



User Documentation

Administrator Manual



PMAPS
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Open the WebPro Viewer

The PMAPS® Viewer ("viewer") allows full functionality of the PMAPS software integrating it with Microsoft Office on the local machine. All PMAPS products use the same Viewer. The viewer configures the first time a user opens it from the PMAPS web application. It runs in the existing machine's user profile to the local profile and does not require administrative rights.

This document provides the recommended configuration for using PMAPS.

Recommended Configuration

We recommend the following computer configuration for optimal performance:

- Microsoft Windows 7 or 10 operating system with 4 GB RAM or better and Internet access
- Latest version of Microsoft .NET Framework
- Google Chrome (latest version) or Internet Explorer 11
- Microsoft Office 2013 or 2016 (standard MSI installation or Office 365¹ platform installation)
- Latest version of Adobe Reader

Login

1. Enter your user name and password.

¹ Microsoft Office components must be installed on all user computers; not compatible with Office 365 'Business Essentials' or 'Enterprise E1' versions.

TIPS

- If you check the [Keep Me Logged In](#) box before you click the [Login to PMAPS WebPro](#) icon you will remain logged in, as long as you are still within a valid login timeframe. If you reboot your computer or sign out of Windows, you will no longer be logged in.

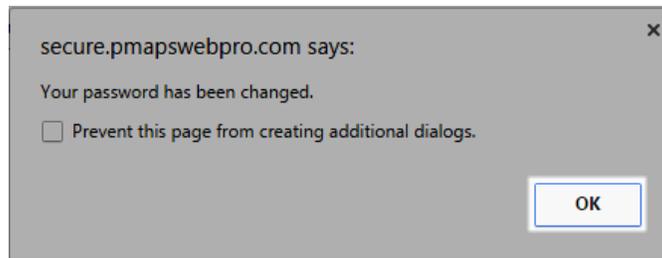
Change Password

1. Enter your current password in the [Current Password](#) field. Enter your new desired password in both the [New Password](#) and [Confirm Password](#) fields, and then click the [Change](#) icon.

The screenshot shows a 'Change Password' form with the following elements:

- Current Password:** A text input field with a masked password field (represented by dots).
- New Password:** A text input field with a masked password field (represented by dots).
- Confirm Password:** A text input field with a masked password field (represented by dots).
- Change:** A green button with the text 'Change'.

2. Wait for the confirmation your password was changed and then click [OK](#).



PMAPS uses traditional strong password authentication. The password must be at least eight characters in length and **must contain at least one capital letter, one number, and one non-alphanumeric character**. The following non-alpha characters are accepted in passwords:
 ~!@#%&^*()_-'";'/?/><.,..

Nomenclature Customization

Tab Labels

Administrators may change the tab label names. To change the name of a tab:

1. Right click the tab you would like to rename; e.g. [Misc](#). The [Assignments](#) and [Revisions](#) tabs may not be renamed.



2. Type over the existing text to enter the new name, and then click [Save](#).

Rename Tab: Misc

New Name:

Misc

[Set to Default](#)

Save

Cancel

TIPS

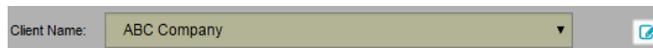
- To revert the tab name back to the PMAPS default, right click on the tab, and then click on [Set to Default](#), and then click [Save](#).

Customize Field Options

Nearly all fields in PMAPS can be customized to some extent. In most cases, you can change at least the field label names. In other cases you can change almost everything about the field—except the structure and the location of the field within the module. This can be done all within the PMAPS application by permitted users.

Some fields and tabs in the database are hard coded and therefore not editable. Many of the non-editable fields contain data that is automatically populated or is tied in some way to other areas within the database.

To determine which fields may be tailored, click on the question icon next to the field.



If all the options in the popup window are disabled, it is an auto-populated field and only the label may be modified.

If the options are available are not disabled, the label and options may be personalized.

<input checked="" type="checkbox"/>	User must complete field before saving
<input type="checkbox"/>	User must complete field after Ship Date
<input type="checkbox"/>	Only Administrators can edit this field
<input type="checkbox"/>	Only Administrators can add or edit Pick-Lists
<input type="checkbox"/>	Update Calendar
<input type="checkbox"/>	Default Value 'Yes'
<input type="checkbox"/>	Disable Field
<input checked="" type="checkbox"/>	Required on Ad Hoc Sales Doc

The following edit options are available to the administrator for each editable field in the database:

- **Label for Screen:** This is the name that shows on screen and in the picklists for Visible Columns and Custom Reports. Use the arrows between the **Label for Screen** and the **Label Description** to copy text between the two.
- **Label Description:** The text in this field shows when a user hovers over the  icon for that field. This is a great place to place a tip for your users if the label is not obvious.

Label Definition for: Client Name

Label for Screen:	↔	Label Description:
Client Name		select the client or prospect

<input checked="" type="checkbox"/>	User must complete field before saving
<input type="checkbox"/>	User must complete field after Ship Date
<input type="checkbox"/>	Only Administrators can edit this field
<input type="checkbox"/>	Only Administrators can add or edit Pick-Lists
<input type="checkbox"/>	Update Calendar
<input type="checkbox"/>	Default Value 'Yes'
<input type="checkbox"/>	Disable Field
<input checked="" type="checkbox"/>	Required on Ad Hoc Sales Doc

More Info
Edit Values

Save
Cancel

- **User must complete field before saving:** Check this box if this field must be completed for when saving a new proposal or editing a an existing proposal.

- **User must complete field after Ship Date:** Check this box if this field must be completed when saving an existing proposal and the "ShipDate" (internal field name) is required.
- **Administrator editing only:** Check this box to restrict editing this field only by an administrator.
- **Administrator adding or editing of Picklists:** Check this box to restrict adding to or editing this field's picklist.
- **Update Calendar:** Check this box to automatically have to publish this proposal item date field to the WebPro calendar.
- **Default Value 'Yes':** Check this box to automatically mark a date field complete in the calendar. This feature is under development.
- **Disable Field:** Check this box to disable a field from use.
- **Required on Ad Hoc Sales Doc:** Check this box to require the field to be completing when populating ad hoc sales doc forms.
- **Must keep the same meaning of field!:** This prompt warns that you must retain the original meaning (type) of the field for internal programming, tracking and reporting purposes.
- **More Info:** This area shows internal program information about the field.

Internal Field Name:	ProspectName
Internal Field Type:	DROPDOWN
Field Position:	Summary1

- **Edit Values:** Administrators and users with permission may add to or edit picklists.

Dashboard Tabs

Dashboard

Dashboard	Summary	Logistics	Marketing	Outcome	Misc	Evaluation	Assignments	Revisions
-----------	---------	-----------	-----------	---------	------	------------	-------------	-----------

The **Dashboard** tab displays all dashboard records according to the user established preferences. The screen shot displays the layout of the **Dashboard** tab:

Proposal Date Due	Client Name	Proposal Name	Product(s)	Installation	Lead Source	Lead Writer
1/27/2017	ABC Company	Proposal for Marketing Services				User, Writer
1/27/2017	ABC Company	Proposal for Marketing Services				User, Writer
1/20/2017	Acme Corporation	Proposal for Marketing Services DOCK				
2/7/2017	ABC Company	Proposal for Marketing Services	PMAPS Web Essentials; PMAPS WebPro			
2/7/2017	ABC Company	Proposal for Marketing Services	PMAPS WebPro			Admin, User
2/7/2017	ABC Company	Proposal for Marketing Services	PMAPS Web Essentials; PMAPS WebPro			
2/7/2017	ABC Company	Proposal for Marketing Services	PMAPS Web Essentials; PMAPS WebPro			User, Writer
10/27/2016	ABC Company	ABC Company RFP Request			Other	Smith, Cindy
5/2/2016	ABC Company	PMAPS Proposal RFI	PMAPS WebPro	On-Demand	Trade Show	Smith, Cindy
5/2/2016	ABC Company	PMAPS Proposal Questionnaire	PMAPS WebPro	On-Demand	Web	Smith, Cindy

Summary

Dashboard	Summary	Logistics	Marketing	Outome	Misc	Evaluation	Assignments	Revisions
-----------	---------	-----------	-----------	--------	------	------------	-------------	-----------

The **Summary** tab contains the most widely used data capture fields when logging proposals. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the **Summary** tab):

- Dropdown (single-select picklist) fields: 9
- Contact dropdown (single-select picklist) fields: 5
- Date fields: 7
- Checkbox (multi-select picklist) fields: 1
- Checkbox fields: 1
- Text entry fields: 1
- Memo text entry fields: 1
- Numeric fields: 1

- Automated fields: 1

The following field is automatically populated sequentially when a new proposal is saved to PMAPS.

▶ Proposal ID

The screenshot displays a multi-section proposal form. The sections include:

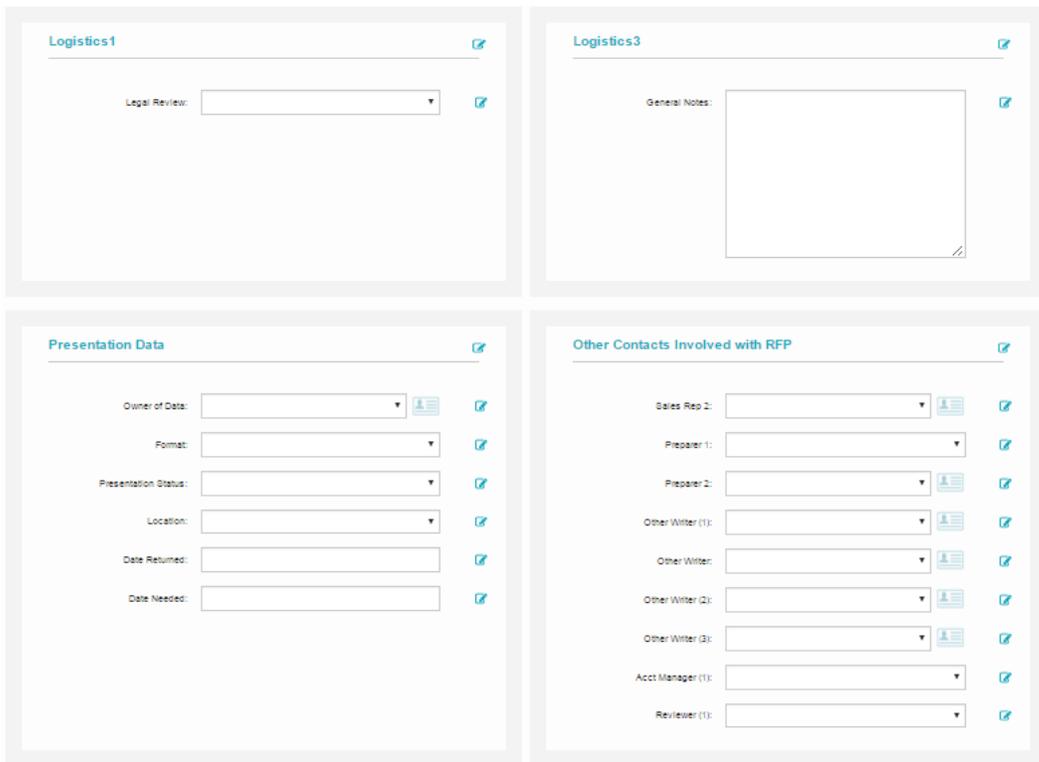
- Basic Information:** Client Name (ABC Company), Proposal Name (Proposal for Marketing Services), and Proposal ID (51).
- Consultant Information:** Consulting Firm and Firm Contact.
- Detailed Information:** Lead Source, Initiator, Request Type (RFI), Estimated Revenue (MM), Proposal Status (highlighted in green), Customer Type, and Line of Business.
- Relevant Dates:** Date Received, Declined (checkbox), Date Declined, Proposal Date Due (01/27/2017), Date Due-Internal, Extension Date, Extension Approved by, Extension Reason, Date Completed Internally (01/11/2017), and Date Submitted.
- People:** Sales Rep, MFI, Lead Writer (User, Writer), Secondary Writer, and Reviewer.
- Other information:** Product(s) list (including PMAPS Web Essentials, PMAPS WebPro, PMAPS WebPro Data Bridge, PMAPS WebPro Tracker, PMAPS WebPro Salesforce Connector, and PMAPS WebPro SharePoint Connector) and a Notes field.

Logistics

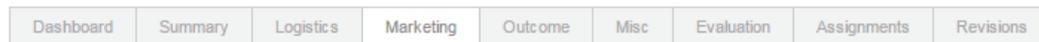
Dashboard	Summary	Logistics	Marketing	Outcome	Misc	Evaluation	Assignments	Revisions
-----------	---------	-----------	-----------	---------	------	------------	-------------	-----------

The default application comes with the following numbers and types of fields (the screen shot displays the layout of the [Logistics](#) tab).

- Dropdown (single-select picklist) fields: 7
- Contact dropdown (single-select picklist) fields: 7
- Date fields: 2
- Memo text entry fields: 1



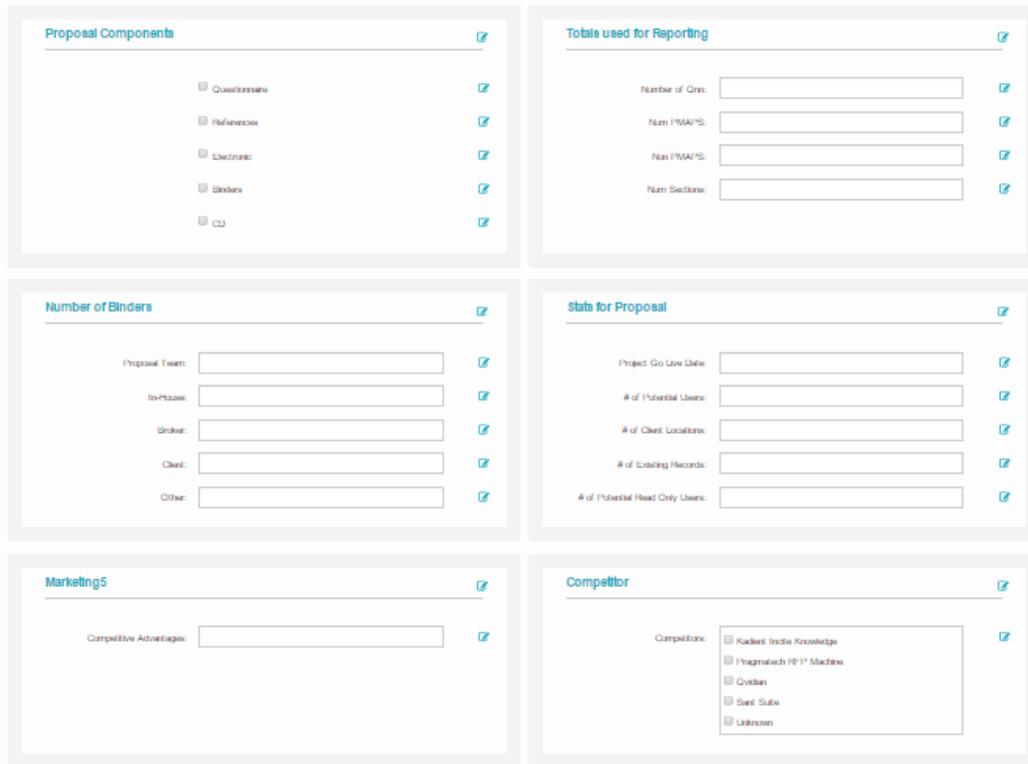
Marketing



The default application comes with the following numbers and types of fields (the screen shot displays the layout of the [Marketing](#) tab).

- Checkbox fields: 5
- Numeric fields: 1
- Date fields: 1

- Checkbox (multi-select picklist) fields: 1



Outcome



The default application comes with the following numbers and types of fields (the screen shot displays the layout of the **Outcome** tab).

- Contact dropdown (single-select picklist) fields: 1
- Date fields: 6
- Checkbox fields: 2
- Dropdown (single-select picklist) fields: 2

- Date fields: 7

The image displays four distinct form panels arranged in a 2x2 grid. Each panel has a title bar with a blue icon on the right.

1. **Quality Control Review**: Contains a 'Responsible' dropdown with a user icon, and four date input fields: 'Date Assembled', 'Date Proofed', and 'Date Final Formatting'. It also has two checkboxes: 'Spelling' and 'Remove Links'.

2. **Delivery Information**: Contains a 'How Shipped' dropdown, a 'Tracking Number' text field, a 'Ship Region' dropdown, and a large 'Shipping Instructions' memo field.

3. **RFP Status**: Contains a 'Status' dropdown, a 'Who Won' dropdown, a 'Reason If Lost' text field, and a 'File Location' memo field.

4. **Follow-up Information**: Contains a 'Follow-up Date' text field, a 'Follow-up Tasks' text field, a 'Date of De-brief' text field, and a 'De-brief Notes' memo field.

Misc

A horizontal navigation bar with nine tabs. The 'Misc' tab is highlighted in a darker grey color, while the others are in a lighter grey. The tabs are: Dashboard, Summary, Logistics, Marketing, Outcome, Misc, Evaluation, Assignments, and Revisions.

The default application comes with the following numbers and types of fields (the screen shot displays the layout of the [Misc](#) tab).

- Dropdown (single-select picklist) fields: 16
- Checkbox fields: 2
- Date fields: 12
- Memo text entry fields: 1
- Text entry fields: 1
- Numeric fields: 5

- Potentially automated fields: 9

The following text entry fields may be automatically populated if using the prospect name field as a picklist field and the address was entered into that picklist record. These are not included in the number of text entry fields listed above. Users simply click the [Address](#) hyperlink to populate the address to the appropriate fields.

The screenshot shows a form titled "Address" with a blue checkmark icon in the top right corner. Below the title, there are nine text entry fields, each with a label to its left and a small blue checkmark icon to its right. The labels are: Attention, Email, Address1, Address2, City, State, Zip, Country, and Phone.

- ▶ Attention
- ▶ Email
- ▶ Address1
- ▶ Address2
- ▶ City
- ▶ State
- ▶ Zip
- ▶ Country
- ▶ Phone

- Automated fields: 5

The following fields are automatically populated as the action is performed in PMAPS.

- ▶ PMAPS ID
- ▶ Last Edited
- ▶ Date Entered
- ▶ Who Last Edited
- ▶ Date Doc Locked
- ▶ Who Edited Doc

▶ Started On

The screenshot displays a configuration page for the 'Started On' tab, organized into several sections:

- General Fields:** Includes dropdown menus for 'Incumbent Software', 'Prospect Short Name', 'Contact Title', 'Contact First Name', 'Sales Rep Title', and 'Client/Server Monitor'.
- Additional Information:** Contains three checkboxes labeled 'Not in Use1', 'Not in Use2', and 'Not in Use3'.
- Address:** Includes text input fields for 'Attention', 'Email', 'Address1', 'Address2', 'City', 'State', 'Zip', 'Country', and 'Phone'.
- Automated Fields:** Includes text input fields for 'Art Work Date Needed', 'Art Work Date Received', 'CRM Unique ID', 'PMAPS ID', 'Last Edited' (05/11/2017), 'Date Entered' (05/10/2017), 'Who Last Edited' (adminuser), 'Date Doc Locked', 'Who Edited Doc' (adminuser), and 'Started On' (05/10/2017).
- User Dropdowns:** A vertical list of ten dropdown menus labeled 'UserDropdown1' through 'UserDropdown10'.
- User Dates:** A vertical list of ten text input fields labeled 'USERDATE1' through 'USERDATE10'.
- User Numbers:** A vertical list of five text input fields labeled 'USERNUMBER1' through 'USERNUMBER5'.

Evaluation

Dashboard	Summary	Logistics	Marketing	Outcome	Misc	Evaluation	Assignments	Revisions
-----------	---------	-----------	-----------	---------	------	------------	-------------	-----------

The default application comes with the following numbers and types of fields (the screen shot displays the layout of the [Evaluation](#) tab).

- Date fields: 1
- Dropdown (single-select picklist) fields: 10
- Memo text entry fields: 3

Assignments

Dashboard	Summary	Logistics	Marketing	Outcome	Misc	Evaluation	Assignments	Revisions
-----------	---------	-----------	-----------	---------	------	------------	-------------	-----------

The [Assignment](#) tab displays the RFP Assignments dashboard. The information available here may be viewed in a customized manner by users, but the labels, functions and meanings are not customizable. Refer to the user manual for instructions on how to use the RFP Assignments dashboard.

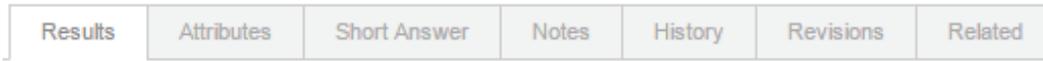
Revisions

Dashboard	Summary	Logistics	Marketing	Outcome	Misc	Evaluation	Assignments	Revisions
-----------	---------	-----------	-----------	---------	------	------------	-------------	-----------

The [Revisions](#) tab displays all revisions made to a dashboard record and includes the ability to view prior versions and compare the current version with prior versions. The information available here and its labels, functions and meanings are not customizable. Refer to the user manual for instructions on how to access revision history.

Search Tabs

Results



The **Results** tab displays all search records according to the user established preferences. The screen shot displays the layout of the **Results** tab:

Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	File Type	Times Inserted
5114	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy	Word	1
5113	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy	Word	-
5112	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy	Word	-
5111	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy	Word	1
5102	Client Services	General	-	-	12/31/2016	Smith, Cindy	Word	-
5101	Client Services	General	-	-	12/31/2017	Doe, Beth	Word	-
5098	Client Services	-	-	Video provides a powerful way to help you prove your point	12/31/2016	Smith, Cindy	Word	1
5094	Client Services	Customer Service	Biography	Beth Doe resume	12/31/2017	Doe, Beth	Word	1

Attributes



The **Attributes** tab contains the data categorization details for database records. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the **Attributes** tab):

- Dropdown (single-select picklist) fields: 11
- Contact dropdown (single-select picklist) fields: 4
- Date fields: 2
- Checkbox (multi-select picklist) fields: 2
- Checkbox fields: 1
- Text entry fields: 1
- Memo text entry fields: 1

- Automated fields: 10

The following fields are automatically populated when a record is added to PMAPS.

- ▶ File Type
- ▶ Doc Type

The following fields are automatically populated when these features are used in PMAPS.

- ▶ Checked Out By
- ▶ Checked Out Date
- ▶ Downloaded Date
- ▶ Downloaded By
- ▶ Needs Translation
- ▶ Needs Translation Date
- ▶ Is Child

► Is Parent

Contacts

SVC:

Who Assessed:

Compliance Approval:

Content Reviewer:

Record Review

Review Cycle:

Date Expires:

Date Last Reviewed:

Record Category

Record Status:

Department:

Main Topic:

Sub Topic:

Short Description:

Language:

Source:

Region:

Prompt on Insert:

Other Details

Products: All Products
 PMAPS Presentation Pro
 PMAPS Web Essentials
 PMAPS WebPro

Version:

Sales Contact:

Consulting Firm:

Original Proposal:

Downloaded Date:

Downloaded By:

Needs Translation

Needs Translation Date:

Is Child

Is Parent

Internal Attributes

File Type:

Doc Type:

Checked Out By:

Checked Out Date:

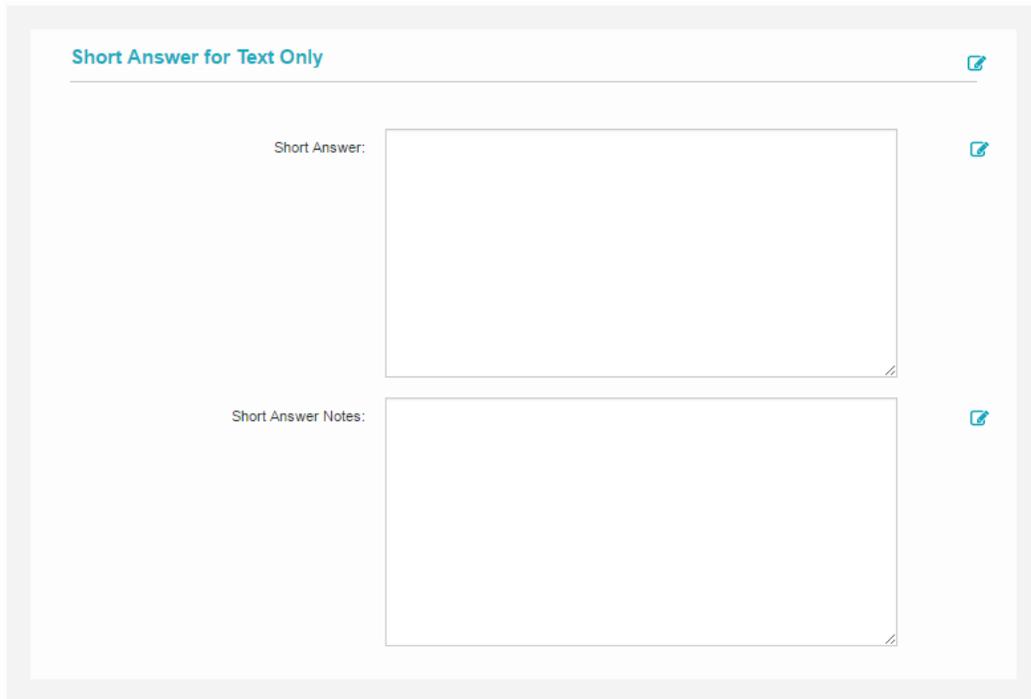
Q & A

Short Answer

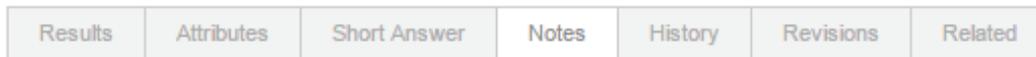
Results	Attributes	Short Answer	Notes	History	Revisions	Related
---------	------------	--------------	-------	---------	-----------	---------

The **Short Answer** tab contains the short answer and notes for a PMAPS record. The tab illuminates in yellow when selecting a record with a short answer. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the **Short Answer** tab):

- Memo text entry fields: 2



Notes



The **Notes** tab contains internal information about a record in text format. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the **Notes** tab):

- Memo text entry fields: 1

- Automated fields: 1

The following field is automatically populated when an indexed document is saved to PMAPS.

- Indexed File Name

The screenshot shows a 'Record Notes' form. At the top, there is a title 'Record Notes' and a small icon. Below the title is a large text area labeled 'Internal Record Notes:'. At the bottom of the form, there is a text input field labeled 'Indexed File Name:'. Both the text area and the input field have small icons to their right, likely for editing or deleting.

History

Results	Attributes	Short Answer	Notes	History	Revisions	Related
---------	------------	--------------	-------	---------	-----------	---------

The [History](#) tab displays insertions of a search record and includes automated fields. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the [History](#) tab):

- Automated fields: 2

The following fields are automatically populated when a record is inserted to a document using the [Insert Full](#) feature.

- Date Last Inserted

▶ Frequency

The screenshot shows a 'History' tab with two input fields. The first field is labeled 'Date Last Inserted:' and is currently empty. The second field is labeled 'Times Inserted:' and contains the value '0'. Both fields have a small blue icon to their right. Below the fields, the text 'No Data' is displayed.

Revisions

Results	Attributes	Short Answer	Notes	History	Revisions	Related
---------	------------	--------------	-------	---------	------------------	---------

The [Revisions](#) tab displays all revisions made to a search record and includes automated fields. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the [Revisions](#) tab):

- Automated fields: 5

The following fields are automatically populated when the user performs the action in PMAPS.

- ▶ [Last Revised](#)
- ▶ # Revisions
- ▶ Date Edited
- ▶ Added By

▶ Date Added

Revisions ✎

Last Revised: ✎

Revisions: ✎

Date Edited: ✎

Added By: ✎

Date Added: ✎

Revision History

Date	Who	Field	Before	After
1/16/2017 8:39:44 PM	adminuser			Q Here is the new question. Video provides a powe...[truncated]
1/16/2017 7:55:24 PM	adminuser			File Saved 📄 compare revert
1/16/2017 7:55:24 PM	adminuser	Date Expires		12/31/2017 12:00:00 AM
1/16/2017 7:55:24 PM	adminuser	Q & A		True
1/16/2017 7:55:23 PM	adminuser	Review Cycle		Annually
1/16/2017 7:55:23 PM	adminuser	Department		Client Services
1/16/2017 7:55:23 PM	adminuser	Language		Spanish
1/16/2017 7:55:23 PM	adminuser	Main Topic		Capabilities
1/16/2017 7:55:23 PM	adminuser	SME		Cindy Smith

Related

Results	Attributes	Short Answer	Notes	History	Revisions	Related
---------	------------	--------------	-------	---------	-----------	---------

The **Related** tab displays all relations for an existing search record and includes automated fields. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the **Related** tab):

- Automated fields: 5

The following fields are automatically populated when the user performs the action in PMAPS.

- ▶ [Related Documents](#)
- ▶ Sales Docs Linked to this Document
- ▶ Assemblies Linked to this Document
- ▶ Proposals Linked to this Document

▶ Internal Document Info

 **Linked Document**

Each document can be a parent or a child. If you make this document a child, you may pick a single parent document for it. If you make this document a parent, you may pick one or more children for it.

Relational Type: **Child Document**

Search ID:

[Add Related Document](#)

	Document	Short Description	Language	Relation	
	5111		English US	Parent	

 **Sales Doc linked to this document**

None

 **Assemblies linked to this document**

None

 **Proposals linked to this document**

None

 **Internal Document Info**

Search ID: 5113

Internal ID: 18235119-e18f-408b-9de6-d40ef6b532cb

Global Attribute Changes

Dashboard Records

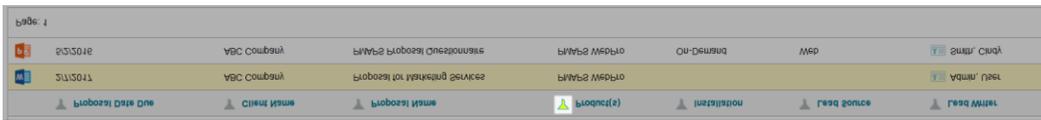
Permitted users can apply global changes to existing attribute values, or clear values, for one or more [Dashboard](#) records at a time. To enable this permission for a user, the user must either be in the group that has the [Multiple Attribute Changes](#) permission enabled or have that permission enabled for their individual user name. Refer to the [Permissions and Restrictions](#) section of the manual for instructions.

To make global changes to [Dashboard](#) records, follow the steps below.

1. Go to the [Dashboard](#).



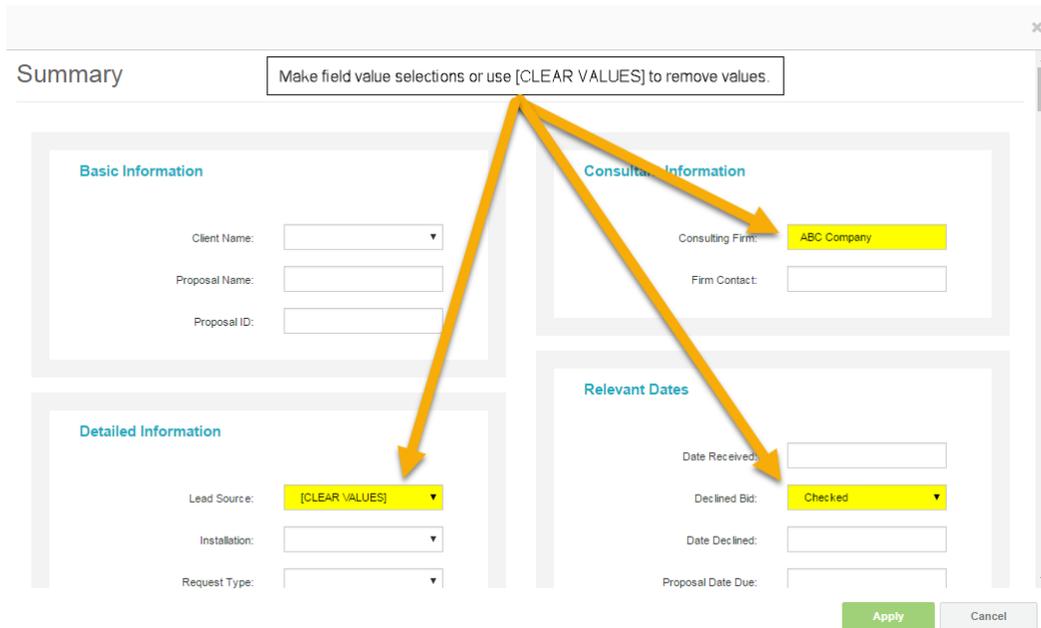
2. Apply the desired filter(s) to narrow down to only those records where you would like to make global changes.



3. Click on the [Global Attribute Changes](#) icon.



4. Make changes to one or more field values. Use the [\[CLEAR VALUES\]](#) option to clear any then-existing values from a field within the selected records (available only for applicable field types).



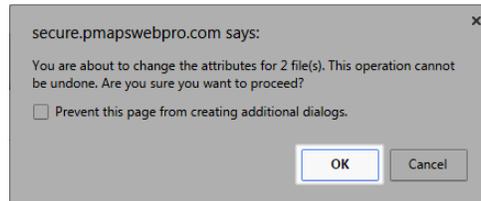
- 5. Scroll up and down to reveal fields in other tabs.

The screenshot shows a 'Summary' form window with a scroll bar on the right. A text box with the instruction 'Scroll up and down to reveal all Dashboard tabs' has an orange arrow pointing to the scroll bar. The form contains four sections: 'Basic Information' (Client Name, Proposal Name, Proposal ID), 'Consultant Information' (Consulting Firm: ABC Company, Firm Contact), 'Detailed Information' (Lead Source: [CLEAR VALUES], Installation, Request Type), and 'Relevant Dates' (Date Received, Declined Bid: Checked, Date Declined, Proposal Date Due). 'Apply' and 'Cancel' buttons are at the bottom right.

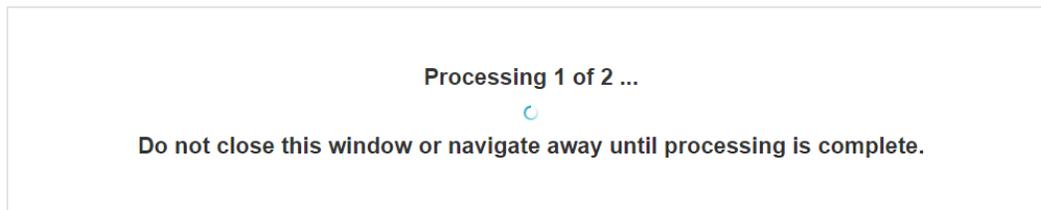
- 6. When you have made all changes, click [Apply](#)

This screenshot is identical to the previous one, but the 'Apply' button at the bottom right is highlighted with a white border, indicating it should be clicked to save changes.

- Review the message to confirm the number of records that will be affected by the change, and then click **OK**. Click **Cancel** if you would like to revise the filters or changes.



- Wait for the processing window to process all records before attempting to navigate away or close the window.



TIP

- After completing step 8 (once the page refreshes), you may need to remove any filters and sorting to reveal the global changes made.

Search Records

Permitted users can apply global changes to existing attribute values, or clear values, for one or more **Search** records at a time. To enable this permission for a user, the user must either be in the group that has the **Multiple Attribute Changes** permission enabled or have that permission enabled for their individual user name. Refer to the **Permissions and Restrictions** section of the manual for instructions.

To make global changes to **Search** records, follow the steps below.

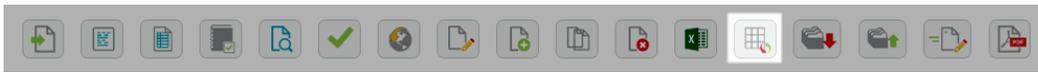
- Go to the **Search** module.



- Apply the desired filter(s) to narrow down to only those records where you would like to make global changes.

Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	File Type
4587	RFP Responses	Company Information	-	brief overview of your company, identifying any parent, subsidiary, and/or affiliate relationships	3/31/2016	Smith, Cindy	WF
4859	RFP Responses	Company Information	-	-	3/31/2017	Smith, Cindy	WF
3484	RFP Responses	Company Information	-	Core Service Offering	3/31/2017	Smith, Cindy	WF
2319	RFP Responses	Company Information	-	Competitive Advantage	3/31/2017	Smith, Cindy	WF
2306	RFP Responses	Company Information	-	Financial Condition / Statements	3/31/2017	Smith, Cindy	WF
2302	RFP Responses	Company Information	-	History	3/31/2017	Smith, Cindy	WF
2300	RFP Responses	Company Information	-	Ownership	3/31/2017	Smith, Cindy	WF

- Click on the **Global Attribute Changes** icon.



- Make changes to one or more field values. Use the new **[CLEAR VALUES]** option to clear any then-existing values from a field within the selected records (available only for applicable field types).

Attributes

Make field value selections or use [CLEAR VALUES] to remove values

Contacts

SME:

Who Answered:

Compliance Approval:

Content Reviewer:

Record Review

Review Cycle:

Date Expires:

Date Last Reviewed:

Record Category

Record Status:

Department:

Main Topic:

Sub Topic:

Other Details

Products:

Version:

Sales Contact:

Apply Cancel

5. Scroll up and down to reveal fields in other tabs.

Attributes

Scroll up and down to reveal all Search tabs

Contacts

SME:

Who Answered:

Compliance Approval:

Content Reviewer:

Record Review

Review Cycle: Monthly

Date Expires:

Date Last Reviewed:

Record Category

Record Status: [CLEAR VALUES]

Department:

Main Topic:

Sub Topic: Competitors

Other Details

Products:

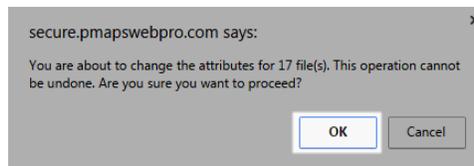
Version:

Sales Contact:

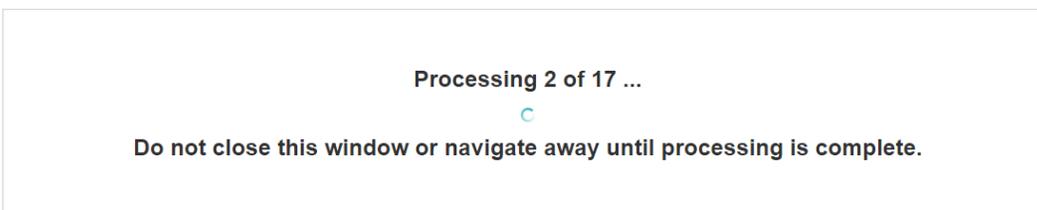
Apply Cancel

- When you have made all changes, click **Apply**

- Review the message to confirm the number of records that will be affected by the change, and then click **OK**. Click **Cancel** if you would like to revise the filters or changes.



- Wait for the processing window to process all records before attempting to navigate away or close the window.



TIP

- After completing step 8 (once the page refreshes), you may need to remove any filters and sorting to reveal the global changes made.

Administration

Access to the [Administration](#) control panel is limited to users who are administrator users. All users have access to the [Account](#) page within the Administration section of PMAPS.



Security

Account

On the [Account](#) page, all users may open the Viewer and change their password.

Open the WebPro Viewer

No administrative rights are necessary to open the Viewer. Once the steps below are complete the Viewer will open automatically when needed.

1. Close the Viewer if open.
2. Log in to your PMAPS application.
3. Go to the [Administration](#) page.



4. Click [Open the WebPro Viewer](#) and follow the on-screen prompts to allow access to PMAPS.



- Once the Viewer opens, go to the [Search](#) page and view any document by clicking the preview icon.



To review the full documentation for the PMAPS Viewer, including common troubleshooting steps and resolutions, download the file below:

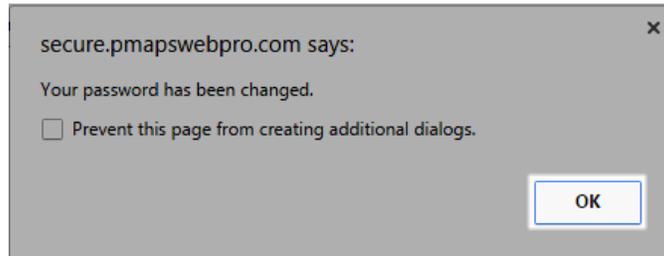
www.pmapswebpro.com/documentation/pmaps_open_viewer_instructions.pdf

Change Password

- Enter your current password in the [Current Password](#) field. Enter your new desired password in both the [New Password](#) and [Confirm Password](#) fields, and then click the [Change](#) icon.

The 'Change Password' form is displayed within a grey-bordered container. It features three input fields, each with a label and a masked password field (represented by asterisks). The labels are 'Current Password:', 'New Password:', and 'Confirm Password:'. Below the input fields is a green 'Change' button.

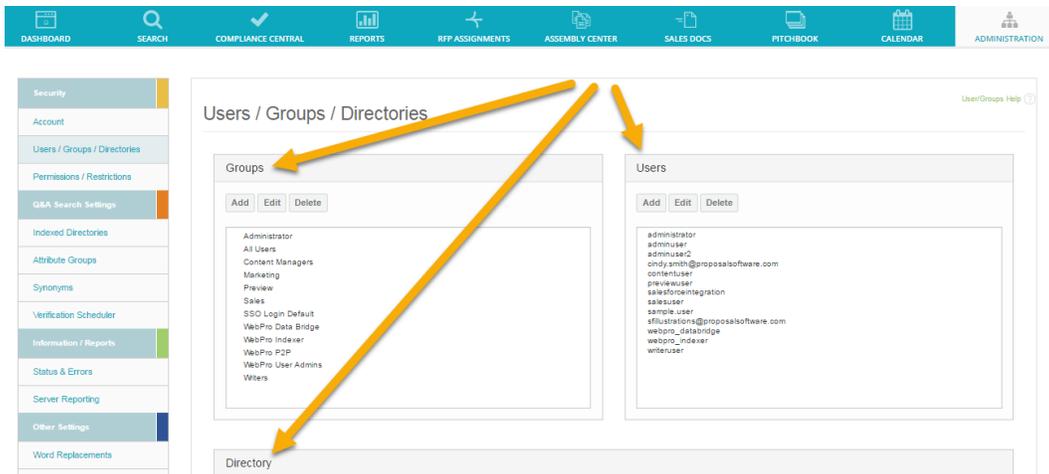
- Wait for the confirmation your password was changed and then click **OK**.



PMAPS uses traditional strong password authentication. The password must be at least eight characters in length and **must contain at least one capital letter, one number, and one non-alphanumeric character**. The following non-alpha characters are accepted in passwords:
~!@#\$\$%^&*()_-'";?/><.,..

Users / Groups / Directories

This page provides administrator access to manage user groups, individual user accounts, and indexed directories.



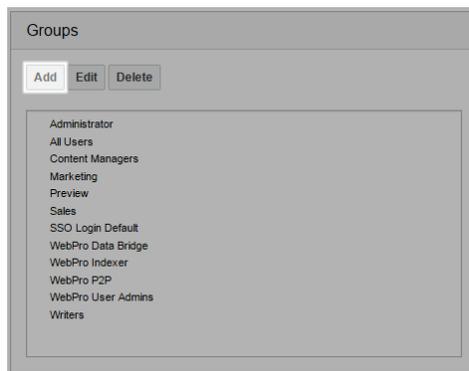
Groups

Here you can create user groups to more easily manage user access and PMAPS permissions. The following default user groups are mandatory and cannot be deleted:

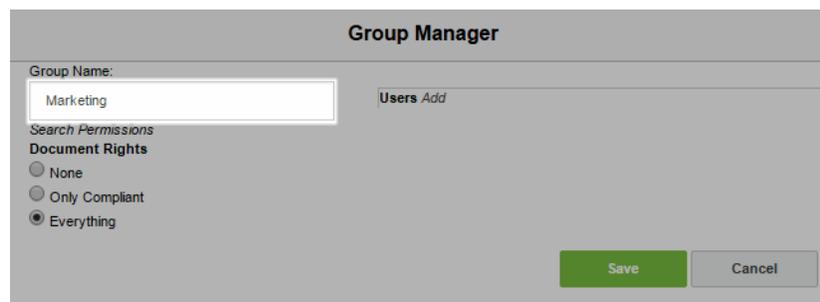
- Administrator
- All Users
- WebPro User Admins

Add Group

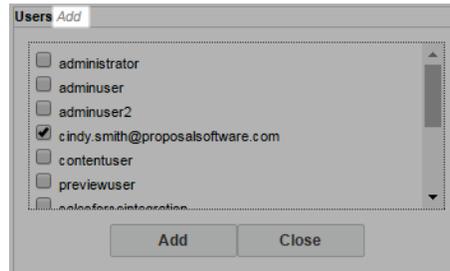
1. Click the [Add](#) icon.



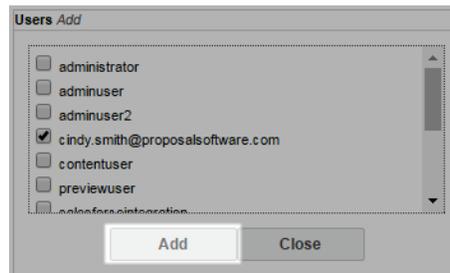
2. Enter a name for the group; e.g., "Marketing."



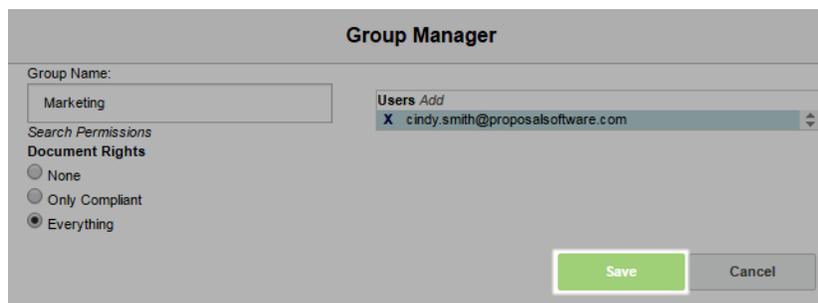
- Click the [Add](#) link next to the [Users](#) header. The link will display in underline in hover mode.



- Click the [Add](#) icon in the [Users](#) section.

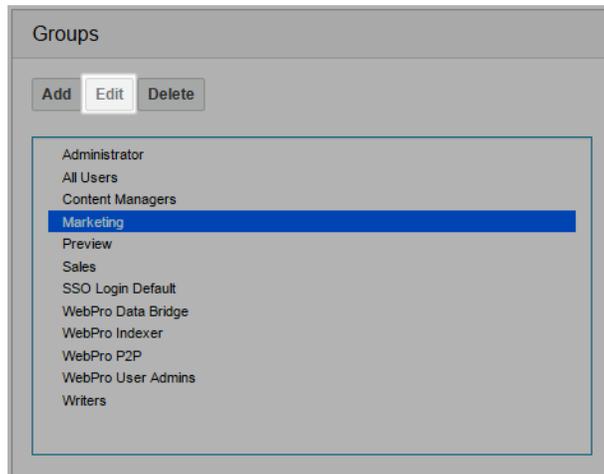


- Review the [Users](#) section to confirm the users you are adding to this group are correct, and then click [Save](#).

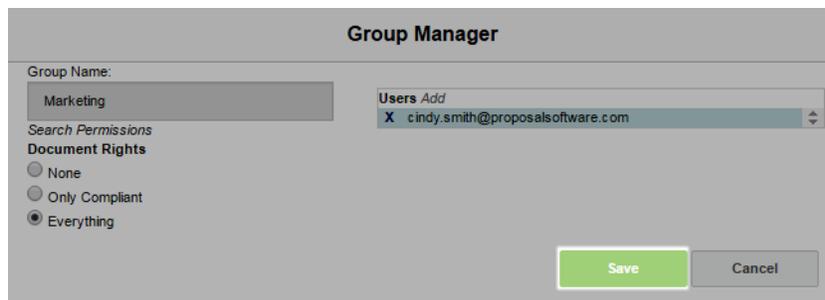


Edit Group

1. Select the group you would like to change, and click [Edit](#).

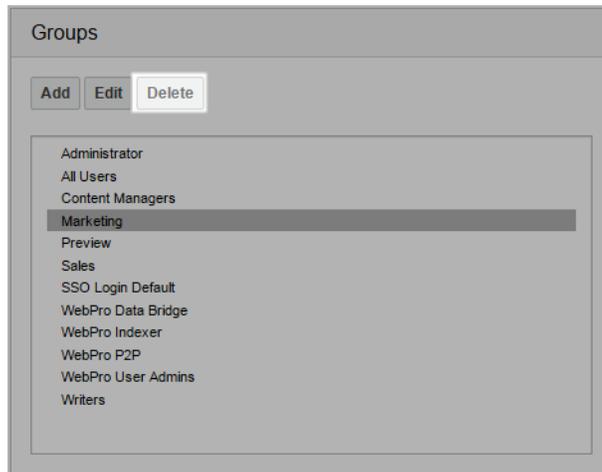


2. Add or edit users, update the document rights if needed, and then click [Save](#).



Delete Group

1. Select the group from the window, and then click [Delete](#).



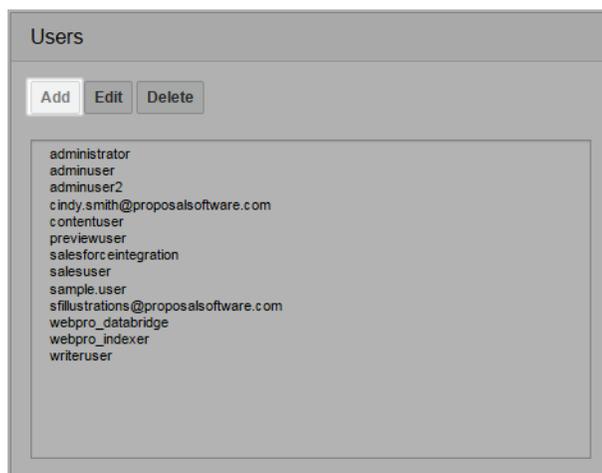
Users

Add User

1. Go to the [Administration](#) page.



2. Click the [Add](#) icon.



User Information

1. Enter a user name. The user name is not case sensitive and may contain any combination of alphabetic and numeric characters, without spaces. It must be between 4-25 characters, and may include the following non-alphanumeric characters: period (.); underscore (_); and at (@) symbol. User names may not be changed once [User Information](#) is saved.

The screenshot shows the 'User Information' form with the following fields and options:

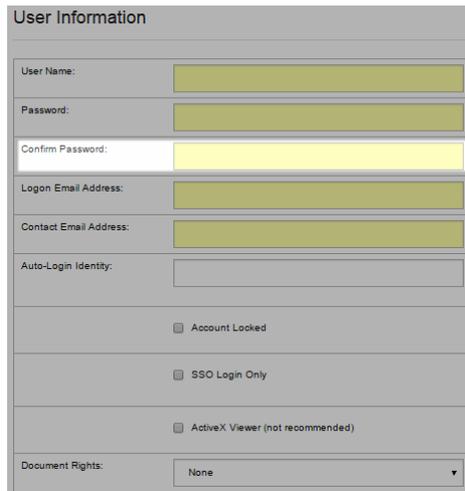
- User Name: [Highlighted in yellow]
- Password: [Green field]
- Confirm Password: [Green field]
- Ligon Email Address: [Green field]
- Contact Email Address: [Green field]
- Auto-Login Identity: [Empty text box]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: [None ▼]

2. Enter a temporary password in the [Password](#) field. The password must be at least eight characters and include at least one capitalized letter, one number, and one non-alphanumeric character.

The screenshot shows the 'User Information' form with the following fields and options:

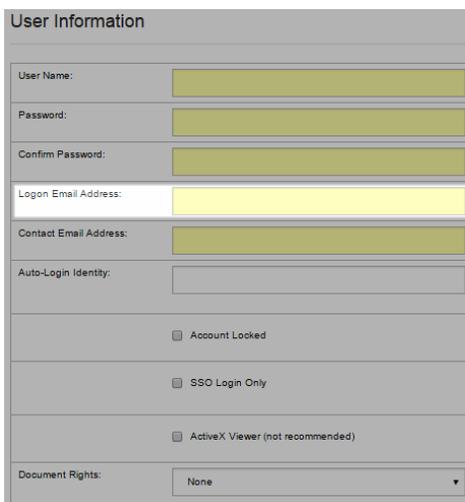
- User Name: [Green field]
- Password: [Highlighted in yellow]
- Confirm Password: [Green field]
- Ligon Email Address: [Green field]
- Contact Email Address: [Green field]
- Auto-Login Identity: [Empty text box]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: [None ▼]

3. Enter the same temporary password in the **Confirm Password** field.



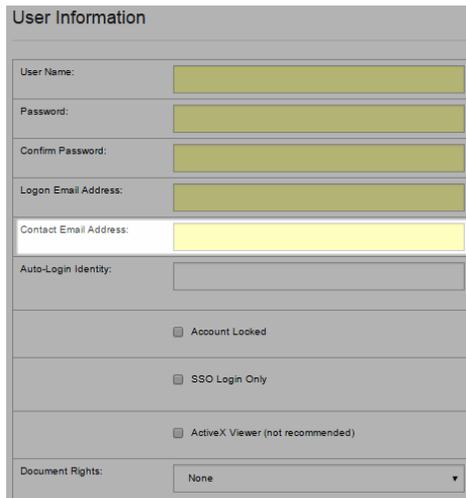
The screenshot shows the 'User Information' form. The 'Confirm Password' field is highlighted in yellow, indicating it is the current focus. Other fields include 'User Name', 'Password', 'Logon Email Address', 'Contact Email Address', 'Auto-Login Identity', and 'Document Rights'. There are also three checkboxes for 'Account Locked', 'SSO Login Only', and 'ActiveX Viewer (not recommended)'.

4. Enter the user's email address in the **Logon Email Address** field.



The screenshot shows the 'User Information' form. The 'Logon Email Address' field is highlighted in yellow, indicating it is the current focus. Other fields include 'User Name', 'Password', 'Confirm Password', 'Contact Email Address', 'Auto-Login Identity', and 'Document Rights'. There are also three checkboxes for 'Account Locked', 'SSO Login Only', and 'ActiveX Viewer (not recommended)'.

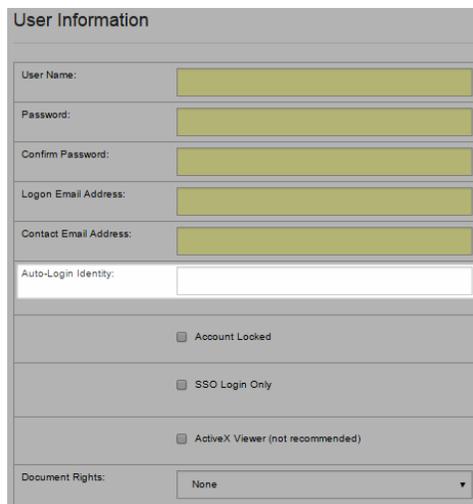
5. Enter the user's email address in the **Contact Email Address** field.



The screenshot shows a 'User Information' form with the following fields and options:

- User Name: [Text Input]
- Password: [Text Input]
- Confirm Password: [Text Input]
- Logon Email Address: [Text Input]
- Contact Email Address: [Text Input, highlighted in yellow]
- Auto-Login Identity: [Text Input]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: [Dropdown menu, currently set to 'None']

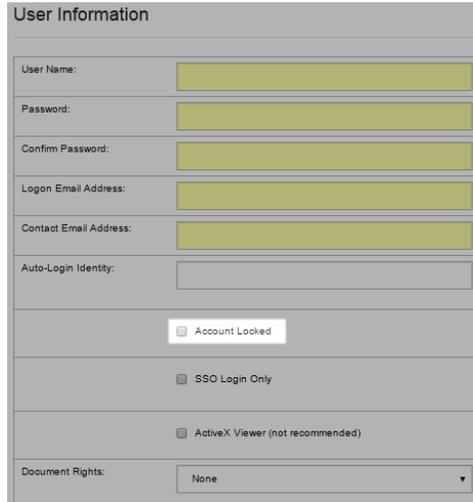
6. Leave the **Auto-Login Identity** field empty. This feature is only available for clients who have PMAPS installed on premises.



The screenshot shows the same 'User Information' form as above, but with the 'Auto-Login Identity' field empty.

- User Name: [Text Input]
- Password: [Text Input]
- Confirm Password: [Text Input]
- Logon Email Address: [Text Input]
- Contact Email Address: [Text Input]
- Auto-Login Identity: [Empty Text Input]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: [Dropdown menu, currently set to 'None']

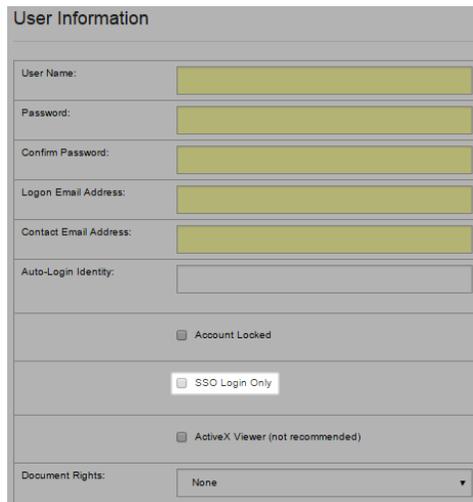
- 7. Leave the **Account Locked** box unchecked. This option prevents a user from logging in to PMAPS.



The screenshot shows a 'User Information' form with the following fields and options:

- User Name: [Text Input]
- Password: [Text Input]
- Confirm Password: [Text Input]
- Logon Email Address: [Text Input]
- Contact Email Address: [Text Input]
- Auto-Login Identity: [Text Input]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: [Dropdown Menu] (None selected)

- 8. For most clients, leave the SSO Login Only box unchecked. This option prevents the user from manually logging in with a user name and password. If your company uses single-sign on, you may want to have the user log in using single sign on. A single sign on certificate must already be in place to use this feature. If you are not currently using single sign on, but would like to implement this feature, please contact your Proposal Software account manager.



The screenshot shows a 'User Information' form with the following fields and options:

- User Name: [Text Input]
- Password: [Text Input]
- Confirm Password: [Text Input]
- Logon Email Address: [Text Input]
- Contact Email Address: [Text Input]
- Auto-Login Identity: [Text Input]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: [Dropdown Menu] (None selected)

9. For **Document Rights**, choose the option desired for the user's Search page results:

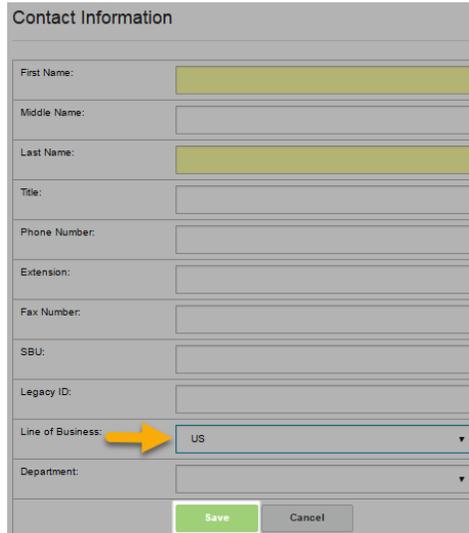
- None = the user will not see any records
- Compliant Only = the user will see only records with a valid Date Expires
- Everything = the user will see all records

The screenshot shows the 'User Information' form. At the bottom, the 'Document Rights' dropdown menu is open, showing three options: 'None', 'Compliant Only', and 'Everything'. The 'Everything' option is highlighted in blue.

10. On the same page, scroll down to the **Contact Information** section and fill in the appropriate fields. **First Name** and **Last Name** are required.

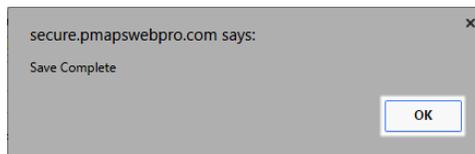
The screenshot shows the 'Contact Information' form. The 'First Name' field contains 'Jane' and the 'Last Name' field contains 'Doe'. Orange arrows point to these two fields. Other fields include Middle Name, Title, Phone Number, Extension, Fax Number, SBU, Legacy ID, Line of Business, and Department. At the bottom are 'Save' and 'Cancel' buttons.

11. If the user should be automatically placed in a **Line of Business**, choose the correct option from the dropdown list, and then click **Save**.

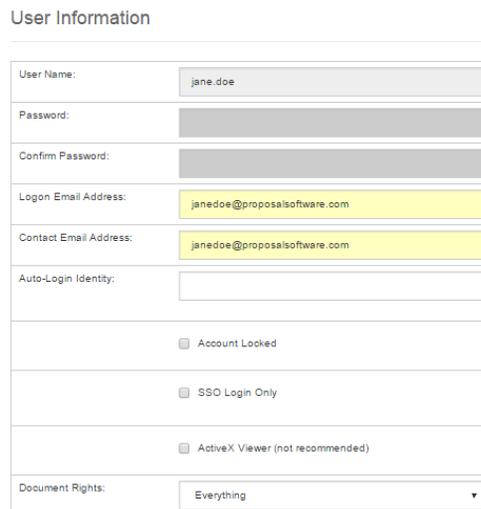


The image shows a 'Contact Information' form with the following fields: First Name, Middle Name, Last Name, Title, Phone Number, Extension, Fax Number, SBU, Legacy ID, Line of Business, and Department. The 'Line of Business' dropdown menu is open, showing 'US' as the selected option, which is highlighted by a yellow arrow. At the bottom of the form are 'Save' and 'Cancel' buttons.

12. Click **OK** at the prompt.



13. Wait for the page to refresh and the user name to become locked.



The image shows a 'User Information' form with the following fields: User Name (jane.doe), Password, Confirm Password, Logon Email Address (janedoe@proposalsoftware.com), Contact Email Address (janedoe@proposalsoftware.com), Auto-Login Identity, Account Locked (checkbox), SSO Login Only (checkbox), ActiveX Viewer (not recommended) (checkbox), and Document Rights (Everything). The email address fields are highlighted in yellow.

Groups

1. On the same page, scroll down to the **Groups** section and click inside the circle to add the user to the appropriate groups. All new users are automatically in the **All Users** group. These selections are automatically saved. You do not need to click the **Save** button.

Groups	
<input type="radio"/>	Administrator
<input checked="" type="radio"/>	All Users
<input type="radio"/>	Content Managers
<input type="radio"/>	Marketing
<input type="radio"/>	Preview
<input checked="" type="radio"/>	Sales
<input type="radio"/>	SSO Login Default
<input type="radio"/>	WebPro Data Bridge
<input type="radio"/>	WebPro Indexer
<input type="radio"/>	WebPro P2P
<input type="radio"/>	WebPro User Admins
<input type="radio"/>	Writers

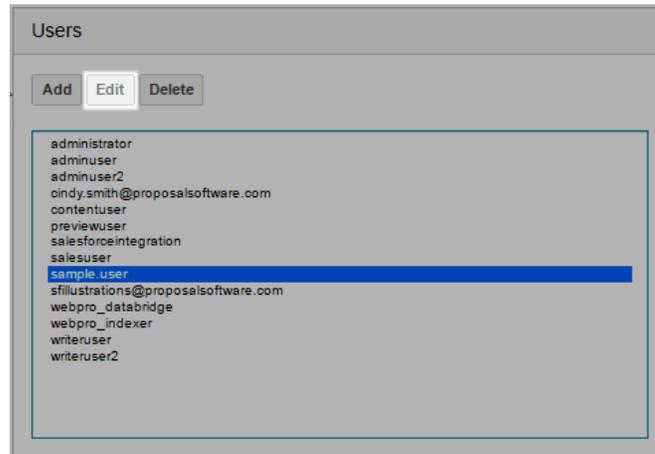
Lists

1. To add the contact to a picklist, click inside the circle for that contact field. These selections are automatically saved. You do not need to click the **Save** button.

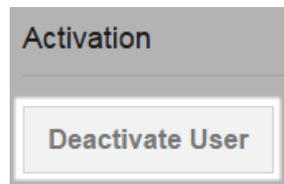
Lists that this user will appear in		
<input type="radio"/>		Compliance Approval
<input checked="" type="radio"/>		Content Reviewer
<input type="radio"/>		Sales Contact
<input checked="" type="radio"/>		SME
<input type="radio"/>		Who Answered
<input type="radio"/>		Lead Writer

Deactivate User

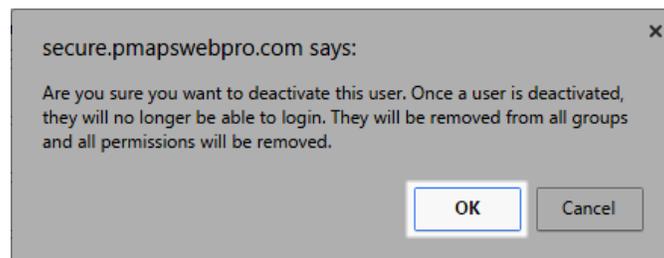
1. Click on the user name, and then click the [Edit](#) icon.



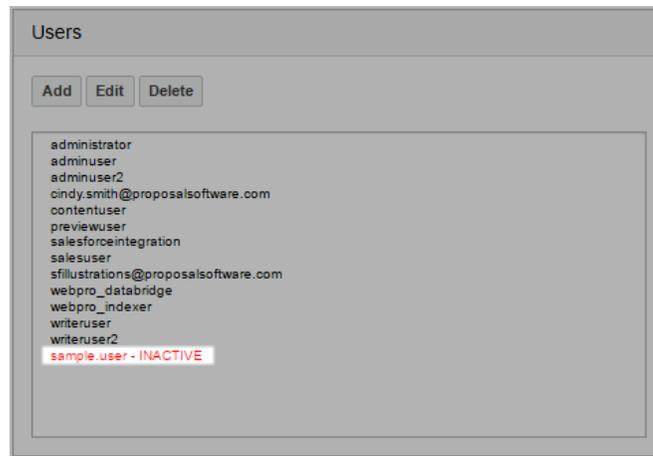
2. Scroll to the bottom of the window, and then click the [Deactivate User](#) icon.



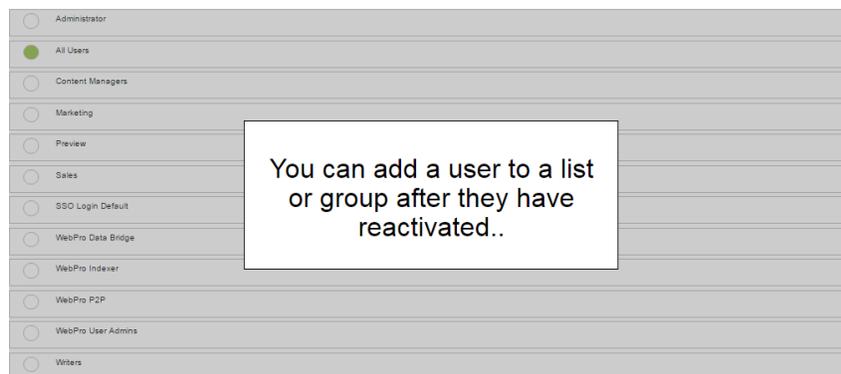
3. Review the prompt, and then click [OK](#) to continue with the deactivation.



Once the deactivation is complete, the page will refresh to the Users / Groups / Directories page and the deactivated user will appear in red with the word "INACTIVE" added. The user is automatically removed from all groups and all contact picklists.



Groups



Lists that this user will appear in

The screenshot shows a list of roles with radio buttons and search icons. A callout box is overlaid on the list.

<input type="radio"/>	Q	Compliance Approval
<input type="radio"/>	Q	Content Reviewer
<input type="radio"/>	Q	Sales Contact
<input type="radio"/>	Q	SME
<input type="radio"/>	Q	Who Answered
<input type="radio"/>	Q	Lead Writer
<input type="radio"/>	Q	MIT
<input type="radio"/>	Q	Other Writer
<input type="radio"/>	Q	Other Writer (1)
<input type="radio"/>	Q	Other Writer (2)
<input type="radio"/>	Q	Other Writer (3)
<input type="radio"/>	Q	Owner of Data
<input type="radio"/>	Q	Preparer 2

You can add a user to a list or group after they have reactivated..

A deactivated user's [User Information](#) may not be edited. The following prompt appears at the top of the page for deactivated users.

This user is deactivated. You cannot make changes. Click 'Reactivate' at the bottom of this page to reactivate the user.

If you would like the contact to remain in the system, edit the existing contact field picklist from any contact picklist field control panel by locating the contact name and assigning the desired picklists.

Reactivate User

1. Click on the inactive user name, and then click the [Edit](#) icon.

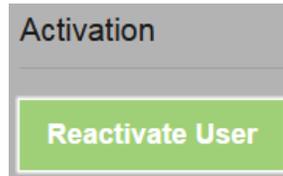
The screenshot shows a 'Users' management window with 'Add', 'Edit', and 'Delete' buttons. A list of users is displayed, with 'sample.user - INACTIVE' highlighted in blue.

Users

Add Edit Delete

- administrator
- adminuser
- adminuser2
- cindy.smith@proposalsoftware.com
- contentuser
- previewuser
- salesforcointegration
- salesuser
- sfillustrations@proposalsoftware.com
- webpro_databridge
- webpro_indexer
- writeruser
- writeruser2
- sample.user - INACTIVE

2. Scroll to the bottom of the window, and then click the [Reactivate User](#) icon.



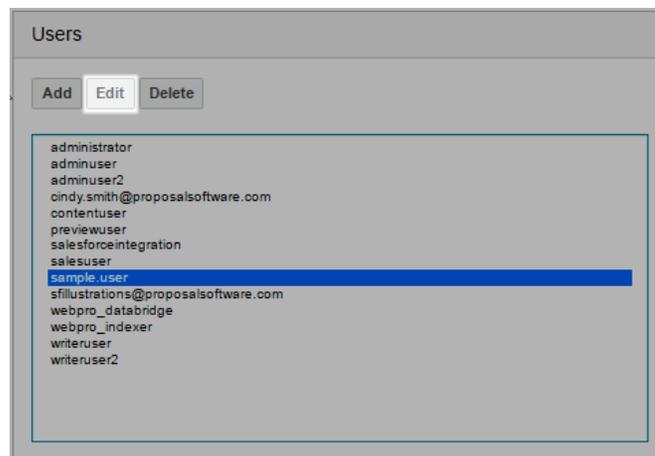
The page refreshes and the account is unlocked. Contact Information is remembered unless the contact was deleted manually from the contact picklist. User Information is remembered except for the password.

3. Place the user in the appropriate group(s) using the instructions above (click [here](#) to go back).
4. Place the user in the appropriate picklist(s) using the instructions above (click [here](#) to go back).
5. Instruct the user to click the [Forgot Password](#) link from the login page and follow the on-screen instructions to receive a temporary password.

Unlock User Account

Only an existing administrator user may unlock an existing account.

1. Select the user name for the locked out user from the [Users](#) window, and then click [Edit](#).



- Uncheck the [Account Locked](#) box, and then click [Save](#). Do not enter a new password during this step.

The screenshot shows a 'User Information' form with the following fields and options:

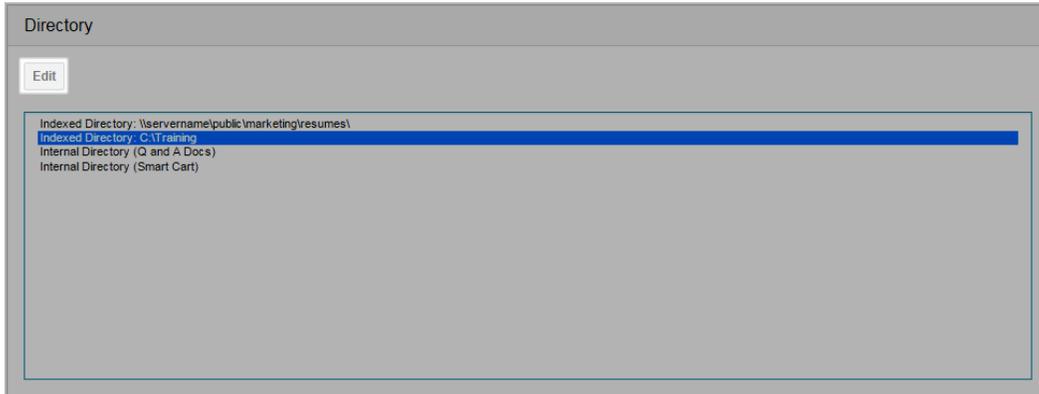
- User Name: sample.user
- Password: [Redacted]
- Confirm Password: [Redacted]
- Logon Email Address: sample.user@proposalsoftware.com
- Contact Email Address: sample.user@proposalsoftware.com
- Auto-Login Identity: [Empty]
- Account Locked
- SSO Login Only
- ActiveX Viewer (not recommended)
- Document Rights: Everything
- Buttons: Save, Cancel

- Instruct the user to click the [Forgot Password](#) link from the login page and follow the on screen instructions to receive a temporary password.

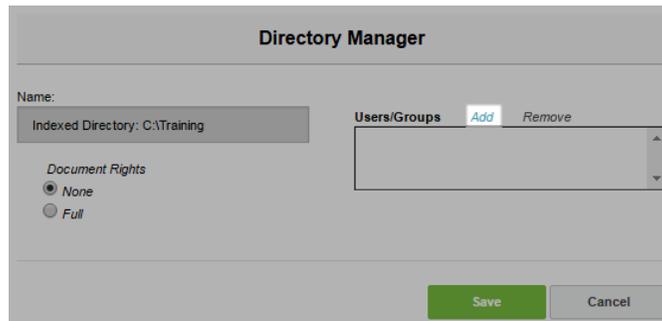
Directories

Administrator users can assign permissions to directory search records in the [Directory](#) window. Indexed directories are available here for WebPro clients only and when the WebPro Indexer is running on a client server. Internal directories are default directories for all PMAPS applications, and should only be modified by a Proposal Software technical engineer.

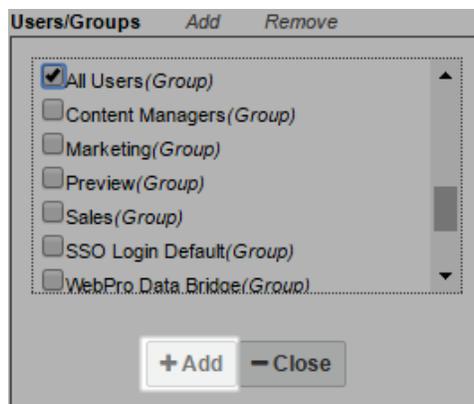
1. To edit document rights for a directory, select it from the **Directory** window and click the **Edit** icon.



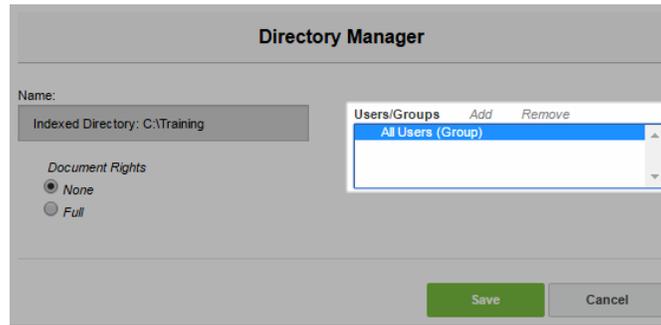
2. In the **Directory Manager** window, click the **Add**.



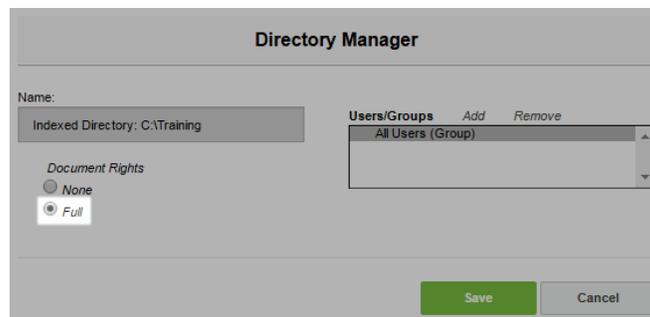
3. Check the box next to the user(s) or group(s) who should have document rights from this directory, and then click **Add**.



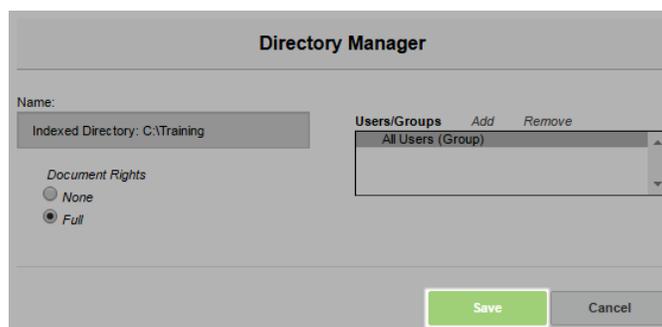
- Select all users or groups in the window (press CTRL key while selecting each). Selected groups display with a blue background.



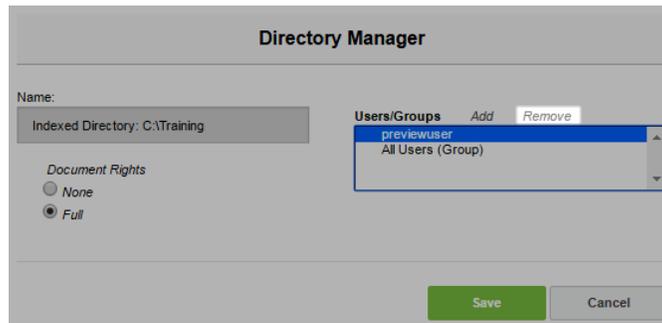
- Under **Document Rights**, change the selection from **None** to **Full**.



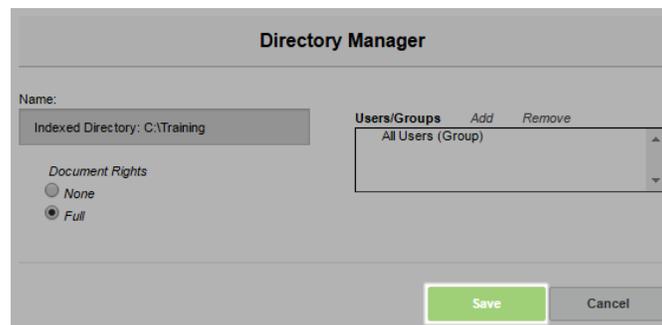
- Review the selections, and then click **Save**.



7. To remove document rights, select the users or groups and click the [Remove](#) link



8. Click [Save](#).



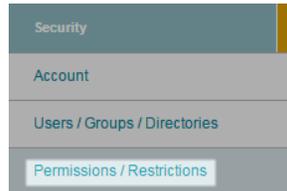
TIPS

- We strongly recommend that you assign permissions using groups so new users added to the permitted groups will automatically have access to the directory documents.
- The most common support troubleshooting issue related to indexed directories is forgetting these important steps needed to assign document rights to the desired users.

Permissions and Restrictions

Administrator users are able to control user permissions, viewing restrictions and file type permissions from this control panel.

1. Go to the [Permissions / Restrictions](#) page.



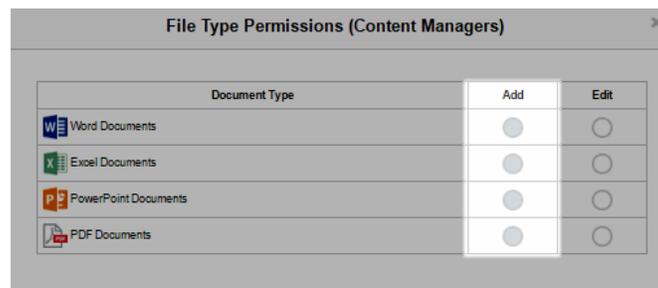
2. Click on the icon under the [Add Documents](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
All Users	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Content Managers	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Preview	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Sales	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +						

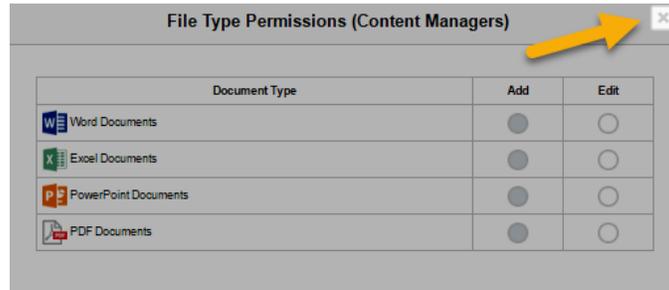
3. Under the [File Type Permissions](#) column, click the clipboard icon for the same user or group.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
All Users	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Content Managers	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Preview	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Sales	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +						

4. Click on the icon under the [Add](#) column for the document types the user should be permitted to add.



- Click the [Close](#) icon.



Add Proposals

To allow users to add new proposals to the [Dashboard](#), enable the [Add Proposals](#) permission.

- Go to the [Permissions / Restrictions](#) page.



- Click on the icon under the [Add Proposals](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basis Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Desktop Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	[0] +	[0] +																				
All Users	<input type="radio"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	
Marketing	<input type="radio"/>	[0] +	[0] +																				
Preview	<input type="radio"/>	[0] +	[0] +																				
Sales	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	

Assembly Ctr Admin

To allow users to add and edit assembly center templates, enable the [Assembly Ctr Admin](#) permission. If not permitted, users will not be permitted to access the [Assembly Center](#) template area from the navigation toolbar.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Assembly Ctr Admin](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	[0] +	[0] +																				
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Attribute Admin

To allow users to manage settings for all [Search](#) and [Dashboard](#) field attributes (when the user is not in the [Administrator](#) group), enable the [Dashboard Admin](#) permission.

1. Go to the [Permissions / Restrictions](#) page.



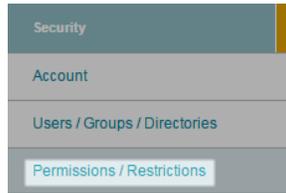
2. Click on the icon under the [Attribute Admin](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	[1] +	[0] +																				
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Basic Editing

To activate the full navigation toolbar, enable the **Basic Editing** permission. **Preview Only** users may not have this permission enabled.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the **Basic Editing** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs in Word	Unbook Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	[0] +	[0] +																				
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Build Sales Docs

To allow users to add new and edit existing sales docs templates, enable the **Build Sales Docs** permission.

1. Go to the [Permissions / Restrictions](#) page.



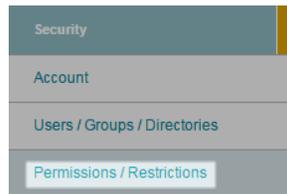
- Click on the icon under the **Build Sales Docs** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Calendar Admin

To allow users to access and manage calendars for all users, enable the **Calendar Admin** permission.

- Go to the **Permissions / Restrictions** page.



- Click on the icon under the **Calendar Admin** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Compliance Central Admin

To allow users to access and manage compliance central for all users, enable the **Compliance Central Admin** permission.

1. Go to the [Permissions / Restrictions](#) page.



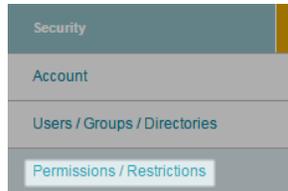
2. Click on the icon under the [Compliance Central Admin](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Custom Report Admin

To allow users to view, create, and edit all custom reports, enable the [Custom Report Admin](#) permission.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Custom Report Admin](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Delete Documents

To allow users to delete existing [Search](#) records, enable the [Delete Documents](#) permission. Users with this permission can delete any [Search](#) record [File Type](#) in their search results tab. Indexed documents may not be deleted from the PMAPS web application.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Delete Documents](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Upload Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	[0] +	[0] +																				
All Users	<input type="radio"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="radio"/>	[0] +	[0] +																				
Marketing	<input type="radio"/>	[0] +	[0] +																				
Preview	<input type="radio"/>	[0] +	[0] +																				
Sales	<input type="radio"/>	[0] +	[0] +																				

Delete Proposals

To allow users to delete existing proposals, enable the [Delete Proposals](#) permission. Users with this permission can delete any [Dashboard](#) record in their Dashboard tab results. Indexed documents may not be deleted from the PMAPS web application.

1. Go to the [Permissions / Restrictions](#) page.



- Click on the icon under the **Delete Proposals** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Upload Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Edit Documents

To allow users to edit existing search records, enable the **Edit Documents** permission. Users with this permission can edit any **Search** record **File Type** in their search results tab. Indexed documents may not be edited from the PMAPS web application. Once you enable this permission, assign **File Type Permissions** next.

- Go to the **Permissions / Restrictions** page.



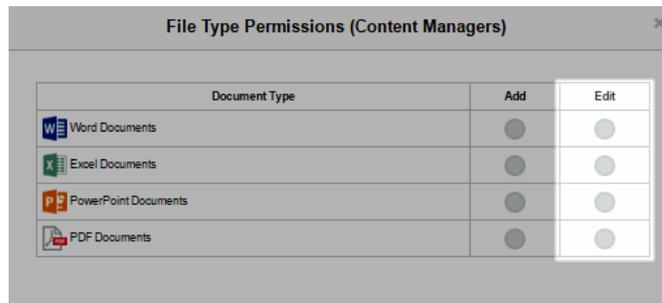
- Click on the icon under the **Edit Documents** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Upload Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

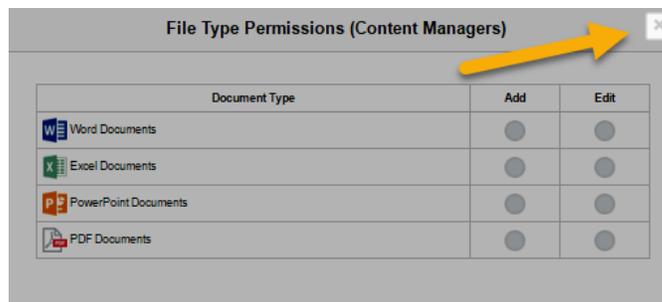
- Under the **File Type Permissions** column, click the clipboard icon for the same user or group.

User or Group	Add Documents	Add Proposals	Assembly Ctl Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Upload Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

- Click on the icon under the **Edit** column for the document types the user should be permitted to edit.



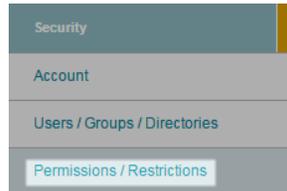
- Click the **Close** icon.



Edit Proposals

To allow users to edit existing proposals from the **Dashboard**, enable the **Edit Proposals** permission. Users with this permission can edit any **Dashboard** proposal in their Dashboard tab.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Edit Proposals](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Fill Out Sales Docs

To allow users to create sales docs from the Dashboard and/or WebPro Mobile, enable the [Fill Out Sales Docs](#) permission. Users with this permission will be able to create sales docs templates they have permission to access.

1. Go to the [Permissions / Restrictions](#) page.



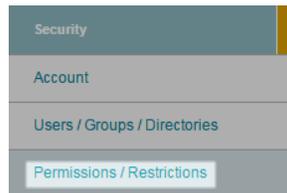
2. Click on the icon under the [Fill Out Sales Docs](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Multiple Doc Download

To allow users to download and/or checkout [Search](#) records for offline editing, enable the [Multiple Doc Download](#) permission. Indexed documents may not be downloaded from the PMAPS web application.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Multiple Doc Download](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Upload Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	[0] +	[0] +																				
All Users	<input type="radio"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	[0] +	[0] +	
Marketing	<input type="radio"/>	[0] +	[0] +																				
Preview	<input type="radio"/>	[0] +	[0] +																				
Sales	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	[0] +	[0] +	

Multiple Doc Upload

To allow users to upload checked out documents, enable the [Multiple Doc Upload](#) permission.

1. Go to the [Permissions / Restrictions](#) page.



- Click on the icon under the **Multiple Doc Upload** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Multiple Global Attributes

To allow users to make global changes to Dashboard and Search record attributes, enable the **Multiple Global Attributes** permission.

- Go to the **Permissions / Restrictions** page.



- Click on the icon under the **Multiple Global Attributes** column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Run Verify Process

To allow users to process multiple documents at once through compliance central, enable the **Run Verify Process** permission.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Run Verify Process](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Sales Docs In Word

To allow users to output generated sales docs to Microsoft Word format, enable the [Sales Docs In Word](#) permission. Users without this permission enabled will only be able to output sales docs to PDF format.

1. Go to the [Permissions / Restrictions](#) page.



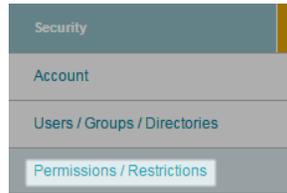
2. Click on the icon under the [Sales Docs In Word](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[0] +	[0] +	

Unlock Proposals

To allow users to unlock Dashboard proposal documents, enable the [Unlock Proposals](#) permission.

1. Go to the [Permissions / Restrictions](#) page.



2. Click on the icon under the [Unlock Proposals](#) column to display a solid circle.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="checkbox"/>	[0] +	[0] +																				
All Users	<input type="checkbox"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	
Marketing	<input type="checkbox"/>	[0] +	[0] +																				
Preview	<input type="checkbox"/>	[0] +	[0] +																				
Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[0] +	[0] +	

Restrictions

Administrators have the ability to establishing document access restrictions to dashboard and search records using attribute picklist values. Viewing restrictions affect what records users see when logged into PMAPS. Editing restrictions affect what records users may edit (only applies if the [Edit Document](#) permission is enabled) when logged into PMAPS. Editing restrictions are only available for [Search](#) records.

We recommend that restrictions be applied at the group level for ease of administration. If applied at the user level, be sure to repeat the same steps for all users to which the restriction should apply.

Add Restriction

Viewing

1. Click on the plus sign icon in the **Viewing** column next to the group or user to which you would like to apply the restriction.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	[0] +	[0] +																				
All Users	<input type="radio"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="radio"/>	[0] +	[0] +																				
Marketing	<input type="radio"/>	[0] +	[0] +																				
Preview	<input type="radio"/>	[0] +	[0] +																				
Sales	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[0] +	[0] +	

2. From the **Select Type** picklist, choose from search records or dashboard records.
 - For **Search** records, select **Q&A Documents**
 - For **Dashboard** records, select **Proposals**

Add a Viewing Restriction

Select Type:

Please Choose Type

Please Choose Type

Choose:

- Q&A Documents
- Proposals

Select Attribute Select Operation

3. Select an attribute on which the restriction should be based.

Add a Viewing Restriction

Select Type:

Proposals

Restriction:

Select Attribute Select Operation

4. Select the operation to use for this restriction.

The screenshot shows the 'Add a Viewing Restriction' dialog box. The 'Select Type' dropdown is set to 'Proposals'. The 'Restriction' section has three dropdowns: 'Lead Writer', 'Select Operation', and '[no entry]'. The 'Save' button is highlighted in green.

4. Select the value to use for this restriction.

The screenshot shows the 'Add a Viewing Restriction' dialog box. The 'Restriction' section now shows 'Lead Writer', '= Equals', and 'Cindy Smith'. A message below the dropdowns reads 'Restriction Query Returned: 4 Results.'. The 'Save' button is highlighted in green.

5. Review the [Restriction Query Returned](#) results to confirm that the selections made are valid.

The screenshot shows the 'Add a Viewing Restriction' dialog box, identical to the previous one, showing the 'Restriction Query Returned: 4 Results.' message.

6. Click [Save](#).

TIPS

- When using Not Equal To for multiple options, all records must have a value populated in the field selected as the attribute type for the restriction.

Editing

Editing restrictions are only available for Search records.

1. Click on the plus sign icon in the **Editing** column next to the group or user to which you would like to apply the restriction.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Upload Proposals	Viewing	Editing	File Type Permissions
Administrator	<input checked="" type="radio"/>	[0] +	[0] +																				
All Users	<input type="radio"/>	[0] +	[0] +																				
Content Managers	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	[0] +	[0] +	
Marketing	<input type="radio"/>	[0] +	[0] +																				
Preview	<input type="radio"/>	[0] +	[0] +																				
Sales	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	[0] +	[0] +	

2. Select an attribute on which the restriction should be based.

Add an Editing Restriction

Restriction:

3. Select the operation to use for this restriction.

Add an Editing Restriction

Restriction:

4. Select the value to use for this restriction.

Add an Editing Restriction

Restriction:

Restriction Query Returned: 52 Results.

- Review the **Restriction Query Returned** results to confirm that the selections made are valid.



- Click **Save**.

TIPS

- When using Not Equal To for multiple options, all records must have a value populated in the field selected as the attribute type for the restriction.

Remove Restriction

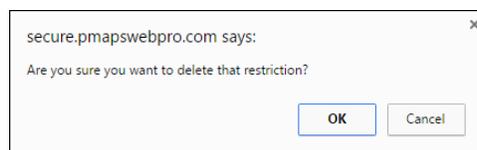
- Click on the number icon in the **Viewing** or **Editing** column next to the group or user.

User or Group	Add Documents	Add Proposals	Assembly Ctr Admin	Attribute Admin	Basic Editing	Build Sales Docs	Calendar Admin	Compliance Central Admin	Custom Report Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Unlock Proposals	Viewing	Editing	File Type Permissions
Administrator	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	[0] +	[0] +	🗑️
All Users	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	[0] +	[0] +	🗑️
Content Managers	●	●	○	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	[1] +	[0] +	🗑️
Marketing	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	[0] +	[0] +	🗑️
Preview	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	[0] +	[0] +	🗑️
Sales	○	●	○	○	●	○	○	○	●	○	○	○	●	○	○	○	○	○	○	○	[0] +	[0] +	🗑️

- Click the trash icon next to the restriction you would like to remove.



- Click **OK** to confirm deletion.



- When you are done removing restriction(s), click [Close](#).



Q&A Search Settings

Indexed Directories

The WebPro Indexer is an optional component for PMAPS WebPro clients and included as part of your subscription. If you would like to synchronize files automatically using a schedule, the WebPro Indexer application must be installed on a client controlled Windows server or dedicated Windows computer.

The Indexer allows clients to synchronize documents into their PMAPS WebPro application using secure Web Services (SOAP, SSL Port: 443). The Indexer continuously scans for files from folder directories. Permitted file types include .doc, .docx, .xls, .xlsx, .ppt, .pptx, .html, and .pdf. These documents are read only and may not be edited or deleted from the PMAPS application. They may be used for a variety of purposes.

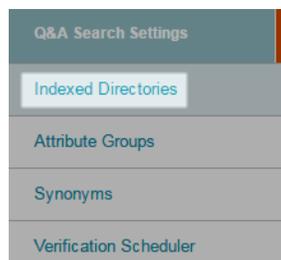
The Indexer is not available with Web Essentials.

Add a New Directory

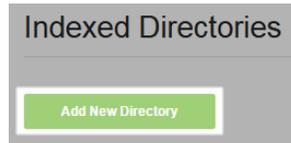
- Go to the [Administration](#) page.



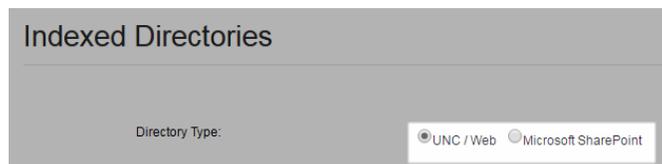
- Under [Q&A Search Settings](#), select [Indexed Directories](#).



3. Click [Add New Directory](#).



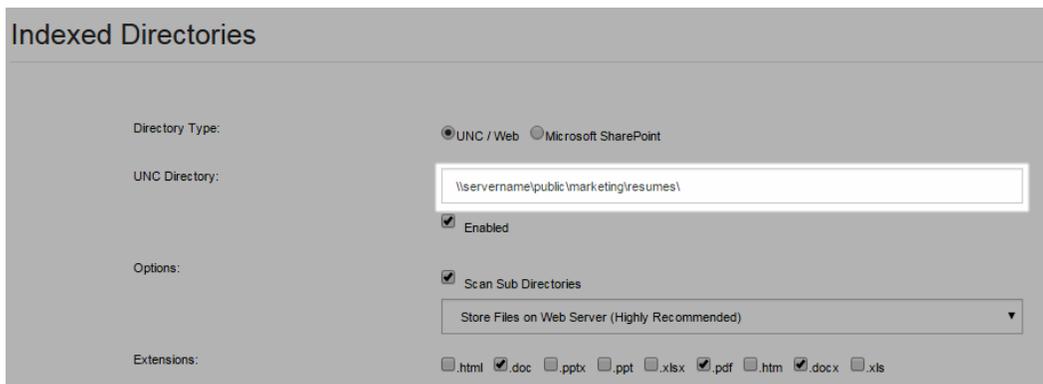
4. Select the type of directory [UNC/Web](#) or [Microsoft SharePoint](#).



Follow the instructions below for [UNC Directory](#) or [Microsoft SharePoint](#) depending on the directory type.

UNC Directory

5. In the [UNC Directory](#) field, enter the complete UNC folder path directory for the location of the files. Do not use mapped network drive paths. Leave the [Enabled](#) box checked.



- If you would like to scan all sub directories contained within the listed folder, check the box next to [Scan Sub Directories](#).

The screenshot shows the 'Indexed Directories' configuration interface. It includes the following fields and options:

- Directory Type:** Radio buttons for 'UNC / Web' (selected) and 'Microsoft SharePoint'.
- UNC Directory:** A text input field containing the path '\\servername\public\marketing\resumes\'.
- Enabled:** A checked checkbox.
- Options:** A checked checkbox for 'Scan Sub Directories' and a dropdown menu set to 'Store Files on Web Server (Highly Recommended)'.
- Extensions:** A row of checkboxes for file extensions: .html, .doc (checked), .pptx, .ppt, .xlsx, .pdf (checked), .htm, .docx (checked), and .xls.

- To store a copy of indexed files in your PMAPS hosted server folder (highly recommended for faster/confirmed retrieval), leave the option set to [Store Files on Web Server \(Highly Recommended\)](#). If you choose to [Keep file in existing location](#), any users that view these documents in their search results must also have access to the folder directory. If they do not have this access, they will receive an error when attempting to view these documents.

This screenshot is identical to the one above, showing the 'Indexed Directories' configuration page. The 'Scan Sub Directories' checkbox is checked, and the dropdown menu is set to 'Store Files on Web Server (Highly Recommended)'. The 'Enabled' checkbox is also checked, and the file extension checkboxes for .doc, .pdf, .docx, and .xls are selected.

- Select the indexer name assigned during configuration of the Indexer application.

Directory Type: UNC / Web Microsoft SharePoint

UNC Directory:

Enabled

Options: Scan Sub Directories

Extensions: .html .doc .pptx .ppt .xlsx .pdf .htm .docx .xls

Indexer:

- Select attributes appropriate to the files contained within the directory folder, and then click **Save**. Note: if you choose to scan sub directories, all documents will be added using the same set of attributes.

Indexer:

Contacts

SME:

Who Answered:

Compliance Approval:

Content Reviewer:

Record Category

Record Status:

Department:

Main Topic:

Sub Topic:

Short Description:

Language:

Source:

Region:

Prompt on Insert:

Internal Attributes

Q & A:

Record Review

Review Cycle:

Date Expires:

Date Last Reviewed:

Other Details

All Products

PMAPS Presentation Pro

PMAPS Web Essentials

PMAPS WebPro

Version:

Sales Contact:

Consulting Firm:

Original Proposal:

Microsoft SharePoint

5. Enter the [SharePoint Url](#) that contains the documents or folders you would like to index to your PMAPS application.

Directory Type: UNC / Web Microsoft SharePoint

SharePoint Url:

SharePoint Domain:

SharePoint Login:

SharePoint Password:

(your password is saved, but not shown)

6. Enter the [SharePoint Domain](#) (this may not be necessary depending on format of your SharePoint site). We recommend attempting to connect first without the domain.

Directory Type: UNC / Web Microsoft SharePoint

SharePoint Url:

SharePoint Domain:

SharePoint Login:

SharePoint Password:

(your password is saved, but not shown)

7. Enter the [SharePoint Login](#) for the user account with access to the SharePoint directories.

Directory Type: UNC / Web Microsoft SharePoint

SharePoint Url:

SharePoint Domain:

SharePoint Login:

SharePoint Password:

(your password is saved, but not shown)

8. Enter the [SharePoint Password](#) for the [SharePoint Login](#)

9. Click Refresh.

Directory Type: UNC / Web Microsoft SharePoint

SharePoint Url:

SharePoint Domain:

SharePoint Login:

SharePoint Password:

(your password is saved, but not shown)

10. Select one or more folders that contain documents you would like to index (use the CTRL key simultaneously with the selections to select more than one).

SharePoint Lists:

- / - List Template Gallery
- / - Marketing PowerPoint Slides
- / - Master Page Gallery**
- / - Shared Documents
- / - Site Pages
- / - Solution Gallery**
- / - Style Library

11. Select the indexer name assigned during configuration of the Indexer application.

Directory Type: UNC / Web Microsoft SharePoint

SharePoint Url:

SharePoint Domain:

SharePoint Login:

SharePoint Password:

(your password is saved, but not shown)

SharePoint Lists:

- / - List Template Gallery
- / - Marketing PowerPoint Slides
- / - Master Page Gallery**
- / - Shared Documents
- / - Site Pages
- / - Solution Gallery**
- / - Style Library

Extensions: .html .doc .pptx .ppt .xlsx .pdf .htm .docx .xls

Indexer:

12. Select attributes appropriate to the documents contained within the SharePoint folders, and then click **Save**. Note: all documents will be added using the same set of attributes.

TIPS

- Once you have completed added the new directory(ies), you must follow the steps below to grant user access to view the files.

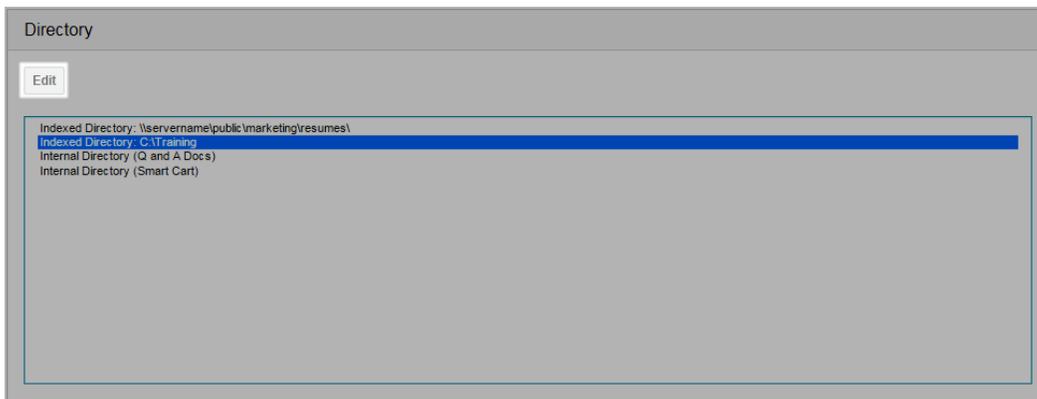
Directory Manager

Once a directory has been added to Indexed Directories, the next step is to grant viewing rights to the appropriate group(s) or user(s). This critical step is required. To grant viewing rights, follow the steps below.

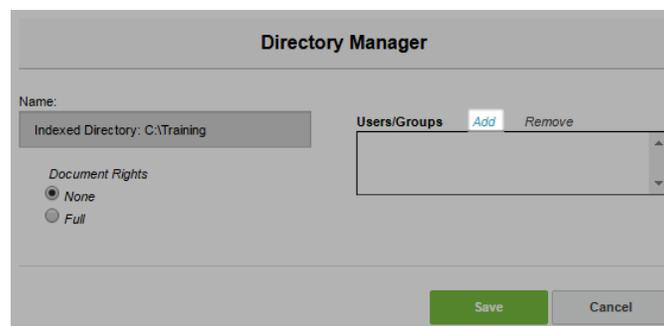
1. Go to the [Security](#) tab and select [Users/ Groups/ Directories](#).



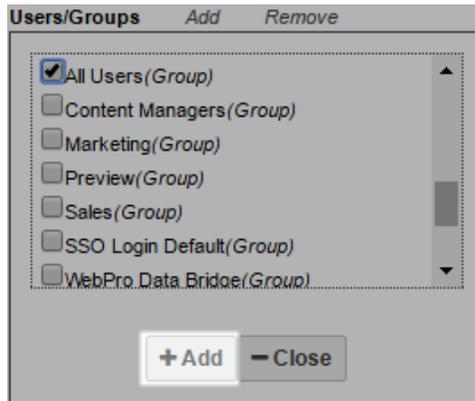
2. To edit document rights for a directory, select it from the [Directory](#) window and click the [Edit](#) icon.



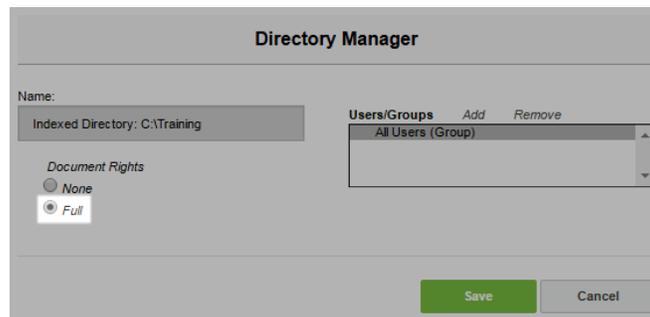
3. Click the [Add](#) button.



4. Select the All Users group to make the files available for search by all users and click [Add](#). Alternatively, select each group and/or user individually.



5. Select all the user and/or group names (use CTRL to select multiple at once) and confirming the user and/or group names are highlighted in blue before choosing the [Full](#) option under [Document Rights](#).



6. Click [Save](#).
7. Repeat steps one through six above for all external directories.

TIPS

- Whenever possible, assign document rights using groups. This way, when you add new users and place them in the group, the user will automatically have access to the documents.

Attribute Group Manager

Attribute groups are used as templates to pre-populate attributes when adding new [Search](#) records to PMAPS. Attribute groups are not linked to the records added using them as a template.

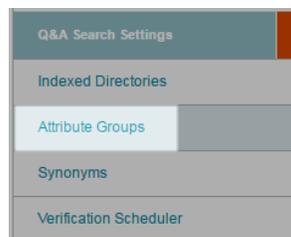
Administrators can add, edit and delete attribute groups.

Add New Attribute Group

1. Go to the [Administration](#) page.



2. Under [Q&A Search Settings](#), click [Attribute Groups](#).



3. Click [Add New Attribute Group](#).



4. Add a **Group Name** and complete the attributes that should be pre-populated when selected in the **Template to Load** picklist.

5. Add a **Group Name** for the attribute group template that describes the set of attributes applied when used.

6. Click **Save**.

TIPS

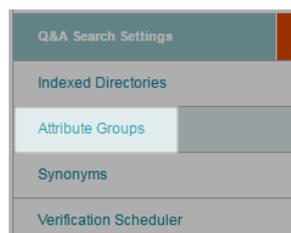
- When creating attribute groups, enter field values that will not need to be updated frequently in the future. This will minimize the amount of time you will need to dedicate to maintaining attribute groups.
- Remember to check the **Q & A** checkbox if records are normally formatted as question-and-answer pairs.

Edit Existing Attribute Group

1. Go to the **Administration** page.



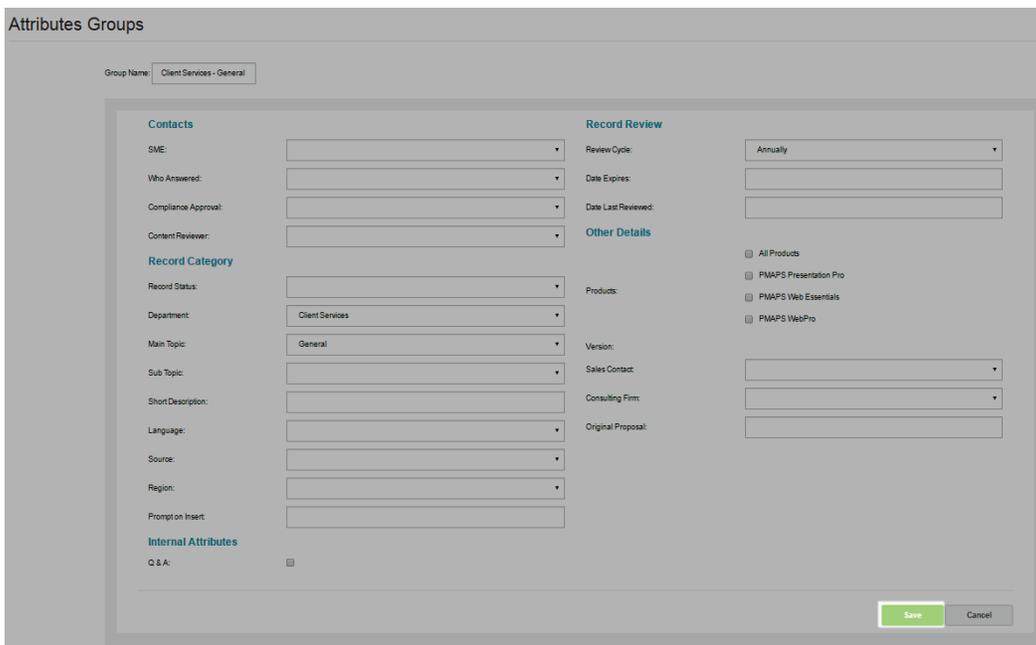
2. Under **Q&A Search Settings**, click **Attribute Groups**.



- Click [Edit](#) on the line of attribute group you would like to modify.



- Make appropriate changes to the attributes and then click [Save](#).



TIPS

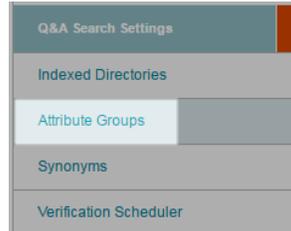
- Changing attribute group templates will not modify the attributes of existing records. To update attributes for multiple records, use the [Global Attribute Changes](#) tool.

Delete Existing Attribute Group

- Go to the [Administration](#) page.



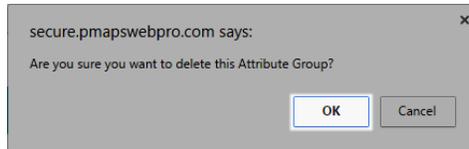
- Under [Q&A Search Settings](#), click [Attribute Groups](#).



- Click [Delete](#) on the line of attribute group you would like to remove.



- Click [OK](#) to confirm deletion.



Synonyms

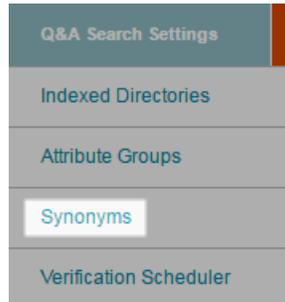
Synonyms can help users find more information when searching for text in the Search database. Synonyms can be single words or phrases and are not case sensitive. Use of synonyms in searching is optional by user. Administrators can add, edit and delete synonyms.

Add a New Synonym

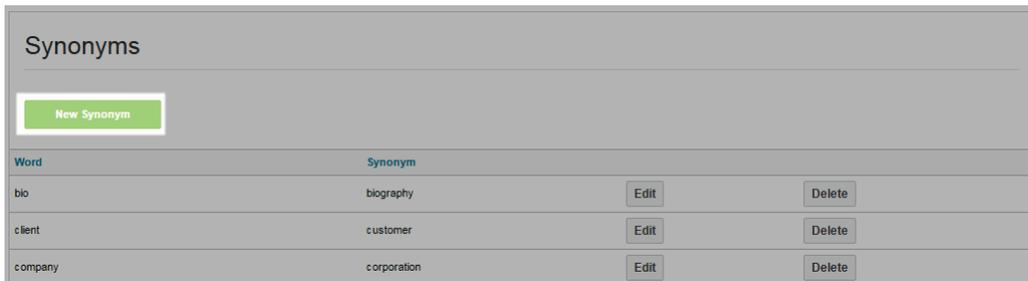
- Go to the [Administration](#) page.



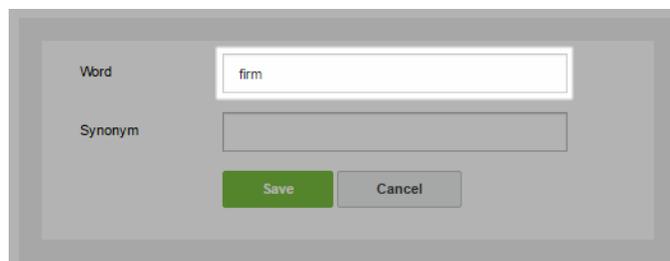
- Click on **Synonyms**.



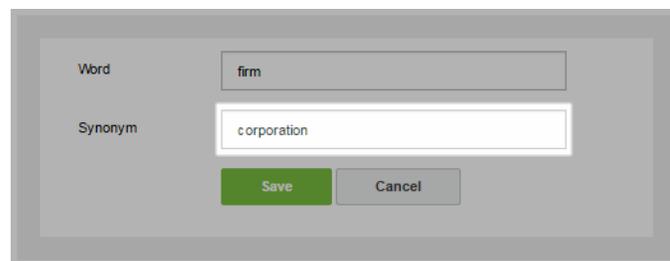
- Click **New Synonym**.



- In the **Word** field, enter the word or phrase for which you would like to add a search synonym.



- In the **Synonym** field, enter the synonym for the **Word**.



6. Click [Save](#).

A screenshot of a web form. It has two input fields: 'Word' with the text 'firm' and 'Synonym' with the text 'corporation'. Below the fields are two buttons: a green 'Save' button and a grey 'Cancel' button.

TIPS

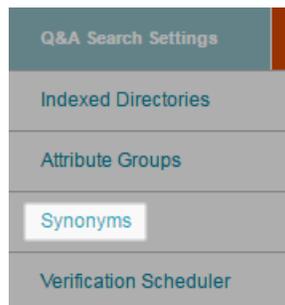
- Entries are reciprocal. If the user enters either the word or the synonym in the search criteria and checks the option to include synonyms, all matching results are included.

Edit an Existing Synonym

1. Go to the [Administration](#) page.



2. Click on [Synonyms](#).



- Click **Edit** on the line of synonym you would like to modify.

Synonyms			
New Synonym			
Word	Synonym	Edit	Delete
bio	biography	Edit	Delete
client	customer	Edit	Delete
company	corporation	Edit	Delete
company	firm	Edit	Delete
company	organization	Edit	Delete
customer	client	Edit	Delete

- Make the changes and click **Save**.

Word:

Synonym:

[Save](#) [Cancel](#)

Delete Existing Synonym

- Click **Delete** on the line of synonym you would like to remove. The synonym is immediately removed.

Synonyms			
New Synonym			
Word	Synonym	Edit	Delete
bio	biography	Edit	Delete
client	customer	Edit	Delete
company	corporation	Edit	Delete
company	firm	Edit	Delete
company	organization	Edit	Delete
customer	client	Edit	Delete

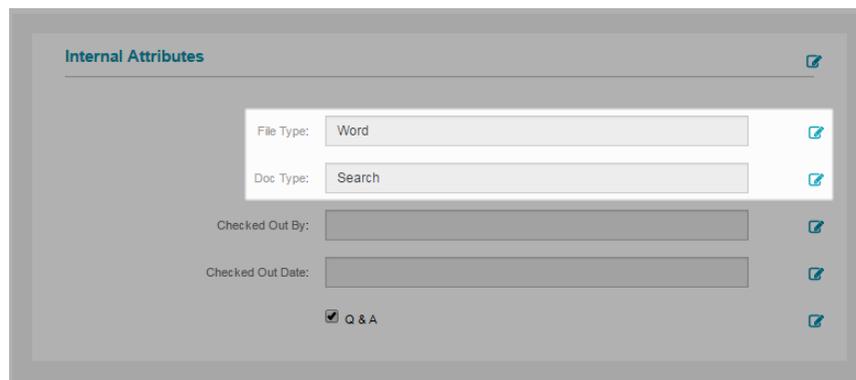
Verification Scheduler

The [Verification Scheduler](#) can be used to automate disbursement of your search records for updating through Compliance Central. By default, this feature is disabled. To request activation, please contact your account manager.

The Verification Scheduler is not available for Web Essentials clients.

Establish Saved Search

The first step in using the scheduler is to establish a [Saved Search](#). This is mandatory for all schedules. Only records in the [Doc Type](#) "Search" and [File Type](#) "Word" are permitted in compliance central, and therefore, when using the scheduler.



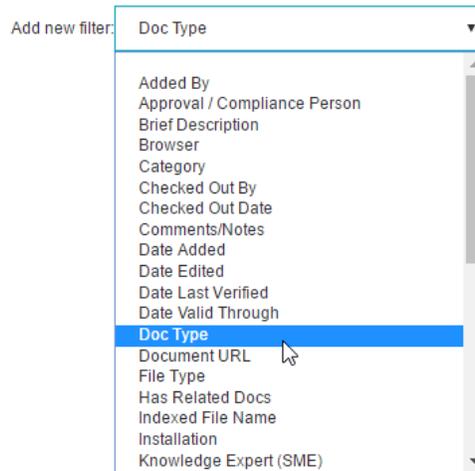
1. Go to the [Search](#) page.



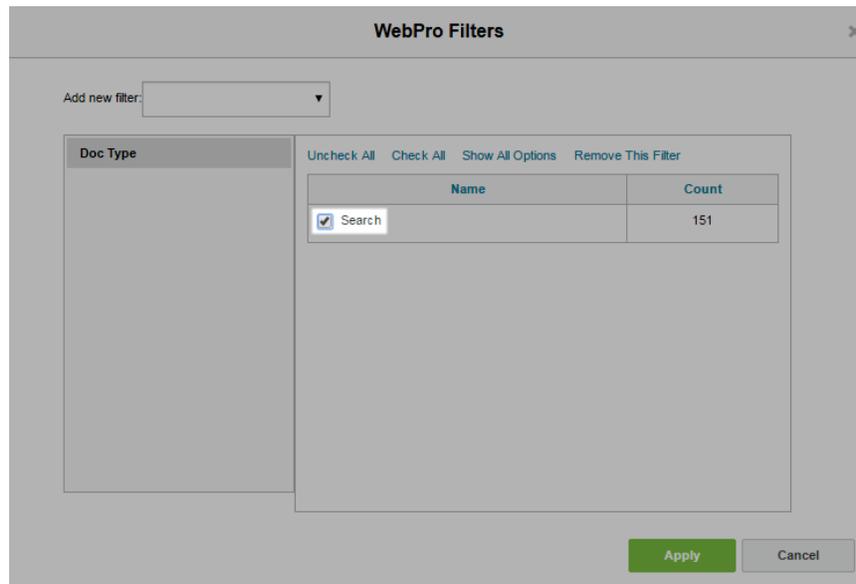
2. Click on [Modify Filters](#) button.



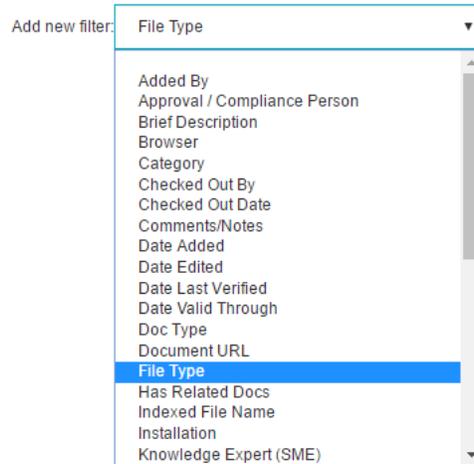
- Under **Add new filter**, select **Doc Type**.



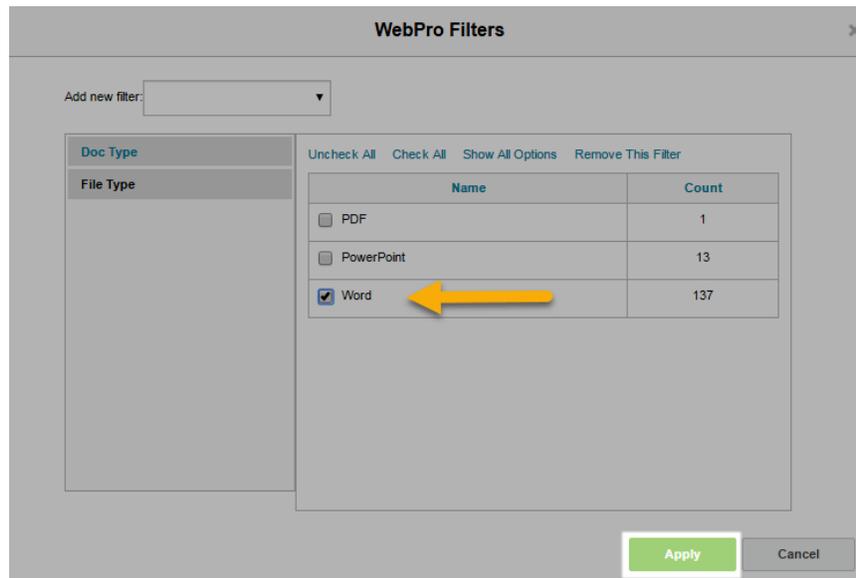
- Check the box next to **Search**.



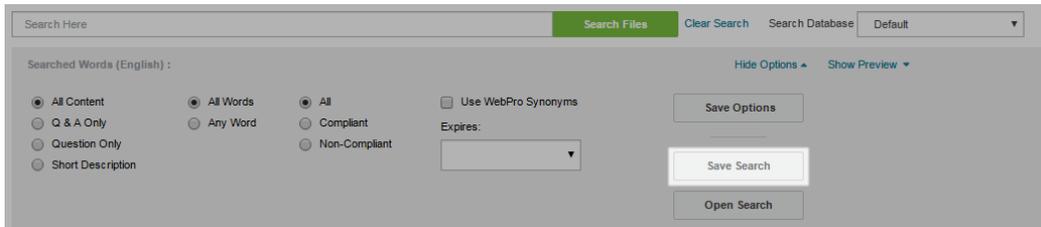
- Under **Add new filter**, select the **File Type** field.



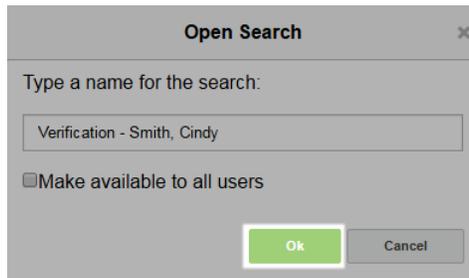
- Check the box next to **Word**, and then click **Apply**.



- Apply all additional desired search text criteria and/or filters, and then click the [Save Search](#) button. Please note that you may need to click [Show Options](#) if the search options are not already displayed.



- Name the saved search with an appropriate name and click [OK](#).

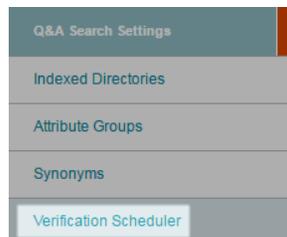


Create Schedule

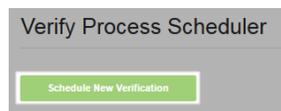
- Go to the [Administration](#) page.



- From [Q&A Search Settings](#), select [Verification Scheduler](#).



- Click [Schedule New Verification](#).



4. Enter an appropriate name for the schedule in the [Process Name](#) field.

The screenshot shows a form titled "Verify Process Schedule". It contains the following fields:

- Process Name:** A text input field containing "Smith Cindy Records".
- Search Criteria:** A dropdown menu with "Admin, User - Verification - Smith, Cindy" selected.
- Schedule:** A dropdown menu with "End of Each Month" selected.
- Next Scheduled Date:** An empty text input field.

 At the bottom of the form are two buttons: "Save" (green) and "Cancel" (grey).

5. Select your [Saved Search](#) from the [Search Criteria](#) picklist. Your user name will appear in front of the [Saved Search](#) name you created.

This screenshot is identical to the previous one, but the "Search Criteria" dropdown menu is highlighted with a blue border, indicating it is the focus of the instruction.

6. Select the desired frequency from the [Schedule](#) options.

This screenshot is identical to the previous ones, but the "Schedule" dropdown menu is highlighted with a blue border, indicating it is the focus of the instruction.

7. Click [Save](#). When the page refreshes the new schedule appears on the page.

Verify Process Scheduler														
Schedule New Verification														
Name	Schedule	Next Run	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Week 1	Week 2	Week 3	Week 4	Last Run
Smith Cindy Records	End of Each Month	5/31/2016												

Information/Reports

Status & Errors

The [Status and Errors](#) page shows a log of application activity and offers various viewing options including a search text bar, date range and basic filtering options. The administrator can also [Clear All Errors](#) and [Refresh](#) the report. The report may also be exported.



Status & Errors Report					
Date	Type	Error	Who	Computer	Application
1/17/2017 12:45:00 PM	Information	WebPro license validated successfully	adminuser	WEB-2	WebPro
1/17/2017 12:30:36 PM	Information	WebPro license validated successfully	adminuser	WEB-1	WebPro
1/17/2017 12:07:25 PM	Error	Exception in the Winforms Main UI thread. Date of Error: 1/17/2017 9:07:59 AM WebPro URL: https://s		LENOVO-PC	Office Automation Error Reporting
1/17/2017 11:20:16 AM	Information	WebPro license validated successfully	adminuser	WEB-2	WebPro
1/17/2017 3:58:57 AM	Information	WebPro license validated successfully	adminuser	WEB-1	WebPro
1/17/2017 3:11:05 AM	Information	WebPro license validated successfully	adminuser	WEB-2	WebPro

TIPS

- If the Status and Errors screen takes a long time to load, it may be time to [Clear All Errors](#) which deletes old data from the log.

Server Reporting

In [Server Reporting](#) you will find several reports that are generated automatically by PMAPS as a result of simply performing various functions in PMAPS.



Compliance Requests

The [Compliance Requests](#) menu displays a history of all requests made through [Compliance Central](#). The screen displays the date, user, and the document name.

Compliance Requests [Refresh] [Refresh]

Search: Start Date: End Date:

<< >>

Date	DocumentIndex	Who	Email	Recipient	Due	Auto	Status	Summary
1/16/2017 8:06:00 PM	5111	adminuser	colleen.charland@pmapsemail.com	cindy.smith@proposalsoftware.com		<input checked="" type="checkbox"/>	inbox	Q Here is the new question./Video provides a powe
1/15/2017 8:11:46 PM	1787	adminuser	colleen.charland@pmapsemail.com		1/20/2017 12:00:00 AM	<input type="checkbox"/>	complete	Hosted Security & Policy Links PLEASE DO NOT SEND
1/15/2017 8:11:46 PM	3099	adminuser	colleen.charland@pmapsemail.com		1/20/2017 12:00:00 AM	<input type="checkbox"/>	complete	Templates Pre-Defined RFP Templates Standard RFP T
1/15/2017 8:11:46 PM	4861	adminuser	colleen.charland@pmapsemail.com		1/20/2017 12:00:00 AM	<input type="checkbox"/>	complete	Do you have Cloud topology, architecture, connecti

Q&A Searches

To view a report of all searches performed by all users in the application:

1. Select the [Q&A Searches](#) menu. The screen displays the Date (and time), Search Term, User name, number of Seconds to complete the search, and the Search Term entered by the user.
2. Clicking [Refresh](#) updates the screen with the most recent searches.
3. Clicking the << or >> buttons allow you to page through the report.

Q&A Searches [Refresh] [Refresh]

Search: Start Date: End Date:

<< >>

Hide Empty Searches

Date	Search Term	# Found	Seconds	Who	Filters
1/17/2017 12:02:29 AM	release	5	0.02	adminuser2	
1/17/2017 12:02:19 AM	test	12	0	adminuser2	
1/17/2017 12:02:17 AM	firmtest	0	0.05	adminuser2	
1/17/2017 12:02:13 AM	firm	6	0.08	adminuser2	
1/17/2017 12:02:08 AM	company	32	0.02	adminuser2	
1/17/2017 12:02:01 AM	turnkey	1	0.11	adminuser2	

TIPS

- New in Version 10, the Q&A Search report also contains the number of records found and filter(s) applied to each search (if any).

Q&A Attributes

This tab reports all changes made to any search record attributes.

Q&A Attributes (Revisions)

Search: Start Date: End Date: Search

<< >>

Date	Who	Email	DocumentIndex	Field	OriginalValue
1/16/2017 7:55:24 PM	adminuser	colleen.charland@pmapsemail.com	5114	Date Expires	
1/16/2017 7:55:24 PM	adminuser	colleen.charland@pmapsemail.com	5114	Q & A	
1/16/2017 7:55:23 PM	adminuser	colleen.charland@pmapsemail.com	5114	Department	
1/16/2017 7:55:23 PM	adminuser	colleen.charland@pmapsemail.com	5114	Review Cycle	
1/16/2017 7:55:23 PM	adminuser	colleen.charland@pmapsemail.com	5114	Language	

Q&A Insertions

To view a report of all Q&As that have been inserted, click the [Q&A Insertions](#) tab. When users are working in the cloud, the proposal name will automatically be tracked in addition to the date, document ID, method of insertion, and user who inserted the record.

Q&A Insertions

Search: Start Date: End Date: Search

<< >>

Date	Proposal	DocumentIndex	ReLink	Method	Who	Email
1/17/2017 12:01:54 AM		4830	<input type="checkbox"/>	Found Button	adminuser2	sysadmin@proposalsoftware.com
1/17/2017 12:01:50 AM		4833	<input type="checkbox"/>	Found Button	adminuser2	sysadmin@proposalsoftware.com
1/17/2017 12:01:43 AM		5111	<input type="checkbox"/>	Found Button	adminuser2	sysadmin@proposalsoftware.com
1/17/2017 12:01:26 AM		5057	<input type="checkbox"/>	Full document from web page	adminuser2	sysadmin@proposalsoftware.com
1/17/2017 12:01:08 AM		5114	<input type="checkbox"/>	Full document from web page	adminuser2	sysadmin@proposalsoftware.com
1/15/2017 6:44:23 PM	Proposal for Marketing Services	4851	<input type="checkbox"/>	Sales Doc generated from web	adminuser	colleen.charland@pmapsemail.com
1/15/2017 6:44:22 PM	Proposal for Marketing Services	4862	<input type="checkbox"/>	Sales Doc generated from web	adminuser	colleen.charland@pmapsemail.com

Tracking Fields

This tab reports all changes made to dashboard record attributes.

Date	Who	Email	Proposal	Field	OriginalValue
1/16/2017 8:45:10 PM	adminuser	colleen.charland@pmapsemail.com	Proposal for Marketing Services	Lead Writer	User, Writer
1/16/2017 8:45:10 PM	adminuser	colleen.charland@pmapsemail.com	Proposal for Marketing Services	Product(s)	PMAPS Web Essentials, PMAPS WebPro
1/12/2017 2:59:56 PM	adminuser	colleen.charland@pmapsemail.com	Acme RFP Response	Installation	On demand
1/12/2017 2:59:56 PM	adminuser	colleen.charland@pmapsemail.com	PMAPS Proposal Questionnaire	Installation	On demand

Login Report (All)

This tab reports every single log in by per user with a date and time stamp.

Date	User
1/17/2017 12:24:44 AM	adminuser
1/17/2017 12:16:40 AM	salesuser
1/17/2017 12:16:18 AM	adminuser2
1/17/2017 12:16:02 AM	previewuser
1/17/2017 12:04:49 AM	adminuser

Login Report (Daily)

This tab reports every unique log in per user with a date stamp.

Date	User
1/17/2017	adminuser
1/17/2017	adminuser2
1/17/2017	previewuser
1/17/2017	salesuser

User Report

This tab reports every user in the system by role (group).

The screenshot shows the 'User Report' interface. At the top, there is a search bar with the text 'Search'. Below the search bar is a table with two columns: 'User' and 'Role'. The table contains the following data:

User	Role
administrator	All Users
administrator	WebPro User Admins
administrator	WebPro P2P
administrator	Administrator
adminuser	All Users
adminuser	WebPro User Admins
adminuser	WebPro P2P
adminuser	Administrator
adminuser2	All Users
adminuser2	WebPro User Admins
adminuser2	Administrator
cindy.smith@proposalsoftware.com	All Users
cindy.smith@proposalsoftware.com	WebPro User Admins

Active Users

This tab reports, by user, login and logout dates and times to the web application; the last Viewer launch date and time; and the last activity date and time.

The screenshot shows the 'Active Users' interface. At the top, there are search filters for 'Start Date' and 'End Date', followed by a 'Search' button. Below the filters is a table with the following columns: 'Type', 'User', 'Launched', 'Last Activity', and 'Auto Logout'. The table contains the following data:

Type	User	Launched	Last Activity	Auto Logout
Web	adminuser	1/17/2017 12:24:44 AM	1/17/2017 12:26:58 AM	1/17/2017 8:24:44 AM
Viewer	adminuser2	1/17/2017 12:01:00 AM	1/17/2017 12:01:26 AM	

Other Settings

Word Replacements

This utility allows you to manage an unlimited number of text word codes that can be automatically found and replaced when using specific PMAPS functions:

- [Insert Full](#) or [Insert Selected Text](#)
 - ▶ Codes in records that are inserted using this feature are automatically replaced

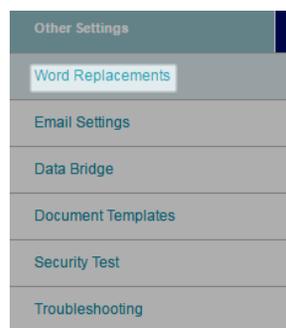
- ▶ Microsoft Word only (in Excel and PowerPoint the Run Word Replacements must be run)
- ▶ Run Word Replacement can be run at any time in Word, Excel and PowerPoint
- Relink Document
 - ▶ Codes in records that are re-inserted using this feature are automatically replaced
 - ▶ Run Word Replacement can be run at any time in Word, Excel and PowerPoint
- Assembly Center
 - ▶ Codes in any documents combined using assembly center are automatically replaced
- Sales Docs
 - ▶ Codes in any documents created using sales docs forms are automatically replaced

Add Code

1. Go to the [Administration](#) page.



2. Under [Other Settings](#), click [Word Replacements](#).



3. Click [Add New](#).

Word Replacements			
Add New			
Keyword	Replacement		
<<ClientName>>	Proposal Tracking Field: Client Name	Edit	Delete
<<#upgrades>>	21	Edit	Delete
<<SalesRepTitle>>	Proposal Tracking Field: Sales Rep Title	Edit	Delete
<<SalesRep>>	Proposal Tracking Field: Sales Rep	Edit	Delete
<<productline>>	three	Edit	Delete

4. Enter the [Replacement Keyword](#) surrounded by two greater than and less than symbols (<< >>) or other unique surrounding characters. The [Replacement Keyword](#) is not case sensitive.

Add A New Word Replacement

Replacement Keyword:

Use Exact Text
 Use Mapped Field

Replacement Text:

5. Select **Use Exact Text** or **Use Mapped Field**:

- a. The **Use Exact Text** option replaces the **Replacement Keyword** with the exact value from the **Replacement Text** field. The **Replacement Text** field is case sensitive—it will be replaced exactly as entered here.

The screenshot shows a dialog box titled "Add A New Word Replacement". It contains two text input fields. The first field, labeled "Replacement Keyword:", contains the text "<<#offices>>". Below this field are two radio buttons: "Use Exact Text" (which is selected) and "Use Mapped Field". The second field, labeled "Replacement Text:", contains the number "35". At the bottom of the dialog are two buttons: "OK" and "Cancel".

- b. The **Use Mapped Field** option replaces the **Replacement Keyword** with the value populated in attribute field for the selected proposal in the **Dashboard**.

The screenshot shows a dialog box titled "Add A New Word Replacement". It contains a text input field labeled "Replacement Keyword:" with the text "<<zip>>". Below this field are two radio buttons: "Use Exact Text" and "Use Mapped Field" (which is selected). There are two dropdown menus below the radio buttons. The first is labeled "Q&A or Proposal:" and has "Proposal" selected. The second is labeled "Field:" and has "Zip" selected. At the bottom of the dialog are two buttons: "OK" and "Cancel".

- Click **OK**.

Add A New Word Replacement

Replacement Keyword: <<zip>>

Use Exact Text Use Mapped Field

Q&A or Proposal: Proposal

Field: Zip

OK Cancel

Edit Code

- Click **Edit** icon on the line of the code you would like to modify.

Word Replacements

[Add New](#)

Keyword	Replacement		
<<ClientName>>	Proposal Tracking Field: Client Name	Edit	Delete
<<#upgrades>>	21	Edit	Delete
<<SalesRepTitle>>	Proposal Tracking Field: Sales Rep Title	Edit	Delete
<<SalesRep>>	Proposal Tracking Field: Sales Rep	Edit	Delete
<<productline>>	three	Edit	Delete

- Make changes and click **OK**.

Add A New Word Replacement

Replacement Keyword: <<#upgrades>>

Use Exact Text Use Mapped Field

Replacement Text: 22

OK Cancel

Delete Code

1. Click [Delete](#) on the line of the code you would like to remove. The code is immediately removed.

Word Replacements		
Add New		
Keyword	Replacement	
<<ClientName>>	Proposal Tracking Field: Client Name	Edit Delete
<<#upgrades>>	21	Edit Delete
<<SalesRepTitle>>	Proposal Tracking Field: Sales Rep Title	Edit Delete
<<SalesRep>>	Proposal Tracking Field: Sales Rep	Edit Delete
<<productline>>	three	Edit Delete

Email Settings

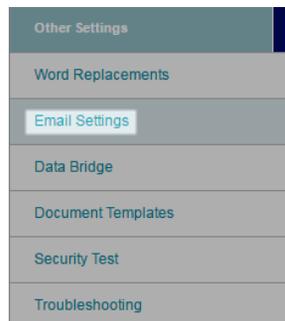
This page provides administrators with the ability customize outgoing PMAPS email messages:

- [Request Compliance Email](#) – outgoing message for new compliance central requests
- [Document Returned to Inbox](#) – outgoing message for returned compliance central requests
- [Configure Assembly Email](#) – outgoing message for assembly center assignments
- [Configure Sales Doc Email](#) – outgoing message for completed sales doc

1. Go to the [Administration](#) page.



2. From [Other Settings](#), click [Email Settings](#).



3. Click on the tab for the email template you would like to modify.

Request Compliance Email | Document Returned To Inbox | Configure Assembly Email | Configure Sales Doc Email

Subject:

PMAPS Proposal Content Request: Due Date: <<DUEDATE>>

Body:

Thank you for your participation as subject matter expert for proposal content. As a reminder, we are requesting your review of the attached database responses as outlined below:

- Do not turn off track changes.

- Make content revisions in between the Start and End flags.

- Only add internal notes/comments in the table cell under the SME Comments and Confirmation column.

- If there are no content revisions, enter your initials in the cell under the SME Approval column.

- Return the document only once all responses have been reviewed. Partial updates cannot be accepted.

We need your response by <<DUEDATE>>. Simply reply to this email and attach your document.

Again, thank you for your continued participation and support!

Requested By: <<REQUESTOR>>, <i>Proposal Team</i>

Requestor's Email: <<REQUESTOREMAIL>>

<<REQUESTOR>>: Requestor's Name
 <<REQUESTOREMAIL>>: Requestor's Email
 <<DUEDATE>>: Due Date

Preview | Save | Cancel

4. Customize the text in the subject and body. At any time during the update process, click the [Preview](#) icon to review the look of the changes.

Request Compliance Email Document Returned To Inbox Configure Assembly Email Configure Sales Doc Email

Subject:

PMAPS Proposal Content Request: Due Date: <<DUEDATE>>

Body:

Thank you for your participation as subject matter expert for proposal content. As a reminder, we are requesting your review of the attached database responses as outlined below:

- Do not turn off track changes.

- Make content revisions in between the Start and End flags.

- Only add internal notes/comments in the table cell under the SME Comments and Confirmation column.

- If there are no content revisions, enter your initials in the cell under the SME Approval column.

- Return the document only once all responses have been reviewed. Partial updates cannot be accepted.

We need your response by <<DUEDATE>>. Simply reply to this email and attach your document.

Again, thank you for your continued participation and support!

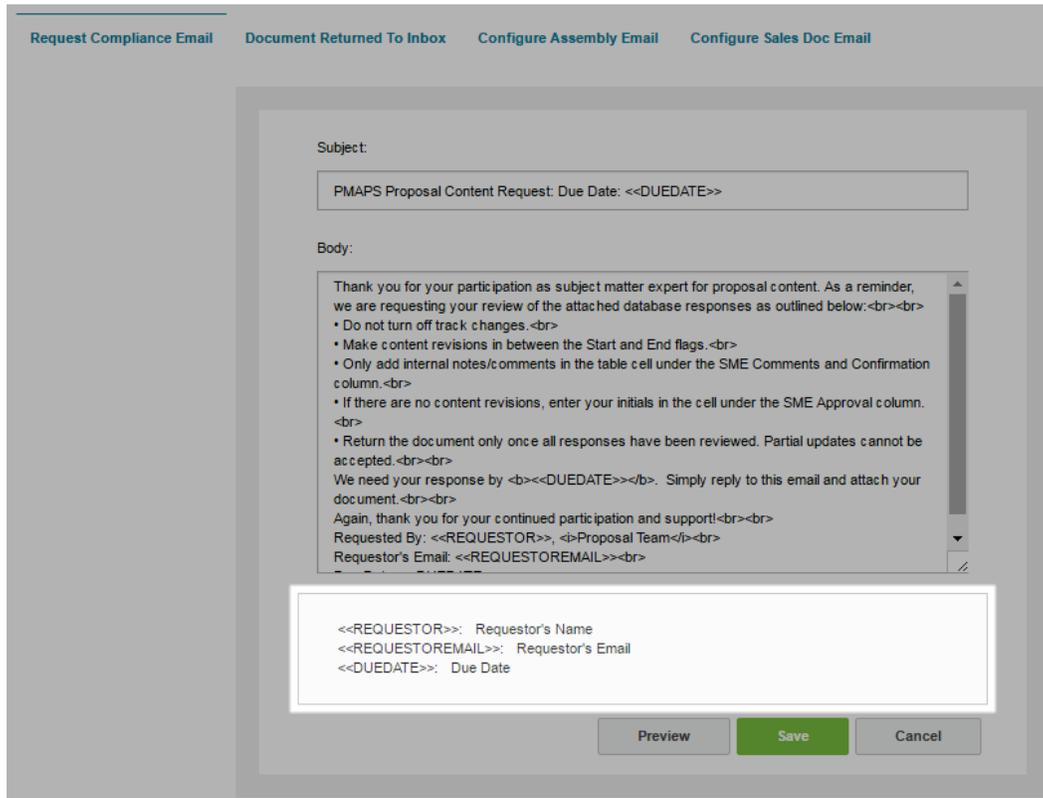
Requested By: <<REQUESTOR>>, </i>Proposal Team</i>

Requestor's Email: <<REQUESTOREMAIL>>

<<REQUESTOR>>: Requestor's Name
 <<REQUESTOREMAIL>>: Requestor's Email
 <<DUEDATE>>: Due Date

Preview Save Cancel

- Use the available codes to personalize each outgoing message. Codes are replaced based on the user processing the compliance central request.



- Use HTML codes to add line breaks and emphasis. Here are some helpful codes:

HTML Code	Action
 	Adds a line break after the text
	Begins bold text (must use the code for ends bold text where bold should end)
	Ends bold text
<i>	Begins italicized text (must use the code for ends italic text where italics should end)
</i>	Ends italicized text

Data Bridge

The PMAPS WebPro Data Bridge is an optional module used to import and/or export data between external applications and the PMAPS dashboard.

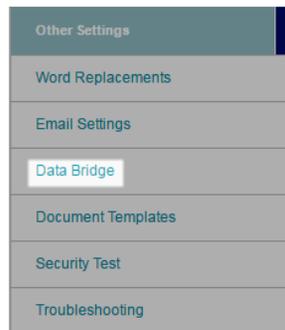
The first step in configuring the Data Bridge is to install and configure the Data Bridge external application. The Data Bridge must be configured on the PMAPS administrator's computer and the application must [Run as administrator](#).

Configure Data Bridge Basic Settings

1. Go to the [Administration](#) page.



2. From the [Other Settings](#) tab, click on [Data Bridge](#).



3. In the **Import File Name** field, enter the full path for where the import file resides, including the file name and extension (must be a .csv file).

Save Data Bridge Settings

▼ **Data Bridge Basic Settings**

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

- In the **Import Interval** field, enter the frequency for how often data bridge should import proposal data when the application is running.

Save Data Bridge Settings

▼ **Data Bridge Basic Settings**

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

- In the **Default Proposal Document** field, enter the full path for where the document template file resides, including the file name and extension.

Save Data Bridge Settings

▼ **Data Bridge Basic Settings**

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

- In the **Export File Name** field, enter the full path for where the export file resides, including the file name and extension (must be a .csv file).

Save Data Bridge Settings

▼ Data Bridge Basic Settings

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

- In the **Export Interval** field, enter the frequency for how often data bridge should export proposal data when the application is running.

Save Data Bridge Settings

▼ Data Bridge Basic Settings

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

- In the **Export RFP Directory** field, enter the full path for where to save the exported proposals proposal documents.

Save Data Bridge Settings

▼ Data Bridge Basic Settings

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

- In the **Alert Email Addresses** field, enter the email address for individuals to receive notification when data bridge records imports/exports are complete. Separate each email address with a semi-colon.

Save Data Bridge Settings

▼ **Data Bridge Basic Settings**

Import File Name: (csv file: do not used mapped drives)

Import Interval: (minutes, set to zero for no import)

Default Proposal Document: (file with full path)

Export File Name: (csv file: do not used mapped drives)

Export Interval: (minutes, set to zero for no export)

Export RFP Directory: (do not used mapped drives)

Alert Email Addresses: (separate by semicolon)

10. Click [Save Data Bridge Settings](#).

Save Data Bridge Settings

▼
Data Bridge Basic Settings

Import File Name: (csv file: do not use mapped drives)

C:\PMAPS\databridge\import.csv

Import Interval: (minutes, set to zero for no import)

30

Default Proposal Document: (file with full path)

C:\PMAPS\databridge\template.docx

Export File Name: (csv file: do not use mapped drives)

C:\PMAPS\databridge\export.csv

Export Interval: (minutes, set to zero for no export)

1440

Export RFP Directory: (do not use mapped drives)

C:\PMAPS\databridge\exports\

Alert Email Addresses: (separate by semicolon)

illustrations@proposalsoftware.com

Configure Import File

The import file (designated in the [Import File Name](#) field) contains the data to be imported into the dashboard. The best way to configure import file is to generate a report out of the external application to comma separate value format (.csv). This file should contain only the data that will be imported. The import file:

- Must contain a column with the Proposal Name
- Must contain a column with the Prospect Name
- Must contain a column with the Consultant Name
- May not have any empty cells in the first column
- Must contain column headers in the first row
- Must contain contact names in "last, first" format (last comma space first)—other formats will add the name to the contact picklist instead of associating it to the existing name
- Data type in cells must match the format type of the mapped field
- Numeric fields must not contain any non-numeric characters (e.g., currency symbol, period, decimal)

Once the import file is configured, name the file exactly as designated in the [Import File Name](#) field, and then save it to the listed location.

The next step is to map the tracking fields to be imported.

Select Tracking Fields

The [Tracking Fields](#) section is where you designate the attribute fields you would like to import. If you plan to import and export data, note that each field may be used for either import or export, not both.

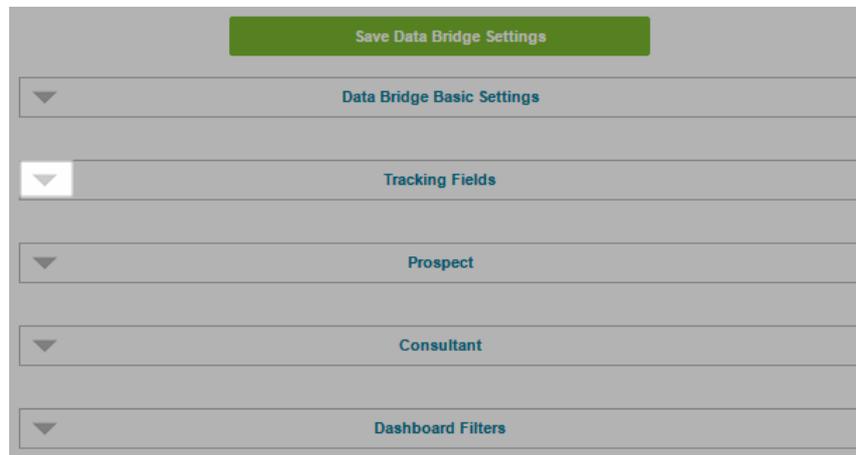
Tracking fields display in alphabetical order according to your field labels, with the exception of the proposal name field, which always appears at the top. If you would like to upload a specific document with an import record, add a column to the import file with the row header "UNC" and enter the full UNC directory path of the document in this cell (include the file name and extension). Do not use mapped drives. The import file may contain rows with a UNC path populated and where the UNC path is empty. For empty cells, the [Default Proposal Document](#) will be loaded with the import record.

With the import file open, map each column to be imported by clicking the button under the [Import](#) column and copying the column header into the [Export/Import Field Heading](#) field.

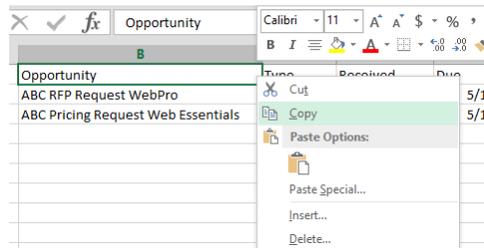
1. Go to the [Administration](#) page.



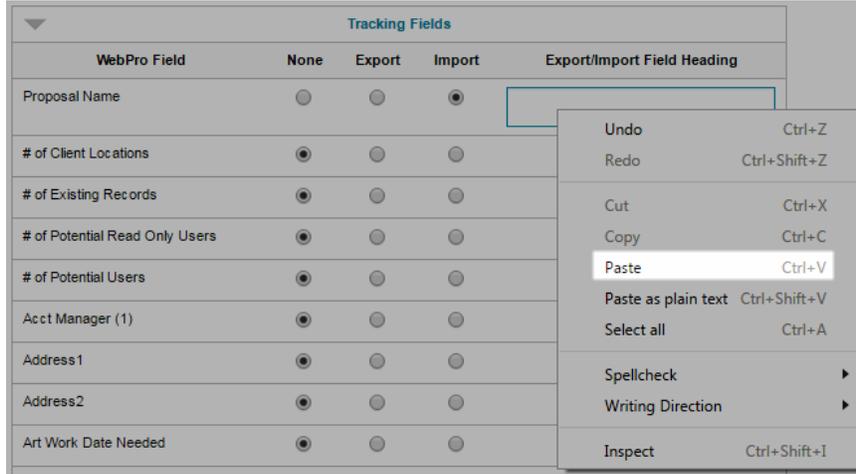
2. Expand the [Tracking Fields](#) section by clicking the plus sign.



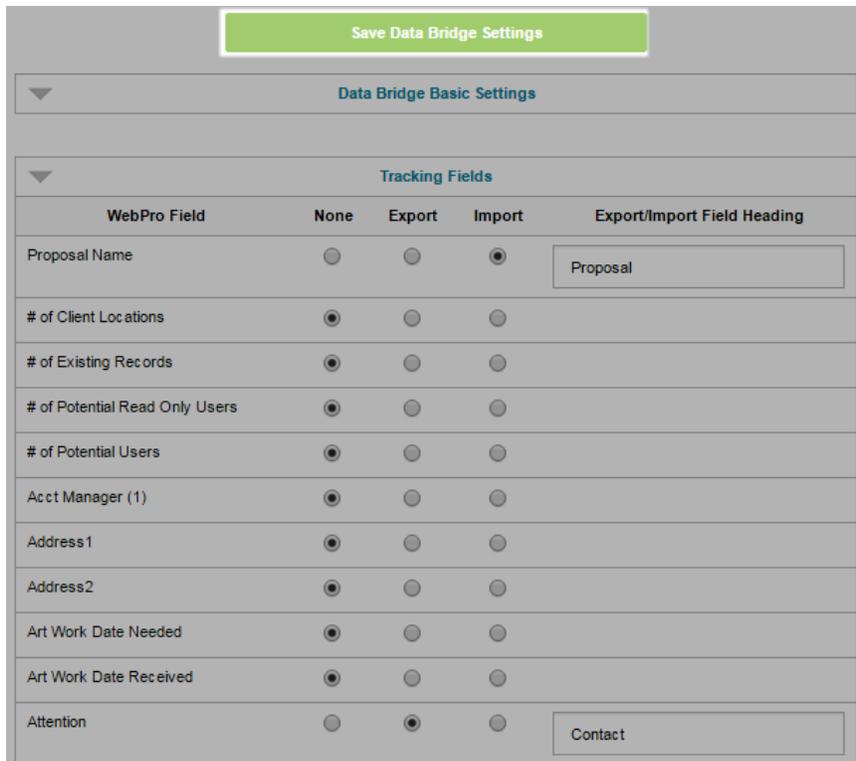
3. Go to the import file and click into the column row header for the opportunity or proposal name and copy to clipboard.



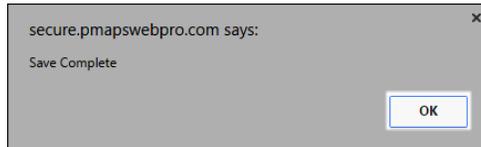
- Click the **Import** button for the first row (the **Proposal Name** field in the screen shot) and paste. If the value "null" is in the field, select it and overwrite by pasting.



- Repeat steps 3 and 4 for all columns in the import file (except for the prospect name column which you will complete next), and then click **Save Data Bridge Settings**.



- Wait for the prompt confirming the save is complete and click **OK**.

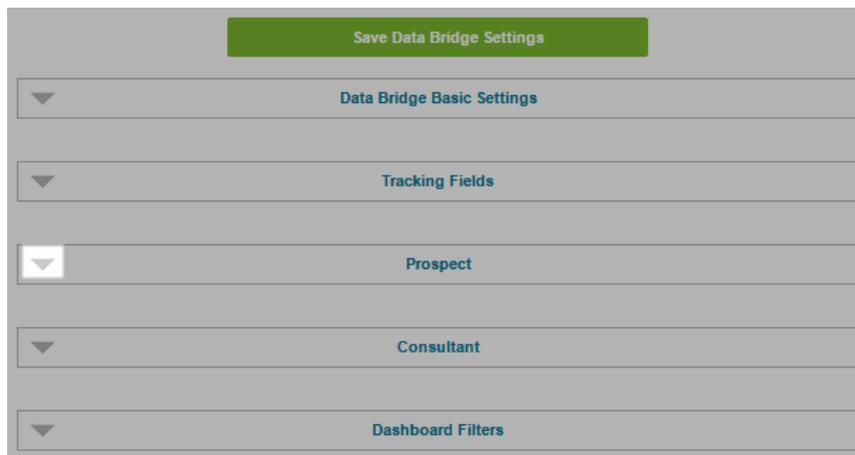


- If you have specified a document to import in the UNC column, verify the document is in the directory specified in the **Default Proposal Document** basic setting.

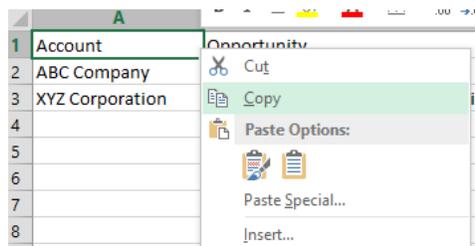
Select Prospect Fields

Once you have populated the **Tracking Fields**, the prospect name field must be selected for import.

- Expand the **Prospect** section by clicking the plus sign.



- Go to the import file and click into the row header for the prospect name and copy to clipboard.



- Click the **Import** button for the first row (the **Name (required for imports)** field in the screen shot) and paste. If the value "null" is in the field, select it and overwrite by pasting.

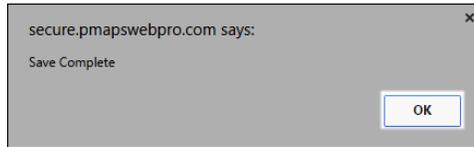
Prospect				
WebPro Field	None	Export	Import	Export/Import Field Heading
Name (required for imports)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Address 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
State	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Zip	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Industry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Contact	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Email	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

- Import address fields if appropriate (in import file), and then click **Save Data Bridge Settings**.

Prospect				
WebPro Field	None	Export	Import	Export/Import Field Heading
Name (required for imports)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Account
Address 1	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Address
Address 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	City
State	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	State
Zip	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Zip
Industry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Contact	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Email	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Symbol	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Unique ID	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Web Site	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Save Data Bridge Settings

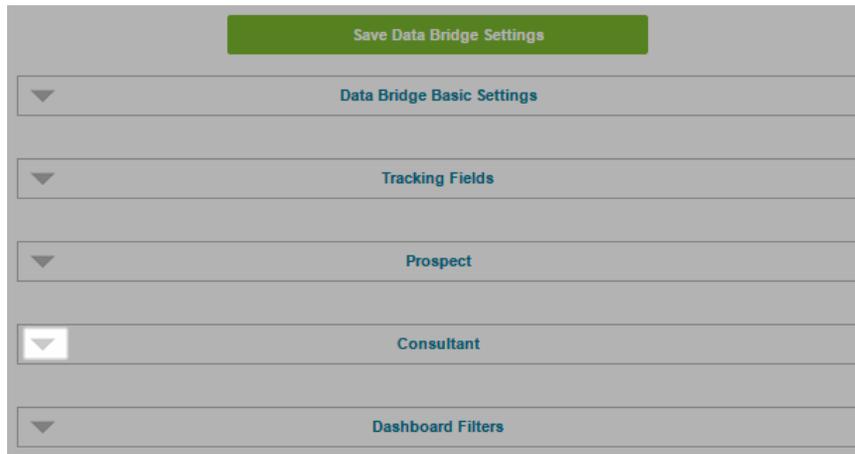
- Wait for the prompt confirming the save is complete and click **OK**.



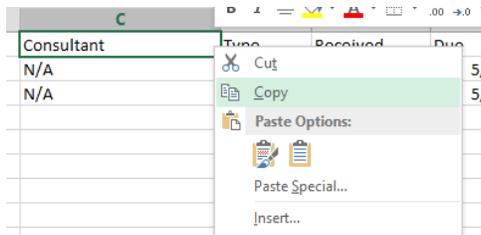
Select Consultant Fields

Once you have populated the **Prospect** fields, the consultant name field must be selected for import.

- Expand the **Consultant** section by clicking the plus sign.



- Go to the import file and click into the row header that contains the consultant name and copy to clipboard.



- Click the **Import** button for the first row (the **Name (required for imports)** field in the screen shot) and paste. If the value "null" is in the field, select it and overwrite by pasting.

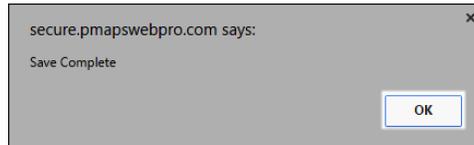
Consultant				
WebPro Field	None	Export	Import	Export/Import Field Heading
Name (required for imports)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Phone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Fax	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Web Site	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Unique ID	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
State	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

- Import address fields if appropriate (in import file), and then click **Save Data Bridge Settings**.

Consultant				
WebPro Field	None	Export	Import	Export/Import Field Heading
Name (required for imports)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Consultant
Phone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Fax	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Web Site	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Unique ID	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 1	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	CAddress
Address 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	CCity
State	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	CState
Zip	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	CZip

Save Data Bridge Settings

5. Wait for the prompt confirming the save is complete and click [OK](#).



Configure Export File and Folder

The export file (designated in the [Export File Name](#) field) is an empty comma separate value file to be used to export data from the dashboard. The best way to configure export file is to create a new Excel file and enter a column header in the first row with the desired export field. Once the export file is configured, save it as in comma separated value format and name the file exactly as designated in the [Export File Name](#) field and to the listed location. Next, ensure that the folder listed [Export RFP Directory](#) exists and is empty. The next step is to map the tracking fields to be exported.

Select Tracking Fields

The [Tracking Fields](#) section is where you designate the attribute fields you would like to export. If you plan to import and export data, note that each field may be used for either import or export, not both.

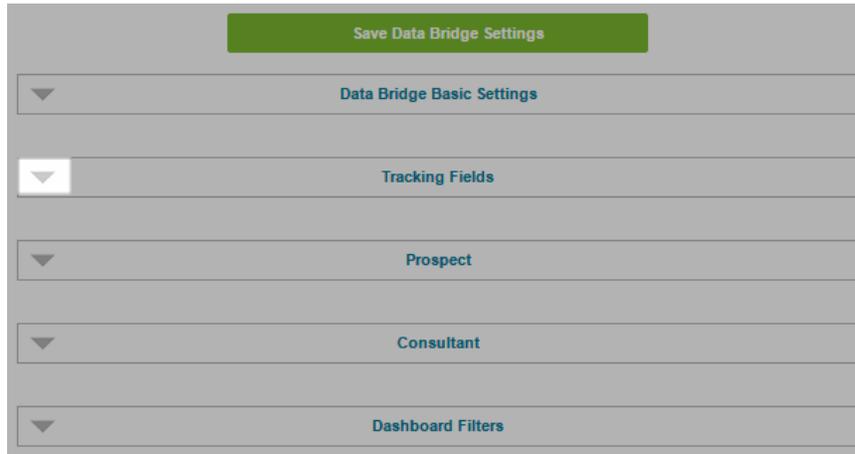
Tracking fields display in alphabetical order according to your field labels, with the exception of the proposal name field, which always appears at the top.

With the export file open, map each column to be exported by clicking the button under the [Export](#) column and copying the column header from the export file into the [Export/Import Field Heading](#) field.

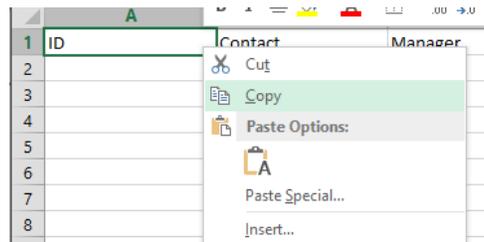
1. Go to the [Administration](#) page.



- Expand the **Tracking Fields** section by clicking the plus sign.



- Go to the export file and click into the first column row header and copy to clipboard.



- Click the **Export** button for the first field and paste. If the value "null" is in the field, select it and overwrite by pasting.

Save Data Bridge Settings

▼ Data Bridge Basic Settings

▼ Tracking Fields

WebPro Field	None	Export	Import	Export/Import Field Heading
Proposal Name	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Proposal
# of Client Locations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Existing Records	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Potential Read Only Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Potential Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Acct Manager (1)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Address1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Art Work Date Needed	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Art Work Date Received	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Attention	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Binders	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Broker	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CD	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

|

- Undo Ctrl+Z
- Redo Ctrl+Shift+Z
- Cut Ctrl+X
- Copy Ctrl+C
- Paste** Ctrl+V
- Paste as plain text Ctrl+Shift+V
- Select all Ctrl+A
- Spellcheck ▶
- Writing Direction ▶
- Inspect Ctrl+Shift+I

- Repeat steps 3 and 4 for all columns in the export file, and then click [Save Data Bridge Settings](#).

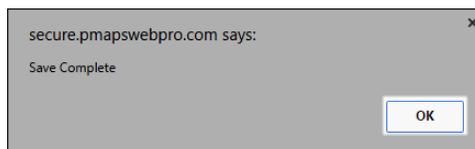
Save Data Bridge Settings

▼ **Data Bridge Basic Settings**

▼ **Tracking Fields**

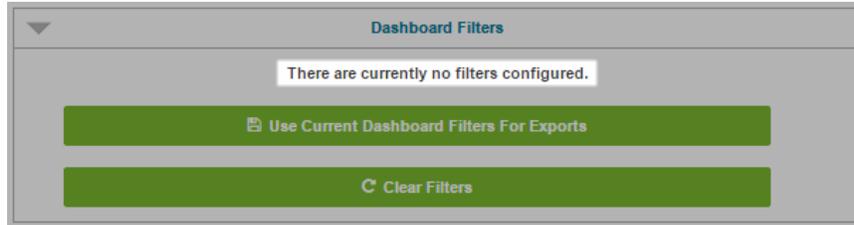
WebPro Field	None	Export	Import	Export/Import Field Heading
Proposal Name	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Proposal
# of Client Locations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Existing Records	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Potential Read Only Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Potential Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Acct Manager (1)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Art Work Date Needed	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Art Work Date Received	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Attention	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Contact

- Wait for the prompt confirming the save is complete and click [OK](#).

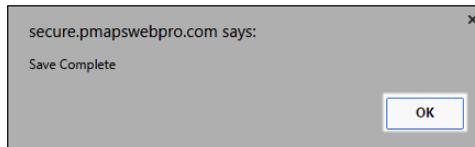
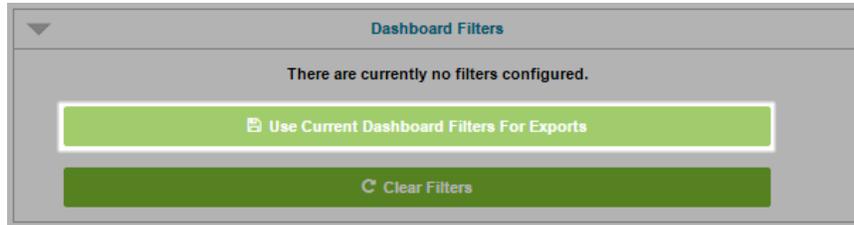


Dashboard Filters

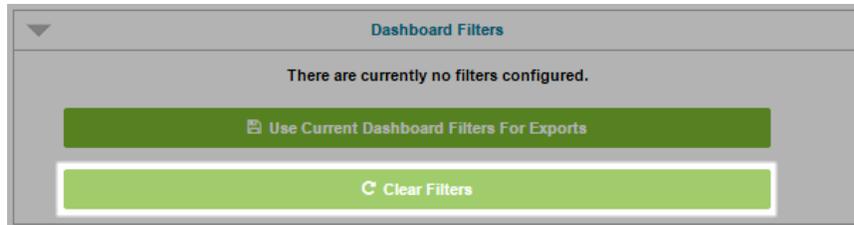
The [Dashboard Filters](#) option allows you to use existing dashboard filters when using the export function of the Data Bridge. The default is [There are currently no filters configured](#) If you leave this option, all proposal data and documents are exported.



To use existing dashboard filters, click [Use Current Dashboard Filters For Exports](#) and click OK when complete.



To remove dashboard filters in use, click [Clear Filters](#) and click [OK](#) when complete.

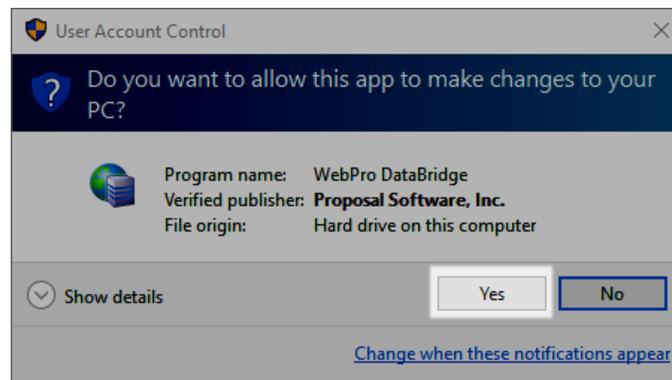


Start Data Bridge Application

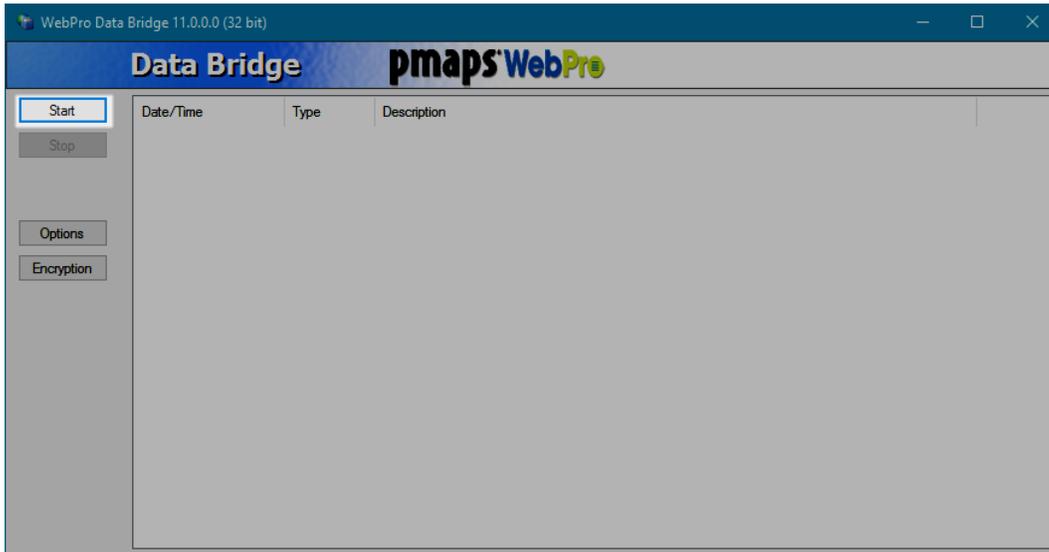
1. Open to the data bridge folder at c:\program files (x86)\proposal software\Data Bridge\.
2. Right click on the [DataBridge.exe](#) application file type, and choose [Run as administrator](#).

Logs	4/29/2016 12:48 PM	File folder	
ABCpdf.dll	4/29/2016 12:41 PM	Application extens...	4,844 KB
AxInterop.FoxitReaderSDKLib.dll	4/29/2016 12:41 PM	Application extens...	44 KB
DataBridge.exe	4/29/2016 12:42 PM	Application	179 KB
Interop.CDIntfEx.dll	4/29/2016 12:41 PM	Application extens...	56 KB
Interop.FoxitReaderSDKLib.dll	4/29/2016 12:41 PM	Application extens...	52 KB
PMAPS.OfficeAutomation.dll	4/29/2016 12:41 PM	Application extens...	709 KB

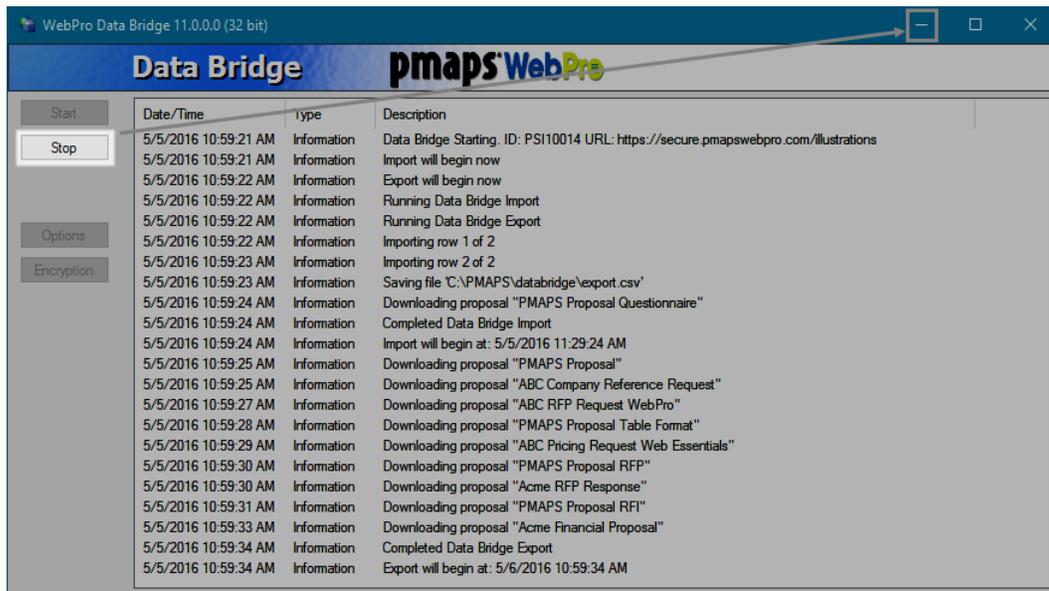
3. If prompted to allow changes to the application, click [Yes](#).



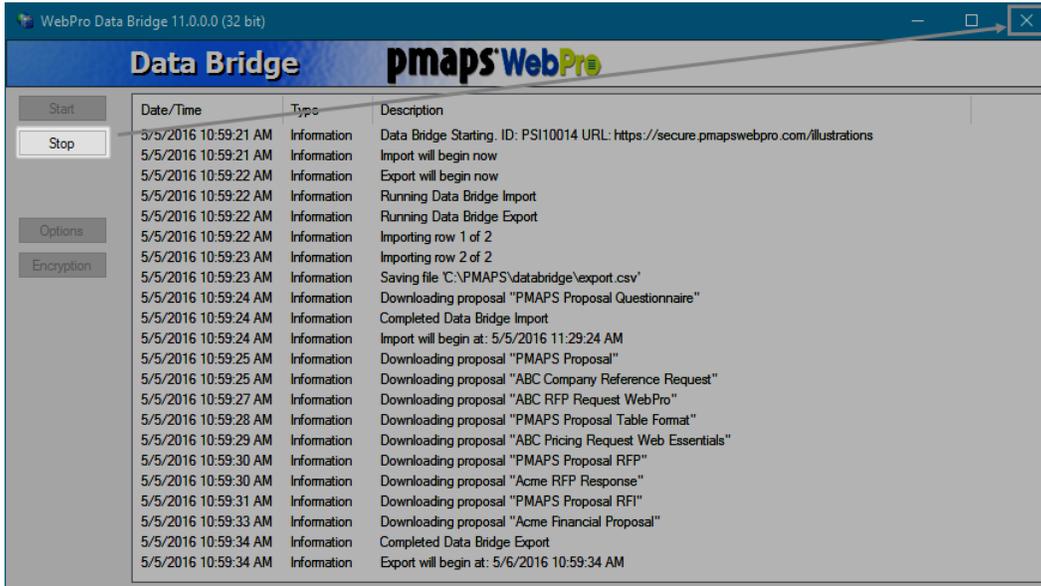
4. Click the **Start** icon.



5. Wait for the application to complete, and choose one of the following:
 - a. To leave the application running, click the **Stop** button, wait for the application to stop, and then minimize the window.



- b. To quit the application running, click the **Stop** button, wait for the application to stop, and then close the window using the X in the upper right of the window.



Document Templates

Microsoft Word and PowerPoint templates may be stored in PMAPS so that users can select them when adding new records to PMAPS. Each template can be associated with a language if using the language field.

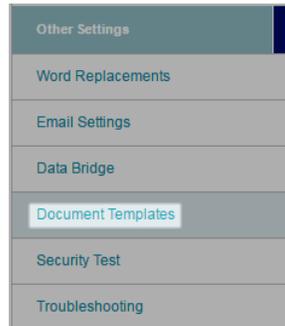
Microsoft Word

Add New Word Template

1. Go to the [Administration](#) page.



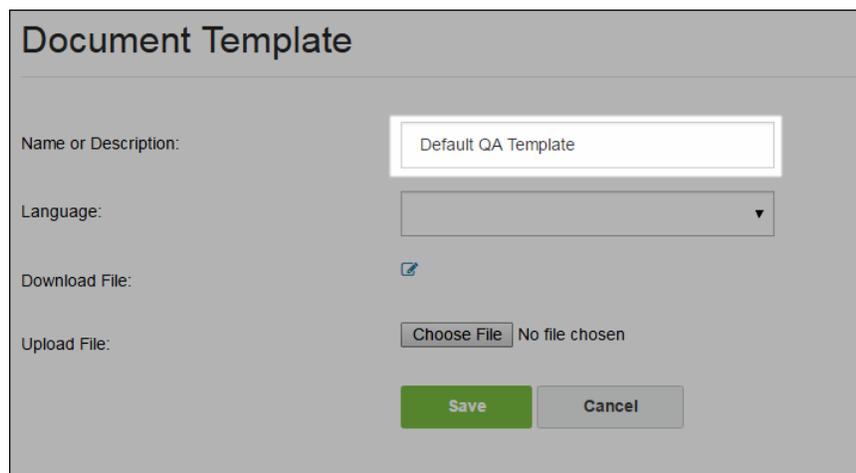
- Under [Other Settings](#), click [Document Templates](#).



- Under Microsoft Word Templates click [Add New Word Template](#).



- In the [Name or Description](#) field enter an appropriate name for this template.



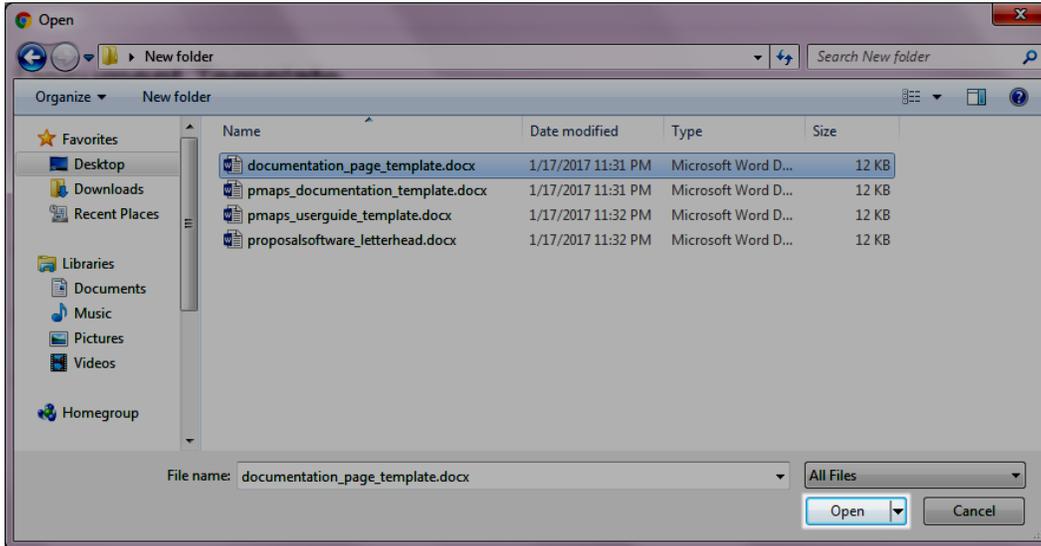
- If applicable, choose a [Language](#) from the picklist (this is not required but should be used if storing multiple language records and/or using parent/child relationships).

The screenshot shows the 'Document Template' form. The 'Name or Description' field contains 'Default QA Template'. The 'Language' dropdown menu is open, showing a list of options. The 'Download File' field has a download icon. The 'Upload File' field has a 'Choose File' button and the text 'No file chosen'. At the bottom, there are 'Save' and 'Cancel' buttons.

- Next to [Upload File](#), click [Choose File](#).

This screenshot is identical to the previous one, but the 'Choose File' button in the 'Upload File' field is highlighted with a white border, indicating it is the next step in the process.

7. Select the Word template file and click **Open**. PMAPS only accepts Word documents with extension .doc or .docx.



8. Click **Save**.

Document Template

Name or Description:

Language:

Download File:

Upload File:

- Wait for the page to refresh and display the templates page.

Microsoft Word Templates

Description	Language	Edit
Arabic	Arabic	✎
Chinese	Chinese	✎
Default QA Template		✎
English UK	English UK	✎
French	French	✎
Japanese	Japanese	✎
QA Template	English US	✎
Spanish	Spanish	✎

Add New Word Template

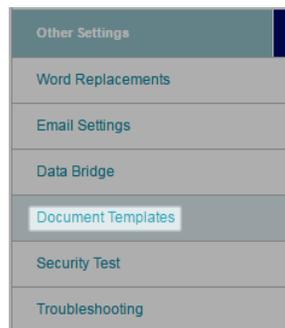
Edit Template

If you need to update the properties of or the document for an existing template, follow the steps below.

- Go to the [Administration](#) page.



- Under [Other Settings](#), click [Document Templates](#).

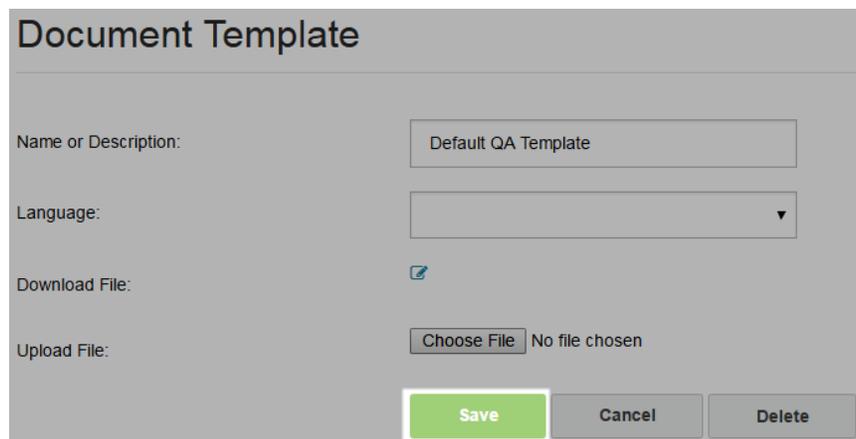


3. Under [Microsoft Word Templates](#), click the [Edit](#) icon next to the template you would like to modify.

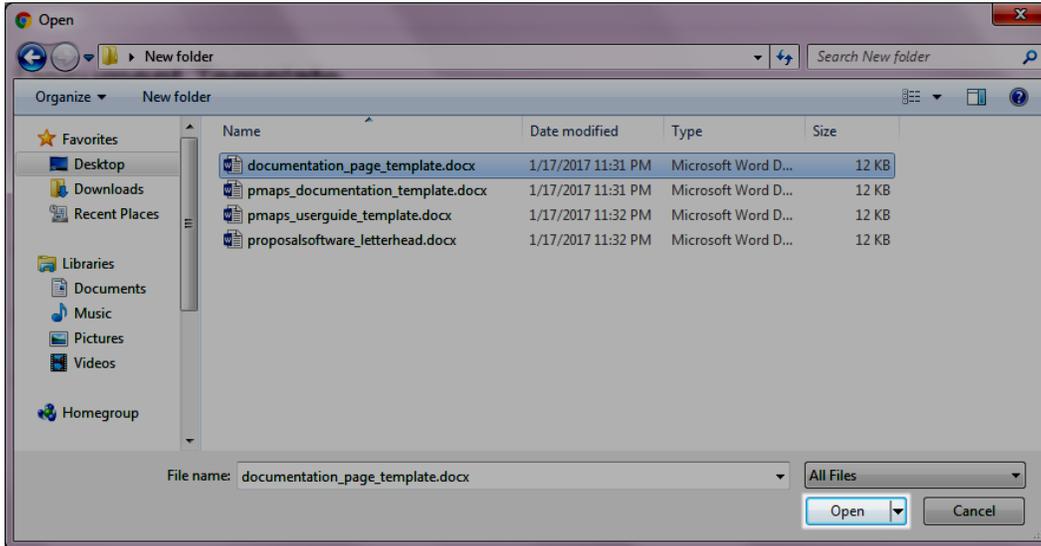


Follow step 4 to replace the document, follow step 5 to modify the document template properties.

4. To replace the document:
 - a. Next to [Upload File](#), click [Choose File](#).



- b. Select the Word template file and click **Open**. PMAPS only accepts Word documents with extension .doc or .docx.



- c. Click **Save**.

Document Template

Name or Description:

Language:

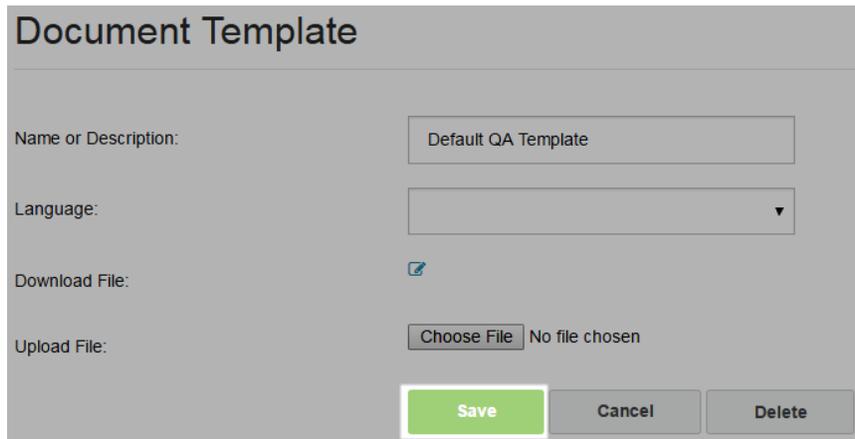
Download File:

Upload File: No file chosen

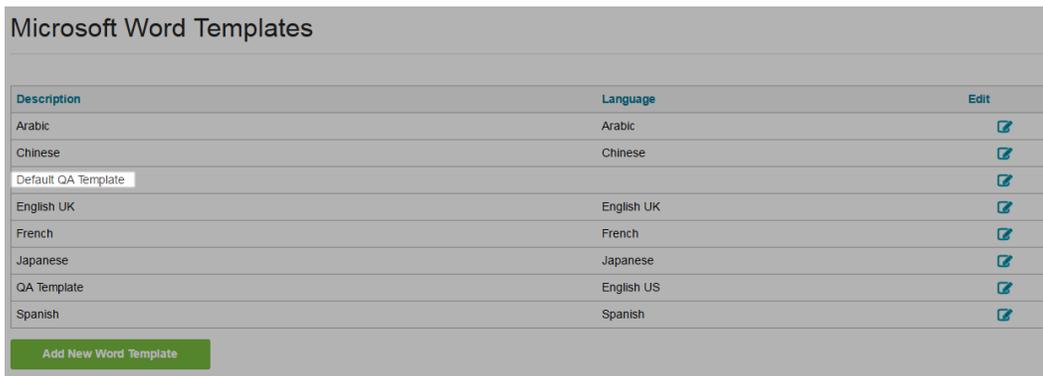
- d. Wait for the page to refresh and display the templates page.



- 5. To modify the document template properties:
 - a. Make desired changes, and then click [Save](#).



- b. Wait for the page to refresh and display the templates page.

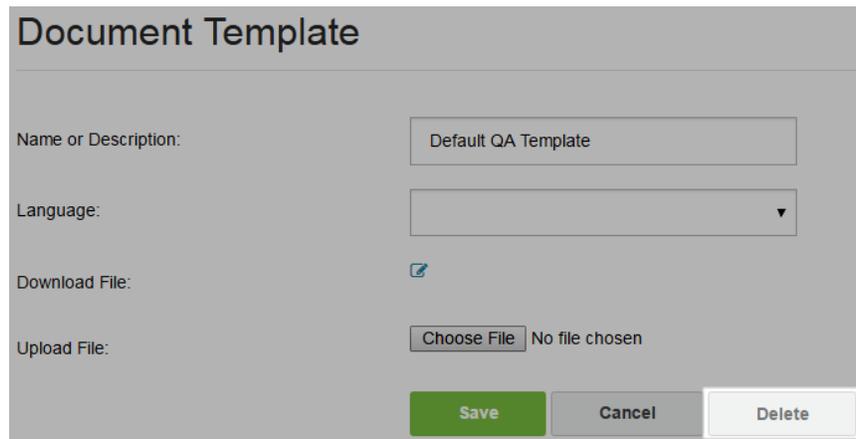


Delete Template

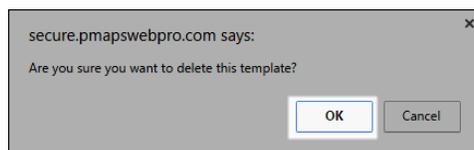
1. Under [Microsoft Word Templates](#), click the [Edit](#) icon next to the template you would like to modify.



2. Click the [Delete](#) hyperlink.



3. Click [OK](#) to confirm.



- Wait for the page to refresh and display the templates page.

Microsoft Word Templates		
Description	Language	Edit
Arabic	Arabic	✎
Chinese	Chinese	✎
English UK	English UK	✎
French	French	✎
Japanese	Japanese	✎
QA Template	English US	✎
Spanish	Spanish	✎

[Add New Word Template](#)

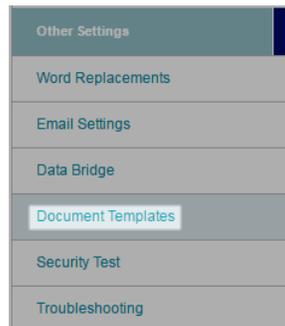
Microsoft PowerPoint

Add Template

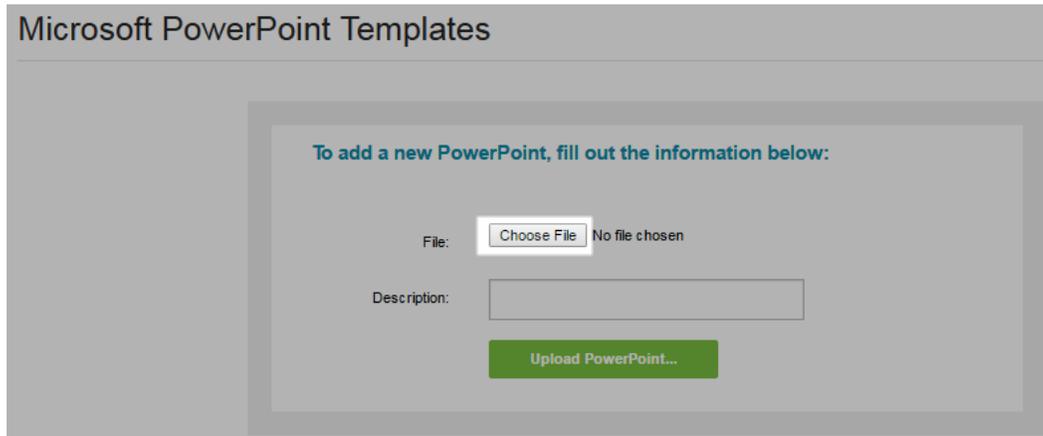
- Go to the [Administration](#) page.



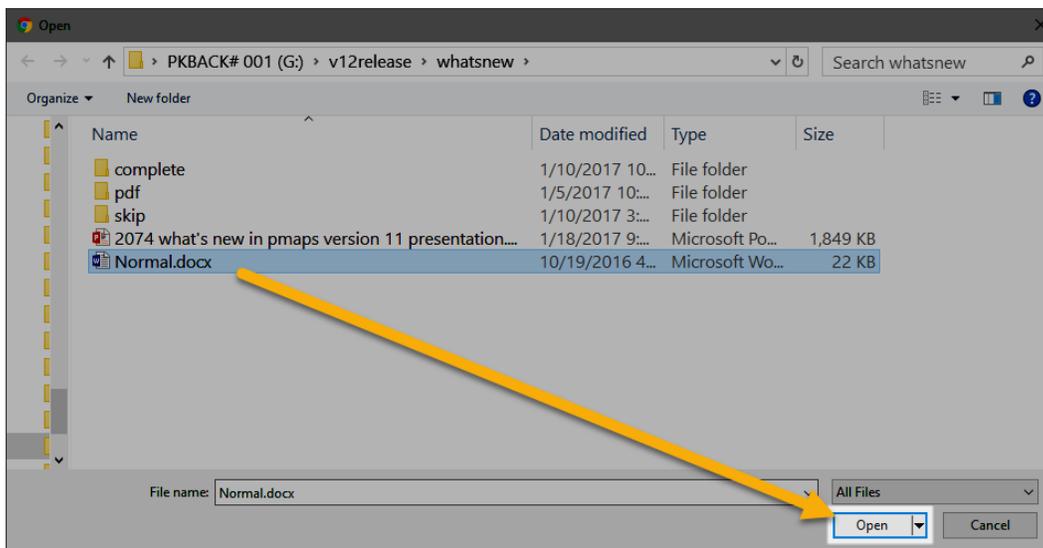
- Under [Other Settings](#), click [Document Templates](#).



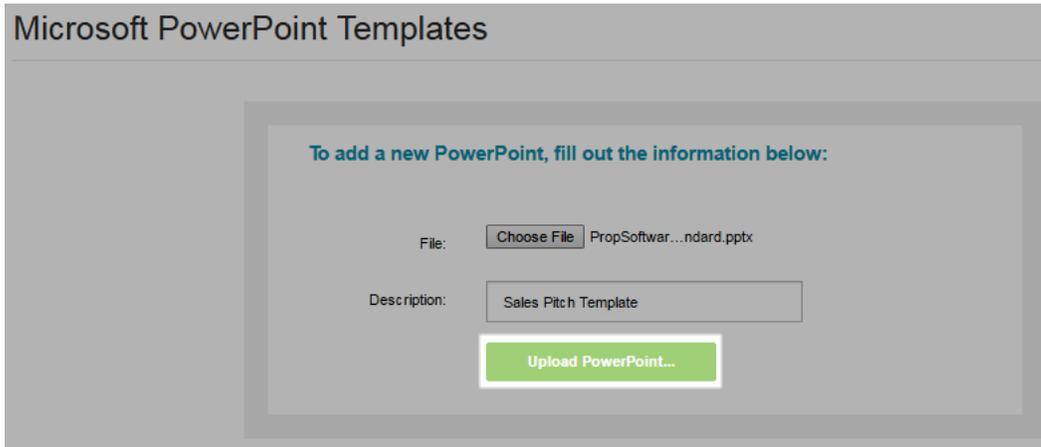
- Under **Microsoft PowerPoint Templates**, click the **Choose File** icon in the space provided for a new template.



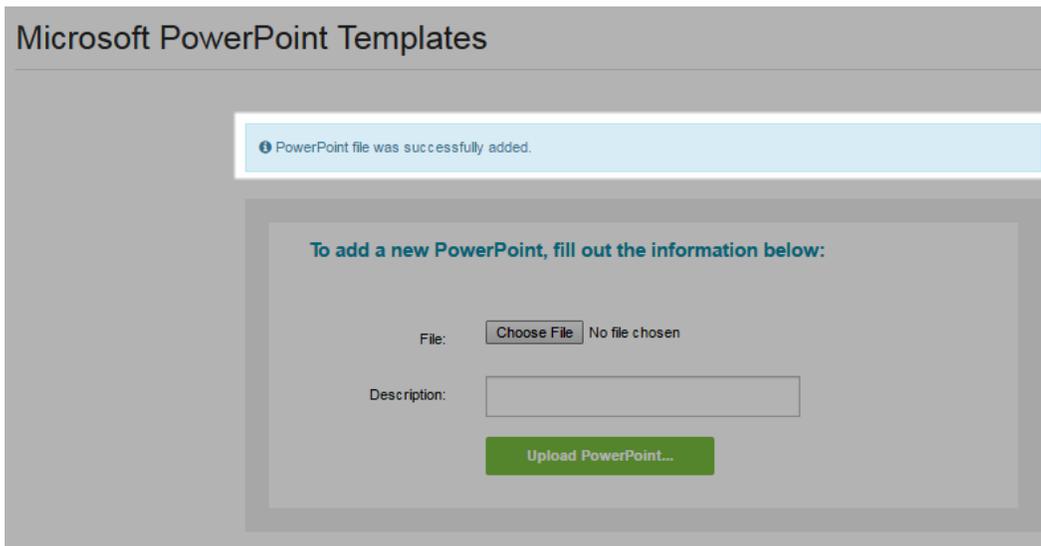
- Select the PowerPoint template file and click **Open**. PMAPS only accepts PowerPoint files with extension .ppt or .pptx.



3. Enter a description for the template, and then click [Upload PowerPoint...](#)



4. Wait for the page to refresh and display the templates page.



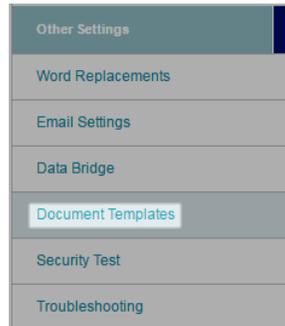
Edit Template

If you need to edit an existing template, follow the steps below.

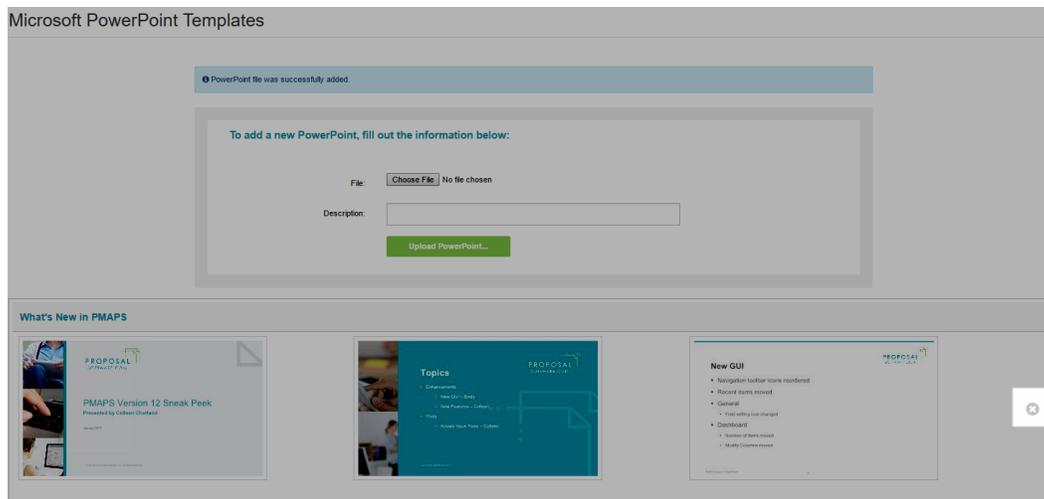
1. Go to the [Administration](#) page.



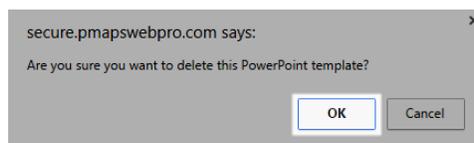
- Under **Other Settings**, click **Document Templates**.



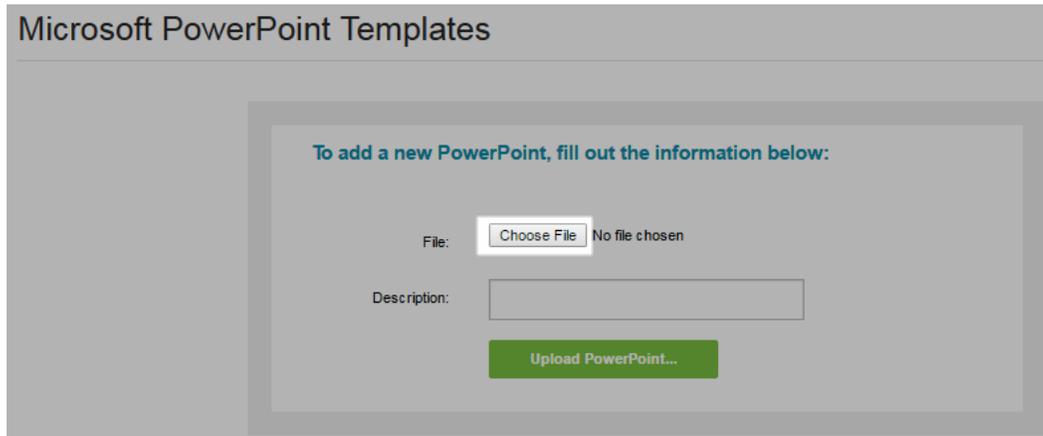
- Under **Microsoft PowerPoint Templates**, find the template you would like to replace and click the delete icon.



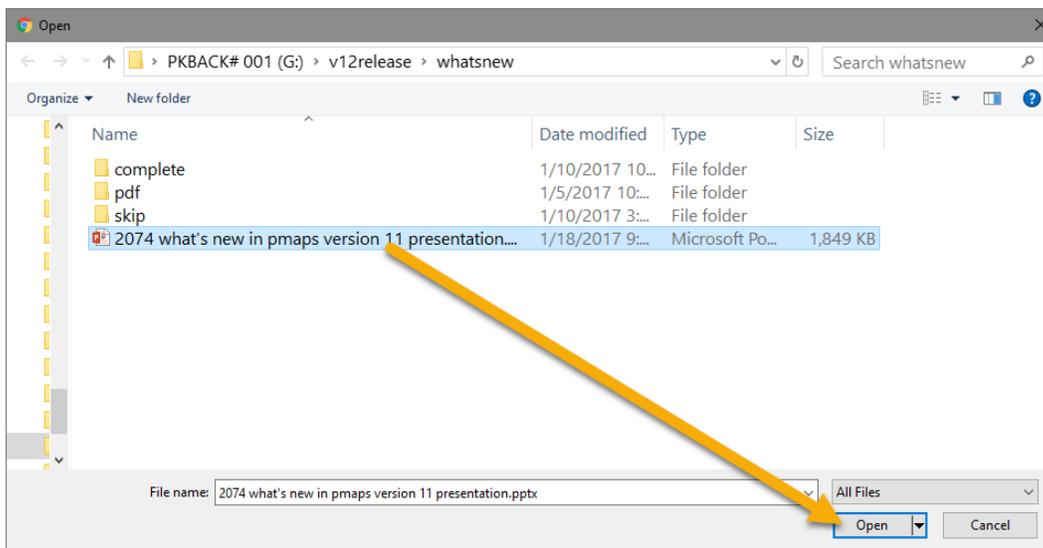
- Click **OK** to confirm.



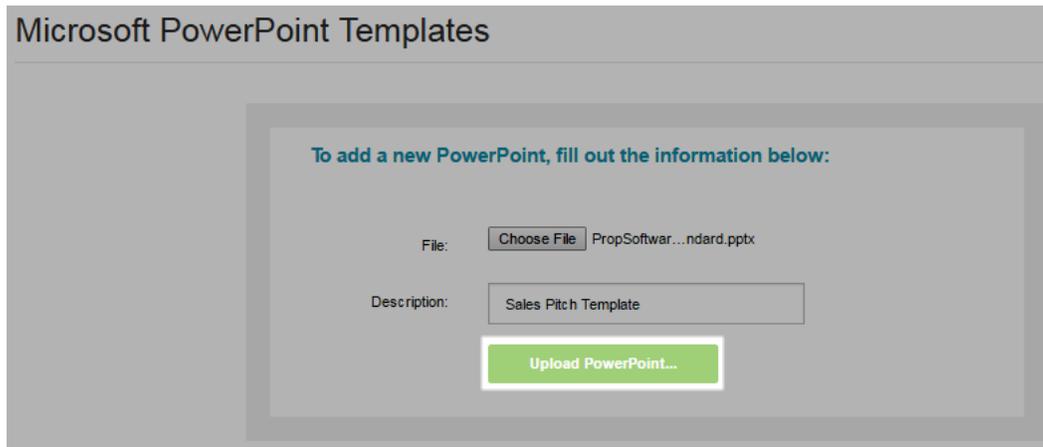
- Under **Microsoft PowerPoint Templates**, click the **Choose File** icon in the space provided for a new template.



- Select the PowerPoint template file and click **Open**. PMAPS only accepts PowerPoint files with extension .ppt or .pptx.



7. Enter a description for the template, and then click [Upload PowerPoint...](#)



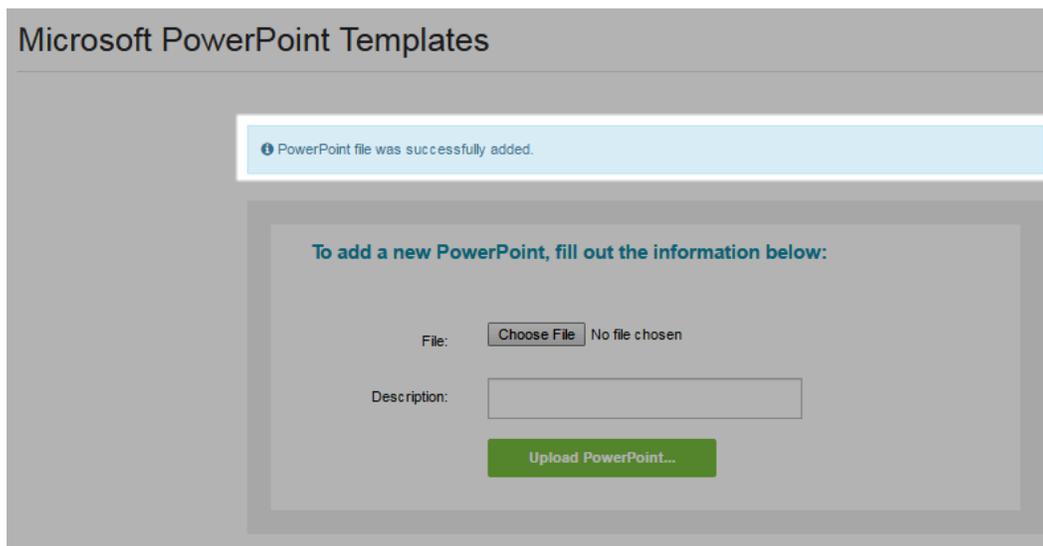
Microsoft PowerPoint Templates

To add a new PowerPoint, fill out the information below:

File: PropSoftwar...ndard.pptx

Description:

8. Wait for the page to refresh and display the templates page.



Microsoft PowerPoint Templates

PowerPoint file was successfully added.

To add a new PowerPoint, fill out the information below:

File: No file chosen

Description:

WebPro Settings

This page displays your PMAPS application default settings. This page is mainly used by Proposal Software for troubleshooting.

Security Test

This page allows Proposal Software to run a security check against your PMAPS application to ensure there are no issues with your database.

Troubleshooting

This page contains several troubleshooting utilities. These functions are performed by Proposal Software to resolve database issues. These features should only be used under explicit instruction from or by Proposal Software engineers.

Sales Docs

Sales Docs are templates (sometimes referred to as forms) that permitted users can access from the Dashboard to quickly build complete sales, proposal, or other document through simple on screen selections.

Users with the [Build Sales Docs](#) permission enabled can create new templates and edit existing templates in this module.

The creation of sales docs is a five step process:

1. [Plan](#): decide what information will be included in the template
2. [Create](#): add the new form and create the underlying database table
3. [Categorize](#): add categories (sections) that provide structure
4. [Build](#): add questions or definition statements used to make selections by users
5. [Assign](#): select the documents to be included in the template

Plan

The planning stage is important because it will save you time when it comes time to create the template. The best way to plan is to deconstruct a sales or proposal document that already exists. As you deconstruct the document, compose a document that includes the following:

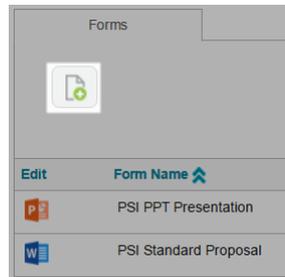
- An outline of the categories (sections) that make up the template
- A list of questions or definition statements under the appropriate category
- List of existing search records associated with each question or statement
- A list of other documents to include at the appropriate question/statement location

Create

1. From the navigation toolbar, go to the [Sales Docs](#) page.



2. Click the [New Form](#) icon.



3. In the [Form name](#) field, enter the name of your form (this will be the name your users see in the drop down list of Sales Doc forms available to them).

The image shows the 'Form name' configuration page. It has a 'Form name' field containing 'PSI Pricing Proposal', a 'Database table name' field containing 'pricingproposal', and a 'Document type' dropdown menu set to 'Word Document'. Below these are 'Group permissions' with checkboxes for Administrator, All Users, Content Managers, Marketing, Preview, Sales, SSO Login Default, WebPro Data Bridge, WebPro Indexer, WebPro P2P, WebPro User Admins, and Writers. A green 'Save' button is at the bottom.

- In the **Database Table name** field, enter a unique name which does not include any spaces (this is an internal database name, and will not be seen by your users).

- From the **Document Type** field, select **Word Document** or **Power Point Document**.

- Check the **Group Permissions** boxes to make this Sales Doc form available to the appropriate user groups.

7. Click **Save**.

8. Wait for the save to complete as confirmed on screen.

Categorize

Once you have created the form, the next step is to add categories (sections). Categories help you structure your questions, and make it easier for your users to fill out the form. You can enter categories in any order and simply drag-and-drop to place them in the correct order later.

1. With the correct **Form** selected, click on the **Categories** tab.

2. In the **Category text** field, enter a category name, and then click **Add Category**.

3. Wait for the page to refresh and the new category displays. Repeat step 2 until all you have added all categories.

Category text: Add Category

Set display order of categories within form (drag and drop)

+	Cover Documents	✎
+	Executive Summary	✎
+	Product Details	✎
+	Attachments	🗑️ ✎

- a. To reorder a category click on the move icon and drag the row. Look for the Move Here placeholder and release the mouse.

Category text: Add Category

Set display order of categories within form (drag and drop)

+	Cover Documents	✎
+	Executive Summary	✎
+	Product Details	✎
+	Attachments	🗑️ ✎

- b. To remove a category click the Delete icon. This option is no longer available once there are questions associated with the category.

Category text: Add Category

Set display order of categories within form (drag and drop)

+	Cover Documents	✎
+	Executive Summary	✎
+	Product Details	✎
+	Attachments	🗑️ ✎

- c. To edit the name of an existing category click the Edit icon.

Category text: Add Category

Set display order of categories within form (drag and drop)

+	Cover Documents	✎
+	Executive Summary	✎
+	Product Details	✎
+	Attachments	🗑️ ✎

- d. Edit the [Category Text](#) and click [Update Category](#).



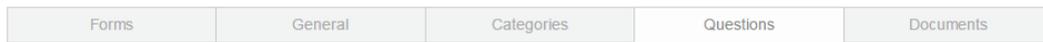
TIP

- Categories populate from the bottom up. To save time, enter your categories in order from last to first.

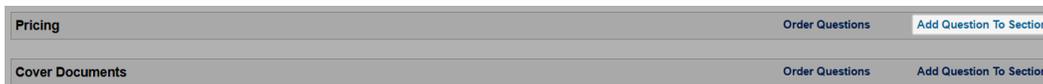
Build

Once you have added the categories, the next step is to add questions or statements from which your users will select options in order to compile their Sales Doc. The steps below will help you build the basic form.

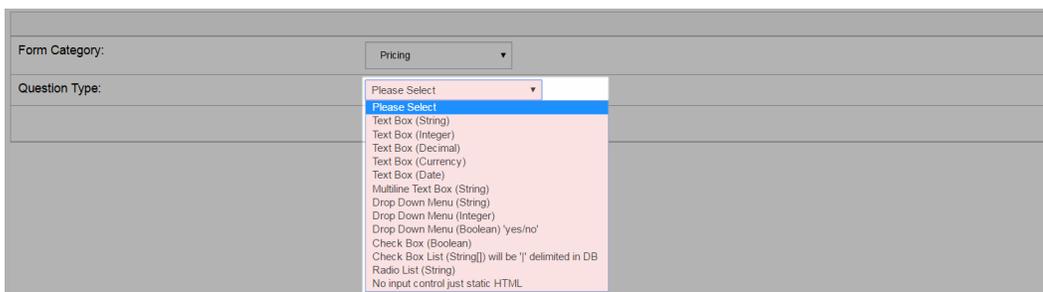
1. With the correct [Form](#) selected, click on the [Questions](#) tab.



2. Click [Add Question To Section](#) next to the appropriate [Category](#).



3. From the [Question Type](#) field, choose the type of field for this question. The [Form Category](#) is pre-populated based on step 2. Refer to the [Question Types](#) section to review all options.



4. Enter the question or statement in the **Question Text** field. This is the information users will see in the final form.

Form Category:	Pricing
Question Type:	Check Box List (String[]) will be *
Database Column to Save to:	<input type="text"/>
Number of Columns:	1
Use Fixed Width:	<input type="checkbox"/>
Question Text:	<input type="text"/>
Display Sections:	<input type="text"/> <small>Enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"</small>
Default Value:	<input type="text"/> ? <small>(This will be the value filled in on form load (Careful To Match Value Type!))</small>
Value Label:	<input type="text"/> ?
Save	

5. In the **Database Column to Save to**, enter a unique name without spaces or symbols for the database table (your users will not see this information).

Form Category:	Pricing
Question Type:	Check Box List (String[]) will be *
Database Column to Save to:	<input type="text"/>
Number of Columns:	1
Use Fixed Width:	<input type="checkbox"/>
Question Text:	<input type="text"/>
Display Sections:	<input type="text"/> <small>Enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"</small>
Default Value:	<input type="text"/> ? <small>(This will be the value filled in on form load (Careful To Match Value Type!))</small>
Value Label:	<input type="text"/> ?
Save	

6. Click **Save**.

The screenshot shows the 'Question Definition' form with the following fields:

- Form Category: Pricing
- Question Type: Check Box List (String[]) will be *
- Database Column to Save to: (Redacted)
- Number of Columns: 1
- Use Fixed Width:
- Question Text: (Redacted)
- Display Sections: (Redacted)
- Default Value: (Redacted)
- Value Label: (Redacted)

The 'Save' button is highlighted in green at the bottom of the form.

7. Wait for the page to refresh and confirm the question saved.

The screenshot shows the 'Question Definition' form after saving. A yellow confirmation message is displayed at the top: "Question Saved 1/17/2017 4:35:34 PM". The form fields are now populated with the following values:

- Form Category: Pricing
- Question Type: Check Box List (String[]) will be *
- Database Column to Save to: productsincluded
- Number of Columns: 1
- Use Fixed Width:
- Question Text: Products to include (check all that apply):

8. Next, click on **Possible Answers**.

The screenshot shows the 'Question Definition' form with the 'Possible Answers' tab selected. A green confirmation message is displayed at the top: "Question Saved 1/17/2017 4:39:18 PM". The form fields are the same as in the previous screenshot:

- Form Category: Pricing
- Question Type: Check Box List (String[]) will be *
- Database Column to Save to: productsincluded
- Number of Columns: 1
- Use Fixed Width:
- Question Text: Products to include (check all that apply):

9. Verify that the selections for **Form**, **Form Section**, and **Question** point to the correct place for your answers.

10. In the **Answer** field, enter an answer value, and then click **Save**. Repeat until all possible answers for this question have been added.

- a. To reorder possible answers, click on the move icon and drag the row. Look for the **Move Here** placeholder and release the mouse.

- b. To remove a possible answer click **delete**.

- c. To edit a possible answer click **edit**.

- d. Edit the [Answer](#) and [Value](#), and then click [Update](#).

Set display order of possible answer for the question(drag and drop)	
For boolean checkbox first answer is used as text	
For boolean dropdown the first answer is "False" and second is "True" They will display differently in drop down though	
+	Answer: Yes Value: Yes
+	Answer: No Value: No

- Repeat steps 1-10 until you have added all questions.
- Refer to the [Help Text](#) section if you would like to display help text—enter information that will assist the user with completing the sales doc.
- Refer to the [Validations & Warnings](#) section if you would like to establish a warning or validation.
 - A validation can be used to check for a specific action and require a correction to proceed.
 - A warning alerts the user but the user can proceed.
 - A visibility validation can be used to set conditional actions where a specific selection displays additional selection options.
- Refer to the [Advanced Options](#) section if you would like to delete a question.

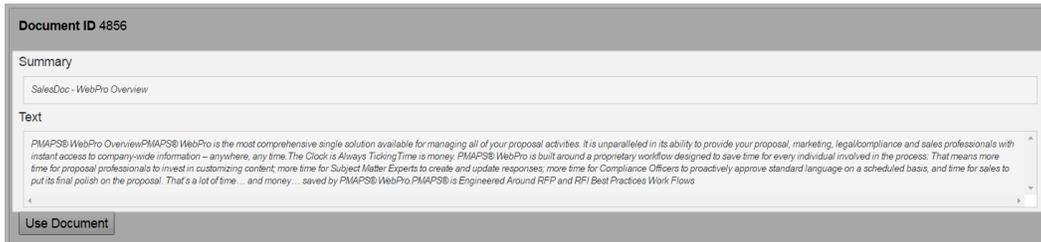
Assign

Once you have added all questions, the next step is to link content to your form using the records in your PMAPS database.

- With the correct [Form](#) selected, click on the [Documents](#) tab.

- Enter the [Search ID](#) for the record you would like to assign, and then click [Search Documents](#).

3. Review the [Summary](#) and/or [Text](#) to verify this is the document you would like to assign.



Document ID 4856

Summary

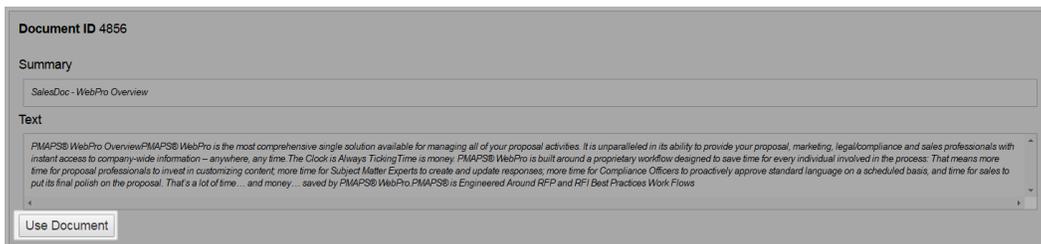
SalesDoc - WebPro Overview

Text

PMAPS WebPro Overview PMAPS WebPro is the most comprehensive single solution available for managing all of your proposal activities. It is unparalleled in its ability to provide your proposal, marketing, legal/compliance and sales professionals with instant access to company-wide information – anywhere, any time. The Clock is Always Ticking Time is money. PMAPS WebPro is built around a proprietary workflow designed to save time for every individual involved in the process. That means more time for proposal professionals to invest in customizing content, more time for Subject Matter Experts to create and update responses, more time for Compliance Officers to proactively approve standard language on a scheduled basis, and time for sales to put its final polish on the proposal. That's a lot of time... and money... saved by PMAPS WebPro. PMAPS is Engineered Around RFP and RFI Best Practices Work Flows

Use Document

4. Click [Use Document](#).



Document ID 4856

Summary

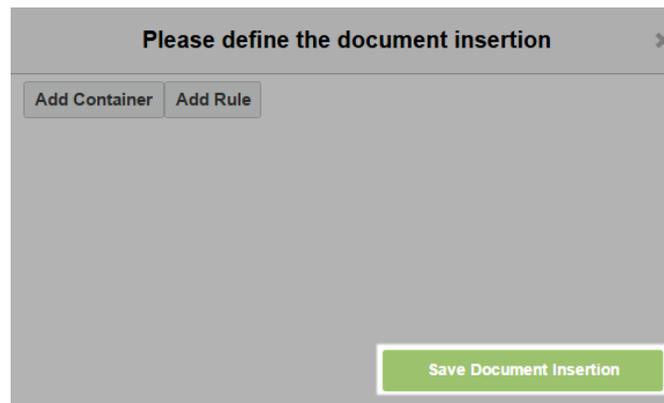
SalesDoc - WebPro Overview

Text

PMAPS WebPro Overview PMAPS WebPro is the most comprehensive single solution available for managing all of your proposal activities. It is unparalleled in its ability to provide your proposal, marketing, legal/compliance and sales professionals with instant access to company-wide information – anywhere, any time. The Clock is Always Ticking Time is money. PMAPS WebPro is built around a proprietary workflow designed to save time for every individual involved in the process. That means more time for proposal professionals to invest in customizing content, more time for Subject Matter Experts to create and update responses, more time for Compliance Officers to proactively approve standard language on a scheduled basis, and time for sales to put its final polish on the proposal. That's a lot of time... and money... saved by PMAPS WebPro. PMAPS is Engineered Around RFP and RFI Best Practices Work Flows

Use Document

5. To always include the document regardless of user selections, click [Save Document Insertion](#) and move to step 7.

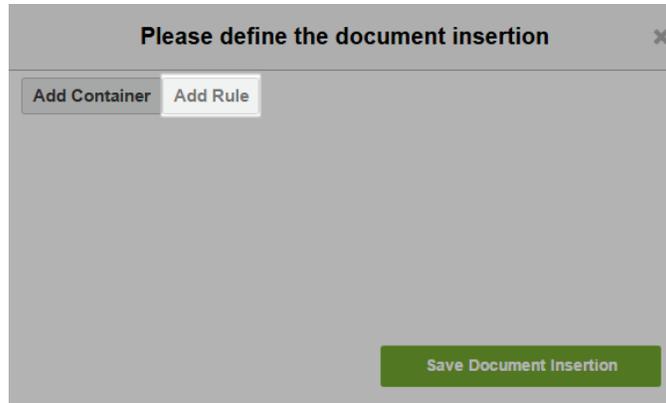


Please define the document insertion

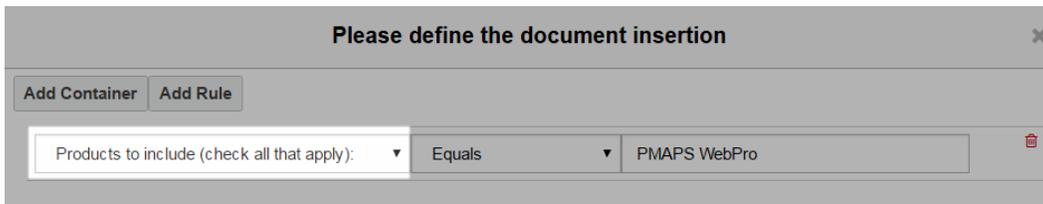
Add Container Add Rule

Save Document Insertion

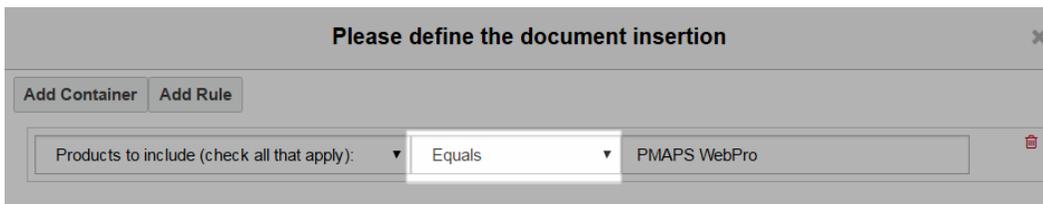
6. To define the document insertion so that the document is inserted only when a specific selection is made by the user, follow the steps below:
 - a. Click on the [Add Rule](#) icon.



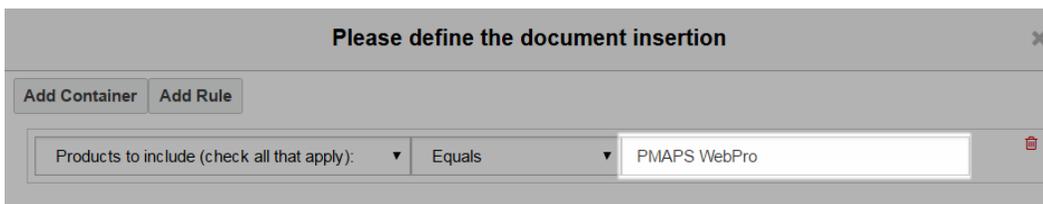
- b. From the first picklist to select the applicable question or definition statement.



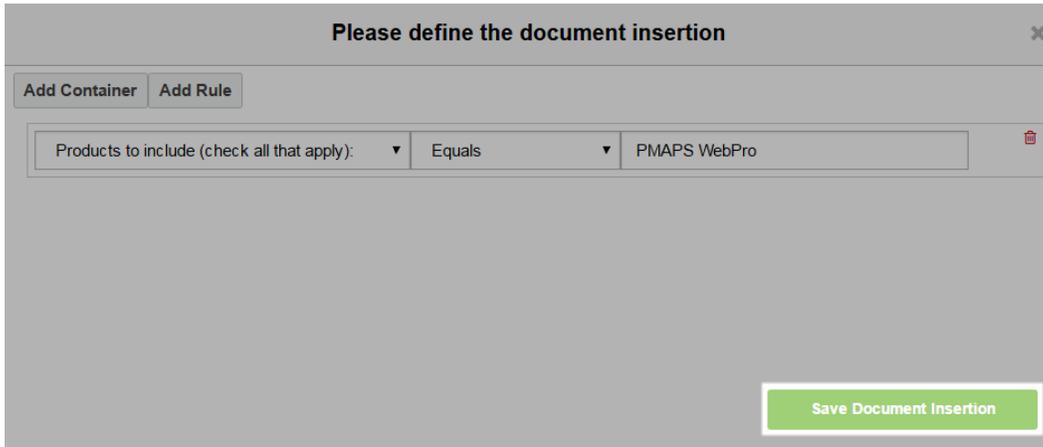
- c. From the second picklist, select the operator you would like to use for the rule. Refer to the [Document Insertion Operators](#) section to review all options.



- d. In the last field, enter the matching value from the [Possible Answers](#) for this document.



- e. Click [Save Document Insertion](#).



- f. Wait for your record to appear in the [Current Document Insertions](#).



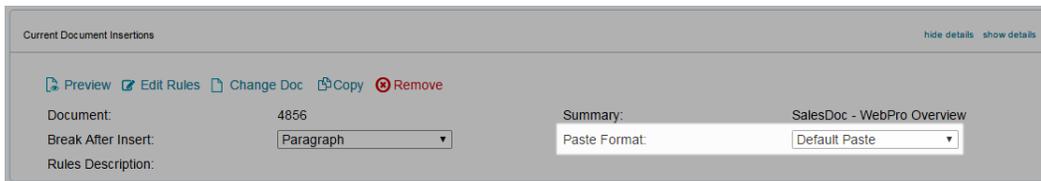
- 7. Choose the appropriate page break option by making a selection from the [Break After Insert](#) picklist.

- [Paragraph](#): inserts a paragraph line after adding this document
- [Page Break](#): inserts a page break after adding this document
- [Section Break Continuous](#): inserts a continuous section break after adding this document
- [Section Break Next Page](#): inserts a new page section break after adding this document
- [None](#): does nothing after adding this document

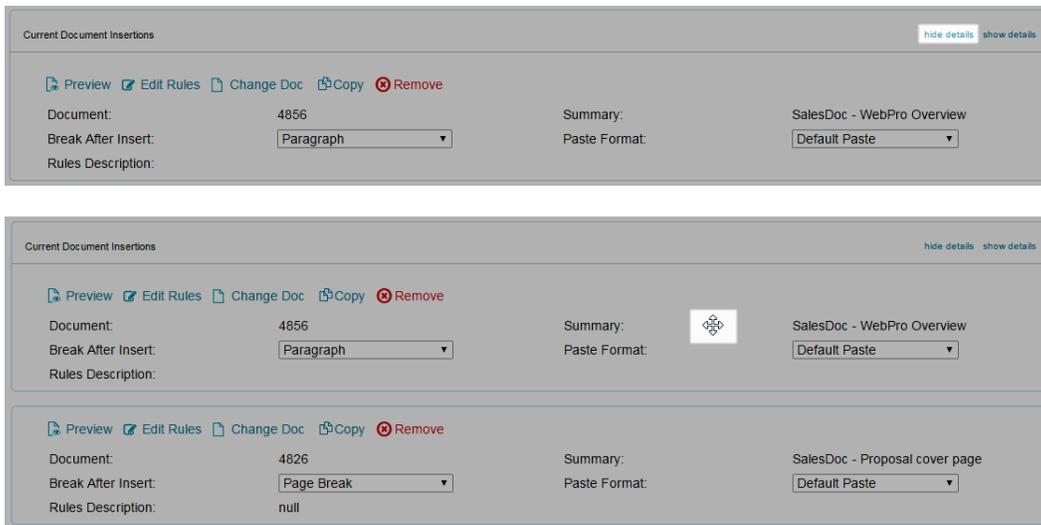


8. Choose the paste option for this document from the **Paste Format** picklist.

- **Default Paste:** uses the settings from your Microsoft Word Normal.dotm for **Pasting between documents when style definitions conflict**.
- **Keep Source Formatting:** This option retains the look of the text by assigning the “Normal” style and includes characteristics such as font size, italics, or other formatting to mimic the style definition of the copied text.
- **Merge Formatting:** This option changes the formatting so that it matches the text that surrounds it.



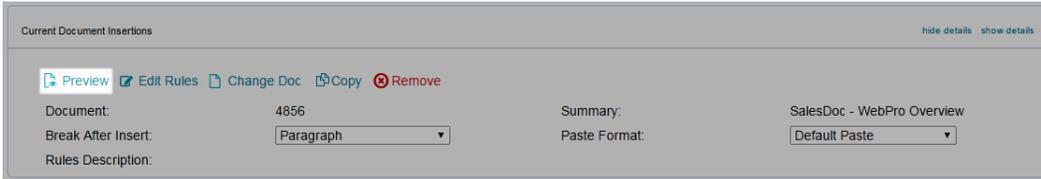
9. Reorder documents by using drag-and-drop. To simplify this process, click the **hide details** link to hide the document insertion details. Click anywhere in the document window and drag it to the desired location and release the mouse.



Click **show details** to view the full document insertion details.



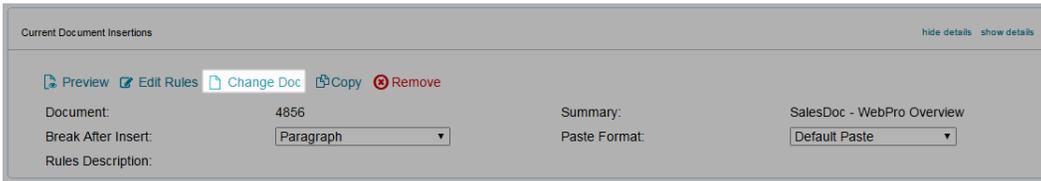
10. To preview a document configured for insertion, click the [Preview](#) icon.



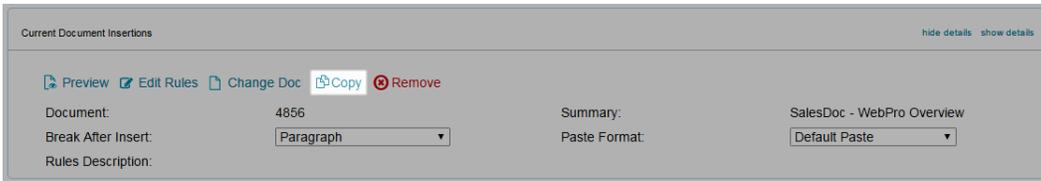
11. To make changes to the rules for insertion, click the [Edit Rules](#) icon.



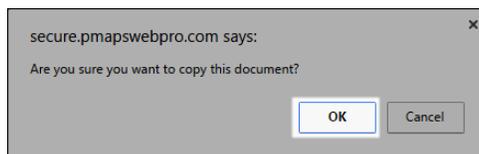
12. To change the document for insertion, click the [Change Doc](#) icon.



13. To make a copy of a document, click the [Copy](#) icon.



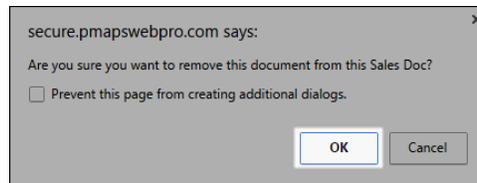
At the prompt, click [OK](#) to confirm. The copy will be added as the last document.



14. To remove the document insertion, click the **Remove** icon.



At the prompt, click **OK** to confirm.



Question Types

There are 13 question types available for selection, with the five that are the most widely used highlighted in blue text.

- Single Selection
 - ▶ Drop Down Menu (String)
 - ▶ Drop Down Menu (Integer)
 - ▶ Drop Down Menu (Boolean) 'yes/no'
 - ▶ Radio List (String)
- Text
 - ▶ Text Box (String)
 - ▶ Text Box (Integer)
 - ▶ Text Box (Decimal)
 - ▶ Text Box (Currency)
 - ▶ Text Box (Date)
 - ▶ Multiline Text Box (String)

- **Checkbox**
 - ▶ [Check Box \(Boolean\)](#)
 - ▶ [Check Box List \(String \[\]\) will be ' | ' delimited in DB](#)
- **Other**
 - ▶ No input control just static HTML

Document Insertion Operators

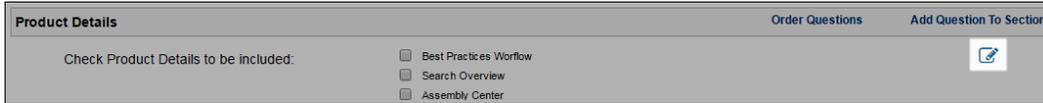
- **Has Value**
 - ▶ There is a value in the related [Possible Answer](#)
- **Does not have Value**
 - ▶ There is no value in the related [Possible Answer](#)
- **Equals**
 - ▶ The value must exactly match the related [Possible Answer](#)
- **Contains**
 - ▶ The value contains all or a portion of the text in the related [Possible Answer](#)
- **Does Not Contain**
 - ▶ The value does not contain any text in the related [Possible Answer](#)
- **RegEx**
 - ▶ The value is a regular expression that matches the related [Possible Answer](#)

Help Text

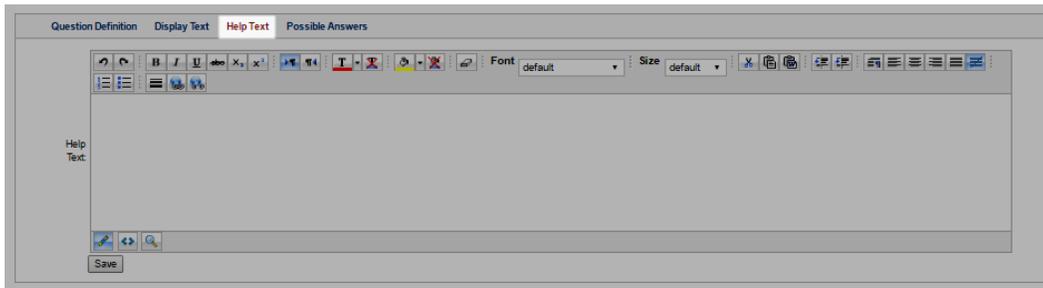
1. With the correct [Form](#) selected, click on the [Questions](#) tab.



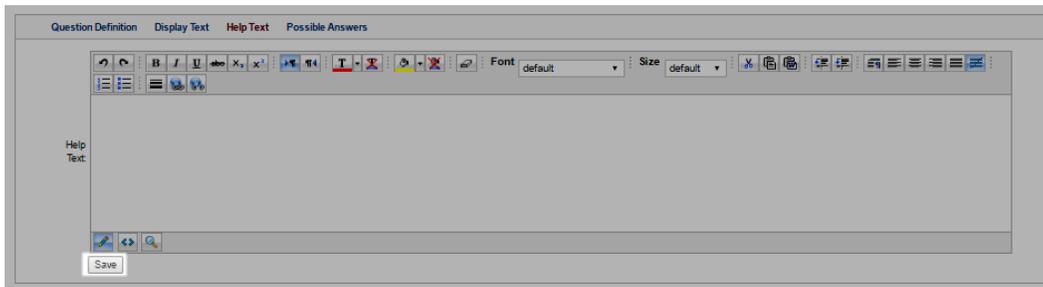
2. Locate the question you want to add [Help Text](#) for, and then click the [Edit](#) icon.



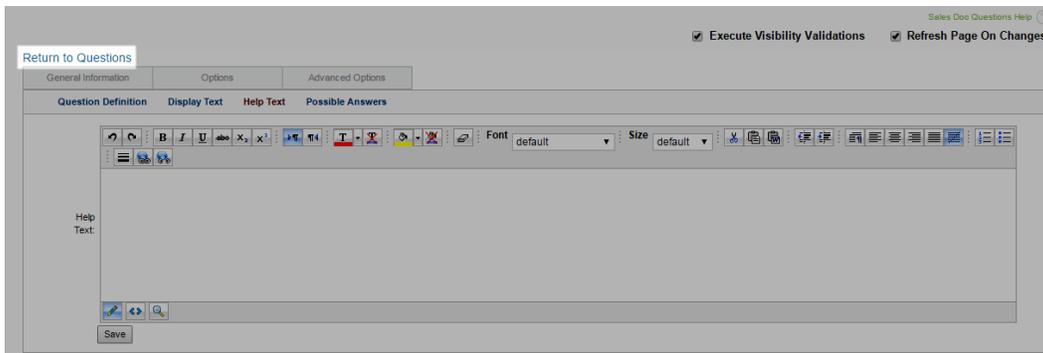
4. Click the [Help Text](#) link above the formatting toolbars.



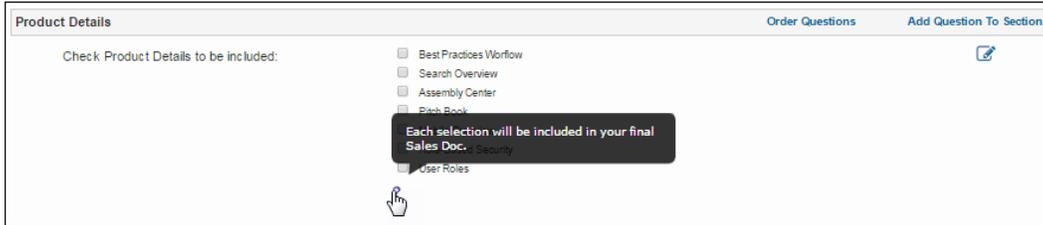
5. Enter and format desired instructional text for the question or statement, and then click [Save](#).



6. Click [Return to Questions](#).



7. Hover over the question mark icon to display the help text.

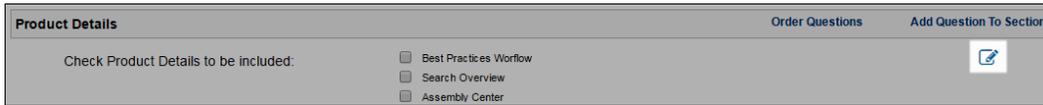


Validations & Warnings

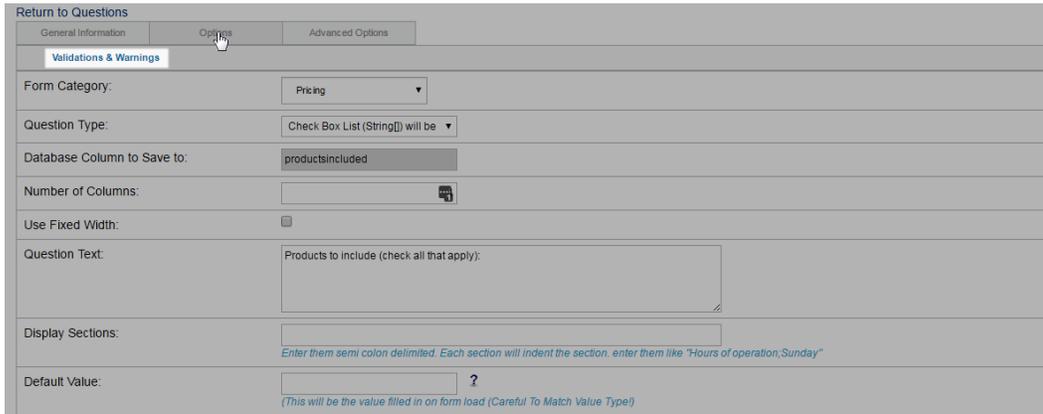
1. With the correct **Form** selected, click on the **Questions** tab.



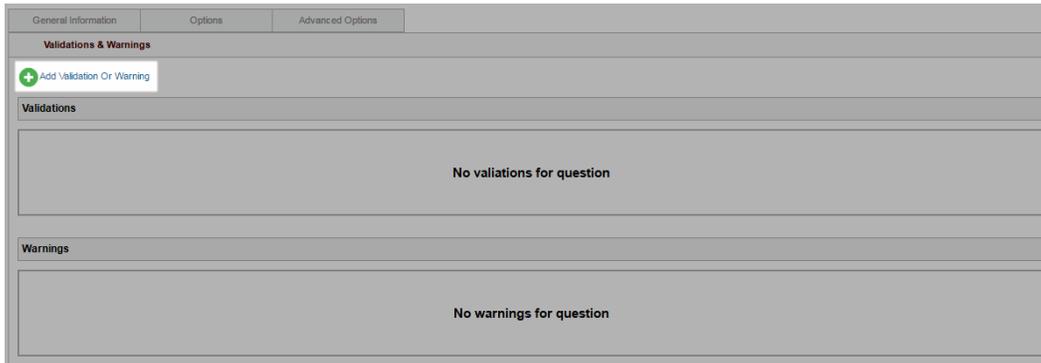
2. Click **edit** next to the question for which you would like to establish a validation or warning.



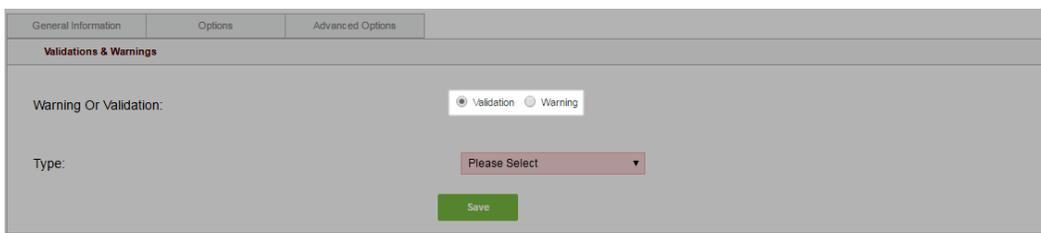
3. Hover over the **Options** tab, and then click on **Validations & Warnings**.



4. Click [Add Validation Or Warning](#).

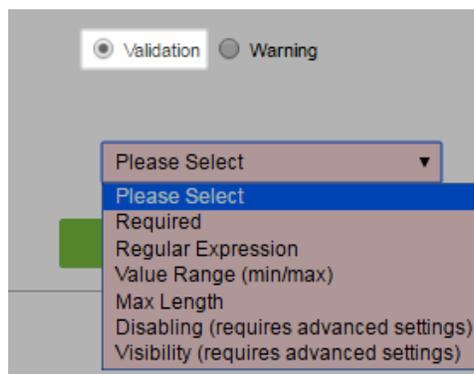


5. Choose [Validation](#) or [Warning](#) by clicking on the appropriate radio button and follow the instructions below for your selection.



Validation

1. From the Type picklist, choose the type of validation. The most widely used types are [Required](#) (see step 2 below) and [Visibility](#) (see step 3 below).



2. To make this selection **Required**:

a. Select **Required** from the **Type** picklist.

The screenshot shows a configuration panel with two radio buttons at the top: 'Validation' (selected) and 'Warning'. Below them is a dropdown menu labeled 'Type' with 'Required' selected. Underneath is a text area labeled 'Error/Warning Tool Tip Display Text:' which is currently empty. A red warning icon is visible to the right of the text area. At the bottom is a green 'Save' button.

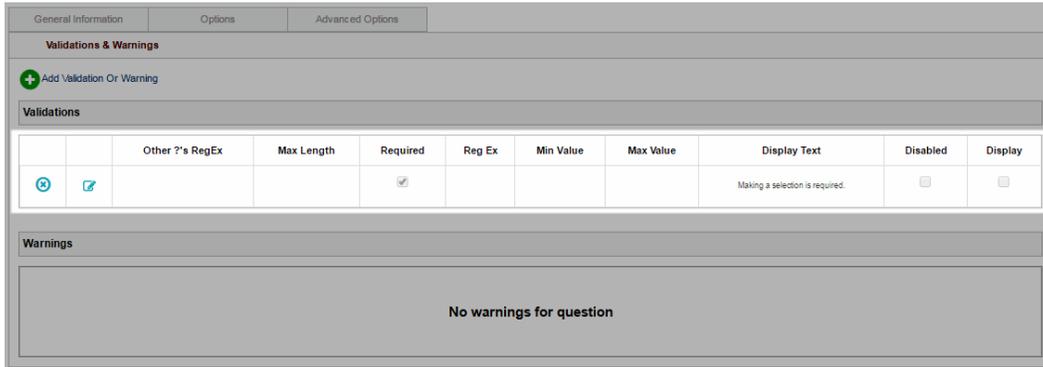
b. Enter text to display in the space provided.

This screenshot is identical to the previous one, but the text area now contains the text 'Making a selection is required.' The 'Save' button remains at the bottom.

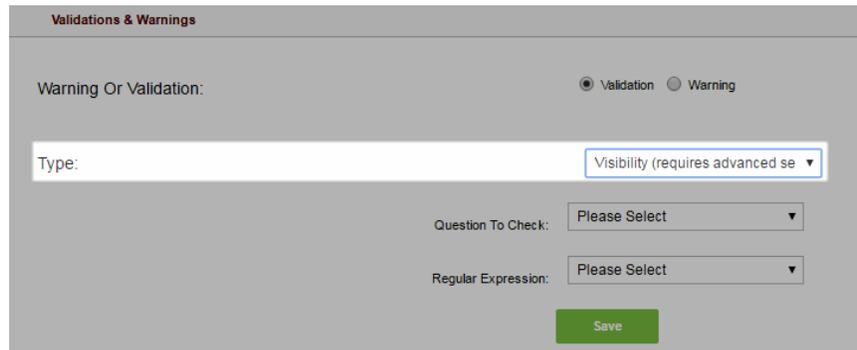
c. Click **Save**.

This screenshot is identical to the previous one, but the green 'Save' button is highlighted with a white border, indicating it has been clicked.

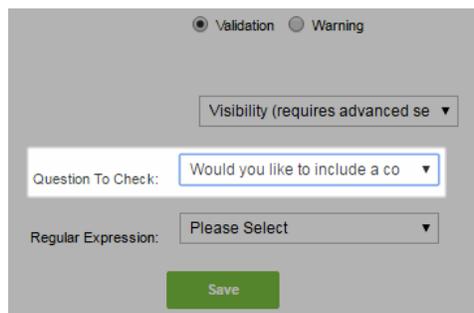
- d. Wait for the save to complete and return to the **Validations & Warnings** window where the new validation displays under **Validations**.



- 3. To apply a **Visibility** validation:
 - a. Select **Visibility (requires advanced settings)** from the **Type** picklist.



- b. From the **Question To Check** picklist, select the question for this visibility validation. When a user makes a selection from the question to check, this additional question or statement will appear.



- c. From the [Regular Expression](#) picklist, choose the appropriate option. The most widely used option is [Custom](#).

The screenshot shows a configuration panel with the following elements:

- Radio buttons for 'Validation' (selected) and 'Warning'.
- A dropdown menu for 'Visibility (requires advanced se)'.
- A 'Question To Check:' dropdown menu with the text 'Would you like to include a co'.
- A 'Regular Expression:' dropdown menu with 'Custom' selected.
- A 'Custom Expression:' text input field which is currently empty and has a red error icon to its right.
- A green 'Save' button at the bottom.

- d. In the Custom Expression field, enter the text of the option that will activate this visibility validation. This is the corresponding [Possible Answer](#) for the [Question to Check](#)—when the user makes the selection here, the dependent section will appear.

This screenshot is identical to the previous one, but the 'Custom Expression:' text input field now contains the text 'Yes'.

The dialog box contains the following text and controls:

- Header: 'Set display order of possible answer for the question(drag and drop)'
- Sub-headers: 'For boolean checkbox first answer is used as text' and 'For boolean dropdown the first answer is "False" and second is "True" They will display differently in drop down though'
- Item 1: A plus icon, the text 'Answer: Yes Value: Yes', a pencil icon, and a trash icon.
- Item 2: A plus icon, the text 'Answer: No Value: No', a pencil icon, and a trash icon.

e. Click [Save](#).

The dialog box has two radio buttons at the top: 'Validation' (selected) and 'Warning'. Below them is a dropdown menu for 'Visibility (requires advanced se)'. The 'Question To Check:' field contains 'Would you like to include a co'. The 'Regular Expression:' dropdown is set to 'Custom'. The 'Custom Expression:' text box contains 'Yes'. A green 'Save' button is at the bottom.

f. Wait for the save to complete and return to the [Validations & Warnings](#) window where the new validation displays under [Validations](#).

The window has three tabs: 'General Information', 'Options', and 'Advanced Options'. Under 'Validations & Warnings', there is a '+ Add Validation Or Warning' button. Below is a table for 'Validations':

		Other ?'s RegEx	Max Length	Required	Reg Ex	Min Value	Max Value	Display Text	Disabled	Display
Delete	Edit	^Yes\$		<input type="checkbox"/>					<input type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table is a section for 'Warnings' which contains the text 'No warnings for question'.

Advanced Options

1. With the correct [Form](#) selected, click on the [Questions](#) tab.

The navigation bar shows five tabs: 'Forms', 'General', 'Categories', 'Questions', and 'Documents'. The 'Questions' tab is highlighted.

2. Click [edit](#) next to the question you would like to delete.

The 'Product Details' section has two buttons: 'Order Questions' and 'Add Question To Section'. Below is a list of checkboxes for 'Check Product Details to be included:':

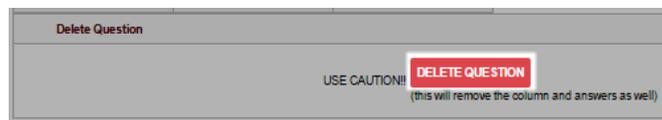
- Best Practices Workflow
- Search Overview
- Assembly Center

An edit icon is visible on the right side.

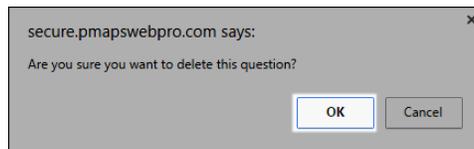
3. Hover over the **Advanced Options** tab, and then click on **Delete Question**.

The screenshot shows a web form titled "Return to Questions" with three tabs: "General Information", "Options", and "Advanced Options". The "Advanced Options" tab is active. Below the tabs, there is a "Delete Question" button. The form contains several fields: "Form Category:" (Cover Documents), "Question Type:" (Drop Down Menu (String)), "Database Column to Save to:" (IncludeCoverLetter), "Width:" (empty), "Question Text:" (Would you like to include a cover letter?), "Display Sections:" (with a note: "Enter them semi colon delimited. Each section will indent the section. enter them like *Hours of operation; Sunday*"), "Default Value:" (with a question mark), and "Value Label:" (with a question mark). A green "Save" button is at the bottom.

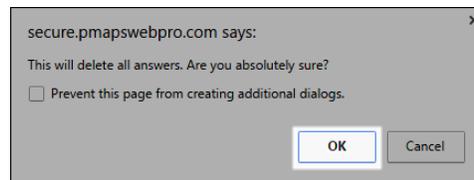
4. Click the **DELETE QUESTION** button.



5. To confirm the option to delete this question, click **OK**.



6. At the second prompt, to confirm the option to delete this question, click **OK**. The question and all associated answers are removed.



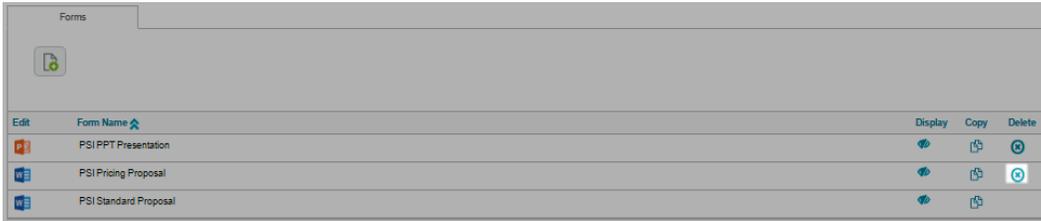
Delete Template

To delete an entire sales doc template (form):

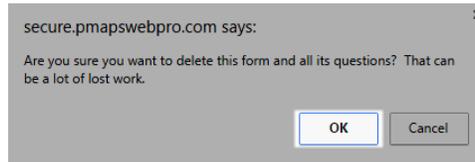
1. From the navigation toolbar, go to the **Sales Docs** page.



- Click the delete icon for the sales doc you would like to remove. Note that this is no longer an option once questions are associated with the form. If you are not certain, consider [hiding the template](#).



- Review the prompt and to confirm removal of this sales doc template, click **OK**.



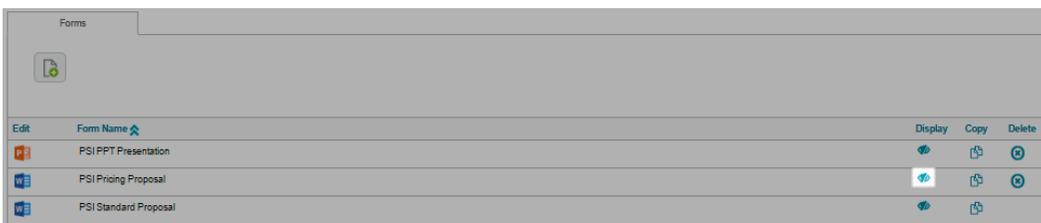
Hide Template

To hide a template:

- From the navigation toolbar, go to the [Sales Docs](#) page.



- Click the display icon for the sales doc you would like to hide.



- Wait for the page to refresh and note the sales doc template is no longer showing. This sales doc will not be available for end users until you choose to display the template.

Edit	Form Name	Display	Copy	Delete
	PSI PPT Presentation			
	PSI Standard Proposal			

To display a hidden template:

- From the navigation toolbar, go to the [Sales Docs](#) page.



- Click the checkbox next to [Show Hidden Forms](#), and then click [Search](#).

- Click the display icon for the template you would like to display.

Edit	Form Name	Display	Copy	Delete
	PSI PPT Presentation			
	PSI Pricing Proposal			
	PSI Standard Proposal			

- Wait for the page to refresh and note the sales doc template is now displayed. This sales doc is now available to permitted users.

Edit	Form Name	Display	Copy	Delete
	PSI PPT Presentation			
	PSI Pricing Proposal			
	PSI Standard Proposal			

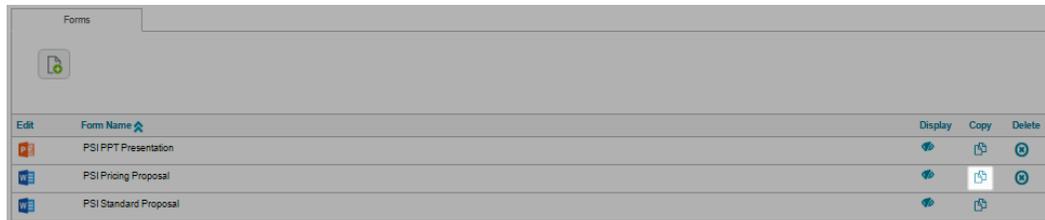
Copy Template

To make a copy of an existing template:

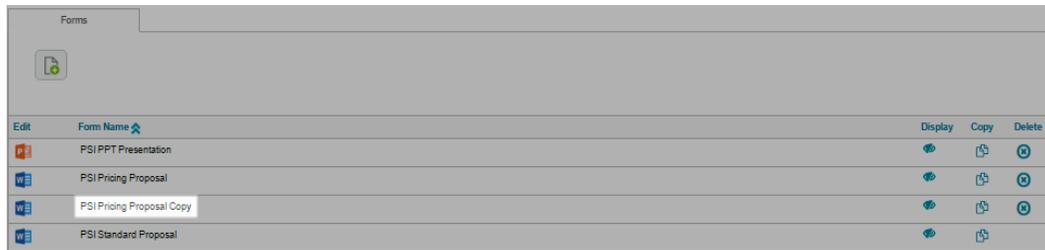
1. From the navigation toolbar, go to the [Sales Docs](#) page.



2. Click the copy icon for the sales doc you would like to duplicate.



4. Wait for the page to refresh and note the sales doc copy is available.



Assembly/Projects

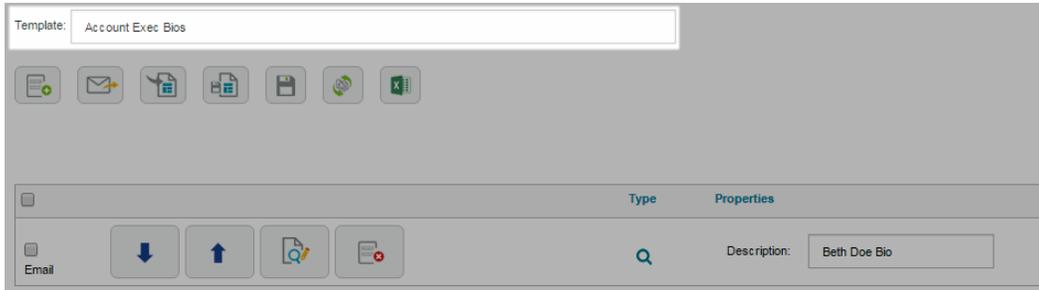
The assembly/project center is a file and project management utility that may be used on any proposal in the dashboard. The assembly project can combine predefined templates with ad hoc sections using documents linked to PMAPS or uploaded to your document network. Each section (or document) has several options that provide control over how it is combined into the final output.

The following file types are permitted in assembly projects:

- Word (.doc and .docx file type)
- Excel (.xls and .xlsx file type)
- PowerPoint (.ppt and .pptx file type)
- Portable Document Format (.pdf file type)

This section outlines the process for building templates. The process for building a template is identical to the process for building an ad hoc assembly project.

An assembly project template displays the **Template** indicator at the top of the template page, while a proposal-specific assembly project displays the proposal name.



To build a new or edit an existing template, click on the **Assembly Center** icon on from the navigation toolbar.



From the assembly/project main page, you can edit an existing assembly project by clicking on the row you would like to edit, or you can add build a new template by clicking on the **Create New Template** icon.



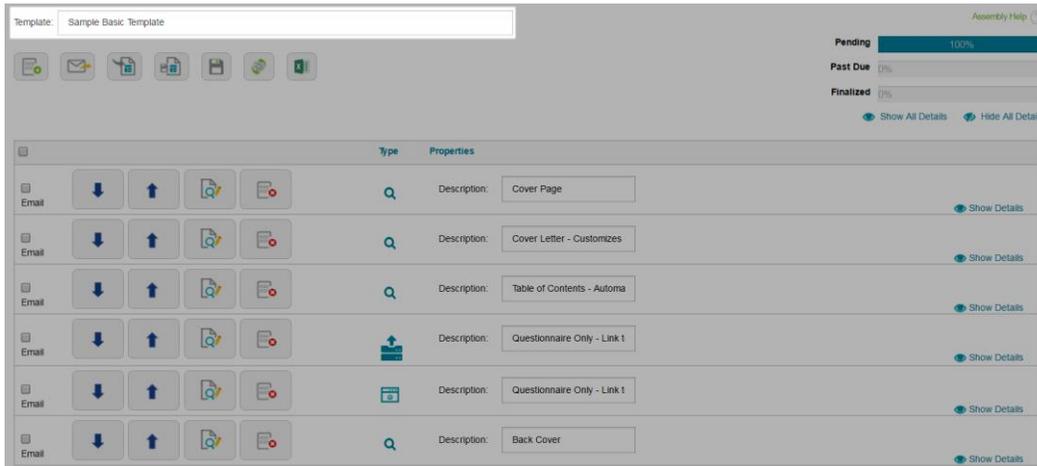
Create a New Template

By default each new assembly project template is empty.

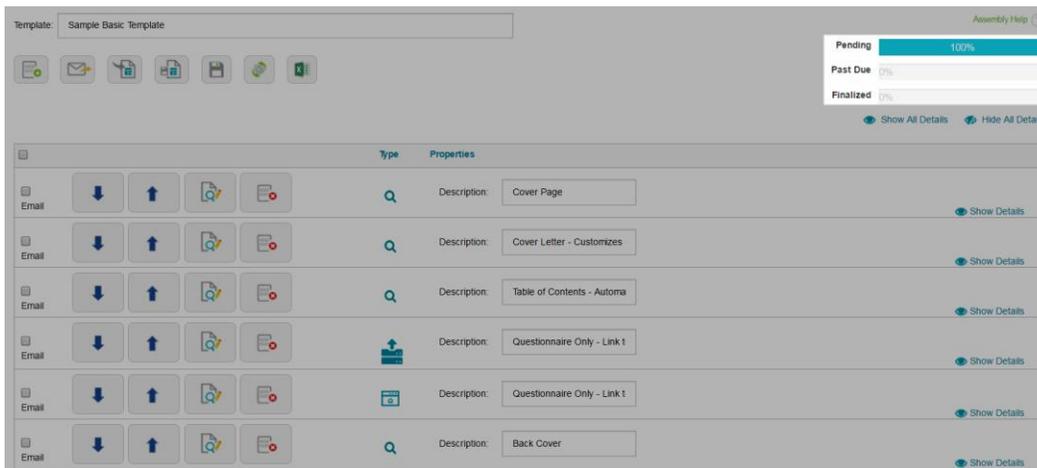


Each assembly project template displays the standard layout consisting of:

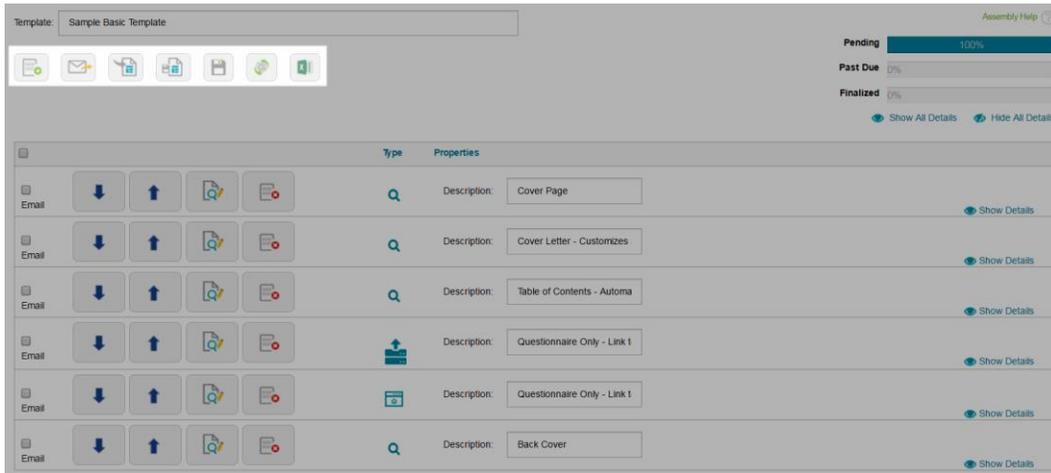
- Template name



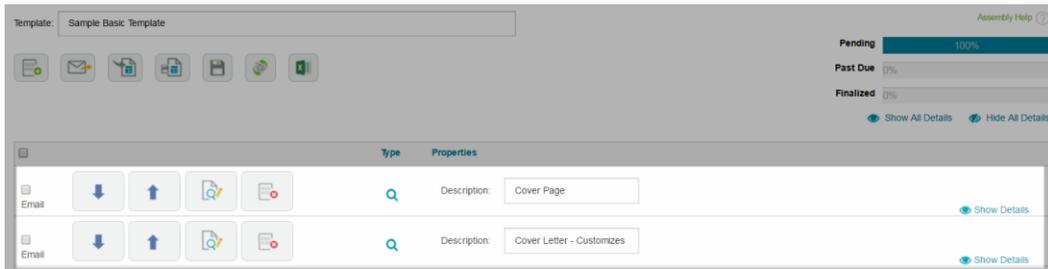
- Progress summary



- Function toolbar



- Sections



You can show or hide the section properties one section at a time or all at once. While building a template, it is recommended that you show details for all sections.

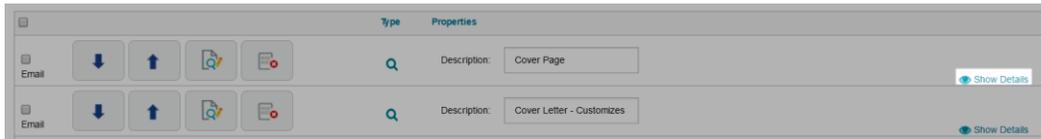
- To show all details for all sections at once, click the [Show All Details](#) icon from the right side of the screen.



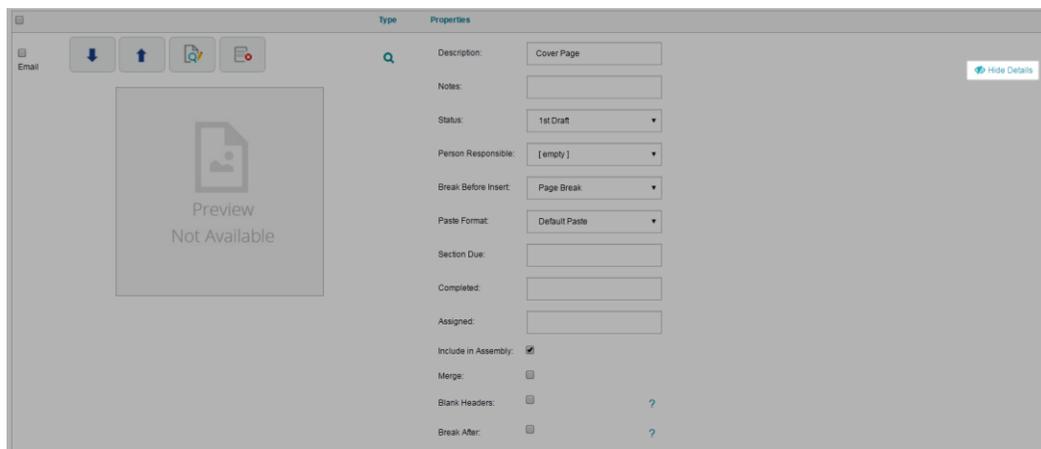
- To hide all details for all sections at once, click the [Hide All Details](#) icon from the right side of the screen.



- To show an individual section, click the [Show Details](#) icon for that section.



- To hide an individual section, click the [Hide Details](#) icon for that section.



1. To begin building a new template, click the [Create New Template](#) icon.



2. Enter a template name that allows easy identification of its use and click [Save](#).
3. Complete the [Properties](#):
 - a. Enter a brief [Description](#) for the section.
 - b. Select the [Person Responsible](#).
 - c. Under [Break Before Insert](#), choose the appropriate break type that will be made before adding the section during assembly.
 - ▶ [Paragraph Break](#): this option inserts a paragraph break before adding the section to the assembly project

- ▶ **Page Break:** this option inserts a page break before adding the section to the assembly project
 - ▶ **Section Break - Continuous:** this option inserts a continuous section break before adding the section to the assembly project
 - ▶ **Section Break - Next Page:** this option inserts a new page section break before adding the section to the assembly project
 - ▶ **None:** this option does nothing before adding the section to the assembly project
- d. Under **Paste Format**, choose a text formatting option for the section to be applied during the assembly.
- ▶ **Default Paste:** uses the setting from your Microsoft Word Normal.dotm for **Pasting between documents when style definitions conflict**.
 - ▶ **Keep Source Formatting:** This option retains the look of the text by assigning the "Normal" style and includes characteristics such as font size, italics, or other formatting to mimic the style definition of the copied text.
 - ▶ **Merge Formatting:** This option changes the formatting so that it matches the text that surrounds it.
- e. Enter a due date in the **Section Due** field (or use the calendar picker).
- f. Leave the **Completed** date empty because this is proposal-specific.
- g. Leave the **Assigned** date empty because this is proposal-specific.
- h. Check the **Include in Assembly** box.

Description: [hide details](#)

Notes:

Status:

Person Responsible:

Break Before Insert:

Paste Format:

Section Due:

Completed:

Assigned:

Include in Assembly:

Merge:

Blank Headers: ?

Break After: ?

- i. Leave the **Merge** box unchecked because this varies by proposal.
- j. **Blank Headers**: Prior to combining, this advanced option removes not only all contents from that section's header and footer but will also remove the blank line in that section's header and footer.
- k. **Break After**: Prior to combining, this advanced option will add a **Section Break – Next Page** at the end of the section before it is added to the assembly project.

Icon Definitions

Function	Icon	Definition
Add Line		Add a new section (line).
Email Selected		Email the selected section(s) to the Person Responsible .
Load Template		Choose a template.
Save as Template		Save the current assembly project as a new template.
Save and Combine		Save and combine the assembly project.
Save Assembly		Saves any changes to the assembly project.
Revert Assembly		Reverts assembly project to the last saved version.
Export to Excel		Exports the data to Excel.
Show Details		Expands the view of all sections to display the available options.
Hide Details		Contracts the view of all sections to hide the available options.
Move Line Down		Moves the section down one position in the assembly project.
Move Line Up		Moves the section up one position in the assembly project.
Edit/View Document		Opens the document in save mode.
Delete Line		Deletes the current section from the assembly project.
Type: Dashboard		Indicates a link to the main dashboard proposal editor document.
Type: Search		Indicates a link to a search record.

Function	Icon	Definition
Type: Network/Web		Indicates the document was uploaded from a network or web URL link.

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