UserGuide

Content Analytics Platform (CAP)

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Content Analytics Platform User Guide

Contents

1.0-Proposal Builder Guide

Follow this guide if you want to jump right into parsing/shredding documents and/or utilizing the Proposal Builder.

If you would like to access the features in the Content Analytics Platform (CAP) then please click on the link for the Content Analytics Platform in the table of contents.

1.1-Getting Started Inside The Proposal Builder

1.1.1-Proposal Builder Canvas
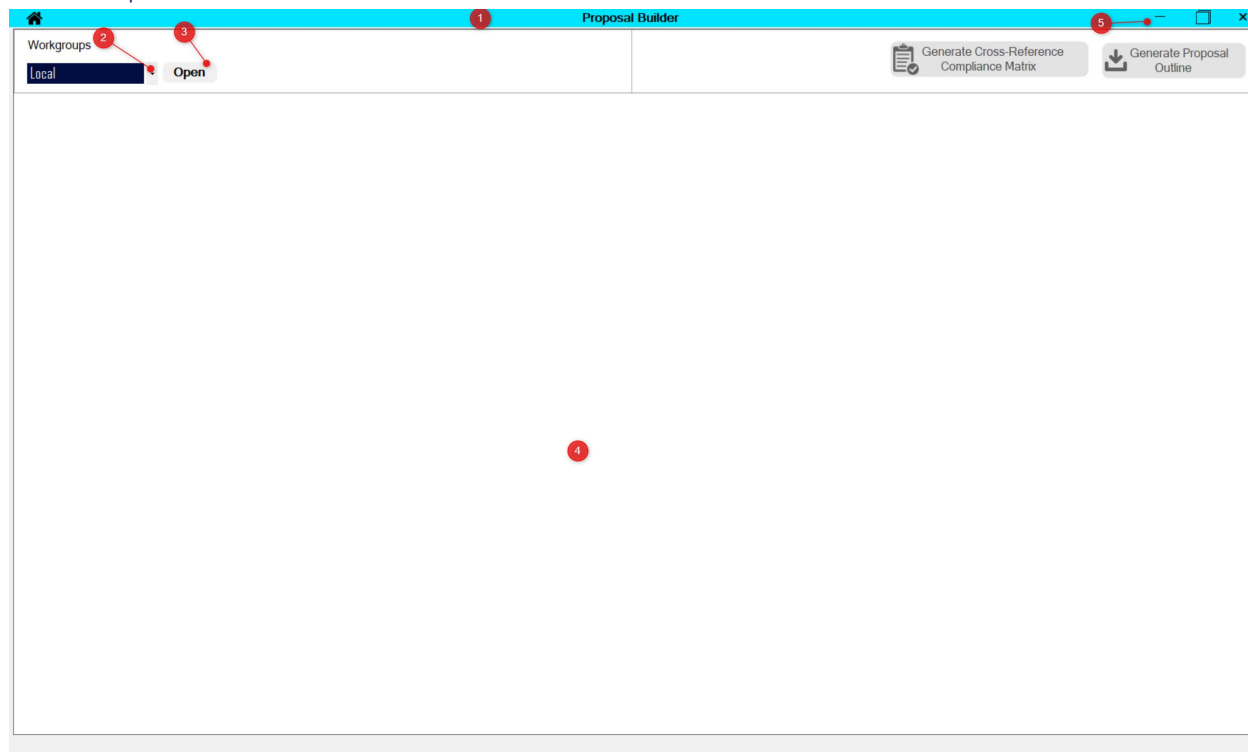
- When you first land inside the Proposal Builder you are presented with the Proposal Builder Canvas.
1. This is the main program window. This window can be stretched across multiple screens.
2. This is the dropdown list of workgroups that you currently have inside of the CAP.
3. Once you select the workgroup that you want use, select "Open" to open the navigation window (discussed later).

4. This is the main canvas where all of your pop-up windows will reside. Any pop-up window can be moved around, resized or minimized inside of the canvas.
5. These Windows buttons will resize the entire program not the windows inside of the canvas. If you hit "x" here, you close the Proposal Builder.

1.2-The Navigation Window
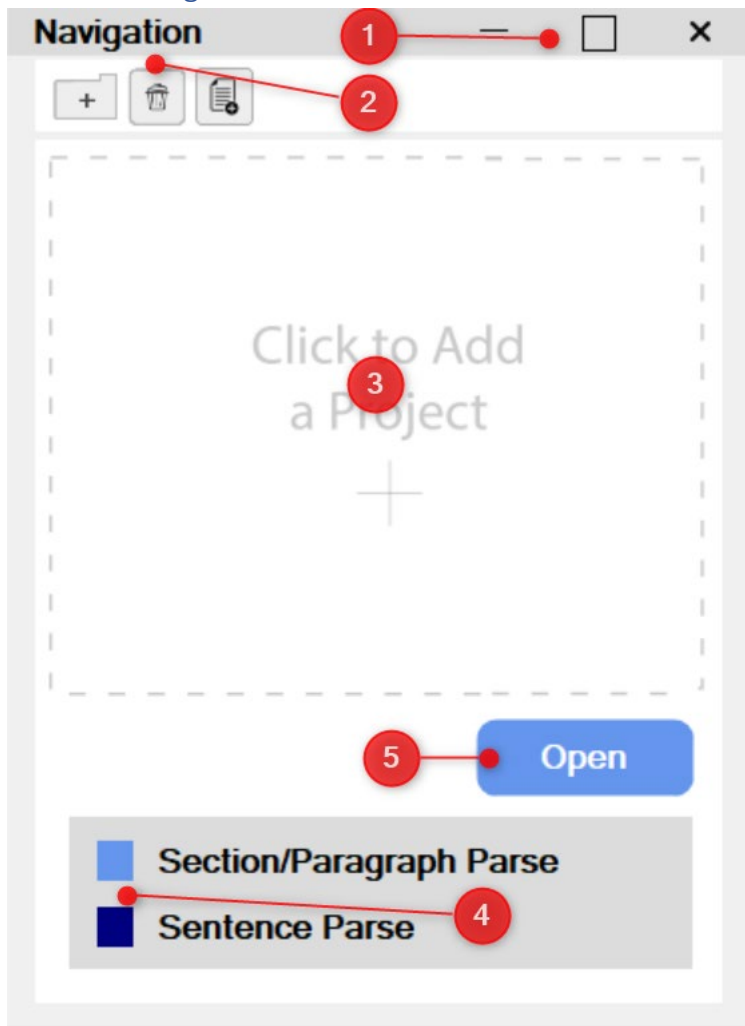
- Once you select and open your desired workgroup the Navigation window will open.
1. The window itself is responsive and can be:
   - Moved around inside the canvas
   - Resized
   - Minimized
   - If closed the proposal, you were working on will close.
2. These buttons have the following functions (left to right):
   - Add Project
   - Remove Project or Document
   - Add Document
3. All projects and documents created inside this workgroup will be displayed.
4. Files that have been previously parsed can be easily identified by their highlight:
   - Light blue documents have been Section or Paragraph parsed
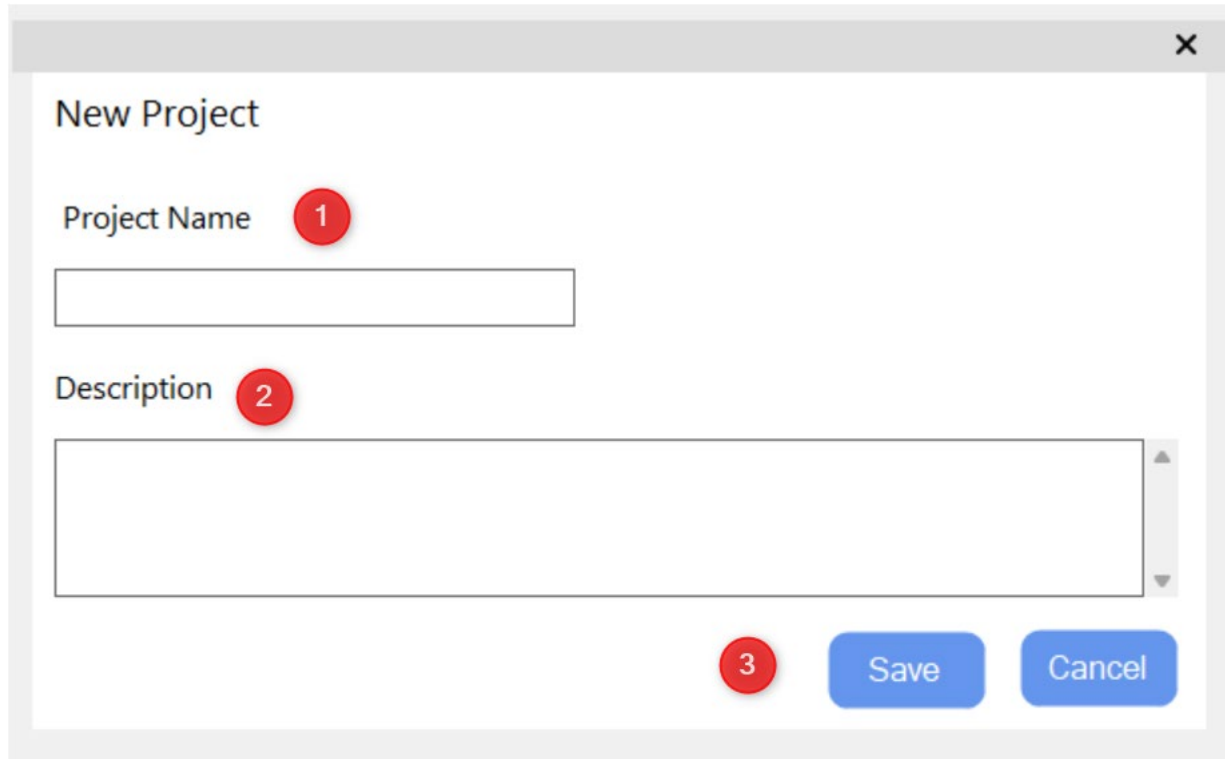
- ▪ Dark blue documents have been Sentence Parsed
- ▪ No highlight means the document hasn't been parsed and won't be available
5. Once you select a project by checking the box select "Open" to move to the next step.

1.2.1-Adding A Project

Select the folder to open the New Project window. You can also select the white space in the navigation window for the first project.

New Project

Project Name ①

Description ②

③ Save   Cancel

1. Assign a name to the project. This is typically the name of the RFP you are responding to.
2. You can give the project a description, although it's not required.
3. Select save to continue or cancel to close the window.

1.2.2-Adding A Document & Selecting How You Will Parse/Shred
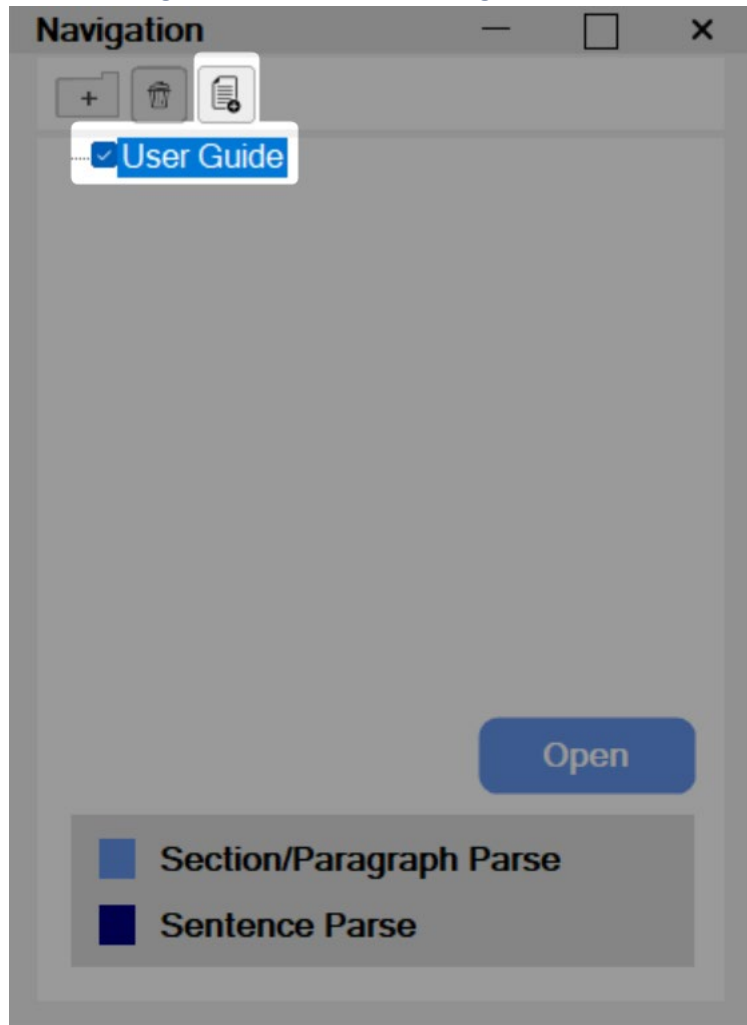
To add a document, select checkbox next to a project then select the document button. This will open the add document window. Please Note: You are required to parse any documents uploaded inside of the Proposal Builder. If you do not want to parse the documents upon upload, please upload inside of the Content Analytics Platform.

Please separate the RFP into their own individual sections (C,L,M,H etc.) into their own MS Word document.

Add Document

Select a document to import into the Professional Document Analyzer. File types supported: MS Word (doc docx), Excel (xlsx), PowerPoint (pptx), textual Portable Document Format (pdf), Rich Text Format (rtf), and Plain Text (txt). Content to Page Numbers are supported for MS Word (docx) and Portable Document Format (pdf)

The checkbox is enabled only for MS Word (docx) and Portable Document Format (pdf).

File	Created	Size KB	Doc Name	Convert using MS Word
				☐

(1) Select Folder   **(2)** Select Files   Import   Cancel

You can upload you documents in one of two ways:

1. Copy your documents into a folder and upload the entire folder. Please note that if you have any files that are not supported inside of the folder you will receive an error message.
2. Selecting the Select Files button will allow you to select the files that you want to upload.
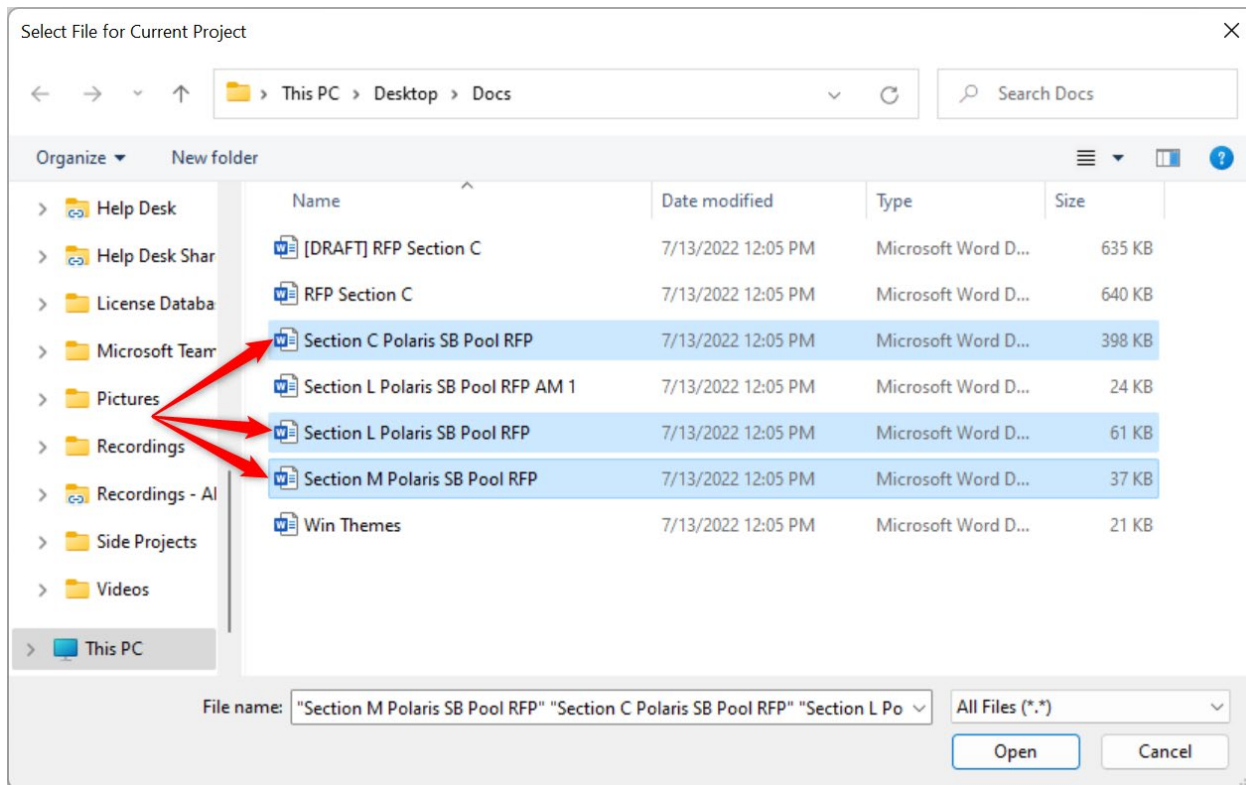
- You can select multiple files at once.
  - Hold "SHIFT" to select multiple consecutive files at once.
  - Hold "CTRL" to select multiple non-consecutive files at once.

1. You can parse by the following types:
   a. Section
   b. Paragraph
   c. Sentence

2. Any Keyword Groups you have created for the workgroup will be listed here. If you want to add, remove or modify any in this dropdown list you will need to do this inside of the Content Analytics Platform.
3. Any Templates you have created for the workgroup will be listed here. If you want to add, remove or modify any in this dropdown list you will need to do this inside of the Content Analytics Platform.
4. Select Next to proceed to the next step.

1. You can adjust the display name of the document to whatever naming convention that you want.
2. Select Import to proceed to the next step.

At this point the system will import and parse your documents. Depending on how many documents you selected an equal number of Excel outputs will open.

1.3-Select Or Create New Proposal Outline Window

- Opening this window requires you to check a Project then select "Open" inside the Navigation window. If you don't check a project first before you select open the system will remind you to select a project first.
    1. Project Checkbox
    2. Open button
    3. Any previously created proposal outlines will already be listed
    4. Highlight any created outline then select open
    5. Allows you to create a brand-new proposal outline
    6. Highlight any previously created proposal outlines to remove them
    7. Allows you to import a custom template:
        - Does not support proprietary templates at this time
        - Allows you to select your own numbering
        - Allows you to create your own headers
        - Allows you to create your own hierarchy tree

1.3.1-Creating A New Outline Using The Default Template
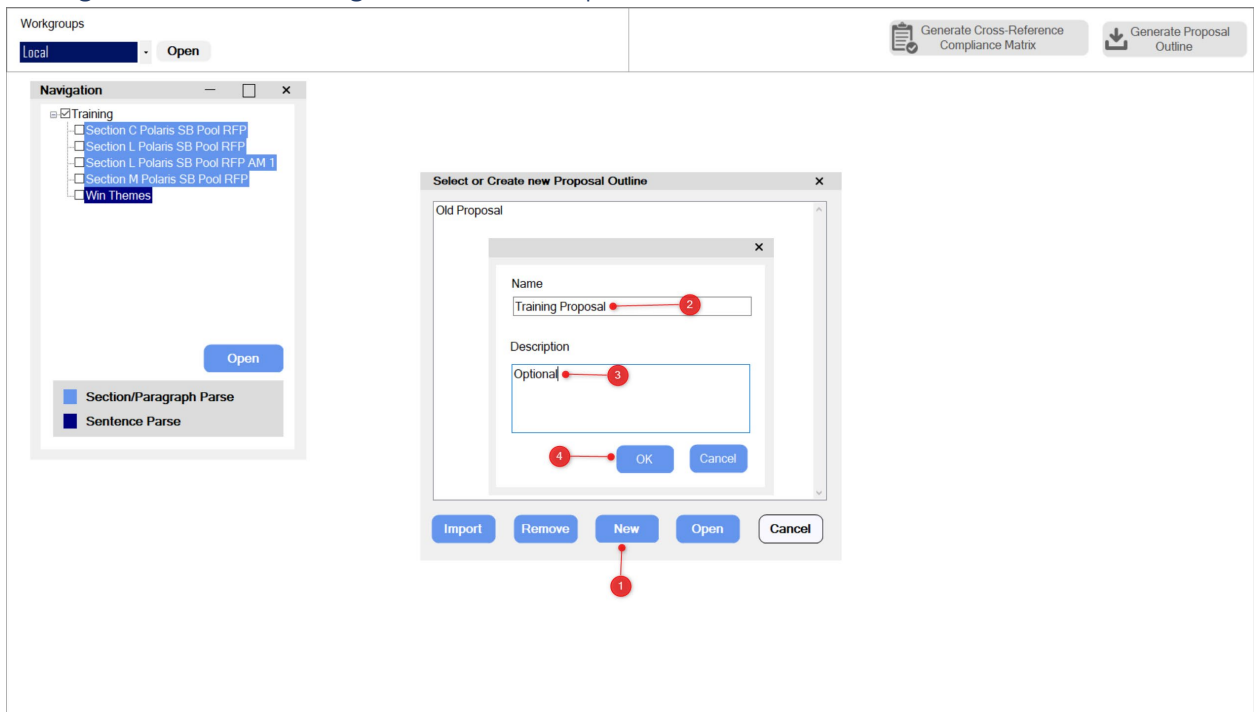
- To use the default template:
1. Select New
2. Give the Proposal a name. This is usually the name of the proposal you're currently working on
3. Give a description of the project (optional)
4. Select OK
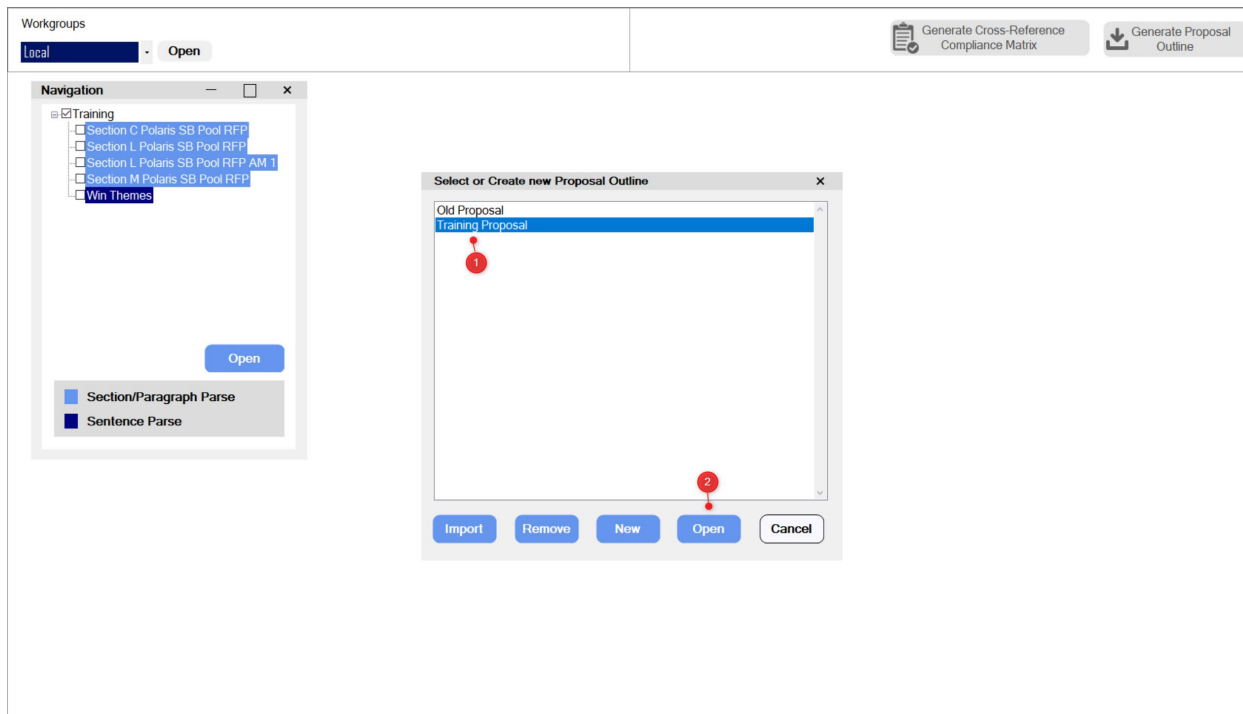
- Once you select OK your new proposal will be listed.
1. Select the proposal you want
2. Select Open to move the next step

1.3.2-Importing Your Own Custom Template (Advanced Feature)

The next section is for advanced users. Most users will use the default template.

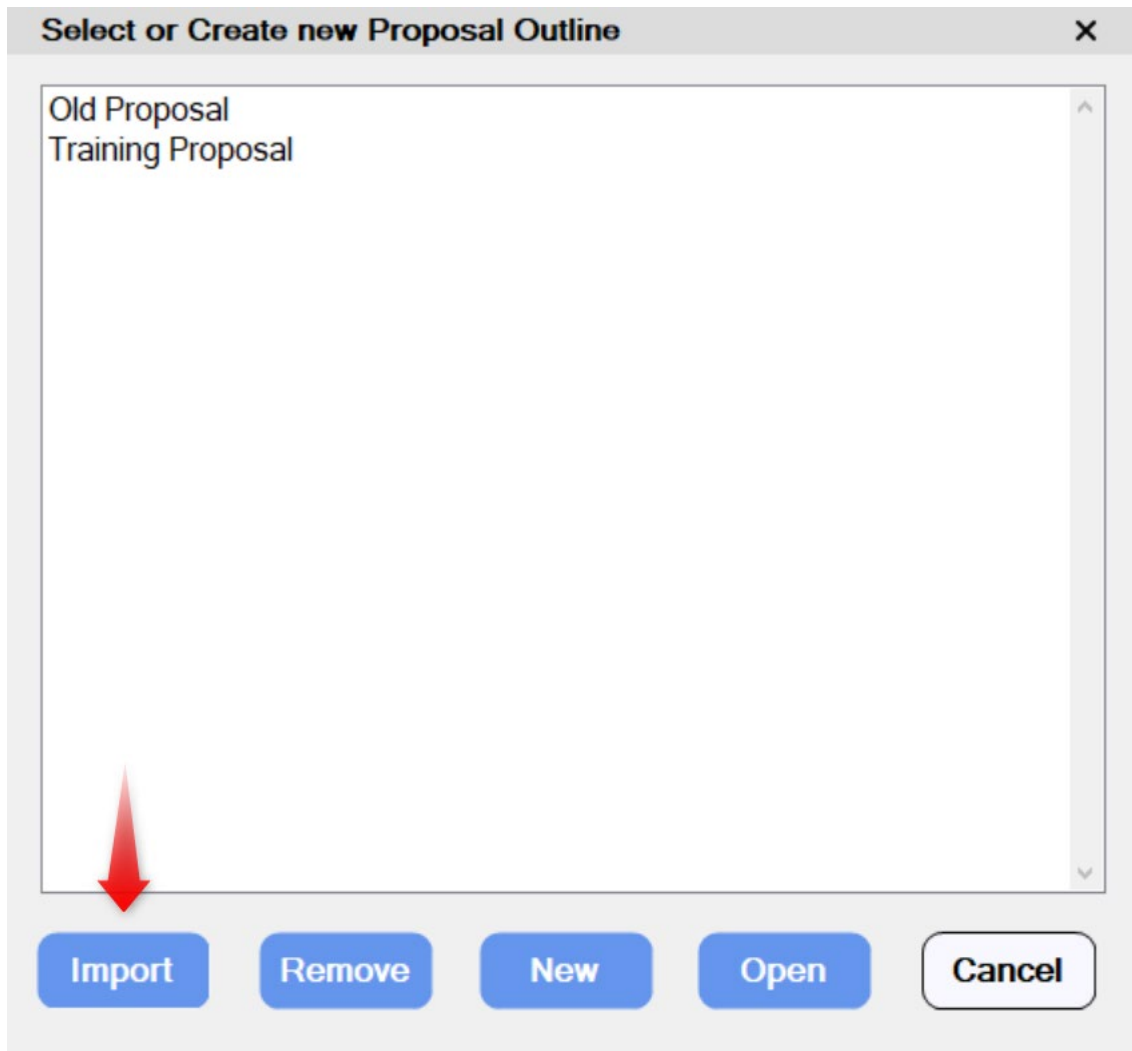Prior to uploading you MUST set up an Excel file in this format.

	A	B	C	D	E	F	G
1	Number	Text	Indent				
2	1.0	First load	1				
3	1.1	Document 11					
4	1.2	Information pass					
5	1.3	Disclosed doc					
6	1.3.1	international dcc					
7	1.3.2	term and conditions					
8	1.4	internal audit					
9	1.4.1	logoff					
10	1.4.2	plus and minus					
11	2.0	Relativity and functions	1				
12	2.1	External					
13	2.1.1	Enviroment					
14							
15							
16							

1. The section numbering
2. The name of the section
3. The indent. For indents you only need to put a 1 on sections that you want as the highest level of the tree, usually your whole numbers 1.0, 2.0 etc.

Select or Create new Proposal Outline ✕

Old Proposal
Training Proposal

Import **Remove** **New** **Open** **Cancel**

Select the Import button to start the process of importing. Please note that at this time we do not support proprietary templates. You will be importing and building your tree with your numbering.

Once you have saved and closed your template select Import Excel and select the file you created.

- Once you select and upload the Excel file options will appear.
    1. Select the row the numbering starts at.
    2. Select the column that the indents are in
    3. Select the column that the section numbers are in
    4. Select the column that the header text is in
    5. Select Load Data once options 1-4 are selected

6. This is a preview of the Excel sheet
7. Sections are listed in grey and subsections are in white
8. This is a preview of how your tree will look once you save the proposal outline

1. To build your initial tree just drag and drop the subsections to their appropriate locations. The arrows show the appropriate locations for this example proposal outline.
2. If you make a mistake, you can always highlight the subsection in the preview and select the Remove Section button
3. Once you have built out your tree select the Save PO button to name your proposal outline

Name your imported outline

Proposal Outline: Import PO   —   ☐   ✕

| Add Sect. | Add Subsect. | Remove | Rename | Collapse All |

↶ ↷   ⬆ ⬇   All outline changes are   LT Mouse: Drag Move
saved automatically.   RT Mouse: Drag Copy

Search   First   Next

- 1.0 First load
  - 1.1 Document 11
  - 1.2 Information pass
  - 1.3 Disclosed doc
    - 1.3.1 international dcc
    - 1.3.2 term and conditions
  - 1.4 internal audit
    - 1.4.1 logoff
    - 1.4.2 plus and minus
- 2.0 Relativity and functions
  - 2.1 External
    - 2.1.1 Enviroment

Once you name and select OK you will see that your imported outline is ready for use

1.4-Once You Open Your Proposal Outline
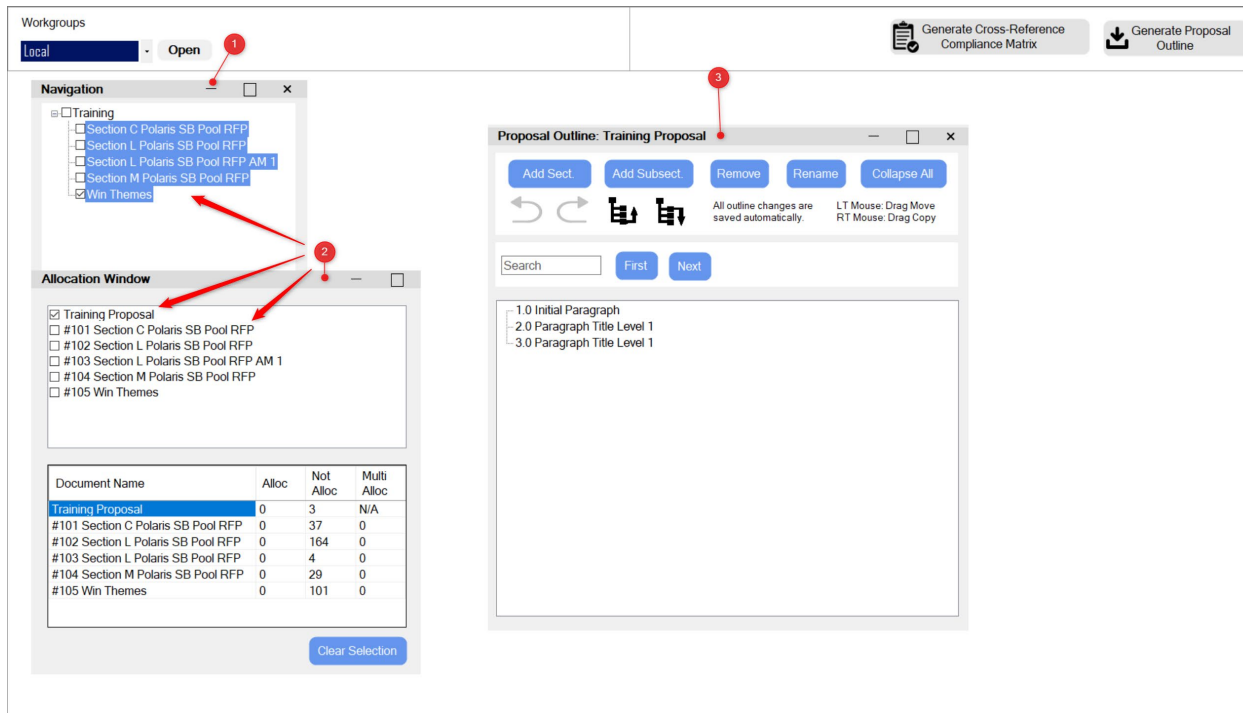
- Once you select and open a proposal outline this is what you are presented with
1. We recommend that you minimize the Navigation window because it's not needed at this point. Remember to *minimize* the window or you will close your proposal outline. The window will minimize to the bottom left of the canvas. The same is true with all windows when minimized.
2. The Allocation window. Only documents that have been parsed (shown highlighted in the Navigation window) are listed inside the Allocation window. If you accidentally close your Proposal Outline or Requirement (shown later) windows you can check the checkbox to reopen them.
3. The Proposal Outline window. This is where you will be creating your proposal outline and cross-reference compliance matrix.

1.5-The Proposal Outline Window

1.5.1-Buttons & Basic Features
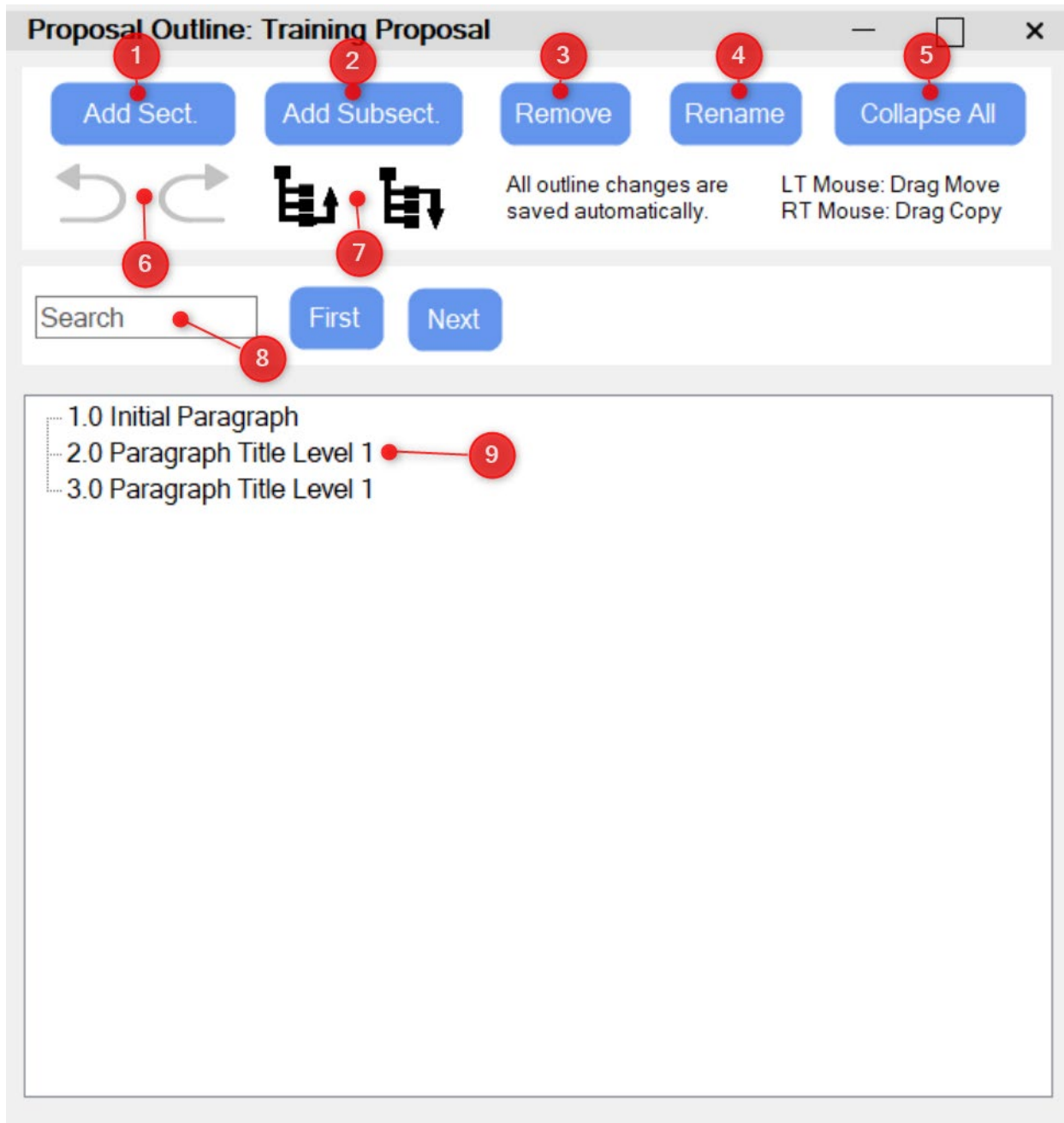
- ▪ Any action with the buttons requires you to have either a header or requirement node highlighted
1. Adds a new section at whatever hierarchy level you're currently on (shown later)
2. Adds a new subsection at whatever section you're currently highlighted on (shown later)
3. Removes a section/subsection or requirement node
4. Renames any section/subsection that you're currently highlighted on. You can also slow double left click on a header to rename.
5. Collapses the entire hierarchy tree
6. Undo/redo buttons. Displays information from the start of your current session.

7. Move a section/subsection or requirement node up or down the tree
8. Allows you to search for anything inside the hierarchy tree.
9. The hierarchy tree. Everything is based off of this tree.

1.5.1.1-Right-click Menu

Proposal Outline: Training Proposal — ☐ ✕

| Add Sect. | Add Subsect. | Remove | Rename | Collapse All |

↺ ↻ 🗐 🗐 All outline changes are   LT Mouse: Drag Move
              saved automatically.   RT Mouse: Drag Copy

Search [   ]   First   Next

- 1.0 Initial Paragraph
- 2.0 Paragraph Title Level 1
- 3.0 Paragraph T

Rename
Add Section
Add Sub-Section
Remove
Move Node Up
Move Node Down

Right Click on a Section Header or Requirement Node to access menu. Functions the same as the buttons up top.

1.5.1.2-Adding A New Section

1. Highlight the indent level you want the section to be added to.
2. Select the Add Section button or use the right-click menu.

Proposal Outline: Training Proposal — ☐ ✕

Add Sect.   Add Subsect.   Remove   Rename   Collapse All

↶ ↷ ⬇ ⬇   All outline changes are   LT Mouse: Drag Move
                    saved automatically.   RT Mouse: Drag Copy

Search   First   Next

1.0 Initial Paragraph
2.0 Paragraph Title Level 1
3.0 Paragraph Title Level 1

✕

New Name

4.0 New Section   (1)

OK   Cancel

1. Give the new section whatever numbering and name that you want. You are responsible for numbering and naming the outline.

Proposal Outline: Training Proposal   — □ ✕

Add Sect. Add Subsect. Remove Rename Collapse All

All outline changes are saved automatically.

LT Mouse: Drag Move
RT Mouse: Drag Copy

2

Search   First   Next

1.0 Initial Paragraph
2.0 Paragraph Title Level 1
3.0 Paragraph Title Level 1
4.0 New Section — **1**

1. The new section appears at the bottom of the tree.
2. If you don't want to add it or added it to the wrong spot you can undo it or just use the remove feature.

1.5.1.3-Adding A Subsection
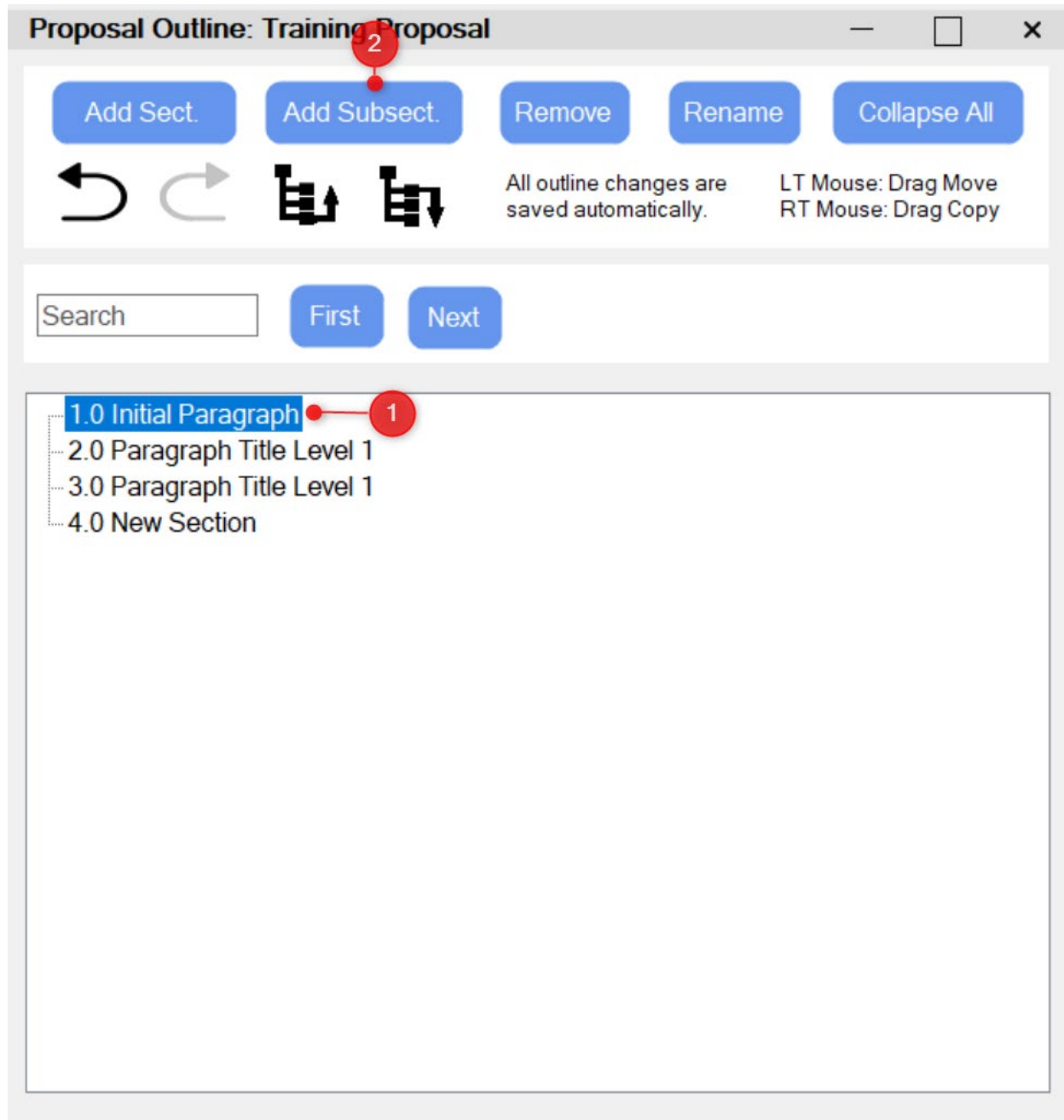
1. Select the Section or Subsection that you want to add the subsection to. You can add subsections to subsections to achieve results like adding a 1.1.1 to a 1.1.
2. Select the Add Subsection button or use the right-click menu.

Proposal Outline: Training Proposal   —   □   ✕

| Add Sect. | Add Subsect. | Remove | Rename | Collapse All |

↶ ↷ 📑 📑   All outline changes are   LT Mouse: Drag Move
saved automatically.   RT Mouse: Drag Copy

| Search | First | Next |

1.0 Initial Paragraph
2.0 Paragraph Title Level 1
3.0 Paragraph Title Level 1
4.0 New Section

✕

New Name

1.1 Subsection   ①

OK   Cancel

1. Give the new section whatever numbering and name that you want. You are responsible for numbering and naming the outline.

Proposal Outline: Training Proposal — □ ✕

Add Sect.	Add Subsect.	Remove	Rename	Collapse All

All outline changes are saved automatically.

LT Mouse: Drag Move
RT Mouse: Drag Copy

Search First Next

2

- 1.0 Initial Paragraph
  - 1.1 Subsection ← **1**
- 2.0 Paragraph Title Level 1
- 3.0 Paragraph Title Level 1
- 4.0 New Section

1. Subsection is now added to the original selection
2. A +/- now appears to expand or collapse the tree

1. Start by copying the header that you want to use by highlighting the text in the Requirements Window and using CTRL+C to copy it.
2. Click on the Add Sect or Add Subsect button to bring up the New Name text box
3. Click into the text box and use CTRL+V to paste the header. Select OK.

Note-You are responsible for numbering.

1. Start by copying the header that you want to use by highlighting the text in the Requirements Window and using CTRL+C to copy it.
2. Slow double-click the section/subsection that you want to rename. Highlight the text that you want to rename in the text box and use CTRL+V to paste the header.
3. You may also use the Rename button or the Right-Click menu to open the New Name text box

Section name has been updated. Note-You are responsible for numbering your sections.

1.6-The Allocation Window

1. Any parsed documents in the project you selected will appear here to open a requirement window. If you don't see a document that you want, look back at the navigation window to see if it's highlighted with a color. If not close the proposal builder and use one of the shred tasks to parse your document for it to appear here. If you accidentally close the proposal outline window you can open it again here by checking the checkbox next to your proposal name. The same applies for requirements windows.
2. This is a secondary list of names. The # in front of the document names corresponds to the unique IDs used for requirements
3. This column displays how many of the total possible requirements have been allocated
4. This column displays how many requirements have not been allocated
5. This column displays how many times a requirement has been allocated multiple times
6. This button will allow you to uncheck all checkboxes

1.7-Requirements Windows

1. Selecting a document in the allocation window will open a requirements window
2. This window can be moved, minimized, resized and closed just like a normal window
3. If you want to search for something inside the requirements window, i.e., shall statements, you can use this search bar
4. Every requirement has a system generated unique ID. This ID is what will be displayed inside of the proposal outline tree
5. This is the section number, paragraph number or sentence number
6. This is the section header or a truncated version of the text body
7. This is the number of times a requirement has been allocated. You are NOT required to allocate all requirements if they are not needed.
8. This shows any keywords that were found
9. This shows what page the requirement is found on in the document
10. Clicking on a requirement will display the full text of the requirement here
11. Any keywords found will all be highlighted in the text body so you can easily see them in context

Note: You can have multiple requirements windows open at once.

Note 2: You can Tab button through the headers and sort them by hitting the F3 Key.

1.8-Building A Proposal Outline

1.8.1-Your Initial Requirements Document

1. First, determine which document you're going to build the proposal outline from. Next, you'll want to minimize the Navigation and Allocation windows so that they appear like the picture shown. You can always double click on them to reopen them. This will give you a clear working space for creating the proposal outline.
2. To start allocating requirements drag (hold down the left mouse button) and drop (release mouse button) onto the Section or Subsection it belongs in.
3. As you start to allocate a requirement the tally will increase with each allocation.

1.8.2-Building Out The Rest Of The Outline

Proposal Outline: Training Proposal — □ ✕

Add Sect.	Add Subsect.	Remove	Rename	Collapse All

↶ ↷ 🖿 🖿

All outline changes are saved automatically.

LT Mouse: Drag Move
RT Mouse: Drag Copy

Search | First | Next

- 1.0 Initial Paragraph ①
  - #102_2
  - #101_3
  - #104_6
  - #105_9
  - 1.1 Subsection
    - #102_3
    - #101_3
    - #104_8
    - #105_1
- 2.0 Paragraph Title Level 1
  - #102_8
  - #101_10
  - #104_11
  - #105_7
  - #102_10
- 3.0 Paragraph Title Level 1
  - #102_9
  - #102_10
  - #101_7
  - #104_19
  - #105_12
- 4.0 New Section
  - #102_13
  - #101_12
  - #104_25
  - #105_33

Allocation Window — □

☑ Training Proposal
☐ #101 Section C Polaris SB Pool RFP
☐ #102 Section L Polaris SB Pool RFP
☐ #103 Section L Polaris SB Pool RFP AM 1
☐ #104 Section M Polaris SB Pool RFP
☐ #105 Win Themes

Document Name	Alloc	Not Alloc	Multi Alloc
Training Proposal	5	0	N/A
#101 Section C Polaris SB Pool RFP	4	33	1
#102 Section L Polaris SB Pool RFP	6	158	1
#103 Section L Polaris SB Pool RFP	0	6	0
#104 Section M Polaris SB Pool RFP	5	24	0
#105 Win Themes	5	96	0

Clear Selection

1. As you can see, I have built out the rest of the outline. Each of the numbers below the sections and subsections is the UID from the requirement window that it came from. You, as the user are responsible for ensuring that every required requirement is where it needs to be.

1.8.3-Amendments & Revisions

I'm sure one thing that everyone reading this guide is well aware of is the government's use of revisions and amendments to update their documentation. How you handle these updates will ultimately come down to what works best for you. We will show you one way that we have seen them handled.

This amendment affected the Section L portion of this RFP. We ran the amendment through the shred task so it would appear inside of the Proposal Builder. We also named it in a way that would easily allow us to identify that it is an amendment affecting Section L.

1.8.4-Addition Of A Requirement

Requirements: #102 Section L Polaris SB Pool RFP

L.2.2   X

UID	Section	Header	Alloc
#102_0	Header Area	Header Area	0
#102_1	L.1	FAR 52.252-1 SOLICITATION PROVISIONS ...	0
#102_2	L.2	FAR AND GSAR PROVISIONS	1
#102_3	L.2.1	FAR 52.216-1 Type of Contract (Apr 1984)	0
#102_4	L.2.2	FAR 52.216-27 Single or Multiple Awards (Oct 1995)	1
#102_5	L.2.3	FAR 52.233-2 Service of Protest (Sept 2006)	0
#102_6	(a)	Protests, as defined in section 33.101 of the ...	0
#102_7	(b)	The copy of any protest shall be received in ...	0
#102_8	L.2.4	GSAR 552.217-71 Notice Regarding Option(s) ...	1
#102_9	L.3	PROPOSAL SUBMISSION INSTRUCTIONS	1
#102_10	L.3.1	Official Legal Offering Entity	2
#102_11	L.3.2	Mergers, Acquisitions, and Novations, as ...	0
#102_12	L.3.3	Inverted Domestic Corporations	0

Requirements: #103 Section L Polaris SB Pool RFP AM 1

Search

UID	Section	Header	Alloc	Keywords	Page
#103_0	Header Area	Header Area	0		1
#103_1	L.2.2.1	Addition 1	0		1
#103_2	L.3.1	Remove Section in its entirety	0		1
#103_3	L.3.4	Demonstration of Modified Section	0	must [1], will [1]	1

The amendment is adding an additional subsection. In the original document using the search bar to find L.2.2 we can see the one tier up requirement and if it's been allocated already.

L.2.2   FAR 52.216-27 Single or Multiple Awards (Oct 1995)
The government anticipates that Multiple Awards shall be made up to a maximum of 100 awards.
all Offerors tied at the 100th position will receive a Master Contract award.
(End of provision)

L.2.2.1   Addition 1
This section is demonstrating an added requirement.
(End of provision)

All outline changes are saved automatically.

LT Mouse: Drag Move
RT Mouse: Drag Copy

Search First Next

Proposal Outline Tree

- 1.0 Initial Paragraph
  - #102_2
  - #101_3
  - #104_6
  - #105_9
  - 1.1 Subsection
    - #102_4
    - #103_1
    - #101_3
    - #104_8
    - #105_1
- 2.0 Paragraph Title Level 1
  - #102_8
  - #101_10
  - #104_11
  - #105_7
  - #102_10
- 3.0 Paragraph Title Level 1
  - #102_9
  - #102_10
  - #101_7

Requirements: #103 Section L Polaris SB Pool RFP AM 1

Search

UID	Section	Header	Alloc	Keywords	Page
#103_0	Header Area	Header Area	0		1
#103_1	L.2.2.1	Addition 1	1		1
#103_2	L.3.1	Remove Section in its entirety	0		1
#103_3	L.3.4	Demonstration of Modified Section	0	must [1], will [1]	1

Requirements: #102 Section L Polaris SB Pool RFP

Search

UID	Section	Header	Alloc	Keywords
#102_0	Header Area	Header Area	0	
#102_1	L.1	FAR 52.252-1 SOLICITATION PROVISIONS ...	0	compliance [2], offeror [1], will [1],
#102_2	L.2	FAR AND GSAR PROVISIONS	1	
#102_3	L.2.1	FAR 52.216-1 Type of Contract (Apr 1984)	0	
#102_4	L.2.2	FAR 52.216-27 Single or Multiple Awards (Oct 1995)	1	shall [1], will [1]
#102_5	L.2.3	FAR 52.233-2 Service of Protest (Sept 2006)	0	
#102_6	(a)	Protests, as defined in section 33.101 of the ...	0	shall [1]
#102_7	(b)	The copy of any protest shall be received in ...	0	shall [1]
#102_8	L.2.4	GSAR 552.217-71 Notice Regarding Option(s) ...	1	accordance [1], in accordance with
#102_9	L.3	PROPOSAL SUBMISSION INSTRUCTIONS	1	accordance [1], ensure [2], in acco
#102_10	L.3.1	Official Legal Offering Entity	2	accordance [1], in accordance with
#102_11	L.3.2	Mergers, Acquisitions, and Novations, as ...	0	
#102_12	L.3.3	Inverted Domestic Corporations	0	accordance [1], in accordance with

Since we had identified that the section that this new requirement belongs to has already been allocated, we need to figure out where in the tree it was allocated.

1. Click on the requirement that you're trying to find in the proposal outline tree and the system will highlight it green in the tree.
2. We will now allocate the new addition to the same 1.1 subsection the original Section L is allocated to.
3. Highlight the UID (#103_1) then either use the Move Node Up button or the Right-Click menu to move the UID up under the original #102_4 UID.
4. Having the subsection under the section will allow the requirement to be easily found in the Proposal Outline

1.8.5-Removing & Modifying A Requirement

1.8.5.1-Keeping Track Of What Has Changed

```
⊟ 1.0 Initial Paragraph
    #102_2
    #101_3
    #104_6
    #105_9
    ⊟ 1.1 Subsection
        #102_4
        #103_1
        #101_3
        #104_8
        #105_1
⊟ 2.0 Paragraph Title Level 1
    #102_8
    #101_10
    #104_11
    #105_7
    #102_10
⊟ 3.0 Paragraph Title Level 1
    #102_9
    #102_10
    #101_7
    #104_19
    #105_12
⊟ 4.0 New Section
    #102_13
    #101_12
    #104_25
    #105_33
Changes
```

One way of keeping track of what has been removed or modified is to create a Changes section inside of the Proposal Outline tree. This section allows for a change history and would be removed during the editing process.

1.8.5.2-Removal Of A Section

1. We can see that Section L.3.1 needs to be removed in its entirety
2. We can find where this section is by searching for it in the original document search bar
3. The requirement will be highlighted
4. We can see that this has been allocated 2 times already. Click on the requirement to have their locations highlight in the tree
5. Both locations have been highlighted.

1. Drag and drop the requirement stating that L.3.1 needs to be removed down to the Changes section
2. Next, we only need to move 1 of the original requirements (2 were allocated) to the Changes section. The other one you can remove from the tree.

1.8.5.3-Modifying A Requirement

In the case of a modified section, we will need to remove and replace the requirement exactly where it is allocated in the tree, if already allocated. This will ensure that we do not disrupt cross reference compliance.

1. Modified section, in this example the proposal due date was changed from May to June
2. Search for the section in the search bar
3. The old requirement will be highlighted when searched
4. This requirement was allocated 1 time already
5. Click on the requirement in the requirement window to highlight the location inside of the tree

1. Drag and drop the modified requirement into the Changes section and the destination section, 4.0 New Section

2. For the requirement that you want removed just drag and drop from in the tree to the Changes section. The arrow displays the new location of the requirement. You do not have to drag it in again from the requirements window.
3. Highlight the new requirement in the tree
4. Move the new requirement up to the location of the removed requirement using the Move Node Up button or the Right-Click menu.
5. The changes are listed in the Changes section for change history.

1.8.6-Checking Your Work

1.8.6.1-Verifying What has Been Allocated & Where It Was Allocated

There are three different ways to verify what has been allocated and where it was allocated

Clicking on the allocated column for a specific document in the Allocation window while having the Proposal Outline and Requirement window open will highlight all allocations.

Clicking on a requirement node in the Proposal Outline will display the node details inside the Requirement window.

Clicking on the requirement inside of the Requirement window will highlight the corresponding requirement node in the proposal outline if it's been allocated.

1.8.6.2-Checking What Has Not Been Allocated

Clicking on the not allocated column for a specific document in the Allocation window while having the Requirement window open will highlight all missing allocations.

1.8.6.3-Checking Multi-allocations

Sometimes you might allocate a requirement more than once by mistake. This will allow you to find them easily and remove them.

Proposal Outline: Training Proposal

Add Sect. | Add Subsect. | Remove | Rename | Collapse All

All outline changes are saved automatically. LT Mouse: Drag Move RT Mouse: Drag Copy

Search | First | Next
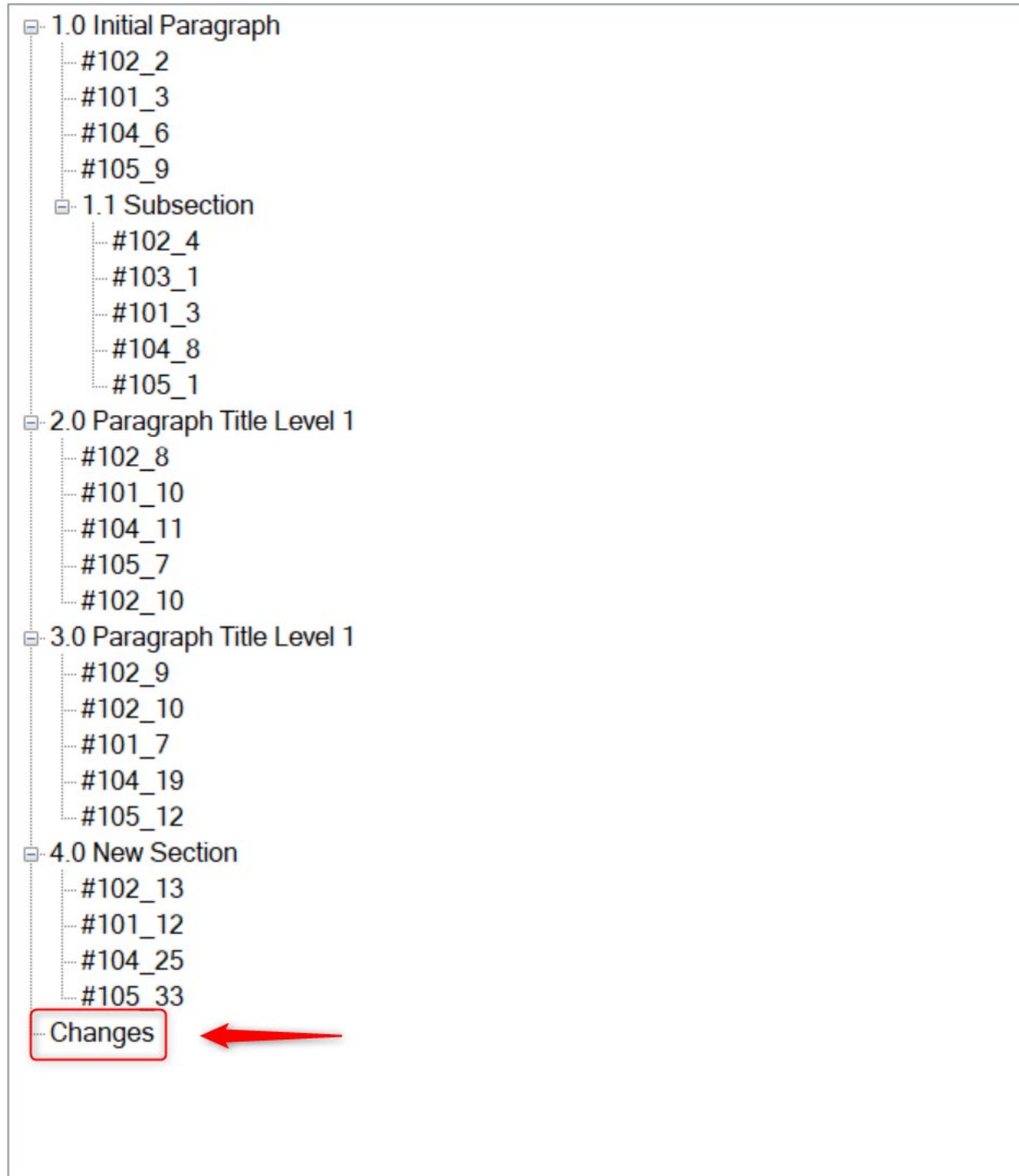
- 1.0 Initial Paragraph
  - #102_2
  - #101_3
  - #104_6
  - #105_9
  - 1.1 Subsection
    - #102_3
    - #101_3
    - #104_8
    - #105_1
- 2.0 Paragraph Title Level 1
  - #102_8
  - #101_10
  - #104_11
  - #105_7
  - #102_10
- 3.0 Paragraph Title Level 1
  - #102_9
  - #102_10
  - #101_7
  - #104_19
  - #105_12
- 4.0 New Section
  - #102_13

Allocation Window

☑ Training Proposal
☐ #101 Section C Polaris SB Pool RFP
☑ #102 Section L Polaris SB Pool RFP
☐ #103 Section L Polaris SB Pool RFP AM 1
☐ #104 Section M Polaris SB Pool RFP
☐ #105 Win Themes

Document Name	Alloc	Not Alloc	Multi Alloc
Training Proposal	5	0	N/A
#101 Section C Polaris SB Pool RFP	4	33	1
#102 Section L Polaris SB Pool RFP	6	158	1
#103 Section L Polaris SB Pool RFP	0	4	0
#104 Section M Polaris SB Pool RFP	5	24	0
#105 Win Themes	5	96	0

UID	Section	Header	Alloc
#102_0	Header Area	Header Area	0
#102_1	L.1	FAR 52.252-1 SOLICITATION PROVISIONS ...	0
#102_2	L.2	FAR AND GSAR PROVISIONS	1
#102_3	L.2.1	FAR 52.216-1 Type of Contract (Apr 1984)	1
#102_4	L.2.2	FAR 52.216-27 Single or Multiple Awards (Oct 1995)	0
#102_5	L.2.3	FAR 52.233-2 Service of Protest (Sept 2006)	0
#102_6	(a)	Protests, as defined in section 33.101 of the ...	0
#102_7	(b)	The copy of any protest shall be received in ...	0
#102_8	L.2.4	GSAR 552.217-71 Notice Regarding Option(s) ...	1
#102_9	L.3	PROPOSAL SUBMISSION INSTRUCTIONS	1
#102_10	L.3.1	Official Legal Offering Entity	2
#102_11	L.3.2	Mergers, Acquisitions, and Novations, as ...	0
#102_12	L.3.3	Inverted Domestic Corporations	0
#102_13	L.3.4	Proposal Due Date and Submission Instructions	1
#102_14	L.3.5	Solicitation Questions	0
#102_15	L.3.6	Pre-proposal Conference	0
#102_16	L.4	PROPOSAL FORMAT AND LIMITATIONS	0
#102_17	L.5	PROPOSAL CONTENT	0
#102_18	L.5.1	General	0
#102_19	L.5.1.1	Standard Form (SF) 33	0
#102_20	1.	The Government requires a minimum acceptance ...	0
#102_21	2.	If any amendments to the solicitation are ...	0
#102_22	3.	The Offeror s Legal Name and Address in Block ...	0
#102_23	4.	The Name, Title, Signature, and Date ...	0
#102_24	L.5.1.2	Representations and Certifications	0
#102_25	L.5.1.3	Contractor Teaming Arrangements, if applicable	0
#102 26	1.	Two or more companies form a joint venture to ...	0

Selected Segment Fu

L.3.1 Official Legal Offering Entity
All the evaluation elements an Offeror is claiming credit for in accordance with Section L.5. mus

Clicking on the multi-allocated column for a specific document in the Allocation window while having the Proposal Outline and Requirement window open will highlight all multi-allocations.

Add Sect. | Add Subsect. | Remove | Rename | Collapse All

All outline changes are saved automatically. LT Mouse: Drag Move RT Mouse: Drag Copy

Search | First | Next

- 1.0 Initial Paragraph
  - #102_2
  - #101_3
  - #104_6
  - #105_9
  - 1.1 Subsection
    - #102_3
    - #101_3
    - #104_8
    - #105_1
- 2.0 Paragraph Title Level 1
  - #102_8
  - #101_10
  - #104_11
  - #105_7
  - #102_10
- 3.0 Paragraph Title Level 1
  - #102_9
  - #102_10
  - #101_7
  - #104_19
  - #105_12
- 4.0 New Section
  - #102_13

UID	Section	Header	Alloc
#102_0	Header Area	Header Area	0
#102_1	L.1	FAR 52.252-1 SOLICITATION PROVISIONS ...	0
#102_2	L.2	FAR AND GSAR PROVISIONS	1
#102_3	L.2.1	FAR 52.216-1 Type of Contract (Apr 1984)	1
#102_4	L.2.2	FAR 52.216-27 Single or Multiple Awards (Oct 1995)	0
#102_5	L.2.3	FAR 52.233-2 Service of Protest (Sept 2006)	0
#102_6	(a)	Protests, as defined in section 33.101 of the ...	0
#102_7	(b)	The copy of any protest shall be received in ...	0
#102_8	L.2.4	GSAR 552.217-71 Notice Regarding Option(s) ...	1
#102_9	L.3	PROPOSAL SUBMISSION INSTRUCTIONS	1
#102_10	L.3.1	Official Legal Offering Entity	2
#102_11	L.3.2	Mergers, Acquisitions, and Novations, as ...	0
#102_12	L.3.3	Inverted Domestic Corporations	0
#102_13	L.3.4	Proposal Due Date and Submission Instructions	1
#102_14	L.3.5	Solicitation Questions	0
#102_15	L.3.6	Pre-proposal Conference	0
#102_16	L.4	PROPOSAL FORMAT AND LIMITATIONS	0
#102_17	L.5	PROPOSAL CONTENT	0
#102_18	L.5.1	General	0
#102_19	L.5.1.1	Standard Form (SF) 33	0
#102_20	1.	The Government requires a minimum acceptance ...	0
#102_21	2.	If any amendments to the solicitation are ...	0
#102_22	3.	The Offeror s Legal Name and Address in Block ...	0
#102_23	4.	The Name, Title, Signature, and Date ...	0
#102_24	L.5.1.2	Representations and Certifications	0
#102_25	L.5.1.3	Contractor Teaming Arrangements, if applicable	0
#102 26	1.	Two or more companies form a joint venture to ...	0

Selected Segment Fu

You can also click on any requirement that has more than one allocation.

1.9-Generating A Cross-Reference Compliance Matrix

sal Builder

Generate Cross-Reference Compliance Matrix | Generate Proposal Outline

Proposal Outline: Training Proposal

Add Sect. | Add Subsect. | Remove | Rename | Collapse All

All outline changes are LT Mouse: Drag Move

At any time, you may generate a Cross-Reference Compliance Matrix button to check your work.

Pressing the button will generate an Excel spreadsheet based on the Proposal Outline tree

1. The name of the Proposal Outline
2. Each of the Sections and Subsections that you created in the tree
3. The name of the document being referenced. Document 1's requirements are columns B, C, D, Document 2's requirements are columns E, F, G and so on
4. The headers of the information being pulled from the document

Note- the system only builds a report based on your current proposal outline tree. If you want to keep a version history, please save a copy of this spreadsheet to your computer.

1.9.1-Manipulating The Proposal Outline Tree For Desired Results In XREF

The system orders the documents shown inside the Cross-Reference Compliance Matrix (XREF) based off of how they are inside of the Proposal Outline tree.

	A	B	C	D		E	F	G
	Training Proposal			Section L Polaris SB Pool RFP ①			② Section C Polaris SB Pool RFP	
	Proposal SectionName	Section No.	Section Header	Parsed Text		Section No.	Section Header	Parsed Te

If I wanted Section C first instead of Section L all I would need to do is simply swap the location of 102_2 & 101_3

Generate a new Cross-Reference Compliance Matrix

	A	B	C	D		E	F	G
	Training Proposal			Section C Polaris SB Pool RFP ⟵		⟶	Section L Polaris SB Pool RFP	
	Proposal SectionName	Section No.	Section Header	Parsed Text		Section No.	Section Header	Parsed Te

Section C is now the first document listed.

1.10-Generate Proposal Outline

To generate a proposal outline, select the button. You can do this at any time during the process. The outline is updated in real time, if you want version history you will need to keep a copy saved to your computer.

Select Report Type ✕

File Format
- ◉ MS Excel
- ○ MS Word

OK Cancel

Currently there are 2 outputs: Excel and Word

1.10.1-MS Excel Output

	A	B	C	D	F	G	H
1	1.0 Initial Paragraph **①**						
2	Section L Polaris SB Pool RFP **②**	L.2 **③**	FAR AND GSAR PROVISIONS **④**	L.2 FAR AND GSAR PROVISIONS / The following FAR and GSAR provisions are applicable to this solicitation and are provided in full text.			
3	Section C Polaris SB Pool RFP	C.1.2	Definition of Information Technology	C.1.2 Definition of Information Techno **⑤** / As referenced in Section C.1, definitions of IT are used to define the scope of the Master Contract and are provided below.			
4	Section M Polaris SB Pool RFP	(4)	Is otherwise eligible for award.	(4) Is otherwise eligible for award. / Considering the above criteria -			
5	Win Themes	9	10. Best value. Our solution balances ...	10. Best value. Our solution balances up-front investment against long-term operating costs to achieve the best overall value.			
6	1.1 Subsection						
7	Section L Polaris SB Pool RFP	L.2.2	FAR 52.216-27 Single or Multiple Awards (Oct 1995)	L.2.2 FAR 52.216-27 Single or Multiple Awards (Oct 1995) / The government anticipates that Multiple Awards shall be made up to a maximum of 100 awards. In the event of a precisely tied score at the 100th position, all Offerors tied at the 100th position will receive a Master Contract award. / (End of provision)			
8	Section L Polaris SB Pool RFP AM 1	L.2.2.1	Addition 1	L.2.2.1 Addition 1 / This section is demonstrating an added requirement. / (End of provision)			
9	Section C Polaris SB Pool RFP	C.1.2	Definition of Information Technology	C.1.2 Definition of Information Technology / As referenced in Section C.1, definitions of IT are used to define the scope of the Master Contract and are provided below.			
10	Section M Polaris SB Pool RFP	(ii)	Offerors must conform to the requirements of ...	(ii) Offerors must conform to the requirements of the solicitation;			
11	Win Themes	1	2. Innovative. Our approach ensures the ...	2. Innovative. Our approach ensures the constant consideration of innovative solutions.			
12	2.0 Paragraph Title Level 1						
				L.2.4 GSAR 552.217-71 Notice Regarding Option(s) (Nov 1992) / The General Services Administration (GSA) has included an option to extend the term of this contract in order to demonstrate the value it places on quality performance by providing a mechanism for continuing a contractual relationship with a successful Offeror that performs at a level which meets or exceeds GSA's quality performance expectations as communicated to the Contractor, in writing, by the / Contracting Officer or designated representative. When deciding whether to			

Sheet1 ⊕

1. Any row in gray is a section or subsection
2. The name of the document. In row 7 + 8 you can see that the amendment subsection requirement we added is just underneath the section it belongs to.
3. The section number
4. The section header or truncated version of the text
5. The parsed text

1.10.2-MS Word Output

1 **4.0 New Section**

Section L Polaris SB Pool RFP AM 1|L.3.4 Demonstration of Modified Section

L.3.4 Demonstration of Modified Section Proposals are due no later than 4:00 p.m. Eastern Time (ET) on June 13, 2022. Proposals must be submitted electronically via the Polaris Submission Portal (PSP). This portal is accessible at: https://polaris.app.cloud.gov The PSP will open for registration no earlier than April 5, 2022 following completion of the SAM.gov transition from DUNS to UEI. GSA Polaris GWAC Program Small Business Pool RFP No. 47QTCB22R0001 Page 60 of 118 GSA Polaris GWAC Program Small Business Pool RFP No. 47QTCB22R0001 Page 60 of 118 GSA Polaris GWAC Program Small Business Pool RFP No. 47QTCB22R0001 Page 60 of 118

2 Section C Polaris SB Pool RFP|C.1.2.3 National Institute of Standards and ...

C.1.2.3 National Institute of Standards and Technology (NIST) NIST defines information technology as the art and applied sciences that deal with data and information. Examples are capture, representation, processing, security, transfer, interchange, presentation, management, organization, storage, and retrieval of data and information (NISTIR 8074 Vol. 2, Supplemental Information for the Interagency Report on Strategic U.S. Government Engagement in International Standardization to Achieve U.S. Objectives for Cybersecurity).

Section M Polaris SB Pool RFP|15.404-1 - Proposal Analysis Techniques.

*15.404-1 - Proposal Analysis Techniques. * * * * **

Win Themes|33 34. Flattened organization. By keeping our ...

34. Flattened organization. By keeping our organization flat, we keep decision making as close as possible to the project.

Changes

Section L Polaris SB Pool RFP AM 1|L.3.1 Remove Section in its entirety

L.3.1   Remove Section in its entirety This section is demonstrating the removal of a section in its entirety.

3 Section L Polaris SB Pool RFP|L.3.1 Official Legal Offering Entity

L.3.1   Official Legal Offering Entity All the evaluation elements an Offeror is claiming credit for in accordance with Section L.5. must be in the Offeror's name as submitted in Block 15A on the Standard Form (SF) 33, Solicitation, Offer and Award, with a corresponding CAGE Code and UEI (SAM) in SAM that matches the Offeror name on the SF33, Block 15A. (See Section L.5.1.1.). See Sections L.3.2, L.5.1.3 and L.5.1.4 for the only exceptions to this requirement.

---

1. Section & Subsection Headers are bolded and underlined
2. Each of the boxes is a separate requirement. The text body for each document is a unique color.
3. You can see the changes in the Changes section that we made earlier in this guide.

2.0 Content Analytics Platform

2.1 Preface

Style Conventions

The following style conventions are used in this document.

Special Characters

Do not use special characters or underscore within Workgroups, project names, and filenames.

Bold

- Names of commands, options, programs, processes, services, and utilities
- Names of interface elements (such windows, buttons, fields, and menus)
- Interface elements the user selects, clicks, presses, or types

Navigation and Layout Naming Conventions

Menus
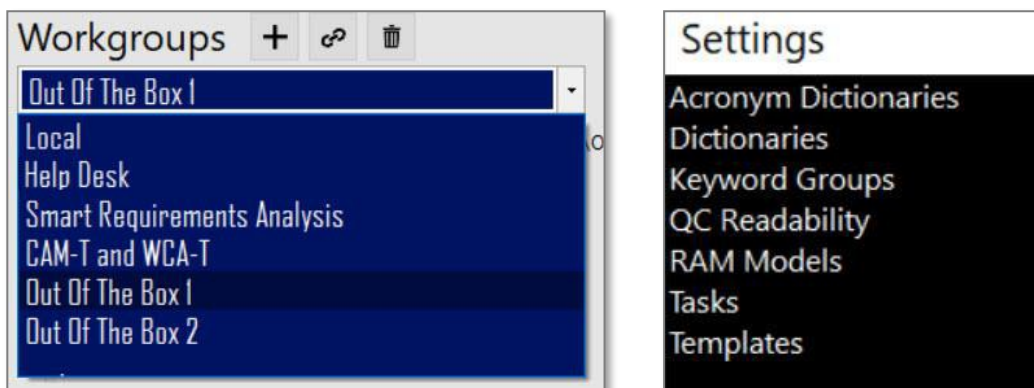
List
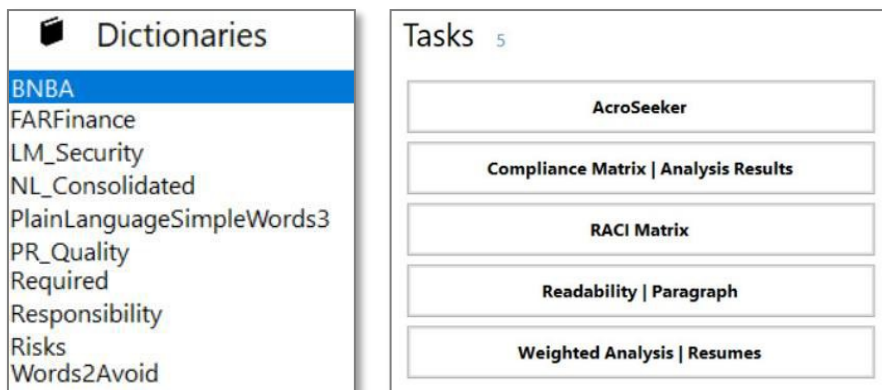
Results Tree
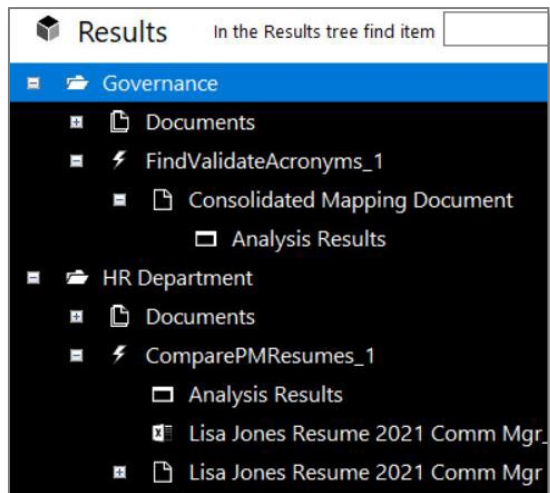
Popup Windows
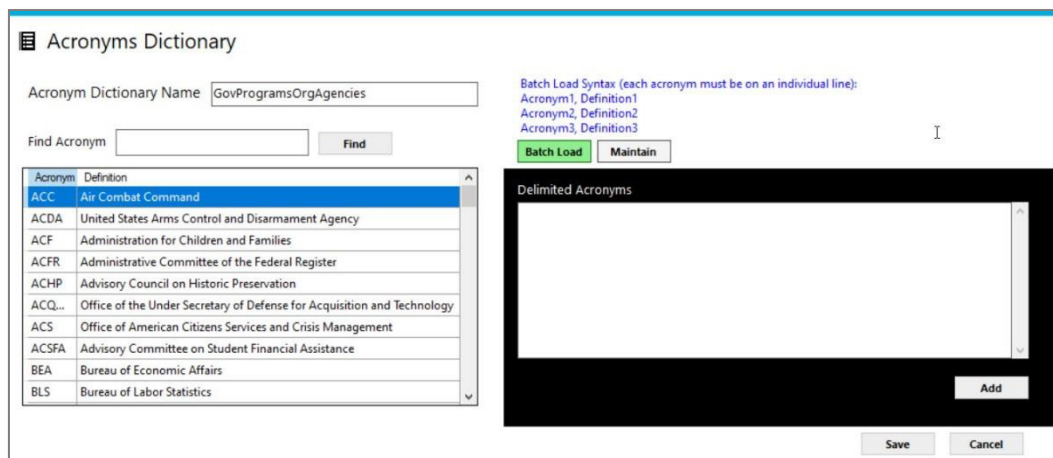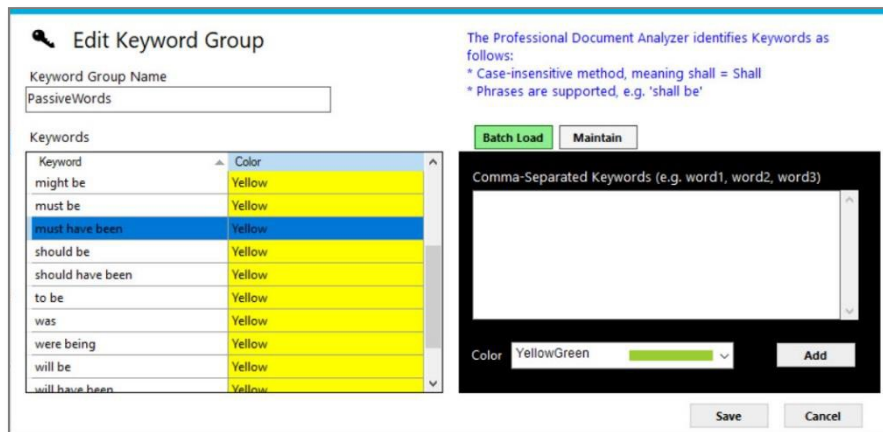
Panels

Excel Templates

Reset Default Settings

Template Types	Template Names
Analysis Results Keywords	C17_Proposal_Output
Deep Analysis Results Keywords	ComplianceMatrix_W1
Analysis Results Dictionary	ComplianceMatrix_W1_Pa
Analysis Results Concepts	Content Review Score Ca
Analysis Results RAM	ContentReviewScoreCard
	Oppt_Capability_Matrix
	ReqMatrix_1
	ReqMatrix_1_Page
	ReqTraceabilityMatrix_2
	ReqTraceabilityMatrix_2_F
	RequirementsParsed

Responsibility Assignment Matrix (RAM) Models

Reset Default Settings

BNBA
DACI
DRASCI
PDQA
RACI
RACIO
RAPID
RASCI
RASI
RATSI

Responsible	R	Those who will do the work to complete the task
Accountable	A	Those answerable for the correct and thorough completion of the deliverable
Consulted	C	Those whose opinions are sought, typically Subject Matter Experts (SMEs)
Informed	I	Those who are kept up-to-date on progress, often only on completion of the task or deliverable

Page

Results

In the Results tree find item [   ] [Find]

- ▣ 📁 **Governance**
  - ▣ 📄 Documents
  - ▣ ⚡ FindValidateAcronyms_1
    - ▣ 📄 Consolidated Mapping Document
      - ▣ ▭ Analysis Results
- ▣ 📁 HR Department
  - ▣ 📄 Documents
  - ▣ ⚡ ComparePMResumes_1
    - ▭ Analysis Results
    - 📄 Lisa Jones Resume 2021 Comm Mgr_
    - ▣ 📄 Lisa Jones Resume 2021 Comm Mgr
- ▣ 📁 IT Department
  - ▣ 📄 Documents
    - ▣ 📄 Cybersecurity Plan
      - ▣ ▭ Analysis Results
- ▣ 📁 Marketing Comm
  - ▣ 📄 Documents
    - 📄 Web Campaign Eval

Welcome to Results

Analysis Results and Reports generated from previous Task Runs.

Symbol Legend

📁	Project
⚡	Analysis
📄	Documents
📄	Document
▭	Analysis Results
📄	Excel Report
📄	MS Word Report
📄	HTML Report

[Back to Welcome]

2.2 CAP Overview

The Content Analytics Platform or "CAP" is a customizable text analytics tool. It uses Artificial Intelligence (AI) and Natural Language Processing (NLP) to provide customizable and configurable insight into your content. CAP is made up of components, such as applications, dictionaries, and templates, which work together in different combinations to analyze your unstructured data and deliver results.

CAP comes standard with a package of applications and templates you can use right out of the box. CAP is also designed to be flexible and scalable to meet your content analysis needs. Here are just a few examples of what you can do with CAP.

Use CAP when you want to:

- ***Decide*** whether or not to bid on a Request for Proposal (RFP).

- ***Identify*** the best job candidate out of a stack of resumes.

- ***Know*** if your content is difficult to read, and if it is, how you can improve it.

- ***Generate*** a list of acronyms and their meaning.

- ***Verify*** your proposal includes all mandatory criteria from the RFP.

- ***Breakout*** the requirements in a document.

- ***Identify*** the common themes in your content.

- ***Compare*** two similar documents and call out their differences.

- ***Point out*** the gaps between two documents.

- ***Capture*** widely used terms in your content and create a dictionary out of them.

With a little imagination and skill, you can create your own applications and templates.

2.2 Getting Started

2.2.1 System Requirements

The following are the minimum system requirements to install and run CAP:

- Installation Space: 320 MB.

- Windows 10 or Newer.

- Typical Project Space Requirement: 4 to 6 MB.

- Minimum Memory Recommended: 8 GB or more.

- Recommended processor: Intel Core i7 or better.

- Recommend a Server for Workgroups with full security access to the drive.

- Recommend solid-state hard drives for best performance.

- MS Office.

- **Required**: Only compatible with Outlook for email within CAP.

Note: *You must have Outlook open in order to see the* **Email** *button on some results options.*

2.2.2 Installing the License Key

The following is the email sent to users with the instructions to install the license key.

Email to end user:

License Key & Download Information

Hello,

This email contains your license key and download links. Please follow all of the steps to access the Content Analytics Platform.

Step 1:

To direct download please click on the link below:

[Direct Download](#)

To download as a compressed file(.ZIP) please click on the link below:

[ZIP Download](#)

Step 2:

After you have downloaded the installation file, follow the prompts to install it on your computer. If prompted for an administrator login, please input your credentials or reach out to your IT Department.

Step 3:

Input the license key by following the steps below:

1. Open the Content Analytics Platform.

2. The *Contact Information & License* window will open **or** click the *Registration* button on the Start-Up screen **or** click the *person* icon at the top left of the screen.

3. Copy the **entire license key** information below in **BLUE** and paste it into the License text box.

First Last | firstlast@mail.com | Company Name | 2022-06-18

73c3edb8-c864-43c8-bbbf-9e2549123e48

ProfDocAnalyzer | ProfDocAnalyzer | 5.7

BJBCR9N-C9J1AP-0P5N85D-Z4BG32-9JSC6T1-7F42EC-8ZXKAK6-3XXQ9B

AJ1A67D-2N4JFF-30WJ4SG-3EWP8P-DFBB89T-BT3F7D-3BTANBA-71T9XX

4. Click Submit button.
   The next time you open the Content Analytics Platform the remaining number of days until your license expires will be displayed at the top left.

5. To schedule your initial hour of training please schedule here: Schedule Training

Need help? Contact support@scionanalytics.com.

2.3 CAP: Putting it all Together
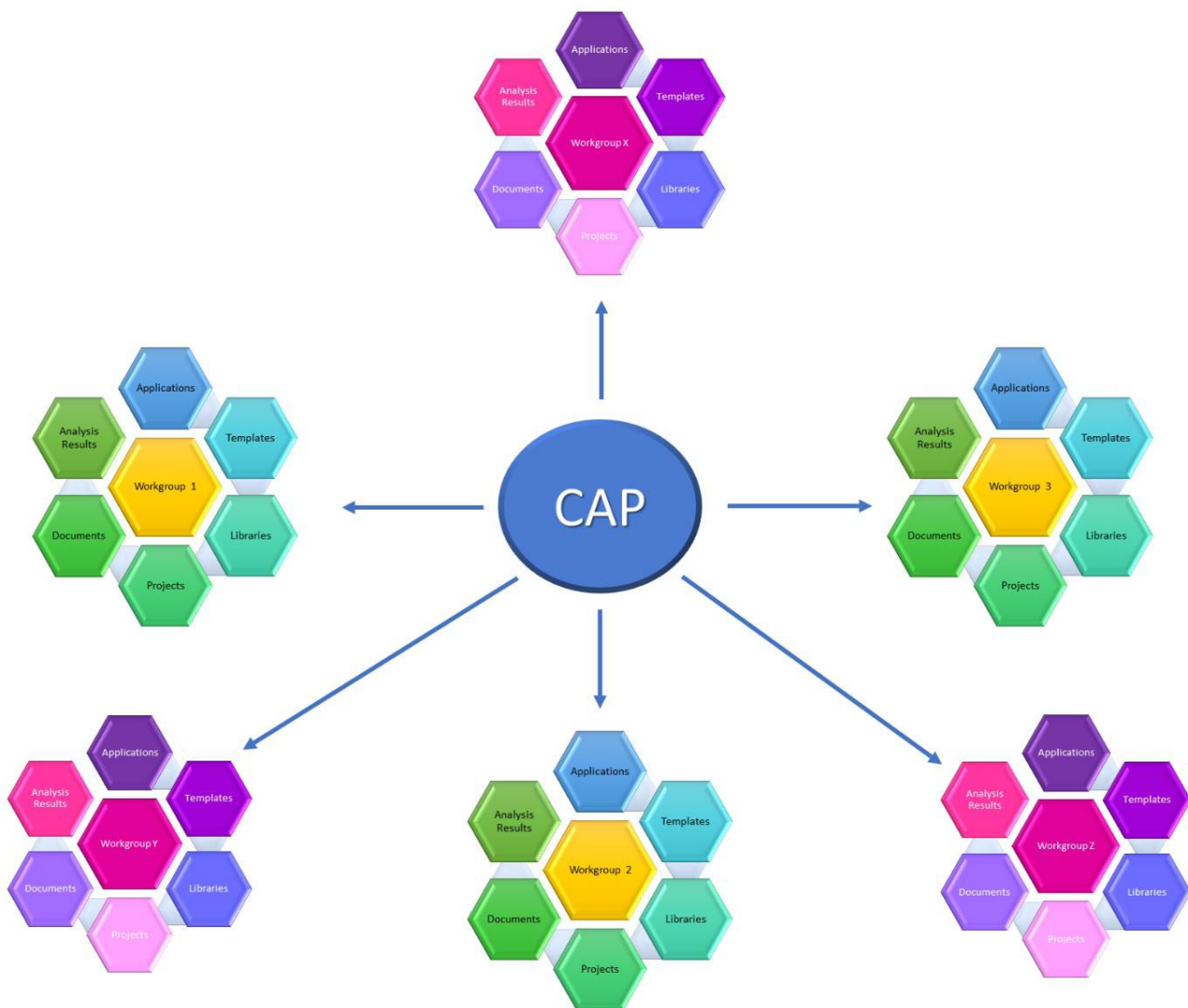
Workgroups – function as a container for all of the tools, applications, templates, and resources you need to analyze all of the content you want.

Applications – the functions that perform specific actions in a series and drive the analysis.

Templates – the layout for the analysis results, output, artifacts, and reports.

Libraries – the dictionaries and keywords are used to extract and highlight important terms.

Projects – the folders in workgroups that contain your documents and analysis results.

Documents – the textual content you want to explore, examine, and analyze.

Analysis Results – the scores, findings, and outcomes of the analysis.

2.3.1 How to Setup Workgroups for the First Time

Workgroups are set up a little differently depending on how your organization is setup and where your content resides.

If you have OneDrive…	**Follow these steps:** 1. Add a New Workgroup in CAP 2. Create a Workgroup on OneDrive 3. Create a Workgroup in CAP 4. Share Your Workgroup with Others (OneDrive) 5. Create Project 6. Upload Documents
If you have SharePoint…	**Follow these steps:** 1. Add a New Workgroup in CAP 2. Create a Workgroup on SharePoint 3. Create a Workgroup in CAP 4. Share Your Workgroup with Others (SharePoint) 5. Create Project 6. Upload Documents
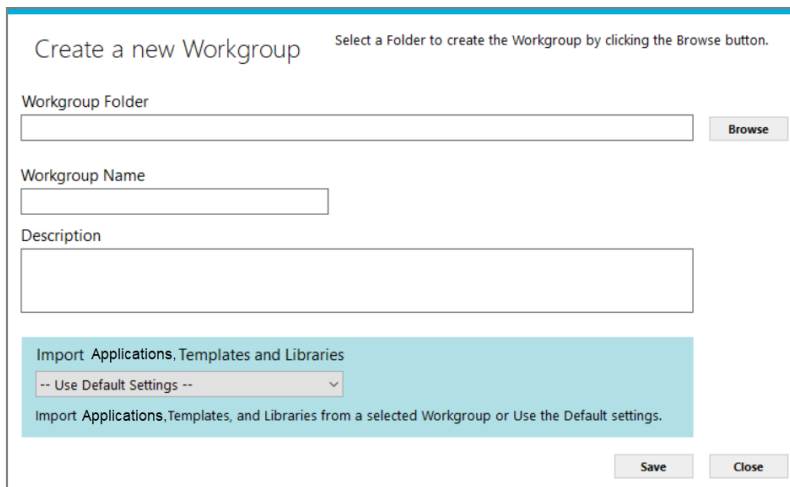
Workgroups function as a container for all of the tools, applications, templates, and resources you need to analyze all of the content you want.

1. To add a new workgroup, go to the **Welcome** page.
2. Click "**+**".
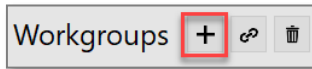
3. In the **Create a new Workgroup** popup window, click **Browse** and go to either *OneDrive or SharePoint,* and click **Make New Folder**.

-

4. In the **Workgroup Name** field, enter a name for the workgroup.

Note: Workgroup names must be unique and cannot be "workgroup".

5. In the **Description** field, enter a brief description of the workgroup. This description will appear under **Workgroups** on the **Welcome** page.
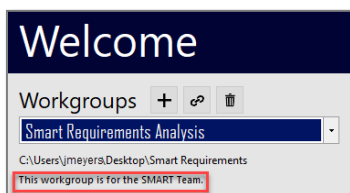
6. Click the menu for **Import Applications, Templates and Libraries**. Use the default settings.

Note: If this is the first workgroup you are setting up, use the default settings. This installs everything you need to start, right out of the box.

7. You will see your new workgroup on the **Welcome** page.

8. Click **Save**.
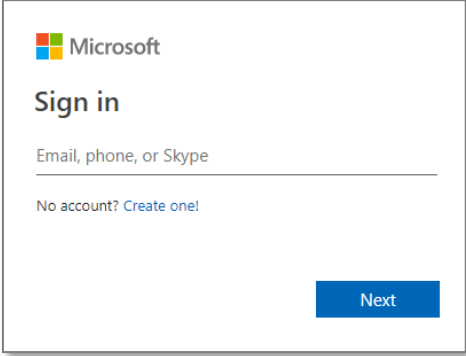
2.3.3 Create a Workgroup on OneDrive

Follow these steps to create a workgroup on **OneDrive**.

1. Launch your browser (i.e., MS Edge, Firefox, Google Chrome).

2. Go to **OneDrive**.

Tip: Type *https://onedrive.live.com/about/en-us/signin/*
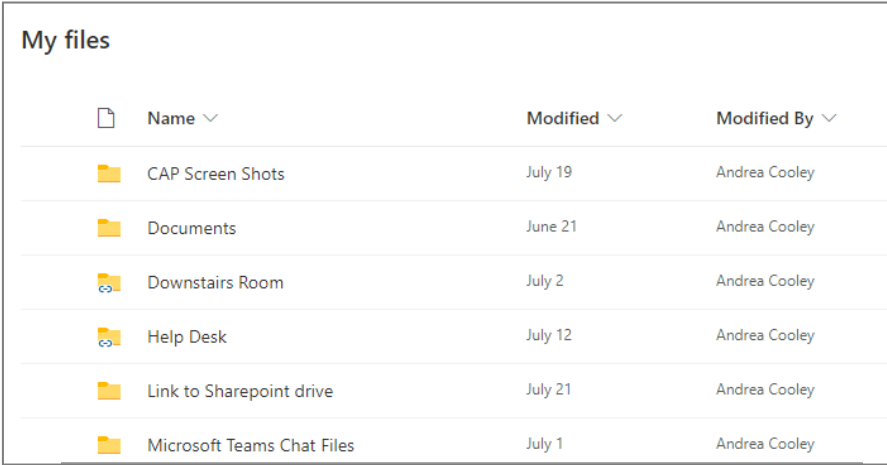
3. Sign into **OneDrive** with your email or phone number, then click **Next**.

4. Click **Your OneDrive is ready**.

Note: You will only see this message if you have never opened **OneDrive** from a browser.

5. You will see a list of your file folders on the **My files** page.

6. To create a workgroup, click the **+ New** dropdown menu and select **Folder**.
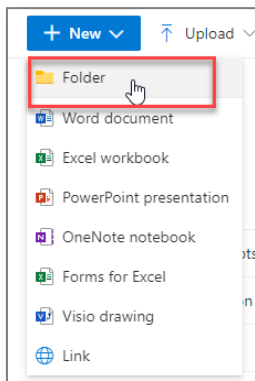
7. Type a name for your workgroup folder and click **Create**.

Note: *You cannot name a workgroup folder "Workgroup".*
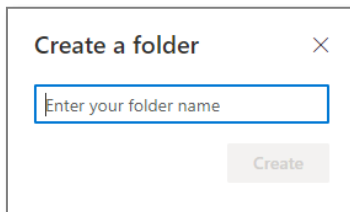
8. Click **Sync** on the navigation bar.

9. A message window will pop up saying "Get ready to sync…" as well as a **OneDrive** popup window.

10. Click **Open Microsoft OneDrive**. Syncing will begin.
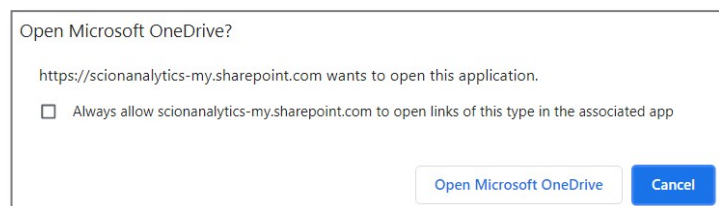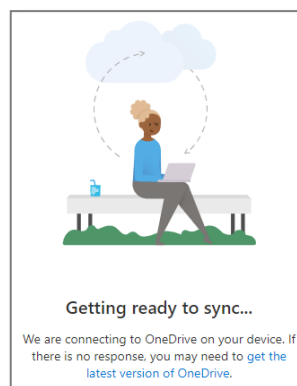
11. Now you can exit **OneDrive**. Next, go to **CAP**.

2.3.4 Create a Workgroup in CAP
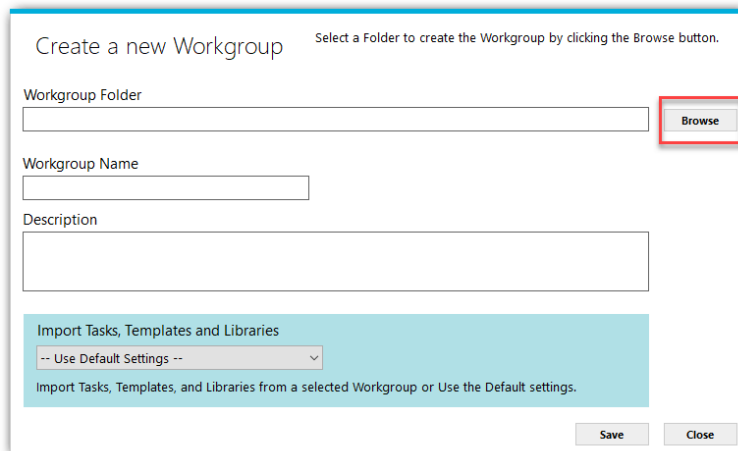
These steps continue from the previous section.

12. Launch CAP .

13. Click the "**+**" to create a workgroup.

14. In the **Create a new Workgroup** popup window, click **Browse**.

15. Go to the *OneDrive or SharePoint* location of the folder you created in the previous section.
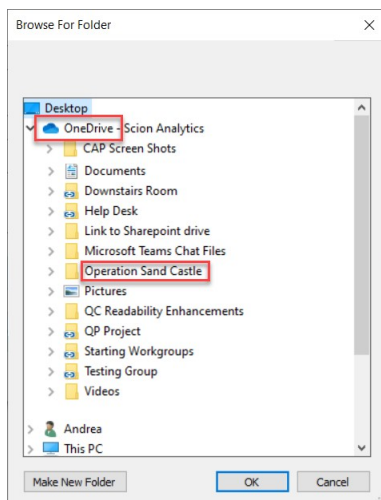
16. In the **Workgroup Name** field, enter a name for the workgroup.

Note: Workgroup names must be unique and cannot be named "workgroup".

17. In the **Description** field, enter a brief description of the workgroup. This description will appear under **Workgroups** on the **Welcome** page.

18. Click the menu for **Import Applications, Templates and Libraries**. Select the default settings if this is the first workgroup you are creating.

19. Click **Save**.

Note: Sharing your new workgroup with your teammates will be handled through OneDrive or SharePoint permissions.

2.3.5 Share Your Workgroup with Others (OneDrive)

Follow these steps if you created a workgroup and want to give teammates access.

1. Launch your browser (i.e., MS Edge, Firefox, Google Chrome).

2. Sign into **OneDrive** with your email or phone number, then click **Next**.

3. You will see a list of your file folders on the **My files** page.

4. Locate the folder of the **Workgroup** you want to share. Click in the **Sharing** column.

5. In the **Manage Access** menu, select the "**+**" next to **Direct Access**.
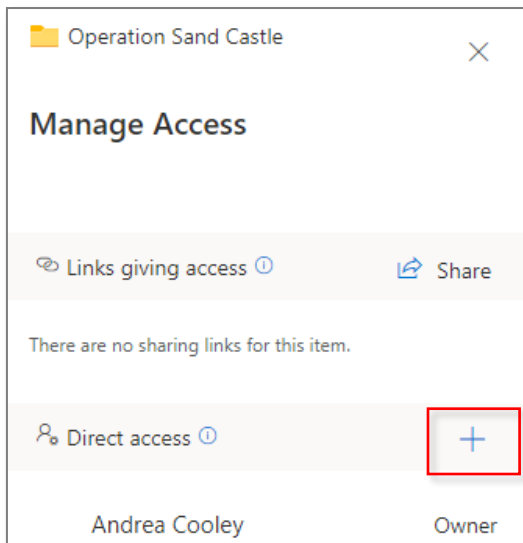
6. In the **Grant access** window, enter either the name of a person, a group, or an email.

Note*: You can enter more than one name.*

7. Click **Grant access**. The person or group will receive an email to access the workgroup.
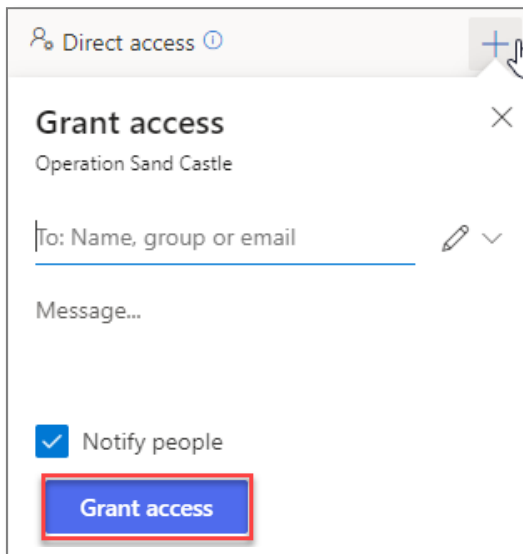
8. Once the user receives the email, they need to click **Open**. Their OneDrive will open.
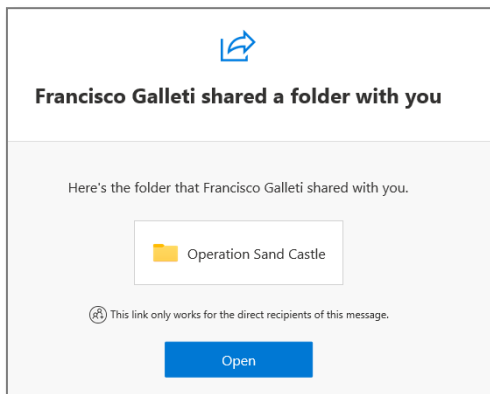
9. On the navigation bar, click **Add shortcut to My files**.

10. This adds a file to **MS File Explorer**.
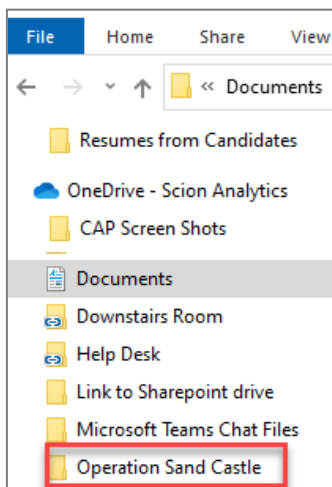
2.3.6 Connect to an Existing Workgroup

1. To link to an existing workgroup, go to the **Welcome** page.

2. Click the **link** icon to connect to an existing workgroup.
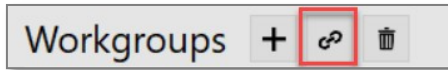
3. In the **Connect to a Workgroup** pop up window, click **Browse**.
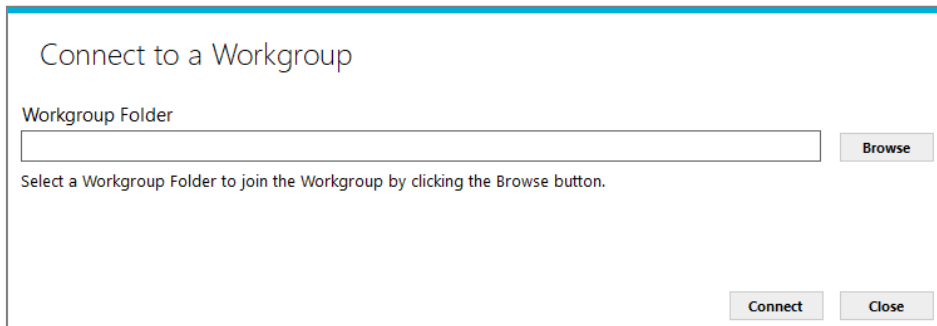
4. In the **Browse for Folder** window, select the workgroup you want to connect to.
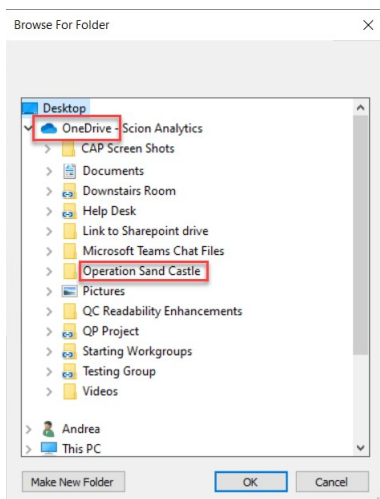
5. Click **OK**. The workgroup will now be in your workgroup dropdown menu.

Note: If the workgroup is cloud-based, please wait for it to fully sync before you will be able to see shared results and documents.

2.3.7 Create a Workgroup on SharePoint

Follow these steps to create a workgroup on SharePoint.

1. Log in to **SharePoint**.

2. Select the site where you want to create the workgroup.

3. Click on **Documents**, **+ New**, then **Folder**.
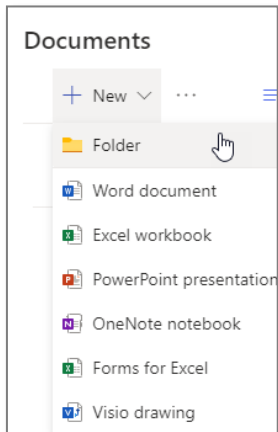
4. Type a name for your workgroup folder and click **Create**.
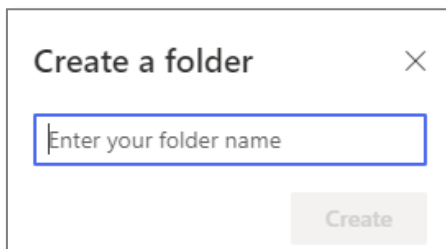
5. Click **See All**.

6. On the navigation bar, click **Sync**.
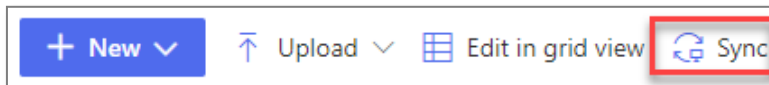
*Note: Only click **Sync** if you are only using **SharePoint**. If you are using both OneDrive and SharePoint, do not click sync.*

6. A message window will pop up saying "Get ready to sync...".

7. Go to **MS File Explorer** to confirm the system folder for SharePoint is created.
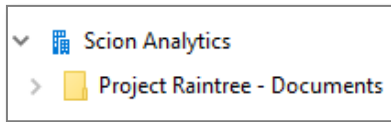
8. Next, go back to 2.4.2 Connect to an Existing Workgroup.

2.3.8 Share Your Workgroup with Others (SharePoint)

Follow these steps if you created a workgroup and want to give teammates access.

1. Launch your browser (i.e., MS Edge, Firefox, Google Chrome).

2. Sign into **SharePoint**.

3. From **My Sites**, locate the **Workgroup** you want to share and click on it.
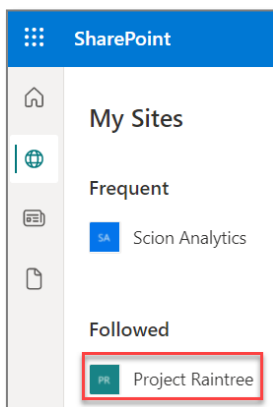
4. Next to **Documents**, click **See all**.
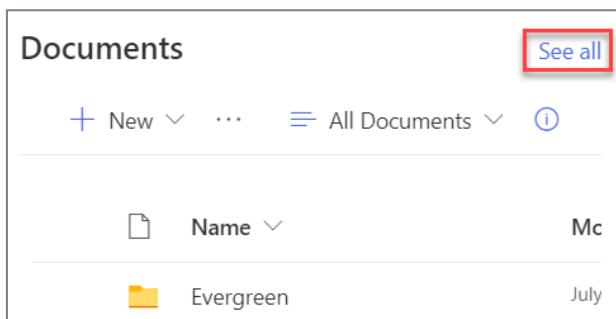
5. Select the circle next to the folder you want to share.
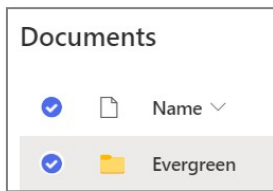
6. Click **Manage access**.
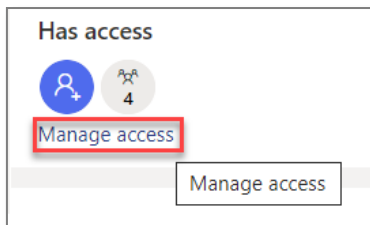
7. In the **Manage Access** menu, select the "**+**" next to **Direct Access**.
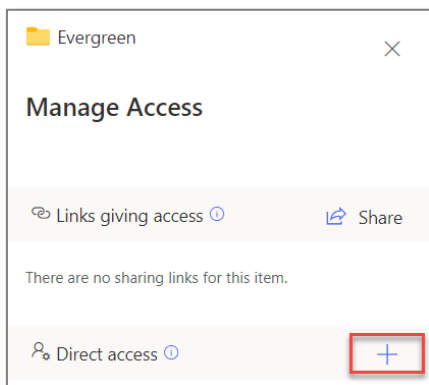
8. In the **Manage Access** window, enter either the name of a person, a group, or an email.

Note: *You can enter more than one name.*
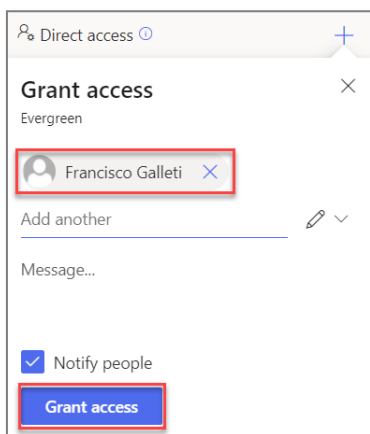
9. Click **Grant Access**. The person or group will receive an email to access the workgroup.

10. Once the user receives the email, they need to click **Open**. SharePoint will open.
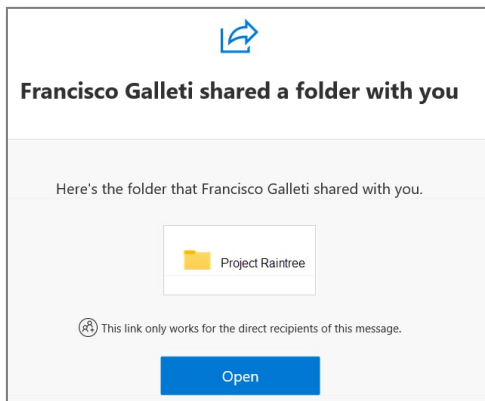
11. On the navigation bar, click **Add shortcut to My files**.
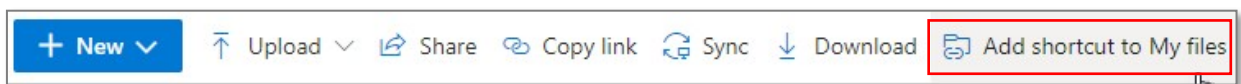
12. This adds a file to **MS File Explorer**.
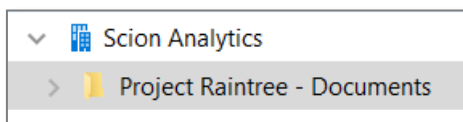
2.3.9 Create a Project

A project is a folder structure within a workgroup. You can create as many projects as you need. This is where the documents you want to analyze will be stored. The artifacts, reports, and matrices will be stored in the project as well.

1. From the **Welcome** page click **Start**.

2. Select any application from the **Application** list and click **Next**.

Note: You will not be running an application, but you need to select one to access the project folder.

3. In the **Project** menu, click **New**.
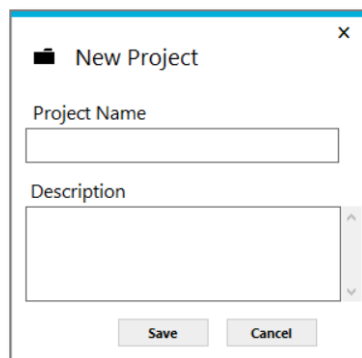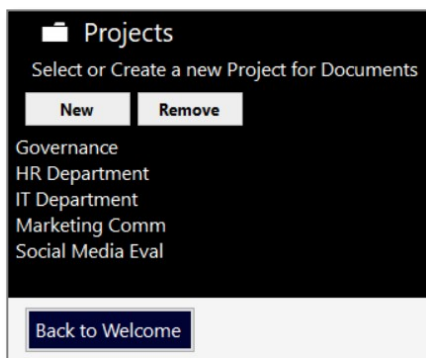
4. In the **New Project** popup window, enter a unique project name and description.

5. Click **Save**. You are now ready to upload documents to the project folder.

2.3.10 Upload Documents

Pre-Requisite: Complete the steps to [Create a Project](#).

1. From the **Projects** menu, select a project folder.
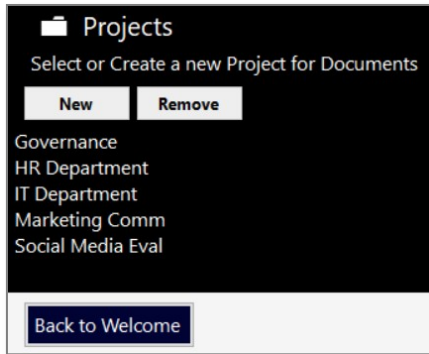
2. In the **Documents** panel, click **New**.

3. In the **Add Document** popup window, click **Select File.**
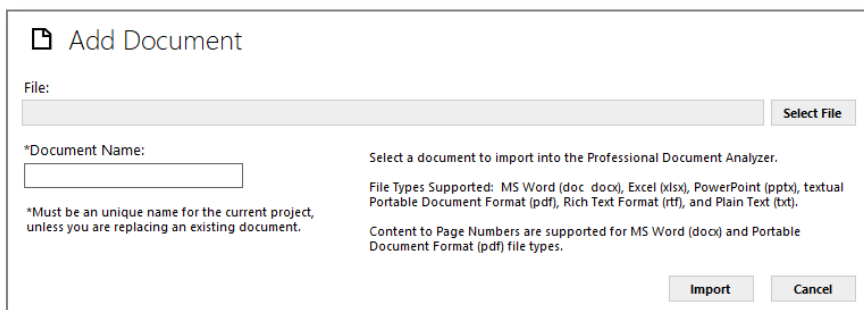
4. Search for the document you want to upload.
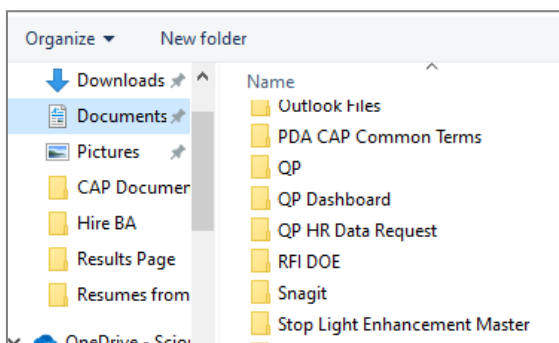
5. In the **Document Name** field, you can edit the name, if necessary. Make sure it is unique unless you are overwriting an existing document.

Tip: *The file name cannot be more that 25 characters.*

6. If the check box next to *Convert using MS Word* appears, then click **Import**. The document is now in your **Documents** list for that project.

Tip: *For every document you upload, you must check the box to convert documents to MS Word. Always import documents to a Microsoft format (Word, Excel, PowerPoint), PDF, RTF, or TXT.*

More About Documents

New:	Uploads a new document to the project.
Open:	Opens the document as a plain-text file.
Remove:	Removes the file from the project. The file will still exist in the workspace.
Replace:	Overwrites the existing file with a newer version. The updated version must have the same name as the original file. Also, any existing analyses and reports will be archived and no longer available in CAP. The updated version of the document will need to be re-analyzed.

2.4 Navigating Your Way through CAP

2.4.1 Welcome Page

The **Welcome** page is where you connect to workgroups, set up your preferences, and access your applications.
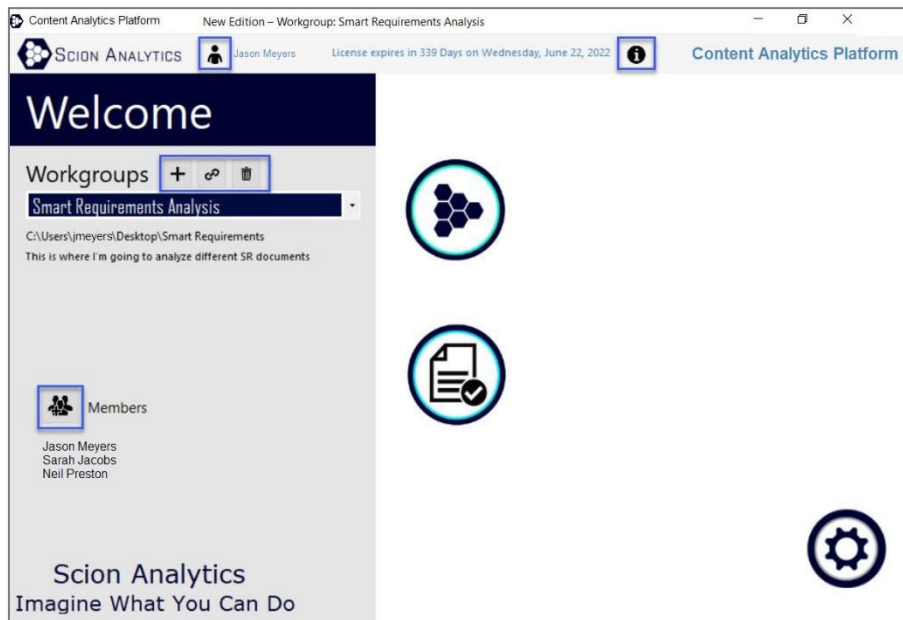
➕	**Add a new Workgroup**	ⓘ	**Release Information**
🔗	**Connect to an existing Workgroup**	👤	**Contact Information & License**
🗑	**Disconnect form the selected Workgroup**	👥	**Members**

Start Button		Hover over the icon on the *left* and it will change to **Start**.	Start
Results Button		Hover over the icon on the *left* and it will change to **Results**.	Results
Settings Button		Hover over the icon on the *left* and it will change to **Settings**.	Settings

1. Click the "i" ⓘ on the **Welcome** page to see the **Release Information**.
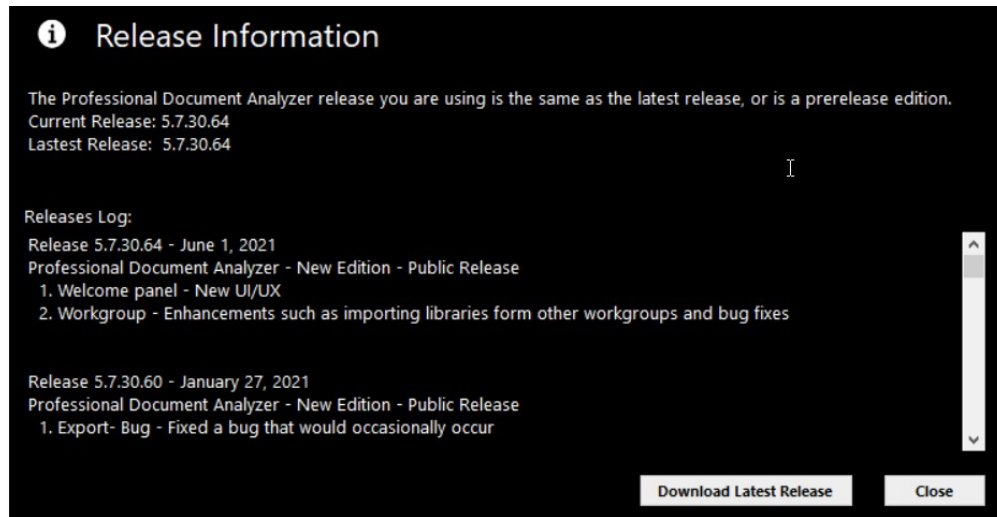
Download Latest Release

From this popup window you can download the latest version of CAP.
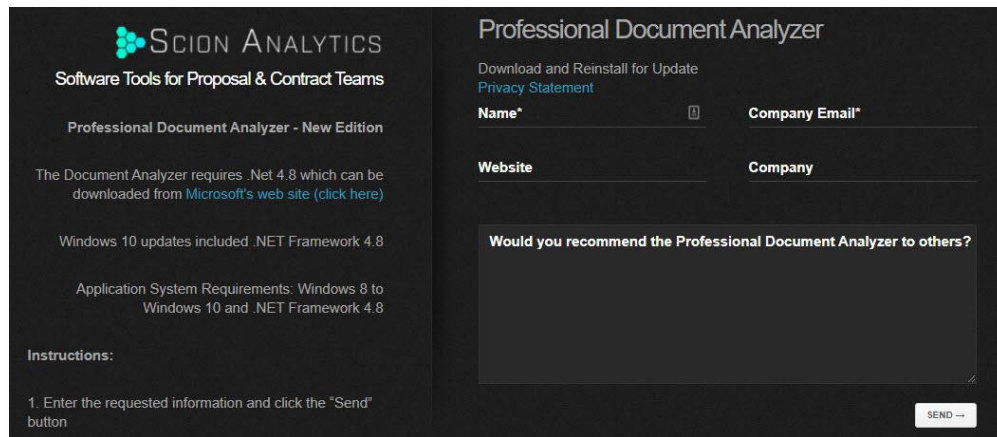
CAP is made up of *Workgroups* which are designed to facilitate teamwork and sharing common resources. While each workgroup is unique, every workgroup contains the same common elements such as project folders, documents, analysis results, applications, dictionaries, keyword groups, and templates.

Workgroups FAQ:

Q: What are Workgroups?
A: Workgroups function as a container for all the tools, applications, templates, and resources you need to analyze all of the content you want.

Q: Why would I create more than one Workgroup?
A: Most organizations create workgroups based on the type of documents they will be analyzing (i.e., RFPs, Resumes, BRDs, SOWs) or the type of work assignments within a specific department (i.e., HR, Finance, IT, Marketing).

Q: Can I have more than one Workgroup with the same name?
A: No. When naming a new workgroup, the workgroup name must be unique.

Q: Who should I invite to my Workgroup?
A: Workgroups can have multiple members who will be working on the same or shared projects. Only invite people who you want to have access to the same information, content, and results.

Q: How many Workgroups can I create?
A: You can create as many workgroups as your organization needs and invite as many authorized team members to a workgroup as you want.

Q: Can I connect a Workgroup to the cloud?
*A: Yes, workgroups can connect to cloud-based services, such as **One Drive or SharePoint**. All workgroup members connected to a cloud-based service share access to applications, projects, documents, templates, libraries, and results. If one member creates a new application, the other members of the workgroup will be able to see it and use it. The same is true with the documents in project folders and the analysis results. They are accessible to all members of the same workgroup.*

Q: Can I share applications with another Workgroup?
A: Applications in a workgroup are specific to that workgroup, but you can copy/clone an application or recreate it in another workgroup. You can also create a new workgroup and instead of importing the default libraries, templates, and application, select the workgroup that has the applications you want. They will be copied to your new workgroup.

Q: Can users outside my Workgroup see my analysis results?
A: No. Workgroups are independent of each other. All analysis results within a workgroup are saved in that workgroup and cannot be accessed by other workgroups.

2.4.2 Applications Page

Applications are a series of precisely defined actions performed in a specific order to analyze content, then generate an artifact, such as a report or matrix. Applications belong to individual workgroups. CAP comes standard with a variety of applications you can use upon installation. You can also modify these applications for your specific needs or simply create your own.

1. From the **Welcome** page, click **Start**.

2. From the **Applications** menu, select the application you want to run.

3. Click **Next**.

4. Choose your document from the project folder.

5. Click **Analyze**.

Tip: If you don't see the application you want in your list, you can add or remove applications from view in **Settings**.

2.4.2.1 Add or Remove Applications from a List

Follow these steps to add or remove an application from view in a workgroup list.

Note: This does not delete the application from the workgroup. It only removes it from view.

1. From the **Welcome** page, click **Settings**.

2. In the **Settings** menu, click **Applications**. You will see the complete list of applications for your current workgroup.

3. To add an **Application** to the list, check the box. Uncheck it to remove it.
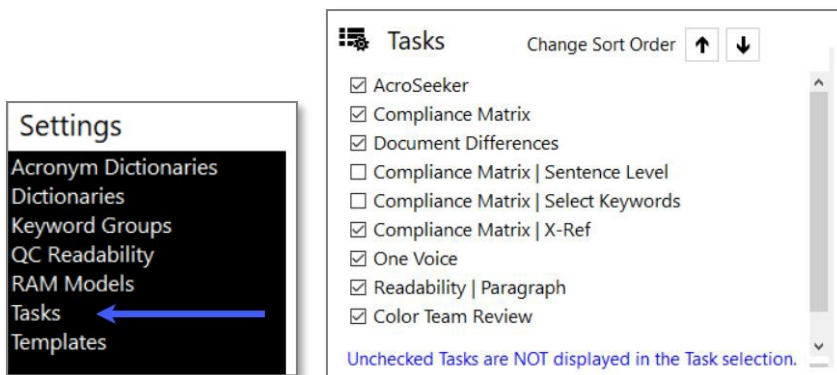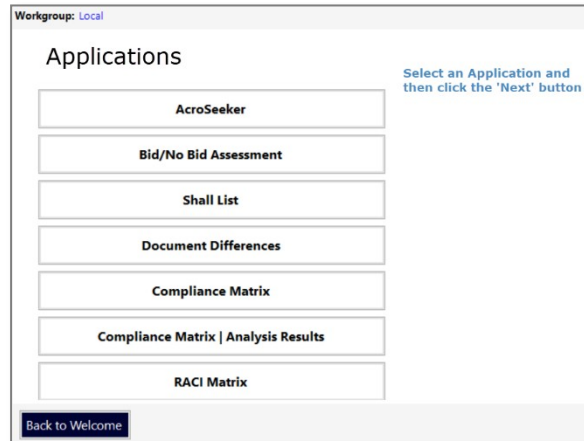
2.4.3 Results Page

On the **Results** page you can review the analysis results and reports generated from previous application runs.
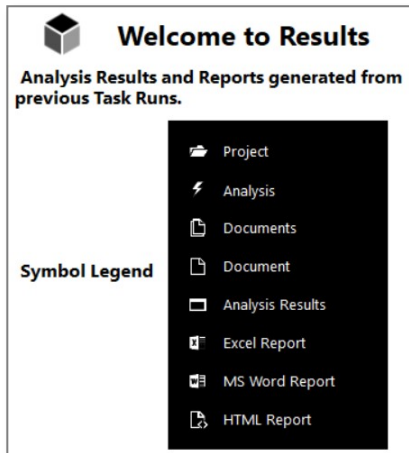
2.4.3.1 Results Tree

In the **Results Tree**, expand the folders under a project until you find the **Analysis Results** icon. Click the **Analysis Results** icon to see the results window.
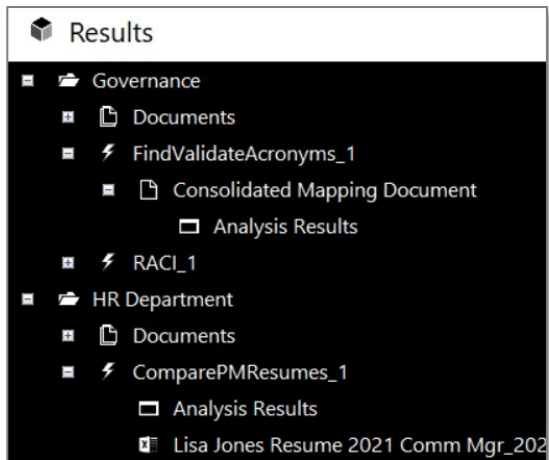
2.4.3.2 Find Results

Enter a term or phrase, then click **Find**.

2.4.4 Settings Page

Settings provide you with the ability to customize dictionaries, QC readability options, RAM models, applications, templates, and other configurations.
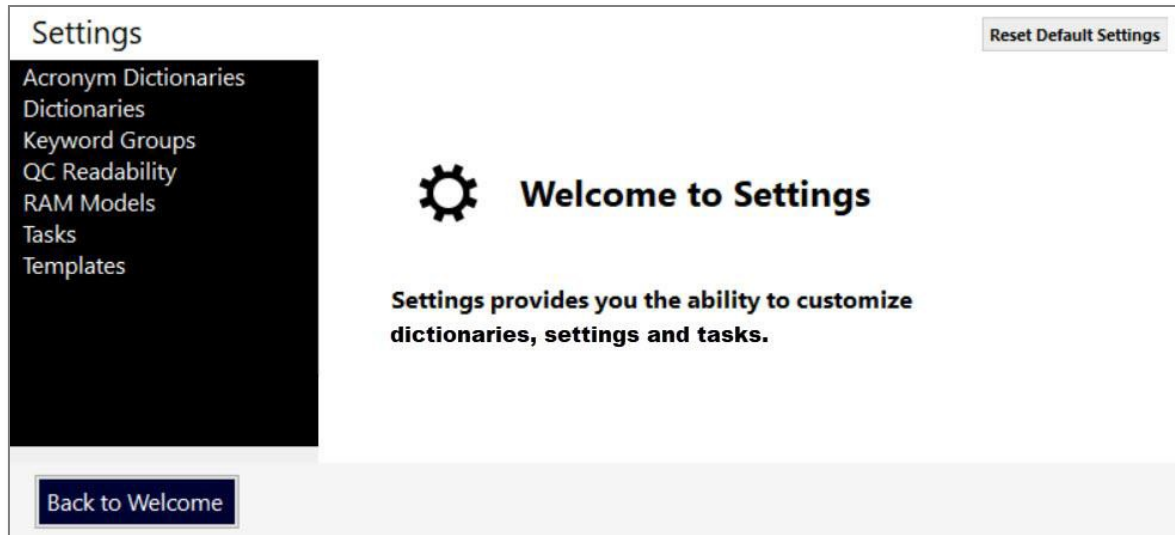
Here's a list of some of the things you can do:

- Edit existing dictionaries & keyword groups
- Create & edit existing applications
- Import your own dictionaries
- Create your own RAM model
- Import your own templates

- Adjust your QC Readability to analyze what is most important to you
- Create an "ignore" dictionary for acronyms
- Edit existing templates

2.5 CAP Settings: A Deep Dive

This section goes into detail about the following settings:

⚙ [Dictionaries](#)

⚙ [Keyword Groups](#)

⚙ [QC Readability Settings](#)

⚙ [RAM Model](#)

⚙ [Templates](#)

⚙ [Applications](#)

2.5.1 Dictionaries

CAP comes standard with several dictionaries upon installation. You can use them *as-is*, modify them, create your own in Excel and import it, or generate one using the *Common Concepts* application.
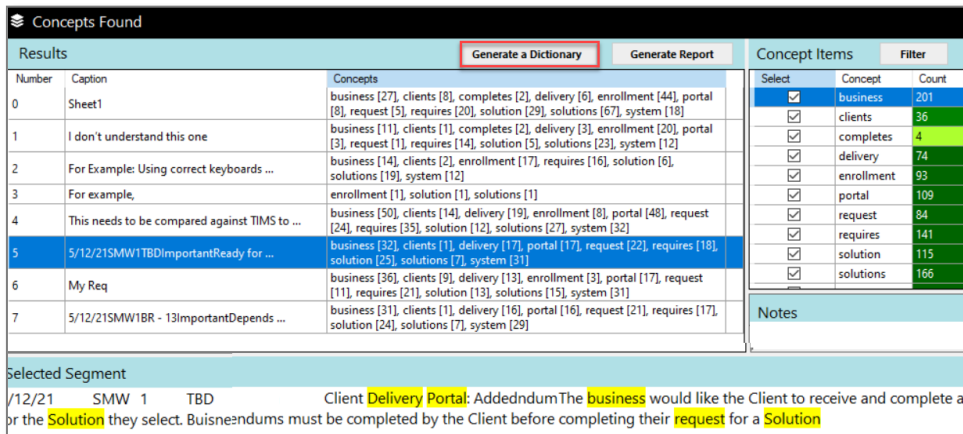
2.5.1.1 Generate a Dictionary with Common Concepts Application

The **Common Concepts** application analyzes your document for the most common terms. The output offers the ability to **Generate a Dictionary**, which automatically adds it to your **Dictionaries** list for use with applications.

1. From the **Welcome** page, click **Start**.
2. In the **Application** menu, click **Common Concepts**, then **Next**.
3. Select a project from the **Projects** menu.
4. Click the checkbox next to the document you want to analyze.

Tip: For best results, select a document rich with terms you want to include in your dictionary. The more times the word appears, the better your results. You can always edit the dictionary to add more terms.
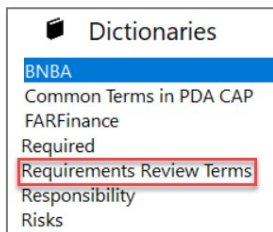
5. Click **Analyze**.
6. The **Results** window opens.
7. Click **Generate a Dictionary**.

8. Enter a name for your dictionary.
9. Now, when you go to Settings\Dictionaries, you will see your dictionary in the **Dictionaries** list.

If you have more than a few terms in your dictionary, you may want to create it in Excel, then import it. For some applications you will need to create your own dictionary, such as for the **Weighted Analysis |Resume** and the **RACI Matrix**.

Use the following format to set up your columns in Excel:

Column A	*Category*	If empty, the default category is *General*.
Column B	*Term*	The word or phrase. Required.
Column C	*Definition*	Optional.
Column D	*Weight*	If empty, the default weight is zero.
Column E	*Synonyms*	Optional.
Column F	*Highlight Color*	If empty, the default color is *YellowGreen*.

Here's an example of how your dictionary should look in Excel. Do not enter the column headings or they will be entered as dictionary terms.

	A	B	C	D	E	F
1	Category	Term	Definition	Weight	Synonyms	Highlight Color
2	General	analysis		0.27	assessment	PowderBlue
3	Technical	servers	required	0.78		Violet
4	Finance	approved		0.14		SpringGreen
5	Security	clearance		0.57		Salmon
6	General	each and every	superfluous	0		SkyBlue
7						

Note: *Do not enter the column headings or they will be entered as dictionary terms (i.e., category, term). If you follow the format, your dictionary should import correctly.*

Once you have created your dictionary, you can import it into CAP.

1. From the **Welcome** page, click **Settings**. ⚙

2. In the **Settings** menu, click **Dictionaries**.

3. Click **Import**. You will see the **Import** pop up window open.
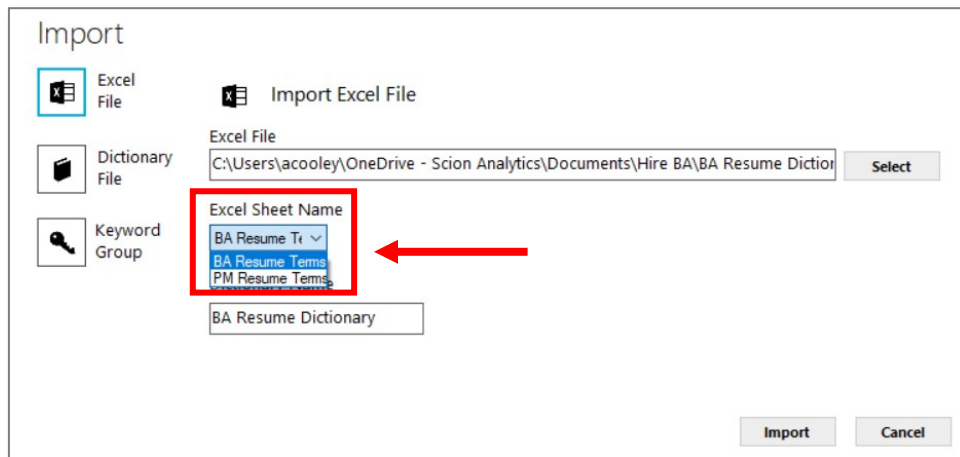
4. Click **Select** to browse for the dictionary you want to import.

5. Select the **Excel Sheet Name** from the dropdown.

6. Click **Import**. Now your dictionary is in the list.

2.5.1.4 Import a Keyword Group as a Dictionary

If you like a keyword group and want to turn it into a dictionary, use the **Dictionaries Import** function.

1. From the **Welcome** page, click **Settings**. ⚙

2. In the **Settings** menu, click **Dictionaries**.

3. Click **Import**. You will see the **Import** pop up window open.

4. Select the keyword group you want.

5. In the **Dictionary Name** field, you can change the name if you want.

6. Click **Import**. Now the keyword group is in the list as a dictionary.

Option: You can edit the dictionary and add definitions, highlight colors, weights, and categories.
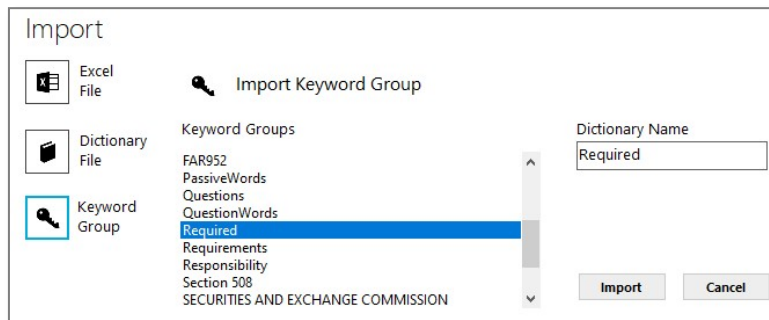
2.5.1.5 Export a Dictionary

You can export a dictionary from CAP, make changes to it, then import it back into CAP.

1. From the **Welcome** page, click **Settings**. ⚙

2. In the **Settings** menu, click **Dictionaries**.

3. Select the dictionary you want and click **Export**.

4. You will be prompted to save the dictionary.

5. Once you have made changes to your dictionary you can re-import it into CAP.

6. Select the dictionary you want and click **Import**.

Note: You will need to change the name of the dictionary when you re-import it. CAP does not overwrite existing files.

7. Follow the remaining step in <u>Import a Dictionary from Excel</u>.

You have many options available when editing a dictionary. Use this option when you want to quickly add a term, change a highlight color, or adjust a weighted value. The changes you make are saved automatically.

- *Give your dictionary a unique name and provide a description.*

- *Add new terms and their definition one at a time or import many at once.*

- *Add terms to categories you create.*

- *Assign a weighted value between 0 and 1 to each term (i.e., .01, .02, .13)*

- *Select a color for each term to see them highlighted in the analysis results.*

- *Search for terms in your dictionary.*

- *Add synonyms to the dictionary.*

In the **Maintain Dictionary Terms** window, you can:		**Use these icons to:**	
1. **Categories**	Choose a category.	➕	Add a new dictionary term.
2. **Term**	Type your dictionary term.	✏️	Update a dictionary term.
3. **Definition**	Type a definition.	🗑️	Delete a dictionary term.
4. **Weight**	Select a weight (0 to 1).	➕	Add a synonym.
5. **Color**	Choose a color.	🗑️	Delete a synonym.
Save	Edits are saved automatically. This button closes the window.	**Cancel**	This does not cancel changes that were already made. This button closes the window.

2.5.1.7 Download Dictionaries

If you have modified or deleted any of the dictionaries that were installed with CAP, you can download the originals from the CAP website.

1. First, delete the dictionary you want to replace if you have not already.

Note: This is because CAP does not overwrite existing files.

2. Select one or more dictionaries from the download list.
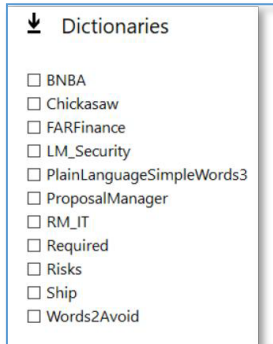
3. Click **Save**. The original dictionary(ies) will download.

2.5.1.8 Restore a Deleted Dictionary

If you deleted a dictionary that you created (not installed with CAP) and want it back, you can get it.

1. From the **Welcome** page, click **Settings**. ⚙
2. In the Settings menu, click **Dictionaries**.
3. Click the **Dictionaries** icon to open **File Explorer**.
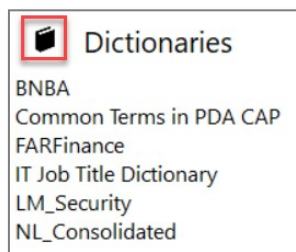
4. Click the **Removed** folder.
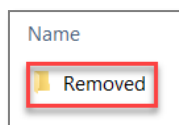
5. Select the dictionary you want to restore.
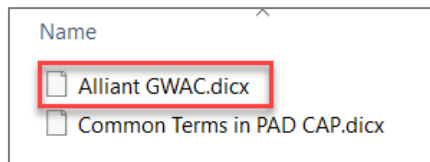
6. Copy and paste it into the **Dictionaries** folder.
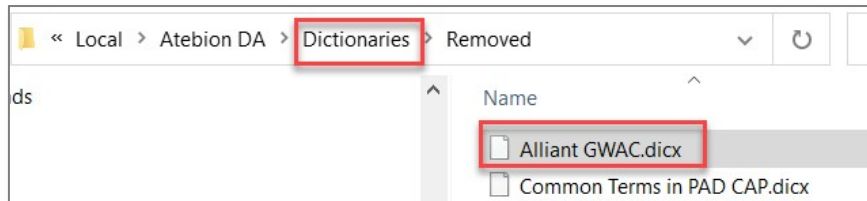
7. Refresh your screen. The dictionary is now back in your list.
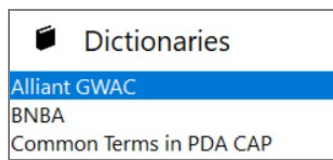
2.5.2 Keyword Groups

Some applications use **Keyword Groups** instead of dictionaries. The difference is that keyword groups only contain the terms and highlight colors. Also, you cannot export a Keyword Group.

2.5.2.1 New Keyword Group

1. From the **Welcome** page, click **Settings.**

2. Select **Keyword Groups** from the **Settings** menu.

3. Click **New**. The **New Keyword Group** popup window opens.

Keyword Group Name	Enter a unique name for your new keyword group.	
Batch Load You can add multiple keywords all at once.	• Enter keywords separated by a comma. • Select a highlight color. • Click Add. • All keywords will have the color you selected. You can change them in the Maintain window.	
Maintain You can add one key word at a time. You can replace one keyword with another. You can change the color of a keyword. You can delete a keyword.	*Keyword*	Enter a unique keyword.
	Color	Select a color for the keyword.
	Add	Adds this new keyword to the Keyword Group.
	Change	To change the color or replace one word with another.
	Delete	To delete the keyword.
	Save	To save your changes.

1. From the **Welcome** page, click **Settings.**

2. Select **Keyword Groups** from the **Settings** menu.

3. Click **Edit**. The **Edit Keyword Group** popup window open.

2.6 RAM Model

In the **Responsibility Assignment Matrix (RAM) Model** settings, you can create a new RAM model and add the roles or modify the roles for an existing one. There are ten RAM model names in CAP. The most common is **RACI** (Responsible, Accountable, Consulted, Informed). The **Bid/No Bid** application and the **RACI Matrix** application both use **RAM Models**. In CAP, you can quickly generate a RACI matrix based on your own dictionary and Excel template.
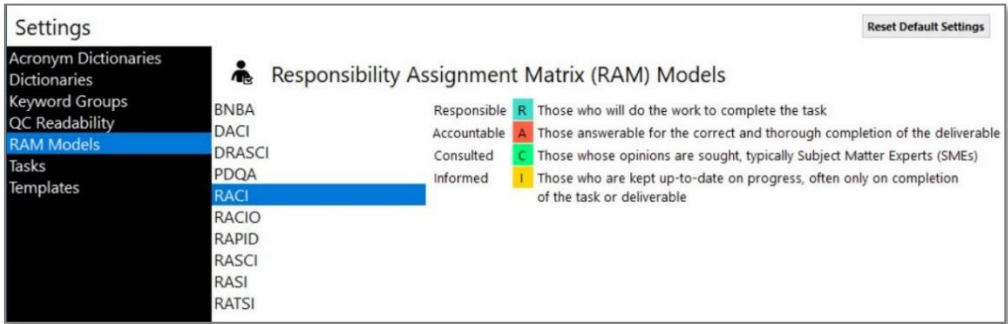
2.6.1 Create a New RAM Model Name

1. From the **Welcome** page, click **Settings**.
2. Select **RAM Models** from the **Settings** menu.
3. Click **New**. The **RAM Model** popup window opens.
4. Enter a unique **Model Name**.
5. Enter a role name.
6. Assign a unique letter for the role.
7. Select the role color.
8. Enter the role description.
9. Repeat steps 5 – 8 until you have added all roles.
10. Click **Save**.
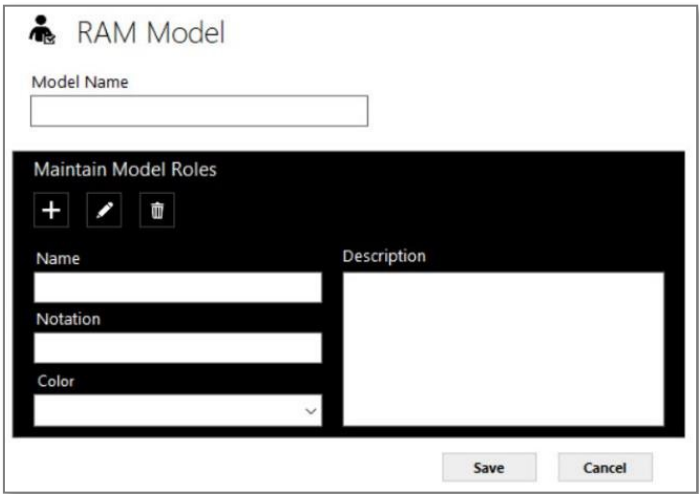
Use these icons to:	
+	Add a new RAM model role.
✎	Update a RAM model role.
🗑	Delete a RAM model role.

2.6.2 Edit Existing RAM Model Roles

1. From the **Welcome** page, click **Settings**.

2. Select **RAM Models** from the **Settings** menu.

3. Click **Edit**. The **RAM Model** popup window opens.

4. You can:
   - Modify the model's name (*must be unique*).
   - Edit a role name.
   - Add a new role (then you would have to [edit the RAM Mapping](#) for that template).
   - Change the letter for the role (*must be unique*).
   - Change the role color.
   - Edit the role description.

5. Click **Save**.

Use these icons to:		
+		Add a new RAM model role.
✏		Update a RAM model role.
🗑		Delete a RAM model role.

2.6.3 Use a New RAM Model in an Existing Template

To use the new **RAM Model**, you will need to add the template.

1. From the **Welcome** page, click **Settings**.

2. Select **Templates** from the **Settings** menu.

3. Select the **Template Type** and the **Template Name** you want to use.

4. The **Excel Template** popup window opens.

5. Click **RAM Mapping** .

6. Select a dictionary from the **Dictionary** dropdown menu. The preview window will change showing the dictionary categories.

7. Modify the **Roles Columns**, if necessary (only supports A – Z).

8. Select the **RAM Model** from the **Model** dropdown menu.

9. Click the **Start RAM Configuration Mapping** button. You will be asked to confirm new mapping.

10. Click **Yes**.

11. You will need to assign a letter in each column for every dictionary term that corresponds to the appropriate letter in the RAM Model.

*Tip: Once you start the mapping, you must complete all of it. You cannot save and go back later. If you try, you will have to click **Start RAM Configuration Mapping** which will wipe everything out, and you will have to do the mapping all over again.*

12. When you are finished, click **Save**.

2.7 Templates

Most applications in CAP use Excel Templates for the output of the analysis results. Templates are associated with applications. You can use a template *as-is*, you can *modify* it, or *create your own*.

1. To access the Templates, go to **Settings**. ⚙
2. Select **Templates**.
3. Select a **Template Type** and **Template Name**. You will see a preview of the template in **Template Preview**.
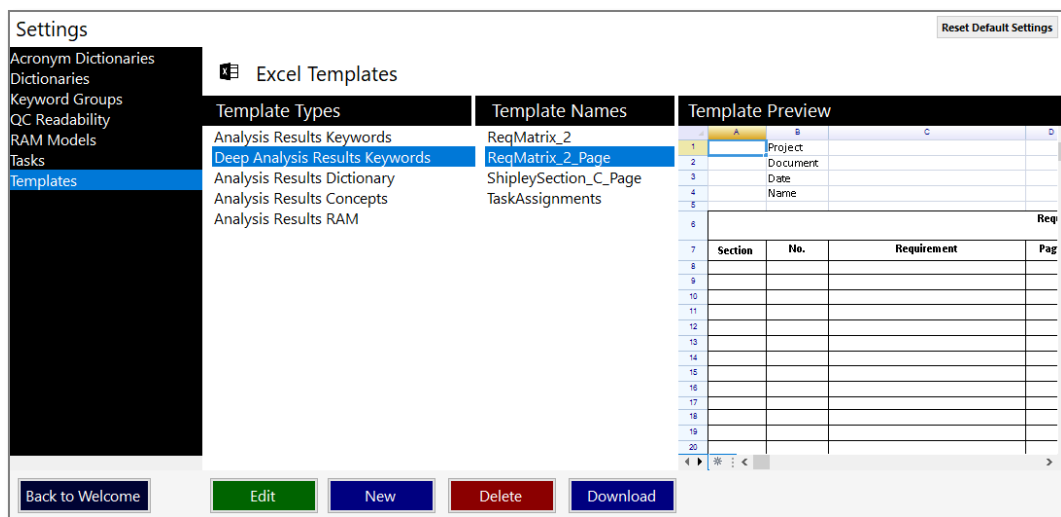
Select one of the following actions for templates depending on what you want to do:

Edit	Select **Edit** when you want to edit the *configuration parameters* (i.e., data elements, header, data mapping) of an existing Excel Template. This does *not* open the template file in Excel. It simply allows you to make configuration changes. To edit the actual template in Excel, [follow these steps](#).
New	Select **New** when you want to add a **New** Excel Template that you have created in Excel and need to upload it to CAP.
Delete	Select **Delete** when you want to delete a template. You will be prompted first to confirm deletion.
Download	Select **Download** when you want to download the original, out-of-the-box template that came with the CAP install. You may need to do this if you deleted a template or modified it and want the original back. *Note: This does not download the template to your computer or device.* Click **Download**. Select one or all templates, then click **Save**. The templates you selected will download from the CAP website to your instance of CAP.

2.7.1 Create a New Template in Excel

CAP is a flexible and scalable platform that enables you to create your own templates in Excel, then upload them to CAP to use with applications.

Create in Excel

1. Launch Excel.
2. Create your template.
3. Save the template with the .xlsx extension (Excel Workbook).

Note: Do not *save the file as an Excel Template with the extension.xltx. It must be .xlsx.*

4. Close the template.

Continue with these steps:

[Upload a Template from Excel](#)

[Enter Configuration Parameters for a Template](#) [Enter](#)

[Header Parameters for a Template (Optional)](#) [Map Data](#)

[Elements to Excel Columns for a Template](#)

2.7.2 Modify an Existing Template in Excel

If you want to make any modifications to the text, formatting, or formulas in a template, you will need to do that in Excel. First, you must delete the template from CAP. Next, make your changes in Excel and save them. Then, you can upload the template into CAP.

Note: CAP does not currently support the ability to overwrite an existing template or file, which is why you must delete it first, then upload the new/modified version.

Delete the Template

1. In CAP, go to **Settings**. ⚙
2. Select **Templates**.
3. Select a **Template Type** and **Template Name**.
4. Click **Delete**. A message will ask you to confirm the deletion.
5. Click **Yes**.

Edit in Excel

6. Launch Excel.
7. Open the template you want to edit (*filename.xlsx*).
8. Make your formatting changes.
9. Save the template (*filename.xlsx*).
10. Close the template (*filename.xlsx*).

Continue with these steps:

[Upload a Template from Excel](#)

[Enter Configuration Parameters for a Template](#) [Enter](#)

[Header Parameters for a Template (Optional)](#) [Map Data](#)

[Elements to Excel Columns for a Template](#)

2.7.3 Upload a New Template from Excel

The following steps continue from the previous section.

Follow these steps when you want to:
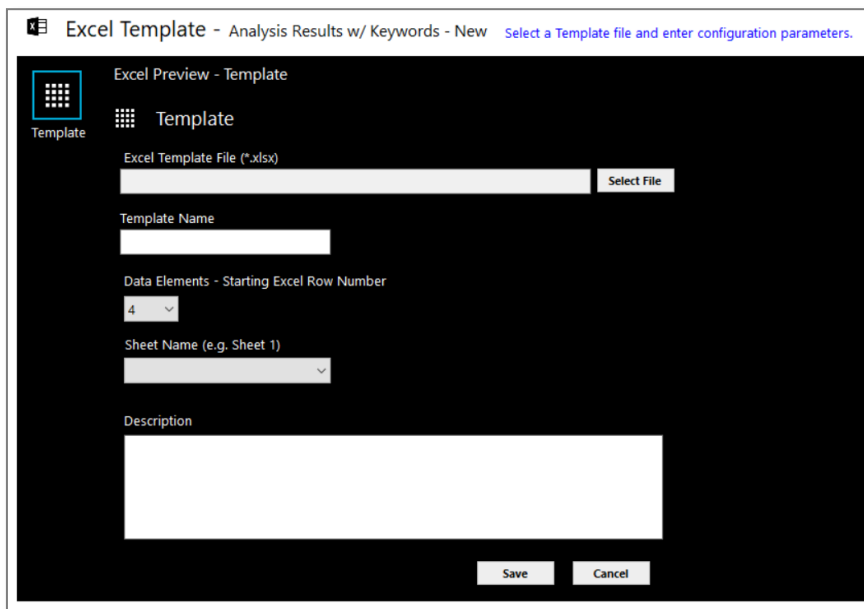
- Upload a **new template** created in Excel.
- Upload a **new version** of a template that was modified in Excel.

1. From the **Welcome** page, click **Settings**. ⚙
2. In the **Settings** menu, click **Templates**.
3. Select a **Template Type** so that the new template gets stored in the right location.
4. Click **New**.

2.7.4 Enter Configuration Parameters for a New Template

The following steps continue from the previous section.

5. The **New Excel Template** window opens.
6. Click **Select File**.

7. Browse for the location of your Excel file (new *template* or new *version*).
8. The file location path will automatically fill in as gray text once you select the file. It cannot be edited.
9. The name of the file will automatically populate the **Template Name**, but you can change it.
10. The **Data Elements** row number defaults to 4, but you can change it.
11. Select the **Sheet Name** from the dropdown menu (e.g., Sheet 1).
12. Enter a description for the template.
13. Click **Save**. The **Excel Template** window changes to the **Data Mapping of Data Elements.** 🔲

2.7.5 Map Data Elements to Excel Columns for a New Template

The following steps continue from the previous section.

This step is for mapping the data elements to the Excel columns so that the output displays in the Excel template properly.

14. Complete the data mapping of the data elements to the Excel columns using the table below.
15. When you are finished, click **Save**.
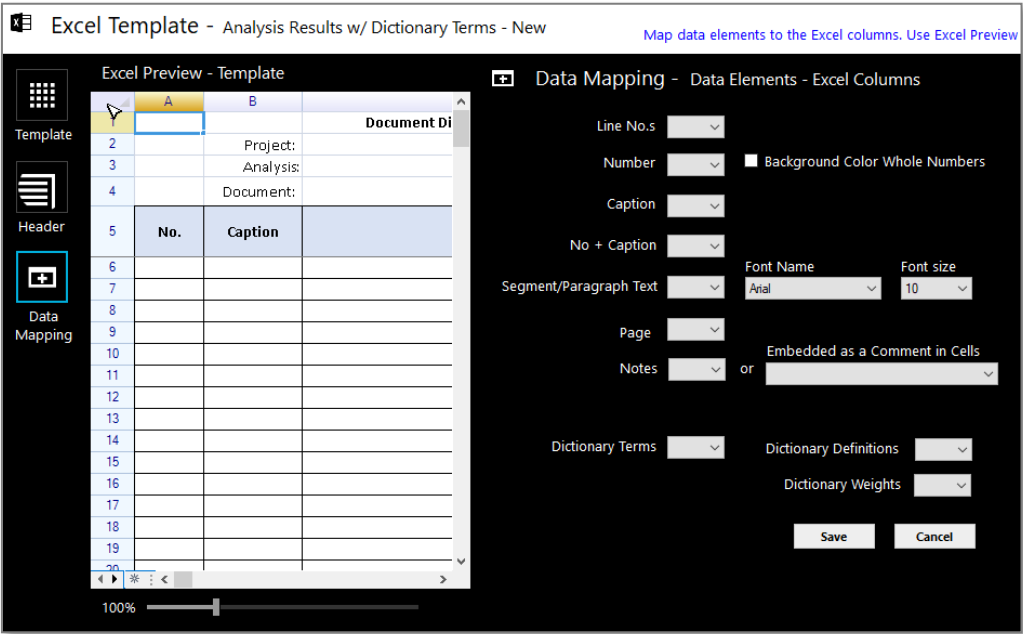
Here is a list of possible data elements you may need to data map, depending on the template requirements.

Note: Not all **Data Mapping** *windows are the same. It will depend on the Excel Template it is associated with.*
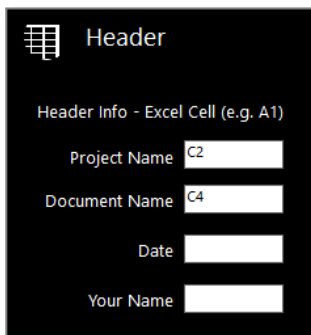
Line Numbers	Enter the column letter you want the line numbers to display in.
Number	Enter the column letter you want the number to display in.
Background Color Whole Numbers	Check box if you want the whole numbers to have a background color. Select the color from the dropdown menu.
Caption	Enter the column letter you want the caption to display in.
No + Caption	Enter the column letter you want the number and caption to display in.
Segment/Paragraph Text	Enter the column letter you want the segment/paragraph text to display in.
Font Name/Font Size	Select a font name and size for the segment/paragraph text.

Page	Enter the column letter you want the page number to display in.
Notes *or* **Embedded as a Comment in Cells**	Enter the column letter you want the notes to display in. *Or* Select the column letter for what you want to embed as a comment.
Concepts	Enter the column letter you want the concepts to display in.
Dictionary Terms	Enter the column letter you want the dictionary terms to display in.
Dictionary Definitions	Enter the column letter you want the dictionary definitions to display in.
Dictionary Weights	Enter the column letter you want the dictionary weights to display in.

2.7.6 Enter Header Parameters for a New Template (Optional)

The following steps continue from the previous section but are *optional*.

1. Click the **Header** icon to go back and enter the header parameters. This is optional.

2. Enter the following information.

Project Name	Enter the cell letter and row number you want the **Project Name** to be on (C2, C3, etc.).
Document Name	Enter the cell letter and row number you want the **Document Name** to be on (C2, C3, etc.).
Date	Enter the cell letter and row number you want the **Date** to be on (C2, C3, etc.).
Your Name	Enter the cell letter and row number you want **Your Name** to be on (C2, C3, etc.).

3. Click **Save**.

2.7.7 Edit Configuration Parameters for an Existing Template

Use these steps when you want to **edit or change** the configuration parameters for an **existing template**.

1. From the **Welcome** page, click **Settings.** ⚙

2. In the **Settings** menu, click **Templates**.

3. Select a **Template Type** and **Template Name.**

4. Click **Edit**. It defaults to the *Template* window. ▦

5. The only fields you can **edit** are *Data Elements, Sheet Name,* and *Description*.

6. Click **Save**.

2.7.8 Edit Header Parameters for an Existing Template

Follow these steps when you want to **edit or change** the header parameters for an **existing template**. This is optional.

1. From the **Welcome** page, click **Settings**. ⚙

2. In the **Settings** menu, click **Templates**.

3. Select a **Template Type** and **Template Name.**

4. Click **Edit**. It defaults to the *Template* window. ▦

5. Click the **Header** icon ▤ to enter the header parameters.

6. Enter the following information.

7. Click **Save**.

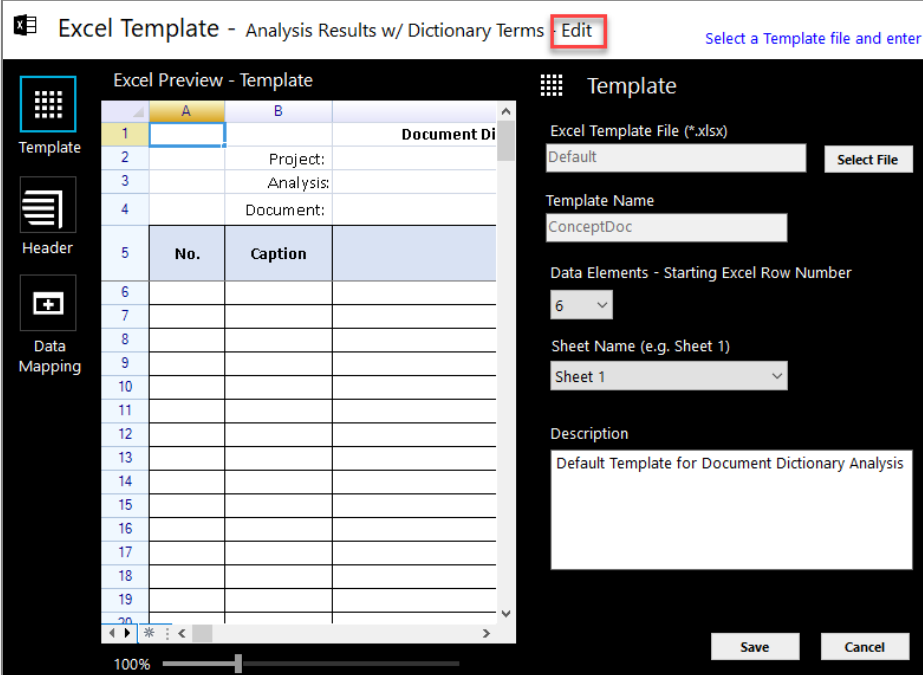| Project Name	Enter the cell letter and row number you want the **Project Name** to be on (C2, C3, etc.).
Document Name	Enter the cell letter and row number you want the **Document Name** to be on (C2, C3, etc.).
Date	Enter the cell letter and row number you want the **Date** to be on (C2, C3, etc.).
Your Name	Enter the cell letter and row number you want **Your Name** to be on (C2, C3, etc.).

2.7.9 Enter New RAM Mapping

Not all templates use the RAM Model. For those that do, such as **RACI_Page** and **BNBA**, you will be able to enter new RAM Mapping here or edit the RAM mapping for an existing model.

1. From the **Welcome** page, click **Settings**.

2. Select **Templates** from the **Settings** menu.

3. Select the **Template Type** and the **Template Name** you want to use.

4. The **Excel Template** popup window opens.

5. Click **RAM Mapping** .

6. Select a dictionary from the **Dictionary** dropdown menu. The preview window will change showing the dictionary categories.

7. Modify the **Roles Columns**, if necessary (only supports A – Z).

8. Select the **RAM Model** from the **Model** dropdown menu.

9. Click the **Start RAM Configuration Mapping** button. You will be asked to confirm new mapping.

10. Click **Yes**.

11. You will need to assign a letter in each column for every dictionary term that corresponds to the appropriate letter in the **RAM Model**.

*Tip: Once you start the mapping, you must complete all of it. You cannot save and go back later. If you try, you will have to click **Start RAM Configuration Mapping** which will wipe everything out, and you will have to do the mapping all over again.*

12. When you are finished, click **Save**.

2.8 Applications

Applications are a series of actions performed in a specific order to produce analysis results.

2.8.1 Create a New Application

One of the benefits of CAP is the ability to create your own applications.

1. From the **Welcome** page, click **Settings**. ⚙
2. From the **Settings** menu, select **Applications**.
3. Click **New**.

4. Select the action you want from the drop-down menu.
5. Enter the instructions for the Action 1 step.
6. Select a response for each of the questions. The questions change dynamically based on your selections.
7. Continue to the Action 2 box and make your selections from the drop-down menu based on what you want the application to do.
8. Continue to Action 3, which is typically the last action. Here is where you select the output.

Action 1

Short Application Name (no spaces)	Enter a short name for the application.
Descriptive Application Name	Enter a longer, more descriptive name for the application.
Description	Describe what this application does and when to use it.
Action 1	Select an action from the dropdown: • Parse • Compare Document Differences • Go to Cross References Matrices • Identify and Validate Acronyms
Step Text	Enter the directions for this step.

Action 1: Parse	Parsing divides the written content of a document into parts or segments.
Use Default Parse Analysis?	Yes – this is used for any of the Compliance Matrix applications. No – this is for all other application types.
Show Parse Type?	Yes – If you show parse type, then you can select which type you want to use. No – If you want to use the selected parse type and not give an option to change it.
If No, Parse Type?	Legal – parses based on section numbers (1.1, 1.2, 1.3, etc.). Paragraph – parses based on written content in a paragraph.
Quantity of Documents	1, 2, 2 or more.
Use Numerical Hierarchy?	Yes – Use this to have the document segmented using 1, 2, 3. No – Use this to have the document segmented using A, B, C.

Action 1: Compare Documents Differences	This is a single action application. There is no Action 2.
Step Text	Enter the directions for this step.

Action 1: Identify and Validate Acronyms	This is a single action application. There is no Action 2.
Step Text	Enter the directions for this step.

Action 1: Go to Cross References Matrices	This is a single action application. There is no Action 2.
Step Text	Enter the directions for this step.

Action 2

Action 2	Select an action from the dropdown: - Compare Docs per Concepts - Compare Docs per Dictionary - Find Concepts - Find Dictionary Terms - Find Keywords per Library - Generate Report - Generate Responsibility Assignment Matrix - Readability Test
Step Text	Enter the directions for this step.

Action 3

Action 3	Select an action from the dropdown: - Display Analysis Results - Deep Analyze - Generate Report
Step Text	Enter the directions for this step.

2.8.1.2 At-a-Glance: Applications, Actions and Examples

The following tables show you the different configuration of actions and the applications that use them.

Action 1	Action 2	Action 3	Application Examples
Parse	Compare Docs per Concepts	Display Analysis Results	Concept Comparison, Gap Analysis
Parse	Compare Docs per Dictionary	Generate Report	Resume Analyzer, Weighted Analysis | Compare Docs, Weighted Analysis | Resumes
Parse	Compare Docs per Dictionary	Display Analysis Results	Weighted Content Analysis
Parse	Find Concepts	Display Analysis Results	Common Concepts, Blue Terms
Parse	Find Dictionary Terms	Display Analysis Results	Risk Assessment, SDD Risk Assessment, SDD RTM
Parse	Find Keywords per Library	Deep Analyze	Analysis Results, Compliance Matrix | Sentence Level
Parse	Find Keywords per Library	Generate Report	Color Team Review, Compliance Matrix, Responsibility Matrix, Shall, WBS
Parse	Find Keywords per Library	Display Analysis Results	Compliance Matrix | Analysis Results, Compliance Matrix | Select Keywords, Finds FARs
Parse	Generate Report		BRD Parser
Parse	Generate Responsibility Assignment Matrix		Capabilities Assessment, Bid/No Bid
Parse	Readability Test		Plain Language

Action 1	Application Examples
Compare Document Differences	Document Differences
Go to Cross Reference Matrices	Compliance Matrix | X-Ref, Cross-Reference, xref (NO LONGER SUPPORTED)
Identify and Validate Acronyms	AcroSeeker

3.0 Frequently Asked Questions

3.1 Contact Information

Sales- sales@scionanalytics.com

Account Management- account-management@scionanalytics.com

Support Links-

support@scionanalytics.com

Need Assistance? Click Here

Need Refresher Training? Click Here

Can I parse an RFP without splitting it into its own sections?

Absolutely! However, for it to be effectively used inside of Proposal Builder for cross reference compliance and proposal outlines you will need to split the document.

Do I have to be in a collaborative workgroup to share outputs?

No you do not. Any of the outputs can be saved to your local machine and shared with anyone the same way you would share any document.

I have custom templates, keyword groups, dictionaries etc in my Local workgroup that other users want. How do I share them if the Local workgroup is not collaborative?

Click on the link below and schedule a time to meet with Support so they can walk you through the process. It's not complicated to do however you can cause issues with your workgroup if not done correctly.