

## VisibleThread for Docs 2.11 – Product Update & Release Notes

October 2014

For this major release, the theme is **better & faster compliance**.

Here are the highlights:

- Better **Compliance Matrix Generation**
- **Enhanced Discovery**
  - **Better Compliance & Gap Analysis**
  - **Easily populate your Concept Dictionaries**
  - **Filtering and grouping**
- **Re-ordering** documents in folders
- Completely **re-written help documentation**, usability enhancements and over 20+ bug fixes

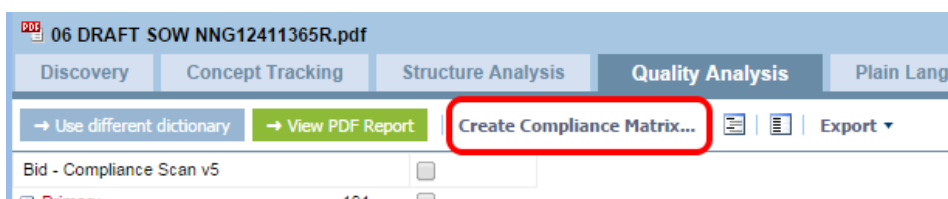
### Better, more complete Compliance Matrix Generation

We have dramatically improved the way we generate compliance matrices and the generated output:

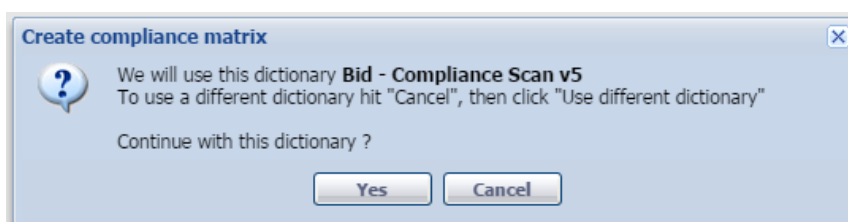
1. you now get a full extract of all content, not just content with keywords,
2. the reference or section heading is extracted for PDF docs,
3. lists of items are now fully output, so patterns like 'The contractor will provide:' followed by a list is handled and output into the matrix,
4. it is using a better Excel format more suitable for a compliance matrix.

We now have a **new dedicated button to generate Compliance Matrices** under the Quality tab. Use this rather than the old approach of exporting to Excel.

- Click the 'Create Compliance Matrix...' button



- The system will then show you which dictionary is currently in use. You will see a message like this:



Normally when you generate a compliance matrix, you will want to highlight terms such as 'will', 'shall', 'must' etc. So you would expect these terms and others to occur in the dictionary. If the current dictionary is not the best one, just cancel and use a more appropriate dictionary by clicking 'Use different dictionary'.

- Once complete, you will see a full compliance matrix like this in Excel:

Category	Keywords	Page	#	Content	Document	Your comments here...
Secondary	request	5		Solicitation Draft <b>request</b> for Proposal NNG12411365R CISTO-SCTS	01 DRAFT RFP NNG12411365R.pdf	
Secondary	obligated requires	5	(a)	(a) Minimum order. When the Government <b>requires</b> supplies or services covered by this contract in an amount of less than \$1,000, the Government is not <b>obligated</b> to purchase, nor is the <b>Contractor obligated</b> to furnish, those supplies or services to the contract.	01 DRAFT RFP NNG12411365R.pdf	
Secondary	contractor obligated	5	(b)	(b) Maximum order. The <b>Contractor is not obligated to honor</b> —	01 DRAFT RFP NNG12411365R.pdf	
		5	(1)	(1) Any order for a single item in excess of \$10 million;	01 DRAFT RFP NNG12411365R.pdf	
		5	(2)	(2) Any order for a combination of items in excess of \$10 million; or	01 DRAFT RFP NNG12411365R.pdf	
		5	(3)	(3) A series of orders from the same ordering office within 30 days that together call for quantities exceeding the limitation in paragraph (b) (1) or (2) of this section.	01 DRAFT RFP NNG12411365R.pdf	
Primary Secondary	requirement contractor required includes	5	(c)	(c) If this is a requirements contract (i.e., <b>includes</b> the Requirements clause at subsection 52.216-21 of the Federal Acquisition Regulation (FAR)), the Government is not <b>required</b> to order a part of any one <b>requirement</b> from the <b>Contractor</b> if that <b>requirement</b> exceeds the maximum-order limitations in paragraph (b) of this section.	01 DRAFT RFP NNG12411365R.pdf	
Primary	contractor	5	(d)	(d) <b>Notwithstanding</b> paragraphs (b) and (c) of this section, the <b>Contractor shall</b> honor	01 DRAFT RFP	

## Enhanced Discovery - Better Compliance & Gap analysis

In 2.10, we had a single word noun discovery view for docs and folders. That worked well for acronyms, and extracting single word concepts like 'security', but it wasn't able to handle multi-word concepts (referred to as 'noun phrases') such as;

- “Liquidated damages”,
- “ISO 9000”,
- “Archive Data Policy”.

Discovery in 2.11 is a complete redesign. It flags multi-word concepts automatically. It groups them into topics.

This new capability has many business use cases including;

- check if proposals are non-aligned with solicitation language,
- check if your proposal is non-compliant and doesn't cater for critical requirements from L&M
- check if different elements of your proposal emphasize the right content,
- check if a brand reference is consistent across multiple documents,
- quickly identify risky content that may trip you up at program delivery phase.

Each column shows a doc.  
Numbers are occurrences

The screenshot shows the 'Discovery' tab of the 'RFP - 1 (NASA)' interface. The main table lists concepts found across various documents. The columns include 'Group', 'Freq.', and several document titles like '01 DRA...', 'Draft P...', '06 DRA...', 'TXZ-Co...', and 'Plan 1...'. The 'property record data' row is highlighted, and its frequency is 1. The document content area shows the text for 'property record data' on page 26 and 'archive data policies' on page 112. The 'Checked concepts' section on the right lists 'archive dat...', 'NCCS Data...', and 'property rec...' with their respective counts and status indicators.

Concepts found across docs.  
Bold denotes group.

Exact Text in documents

And here's a use case where we check if the proposal is compliant. In this case we're missing references to 'Archive Data Policy' & 'real-time data system'.

**We found these concepts**

**RFP, SOW, PWS**

**Our Proposal**

Concepts found	Group	Freq.	01 DRA...	06 DRA...	Draft P...	TXZ-Co...
Data Sensing	data	5				5
Data Visualization	data	5				
data publication services	data	4				
certified cost or pricing data	data	4				
technical data	data	4				
proprietary and open source data elements	data	4				
function data	data	3				
Archive Data Policy	data	3	✓			3
following data	data	3				
such data	data	3				
real-time data system	data	3	✓			1 2
BGP data	data	3				
other data	data	3				

**Found concepts in RFP**

**Nothing in Proposal –**

**The requirement**

Page / Heading / Worksheet	Concept Found	Document Content
Page 116	real-time data system	The scope of this task shall encompass the provision of science data management expertise and support the distributed data and technology development environment of the Direct Readout Laboratory at the Goddard Space Flight Center. The areas of focus will be in design, development and implementation of database schemas and software tools for science processing algorithm implementation in real-time data systems direct readout applications.
Page 147	Archive Data Policy archive data policy	Scenario (3) – Archive Data Policy The Government will evaluate for understanding, completeness, and adequacy the Offeror's proposed

## Enhanced Discovery – Easily populate your Concept Dictionaries

One of the major advantages of filtering and groups is that you can easily identify elements that you want to explicitly track in concept dictionaries.

We have overhauled how this works, so now it's really easy to rapidly populate dictionaries directly from enhanced discovery. It really just takes a couple of clicks:

Select those items you're interested in tracking then click 'Add to concept list'. In the case below, we want to track 'property record data'.

You can also multi-select a number of concepts, in which case 'Add to concept list' will add them all. Multi-select by using CTRL + click, or to select a contiguous set of items, hold down SHIFT and click a second item.

products access multiple data sources and se...	data	1	
Program Support Data	data	1	
property record data	data	1	✓
proprietary cost data			
prototype stream data processing system			
public network data			
real-time data			

**Add to concept list**

Check selected concepts

Clear checked items

## Enhanced Discovery – New Filtering and Grouping Capability

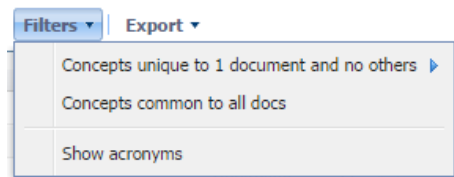
2.11 Enhanced Discovery categorizes extracted concepts into groups (or topics). This is a powerful way of isolating related concepts. Clicking on groups restricts the middle grid to just items in that group. For instance the selected group in this view is 'data' with a total of 441 occurrences.

Concepts found	Group	Freq.	01 DRA...	Draft P...	06 DRA...	TXZ-Co...	Plan 1...
following data	data	3	3				
function data	data	3	3				
real-time data system	data	3	1		2		
technical data	data	3	3				
satellite data	data	3				3	
such data	data	3					
network and Internet data	data	3				3	
BGP data	data	3					3
data fields	data	3				3	
Archive Data Policy	data	3					
data management technologies	data	2					
Network Routing Data Daily Border Gateway ...	data	2					2
tool and data deliverables	data	2					2
Data Matrix Identification Symbols	data	2					2
numerous data sources	data	2					2

Group Name	#
Contractor	735
contract	600
<b>data</b>	<b>441</b>
Government	401
Offeror	348
clause	344
Proposal	311
NASA	294
information	280
performance	265
Solicitation	256
Officer	220
support	215
cost	212
Plan	185

Filters allow you restrict the results further.



You can use these filters to further refine the results:

- **Show concepts unique to 1 doc** and no others - This is useful for gap analysis, or if you need to isolate certain concepts that you would expect to occur in other documents. Lack of terminology alignment can lead to compliance issues.
- **Show concepts common to all docs** – This filters only concepts that occur in every document in the folder
- **Show acronyms** – Useful when looking to isolate only acronyms

## Re-ordering documents in folders

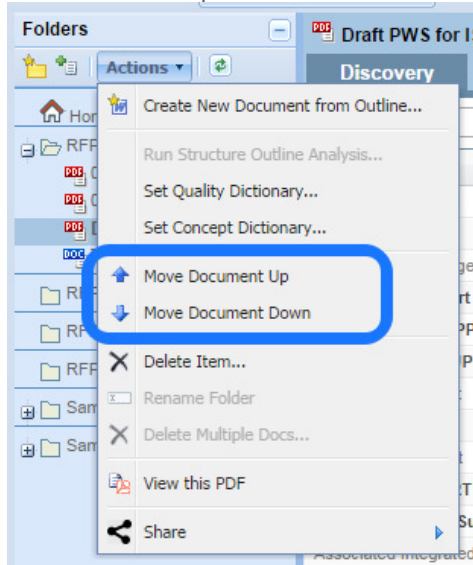
For users coming from versions of VisibleThread Docs prior to 2.11, you will notice a change in behaviour around the position of uploaded documents after upload.

In previous versions of VisibleThread Docs, document were sorted alphabetically.

In 2.11, by popular request, we provide the ability to explicitly order the documents. You can then re-order them in a way that works best for your needs.

For example in a sales context, you might have a folder containing both RFP solicitation documents side by side with your proposal documents. So, in this case you might want to have the solicitation documents appear first, followed by your proposal documents.

To re-order a doc, select the document in the Navigation Pane and click Actions. Then use the up and down arrow to reposition the documents.



## Completely re-written help documentation, usability enhancements

We have re-written the help guide from the ground up. Find the help here:

<http://support.visiblethread.com/entries/22096143-VisibleThread-Docs-help-version-2-11>

## Bugs Fixed in 2.11

- [VT-41] - PDF analysis not counting correct number of terms in some rare cases
- [VT-192] - Paragraphs containing non-breaking spaces aren't being wrapped in grid views
- [VT-729] - Create new outline, apply doesn't work
- [VT-782] - Issue with quality/concept items containing hyphens, where it's picking up matches in hyphenated words that should not match.
- [VT-859] - The "re" of "You're" is incorrectly picked up as a noun in discovery view
- [VT-942] - Use different dictionary at document level -> after refresh, selects Folder Summary view
- [VT-1009] - Import CSV dictionary allows duplicate terms
- [VT-1013] - Dictionary term not being found in PDF when split across lines
- [VT-1042] - Error in Quality view when colorizing multiple overlapping terms
- [VT-1044] - Excel export from Discovery detailed view occasionally does not include all content
- [VT-1045] - concept terms not being matched in pdf when broken on new line
- [VT-1047] - Headings missing from some paragraphs in detailed/instance grid and reports
- [VT-1052] - Export to excel ignoring all content from a particular document

- [VT-1097] - Uncheck 1 concept (or last concept with multiples) in discovery not clearing out the 'checked concepts' pane
- [VT-1110] - Folder Discovery 'Export to Excel' occasionally missing rows, 'Export to CSV' correct
- [VT-1138] - Exporting very large instance grid to excel does not work in IE
- [VT-1149] - Selecting a doc in folder quality view brings you to structure tab
- [VT-1163] - Incorrect filter icon used in Activity views - summary, folder and doc
- [VT-1164] - Incorrect error messages reported when a document upload fails
- [VT-1198] - Non-admin users incorrectly can 'add to dictionary' from Discovery & Concept views
- [VT-1222] - discovery folder view, 'Concept' column in instance grid not wrapping

## Obtaining the Latest Release Notes & Documentation

For the most recent updates to the Release Notes, go to the VisibleThread Support center, at <http://www.visiblethread.com/support/support-home>.

## Contact

Our website gives up-to-date details of contact numbers and addresses. To contact VisibleThread support, navigate to the VisibleThread contact page at: <http://www.visiblethread.com/company/contacts> in your browser or mail: [support@visiblethread.com](mailto:support@visiblethread.com)

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End of VisibleThread 2.11 Release Notes  
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