

How to create a Compliance Matrix in 3-clicks!

Log into VT Docs with your credentials.

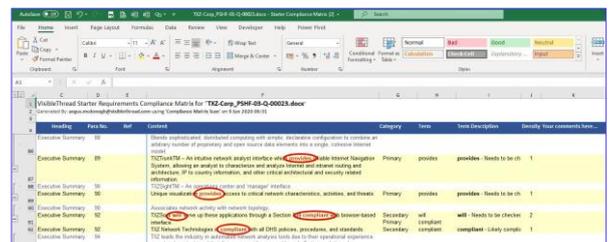
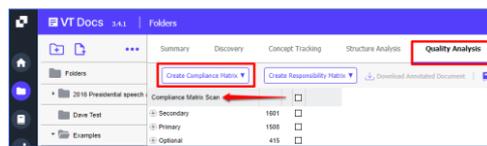
Input your email address and initial password. Change the password after first login.

1. Select the document you want to shred from your folder.
2. Click the **“Quality Analysis”** Tab OR the shortcut on the Summary Tab.
3. A set of search terms is shown on the left.

Use the **“Compliance Matrix Scan”** dictionary to get started. Select ‘Use different dictionary’ to shred using a different dictionary.

4. Click **“Create Compliance Matrix”**.
5. Choose to split the document text by sentence or paragraph.
6. Click **“Generate Matrix”**.
7. Save the Excel file to your local drive.

A full shred of your text by sentence is shown. Keywords are highlighted in Red.

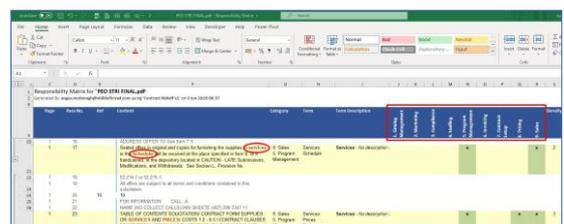


How to create a Responsibility (RACI) Matrix

1. Select the document you want to shred from your folder.
2. Click the **“Quality Analysis”** Tab OR the shortcut on the Summary Tab.
3. A set of search terms is shown on the left. Use the **“Contract Kickoff v1”** dictionary to get started. Select ‘Use different dictionary’ to shred using a different dictionary.
4. Click **“Create Responsibility Matrix”**
5. Select **“Create matrix for this doc”**
6. Choose to split the document text by sentence or paragraph.
7. Click **“Generate Matrix”**.
8. Save the Excel file to your local drive.

The Full text of the document is in Column F. Keyword hits are in red. Categories and teams are flagged against the keywords identified.

9. You can now distribute work across teams or departments.



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)

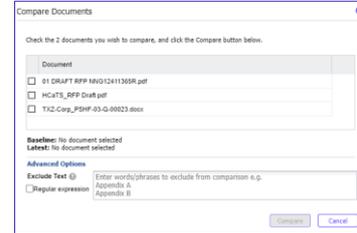
"MODIFIED" (a change to the text within that section)

"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

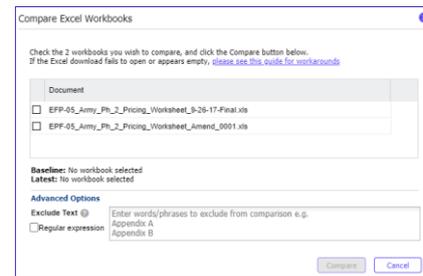
When comparing, always try to compare PDF vs. PDF or Word doc vs. Word doc. Avoid comparing PDF vs. Word doc. This is because the way the docs are stored natively between Word and PDF can distort the results."



Document: Comparison Report - "HCATS_RFP_FINAL.pdf" Vs "HCATS_RFP_Draft.pdf"				
Generated 28 Aug 2020 11:47				
Baseline Document		vs.	Latest Document	
HCATS_RFP_FINAL.pdf			HCATS_RFP_Draft.pdf	
Ref	Content		Ref	Content
	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. 1304 (a)(1)).	IDENTICAL		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. 1304 (a)(1)). Learning management systems, which is a subset of training and HR management, will not be addressed in this solicitation.
	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.	MODIFIED		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

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.



Document: Comparison Report - "EFP-05_Army_Ph_2_Pricing_Worksheet_8-26-17-Final.xls" Vs "EFP-05_Army_Ph_2_Pricing_Worksheet_Amend_0001.xls"					
Generated 28 Mar 2010 02:34					
Baseline Sheet 6: Labor Markup		vs.	Latest Sheet 6: Labor Markup		
7	Row 5	CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE.....	IDENTICAL	Row 1	CONTRACTOR PRICING WORKSHEET FOR MINOR REPAIRS SERVICE ORDER FEE.....
8	Row 6		IDENTICAL	Row 2	
9	Row 7		IDENTICAL	Row 3	
10	Row 8	RFP Number: Location.....	IDENTICAL	Row 4	RFP Number: Location.....
11	Row 9	Companion: Project Name.....	IDENTICAL	Row 5	Companion: Project Name.....
12	Row 10		IDENTICAL	Row 6	
13	Row 11	Base Year: Option Year 1 - B - Month End.....	IDENTICAL	Row 7	Base Year: Option Year 1 - B - Month End.....
14	Row 12	Service Order Fee Element.....	MODIFIED	Row 8	Markup Rates.....
15	Row 13	SO Fee Element 1.....	MODIFIED	Row 9	Revenue Profit and Labor.....
16	Row 14	SO Fee Element 2.....	MODIFIED	Row 10	Joint Handling Charge Rate.....
17	Row 15	SO Fee Element 3.....	MODIFIED	Row 11	Profit on Subcontractor.....
18	Row 16	SO Fee Element 4.....	MODIFIED	Row 12	Subcontractor Handling.....
19	Row 17	SO Fee Element 5.....	MODIFIED	Row 13	Profit on Subcontractor.....
20	Row 18	SO Fee Element 6.....	MODIFIED	Row 14	Indirect Rate Applied to Direct Labor.....
21	Row 19	SO Fee Element 7.....	MODIFIED	Row 15	Joint Rate.....
22	Row 20	Total Service Order Fee (Element 1 + Element 2 + Element 3 + + 0.00% + 0.00% + 0.00%).....	MODIFIED	Row 16	Total Service Order Fee (0.00% + 0.00% + 0.00%).....
23	Row 21		IDENTICAL	Row 17	
24	Row 22	Notes: Total Service Order Fee to be ONLY allowable markup on service orders, with the MODIFIED Row 18	MODIFIED	Row 18	
25	Row 23	exception of the emergency SO fee where applicable.....	IDENTICAL	Row 19	
26	Row 24		IDENTICAL	Row 20	
27	Row 25		IDENTICAL	Row 21	

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 Acronym Report shortcut from the Document 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 or Excel
5. Review and correct any flagged issues in the export document. Update the original document with completed updates.

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.



The screenshot shows the 'Extract Acronyms' button and the resulting 'Acronym Report' table. The table has columns for Acronym, Definition, Status, Location, and Count. The report shows 44 unique acronyms, with 24 well-defined, 0 with conflicting definitions, and 4 with no definition.

Acronym	Definition	Status	Location	Count
AT&T	Not defined	Not defined	Product Description, 2. TDC's Product Offerings, 1927hrs	2
AT&T	Not defined	Not defined	6. Post Performance Information, Any Response	4
AT&T	American Registry for Internet Numbers	Repeated definition	Product Description, 2. TDC's Product Offerings, 1927hrs	2
AT&T	American Registry for Internet Numbers	Repeated definition	Product Description, 2. TDC's Product Offerings, 1927hrs	2

Below the table, there is an 'Export' dropdown menu with options: 'Export to Excel' and 'Export to Word'.

PRO TIP

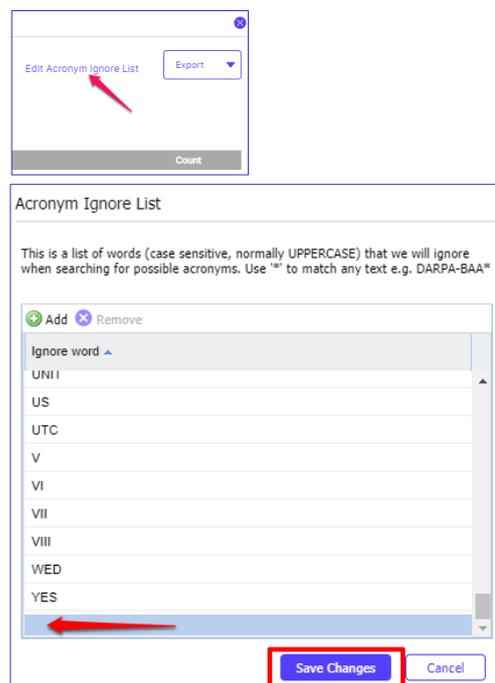
When working with Acronym reports, you may sometimes see 'false positives' that really should not be considered as acronyms. For example, ABOUT, which is capitalized, but is not an acronym.

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"



The screenshot shows the 'Edit Acronym Ignore List' dialog box with an 'Add' button highlighted by a red arrow. Below it is the 'Acronym Ignore List' table, which contains a list of words to ignore. The 'Add' button is highlighted by a red arrow, and the 'Save Changes' button is highlighted by a red box.

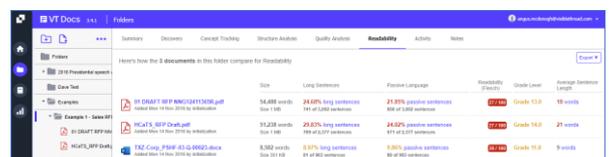
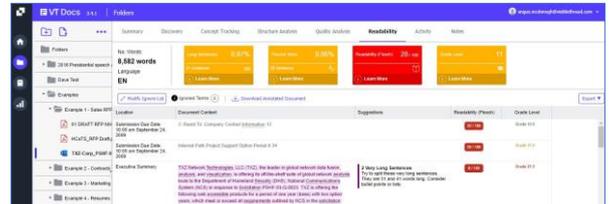
Ignore word
UNII
US
UTC
V
VI
VII
VIII
WED
YES

How to measure your documents Readability

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”.

1. Select a sample document.
2. Click on the ‘Readability’ tab. You will see this view.
3. It shows overall Grade Level and Readability stats on top. You can also see:

- V. Long sentences (Purple)
- Long Sentences (Blue)
- Long Words (dotted underline)
- Passive Voice (Red)
- Hidden Verbs (Green)



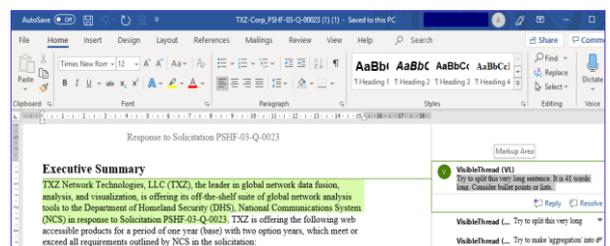
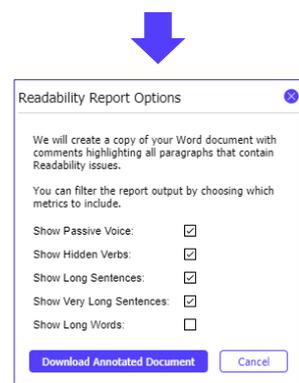
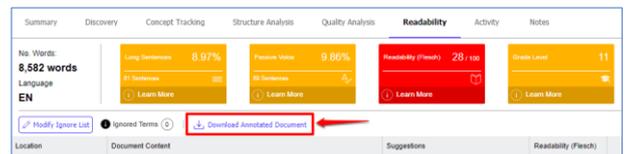
PRO TIP

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 Doc

To edit a doc, you just push the analysis results into MS Word as “Word comments”. Then, you can work directly in Word to make your changes. Once done, re-upload the doc to get fresh analysis results.

1. Select “Download Annotated Document”.
2. Select the types of results you want by ticking the boxes. Then click “Download”.
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 Concept Tracking

Concept Tracking searches documents for general words/phrases of interest.

Suggested Use Cases

Check resumes for qualifications

Check for specific qualifications across a collection of Resumes.

Highlight Bid/no-bid factors

Define a concept list that lists your core competencies. Specify no-bid characteristics. For example, if your company does not support “cost plus accounting”, but it’s required, you should ‘no-bid’ it.

Highlight Risk Elements for Program Delivery

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

Past Performance Search

Use Concept tracking to find prior occurrences of content, for extraction and re-use.

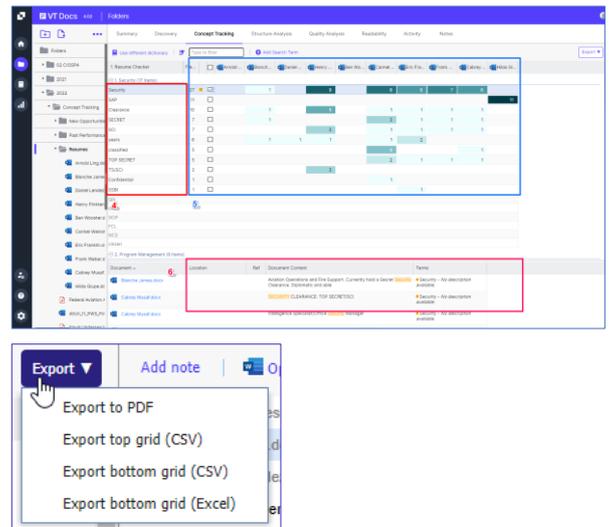
Teaming Partner Capability

Upload partner capability statements. Use Concept Tracking to check for certain key capabilities.

Using Concept Tracking at the Folder Level

A folder can only have one Concept Dictionary set at a time.

1. Select a folder
2. Click **“Use different dictionary”** to select the required dictionary
3. Click **“Set Dictionary”**
4. Terms and phrases from the dictionary, listed by frequency
5. Each column shows a document. The numbers in each column is the hit count for that document.
6. Content surrounding dictionary terms pulled from documents
7. Export the top or bottom grid to a csv or excel file for further review.



How to use the Discovery tab

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.

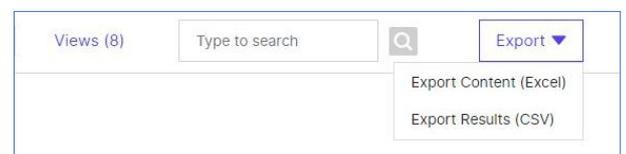
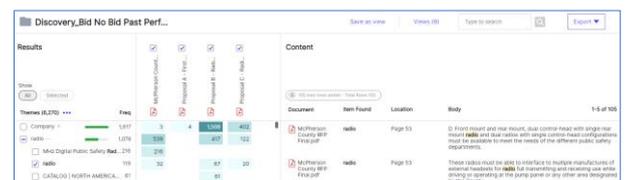
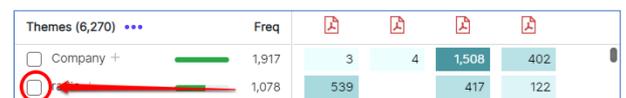
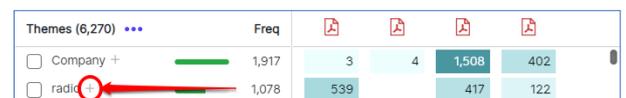
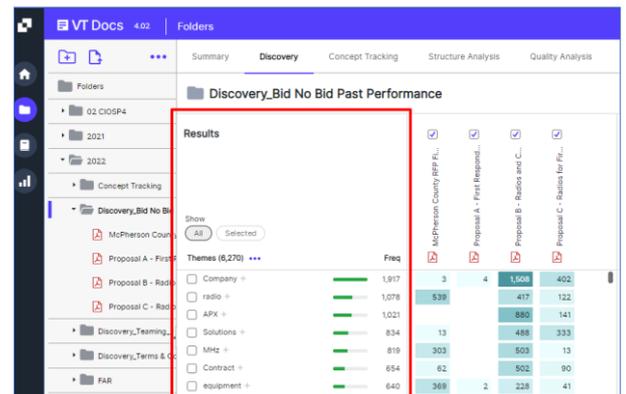
Let Discovery help identify key themes

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".

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

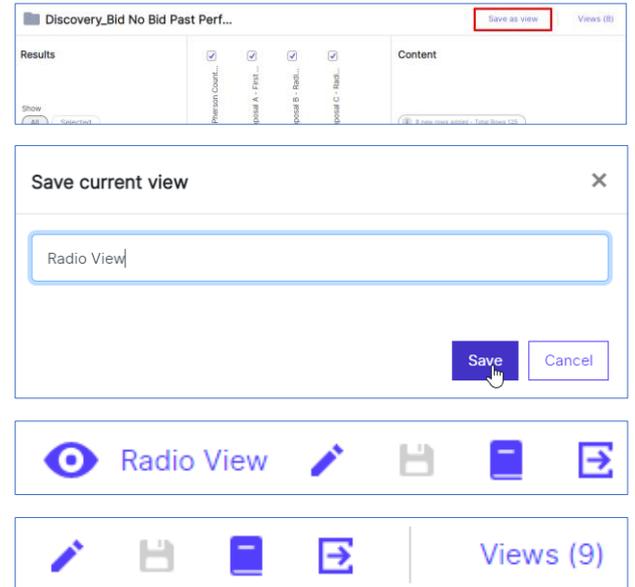
Note: You can also see Discovery for a single document.

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, location and body in the context of 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"
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. 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.

