

QUICKSTART GUIDES

Creating Dictionaries

What are Dictionaries?

Dictionaries are groups of phrases and terms that we want to search for within documents.

How can they help?

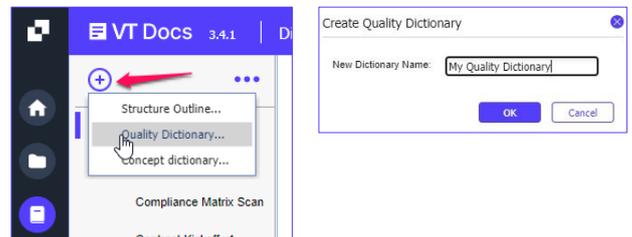
In a proposal or contracts context, they help validate compliance with instructions and lower risk.

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.

How to create your New Dictionary

1. Select the Dictionary icon from the navigation pane.
2. Select “Quality Dictionaries”
3. Select the “+” button and select “Quality Dictionary”
4. Enter your New Dictionary Name and click “OK”
5. Your new dictionary is now ready to insert terms

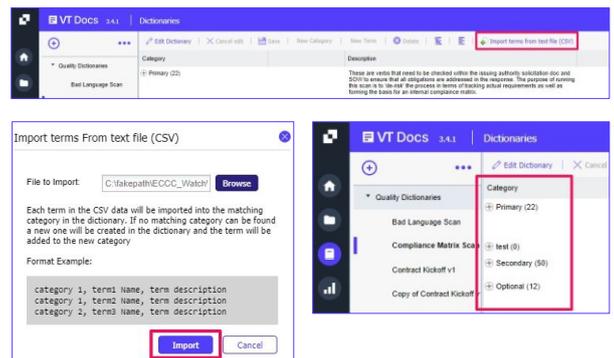


There are two primary ways to customize dictionaries. These are:

- A **Bulk import** from .CSV (Comma Separated Value) formatted text file.
- Using the **VisibleThread Dictionary Editor** (use when adding one or two new terms)

Bulk Import

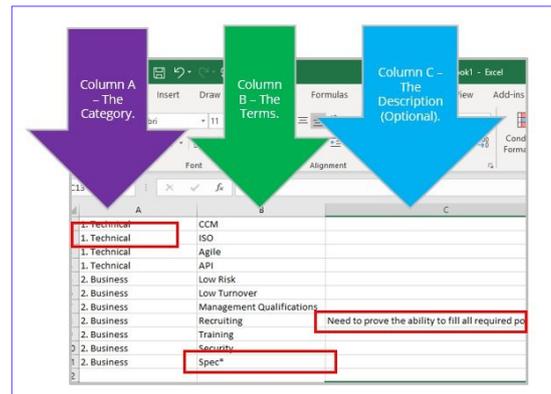
1. Select the Dictionary you want to update
2. Select import terms from text file
3. Browse to your saved .csv file for import
See “How can I create a dictionary quickly?” section of the Guide
4. Select “Import”
5. Your Dictionary categories display



How can I create a dictionary quickly?

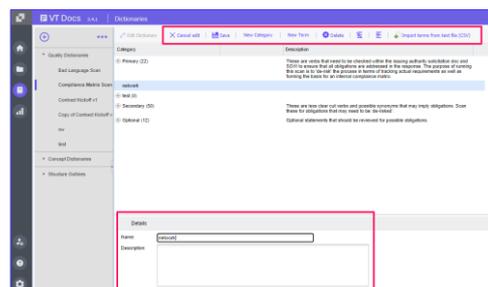
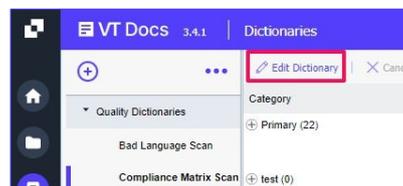
Write a list of terms within MS Excel before creating a dictionary within VT Docs.

1. Create a new MS Excel file.
2. Populate Column A with the Category name/s.
3. Populate Column B with the terms for the category.
4. Add descriptions in Column C (if required).
5. Save the file as a .csv file to your local desktop.



VisibleThread Dictionary Editor

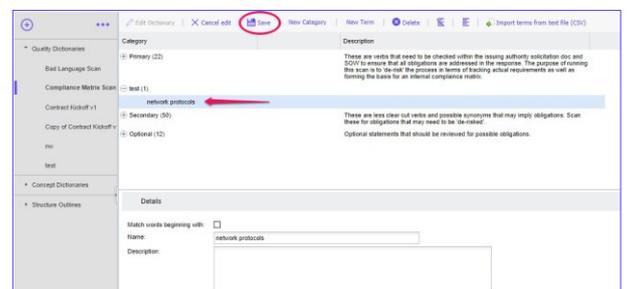
1. Select the Dictionary you want to edit
2. Click the “Edit Dictionary” button.
3. The action buttons in the top bar become active and a second pane in the bottom half of the window displays. Click “New Category” or “New Term”
4. Enter the name and description
5. To change a term or category, select it in the bottom pane.
6. When you have finished editing, click “Save” in the top tool bar.



Your Dictionary list and Navigation pane is now disabled.

PRO TIP

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



Editing Dictionaries using Match Words

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

Click **“Edit Dictionary”**

Click **“New Term”**

Enter the name and description

Select **“Match words beginning with:”** checkbox

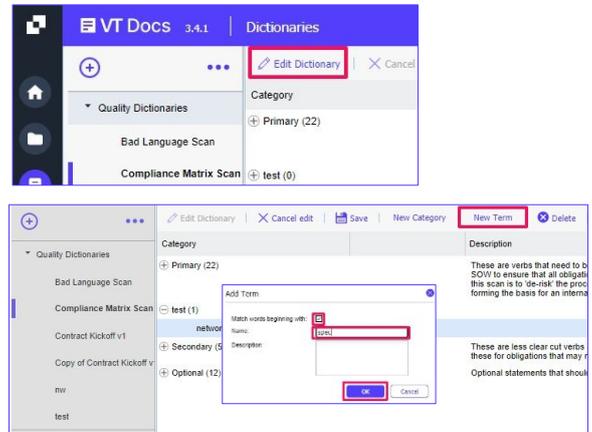
Click **“OK”**

In this example matching terms beginning with spec* means the dictionary will match similar words.

- Specs
- Specification
- Specify
- Specified
- Specifying

When finished editing, hit **“Save”** in the top toolbar.

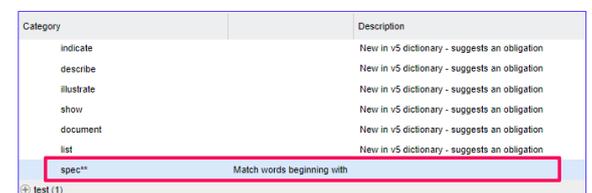
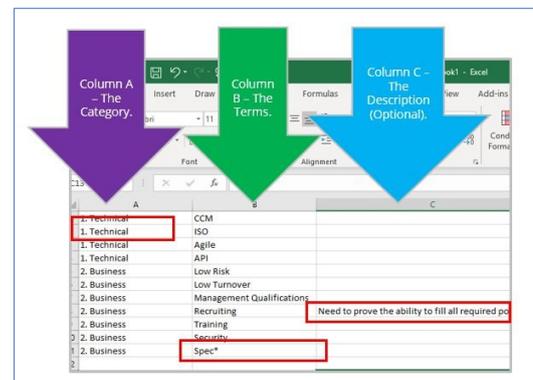
If you don't want to save your changes, hit **“Cancel edit”**. The system will discard any changes you made.



How to use Match Words 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 B place an **“*”** character after the search terms for matching.
3. Complete for all terms required
4. Save your .csv file
5. Open VT Docs
6. Select the Dictionary (Quality or Concept) you want to update
7. Select import terms from text file
8. Browse to your saved .csv file for import
9. Select **“Import”**
10. Your Dictionary categories display on the main window
11. Click on each category to view the search terms included
12. Your dictionary is now ready for use

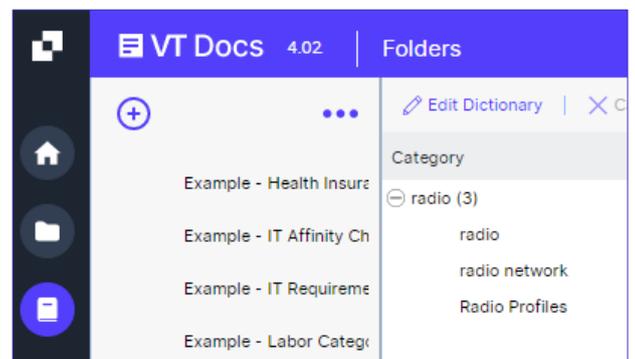
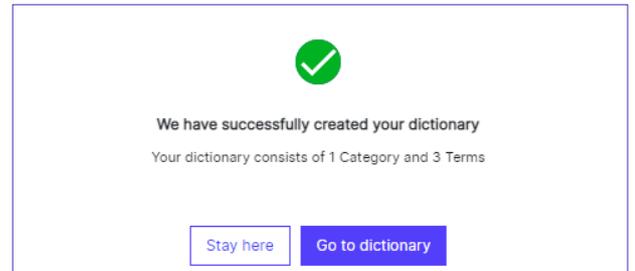
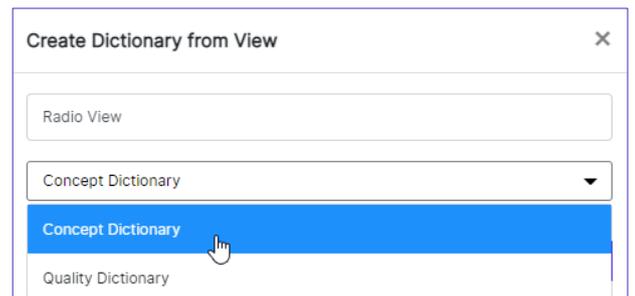




How to create a search dictionary from the Discovery View

1. Select the required view from the “saved views”
2. Click the  icon
3. Select a **Quality** or **Concept** Dictionary from the dropdown menu
4. Click the “**Create**” button.
5. Click the “**Go to dictionary**” button to review your new Search Dictionary.

Please check Pages 6 & 7 of the Main Quickstart Guide for full details on the Discovery feature and Saving Views.



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.

