (a change to the text within that section)

"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."



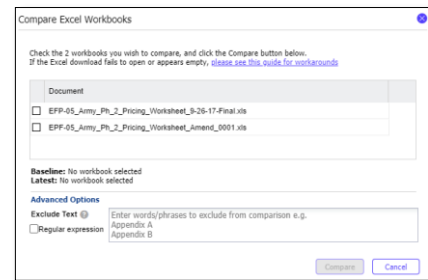
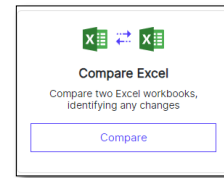
Ref	Content	Baseline Document	vs.	Ref	Content	Latest Document
1	In turn, HSE Training and Management Assistance Program (TMAP) ensures the development and delivery of customized human resources, human capital and training products and services to Federal agencies by managing private sector contractors 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. 3304 (a)(1)).	HICATS_RFP_FINAL.pdf	IDENTICAL	1	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. 3304 (a)(1)).	HICATS_RFP_Draft.pdf
2	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.	HICATS_RFP_FINAL.pdf	MODIFIED	2	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	HICATS_RFP_Draft.pdf

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.



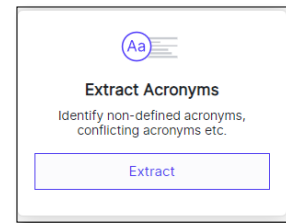
Ref	Content	Baseline Sheet 8: Labor Markup	vs.	Ref	Content	Latest Sheet 8: Labor Markup
8	CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE	CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE	IDENTICAL	8	CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE	CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE
9			IDENTICAL	9		
10			IDENTICAL	10		
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13			IDENTICAL	13		
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99			IDENTICAL	99		
100			IDENTICAL	100		

How to Extract a List of Acronyms

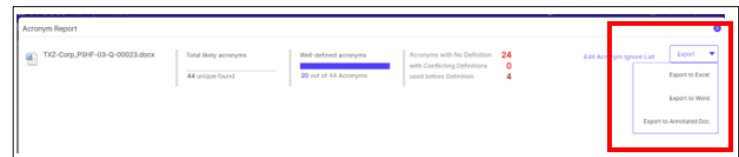
Verifying the integrity of Acronyms in your document

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.



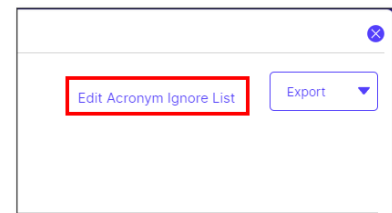
Acronym	Definition	Name	Location	No. occurrences	Count
ATAC	Not defined	Product Description, 3. T2C's Product Offerings, T2C's	Internal registry data from other registries (DPT, ATAC, LACIAC, etc.)	2	2
AP	Not defined	4. Post-Performance Information, 2/01	Feature of the system including the retrieval of large amounts from numerous data sources, query time information	4	4
ARIS	American Registry for Internet Numbers	Repealed definition	Product Description, 3. T2C's Product Offerings, T2C's	2	2
ARIS	American Registry for Internet Numbers	Repealed definition	Product Description, 3. T2C's Product Offerings, T2C's	2	2



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”

Acronym Ignore List

This is a list of words (case sensitive, normally UPPERCASE) that we will ignore when searching for possible acronyms. Use "*" to match any text e.g. DARPA-BAA*

Ignore word

ABOUT

ALL

AM

AND

ANNEX

APPENDIX

APR

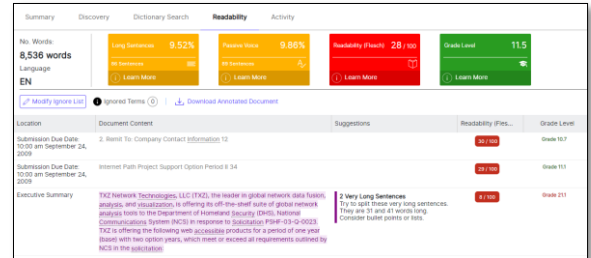
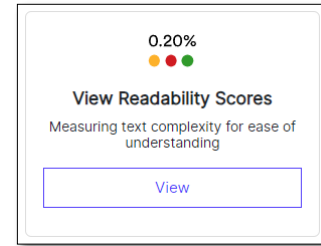
APRIL

AUG

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

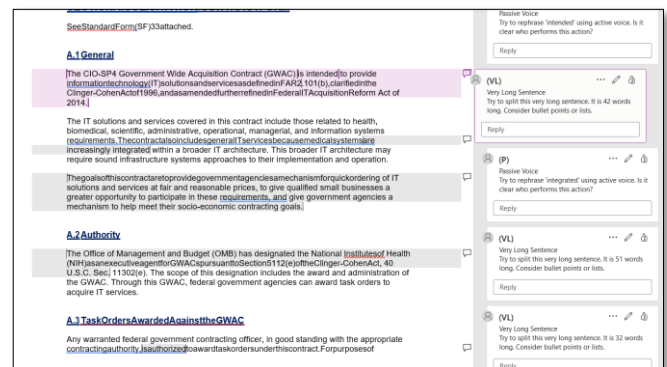
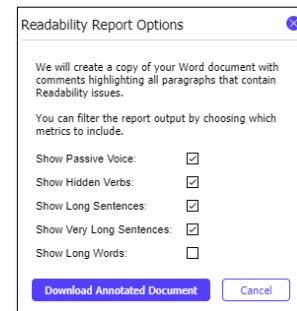
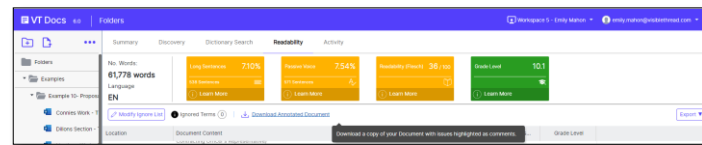
Comparing Readability of Multiple Docs
 You can also see the readability for groups of docs. Just click the folder, and then the Readability tab. Useful to maintain single tone of voice with different authors.

Document	Size	Long Sentences	Passive Language	Readability (Flesch)	Grade Level	Average Sentence Length
Comms Work - TXZ Response.docx	1,811 words Size 34 KB	3.60% long sentences 9 of 256 sentences	3.20% passive sentences 8 of 256 sentences	81.700	Grade 10.5	6 words
Dilona Section - TXZ Response.docx	1,826 words Size 35 KB	22.31% long sentences 29 of 130 sentences	30.00% passive sentences 39 of 130 sentences	61.700	Grade 12.5	14 words
Heathers Work - TXZ Response (1).docx	1,813 words Size 35 KB	10.00% long sentences 27 of 270 sentences	4.70% passive sentences 12 of 270 sentences	82.700	Grade 12.1	9 words
Justins Part - TXZ Response.docx	2,950 words Size 508 KB	6.00% long sentences 24 of 401 sentences	12.40% passive sentences 30 of 241 sentences	61.700	Grade 11.8	10 words
Roba Document - TXZ Response (1).docx	1,130 words Size 19 KB	12.04% long sentences 18 of 149 sentences	2.78% passive sentences 4 of 149 sentences	82.700	Grade 12.4	10 words

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

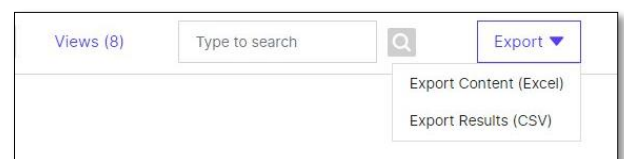
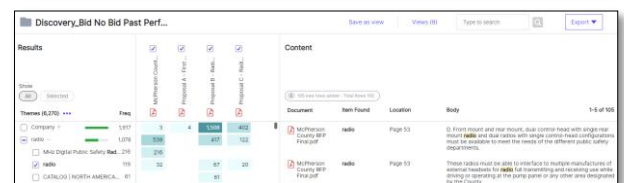
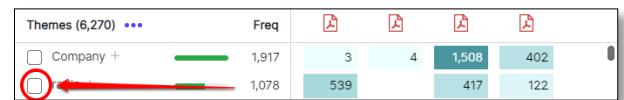
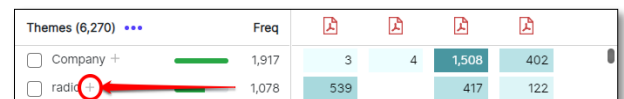
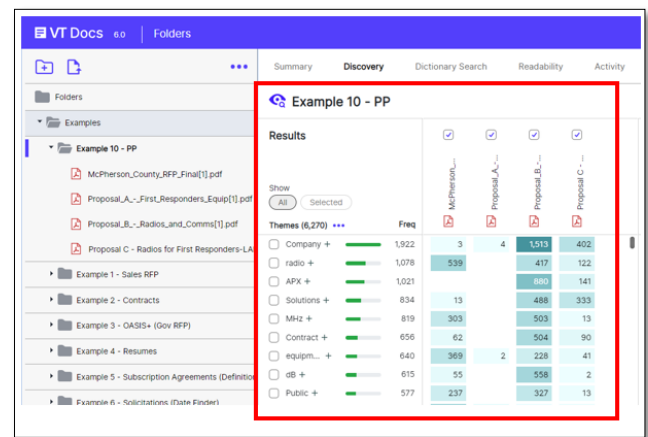
Review commonly used nouns and noun phrases from the Themes pane and see the frequency of usage.

Compliance Gap Analysis

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

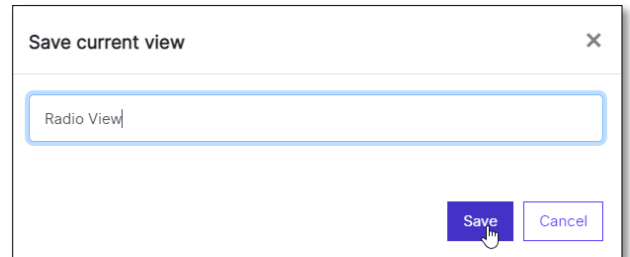
Let Discovery help identify key themes

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.

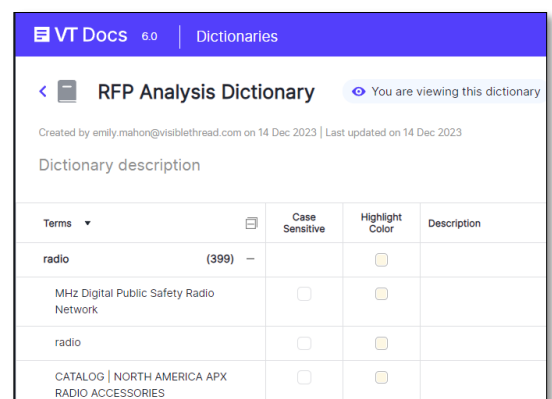
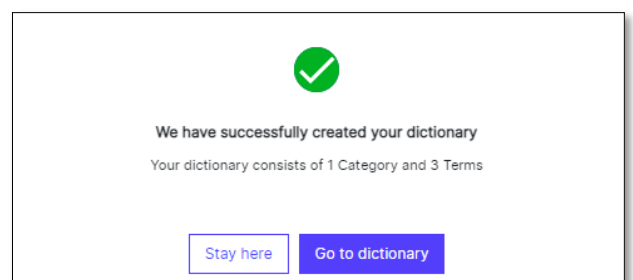
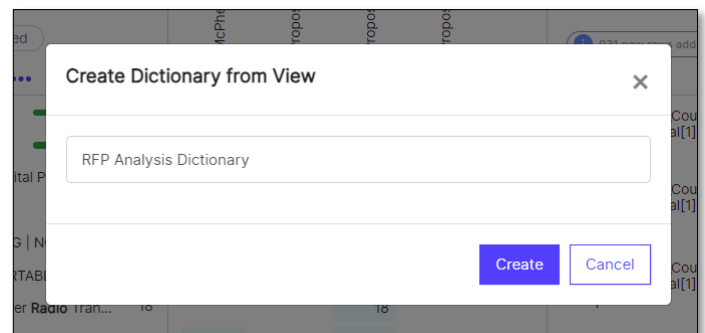


Exit the saved Discovery View

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.

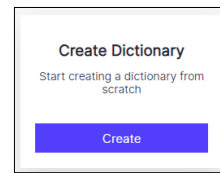
Common uses for dictionaries include identifying:

- “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

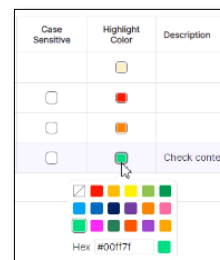
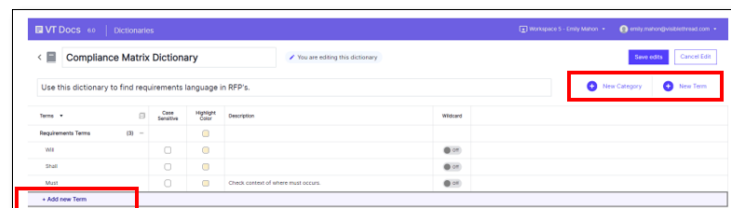
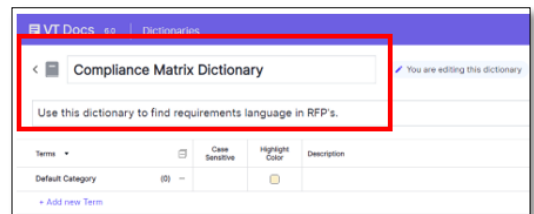
There are two primary ways to customize dictionaries. These are:

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



VisibleThread Dictionary Editor

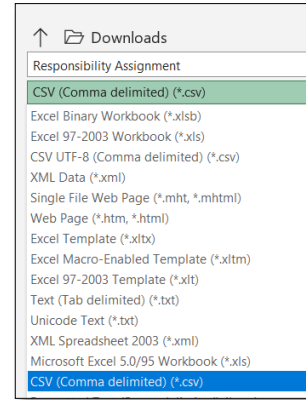
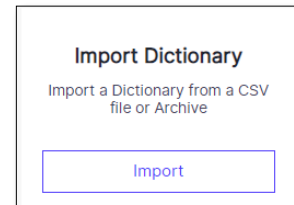
1. Select the Dictionary icon from the navigation pane.
2. Select “Create” from “Create Dictionary” tab.
3. Enter your New Dictionary Name.
4. You can enter a dictionary description; this option is not mandatory.
5. You must have at least one category in a dictionary. Categories are used to group dictionary 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

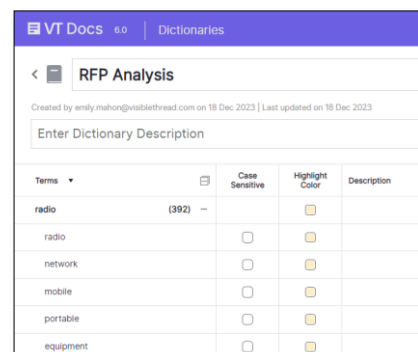
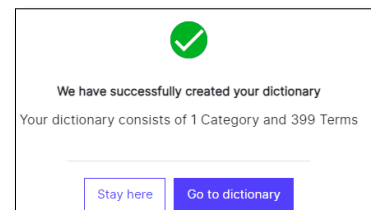
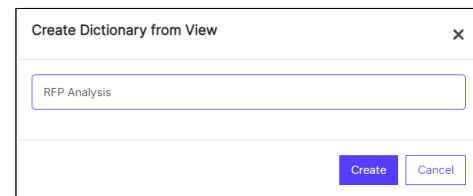
1. Open an Excel workbook.
2. Enter your Category name in Column A. Enter your dictionary search term in Column B.
3. The following columns are not mandatory:
 - Column C – Term Description
 - Column D – Case sensitive. “TRUE” if you want the term to be case sensitive. “FALSE” if you don’t.
 - Column 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”. Your dictionary is created.



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

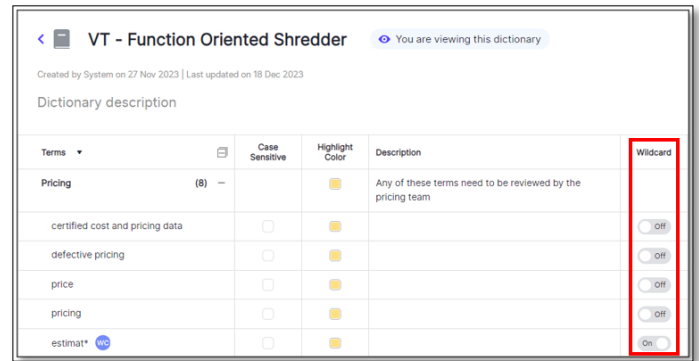
1. Select the required view from the “saved views”
2. Click the  icon.
3. Name your dictionary.
4. Click the “Create” button.
5. Click the “Go to dictionary” button to review your new Search Dictionary.



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”. Your dictionary is created.

More about wildcards

Here are the special characters you can use

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

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.

