PMAPS®

User Documentation

Administrator Manual

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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.

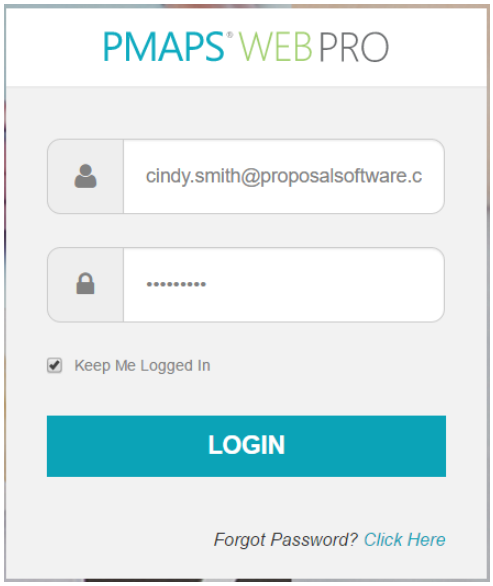
Recommended Configuration

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 365[1] platform installation)
- Latest version of Adobe Reader

Login

1. Enter your user name and password.



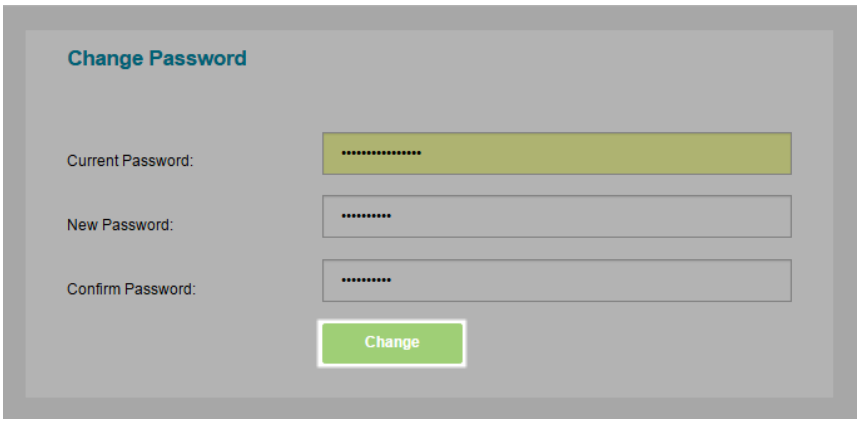
[1] Microsoft Office components must be installed on all user computers; not compatible with Office 365 'Business Essentials' or 'Enterprise E1' versions.

TIPS

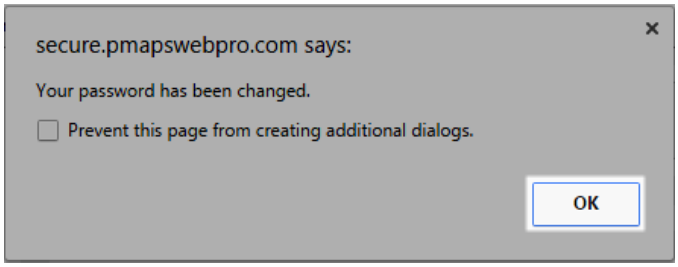
- If you check the Keep Me Logged In box before you click the Login to PMAPS WebPro icon you will remain logged in, as long as you are still within a valid login timeframe. If you reboot your computer or sign out of Windows, you will no longer be logged in.

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.



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



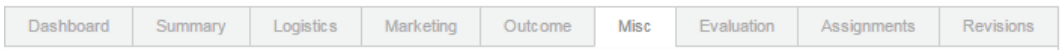
PMAPS uses traditional strong password authentication. The password must be at least eight characters in length and **must contain at least one capital letter, one number, and one non-alphanumeric character**. The following non-alpha characters are accepted in passwords: ~!@#$%^*()_-“;’?/><.,.

Nomenclature Customization

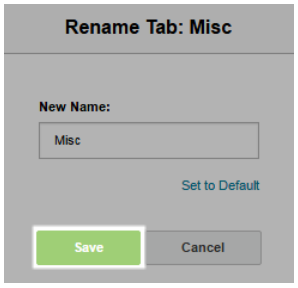
Tab Labels

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.



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

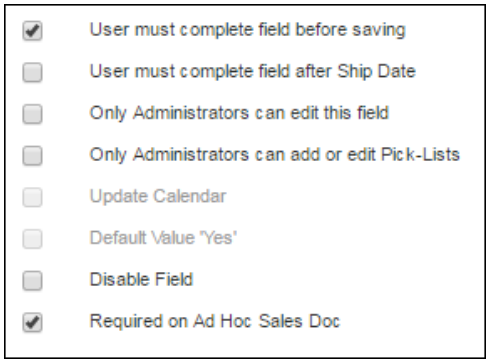
Nearly all fields in PMAPS can be customized to some extent. In most cases, you can change at least the field label names. In other cases you can change almost everything about the field—except the structure and the location of the field within the module. This can be done all within the PMAPS application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

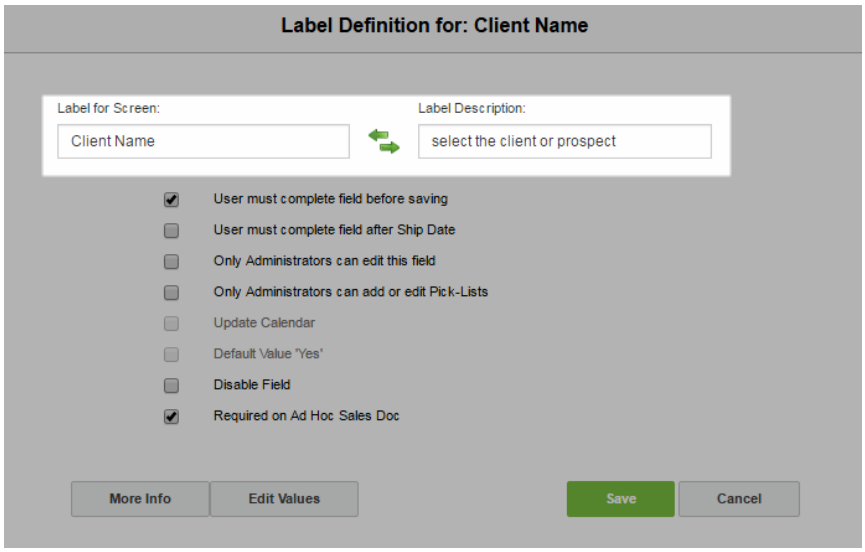
If all the options in the popup window are disabled, it is an auto-populated field and only the label may be modified.

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



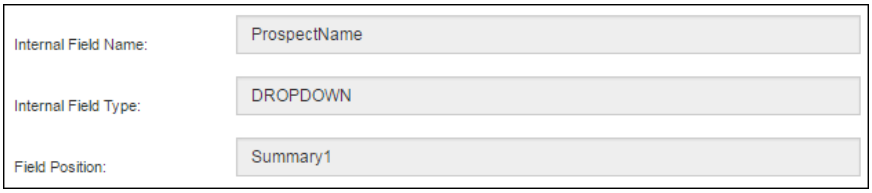
The following edit options are available to the administrator for each editable field in the database:

- 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.



- 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.

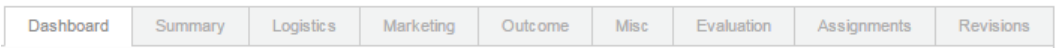
- User must complete field after Ship Date: Check this box if this field must be completed when saving an existing proposal and the "ShipDate" (internal field name) is required.
- Administrator editing only: Check this box to restrict editing this field only by an administrator.
- Administrator adding 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 thix 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.



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

Dashboard Tabs

Dashboard



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 DOCX				
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 | Outcome | Misc | Evaluation | Assignments | Revisions

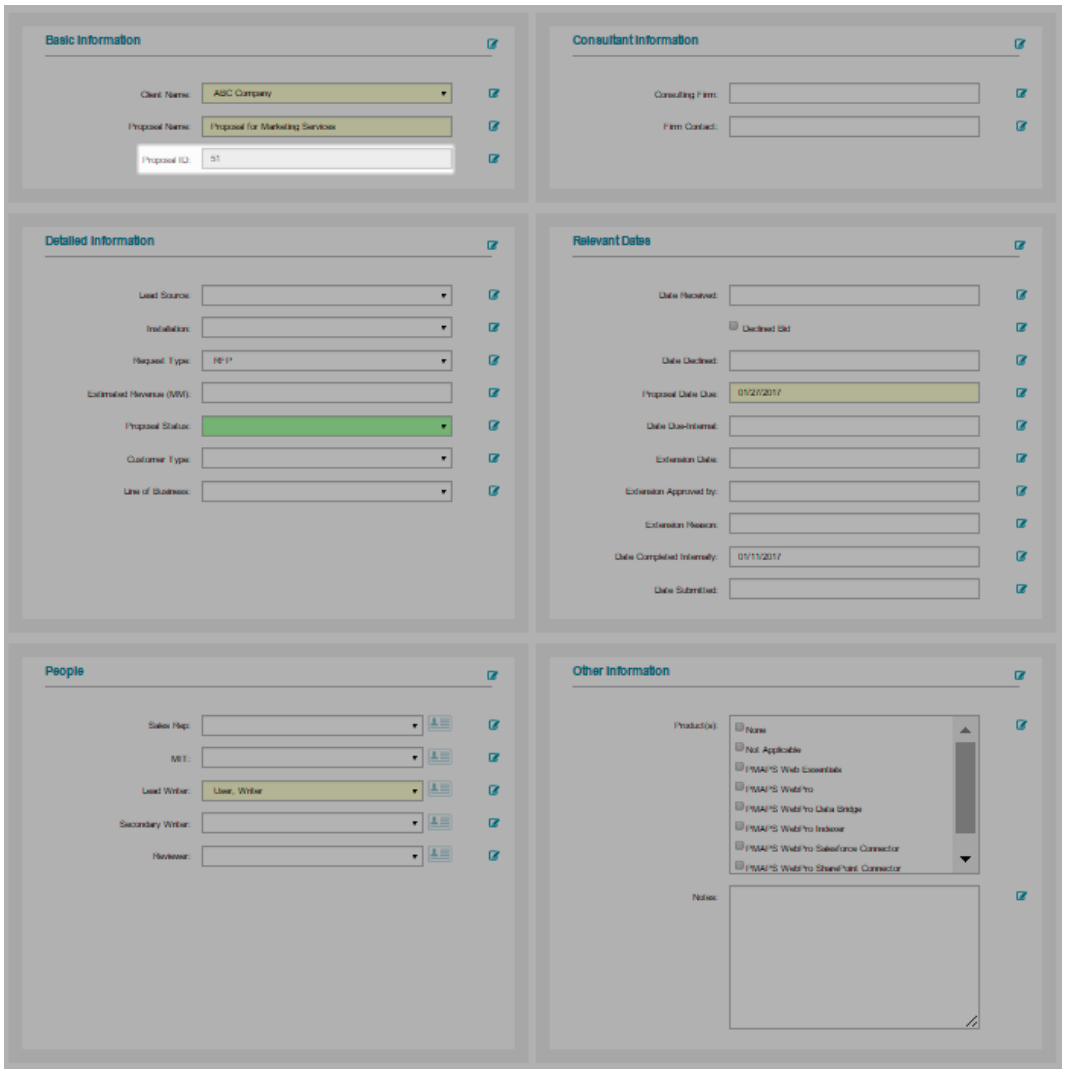
The Summary tab contains the most widely used data capture fields when logging proposals. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Summary tab):

- 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

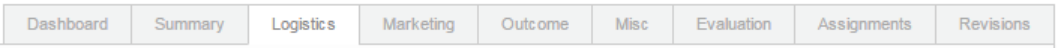
- Automated fields: 1

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

  - Proposal ID

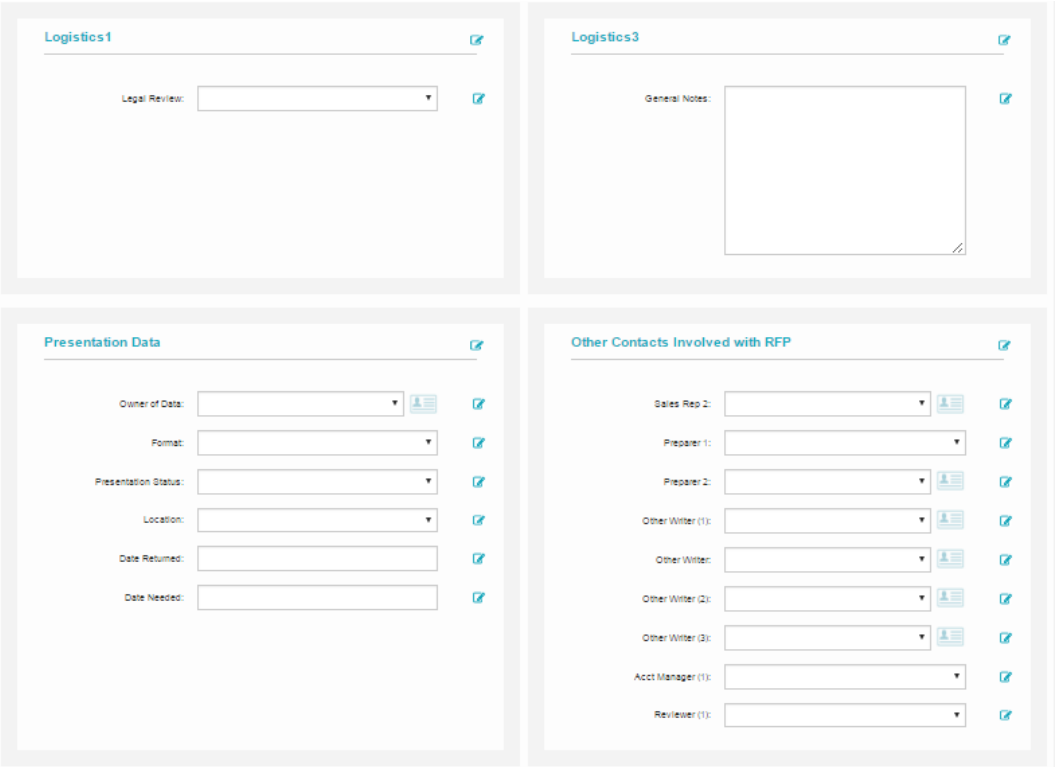


Logistics

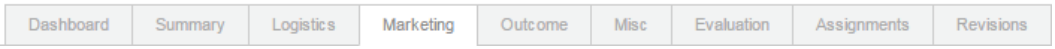


The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Logistics tab).

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



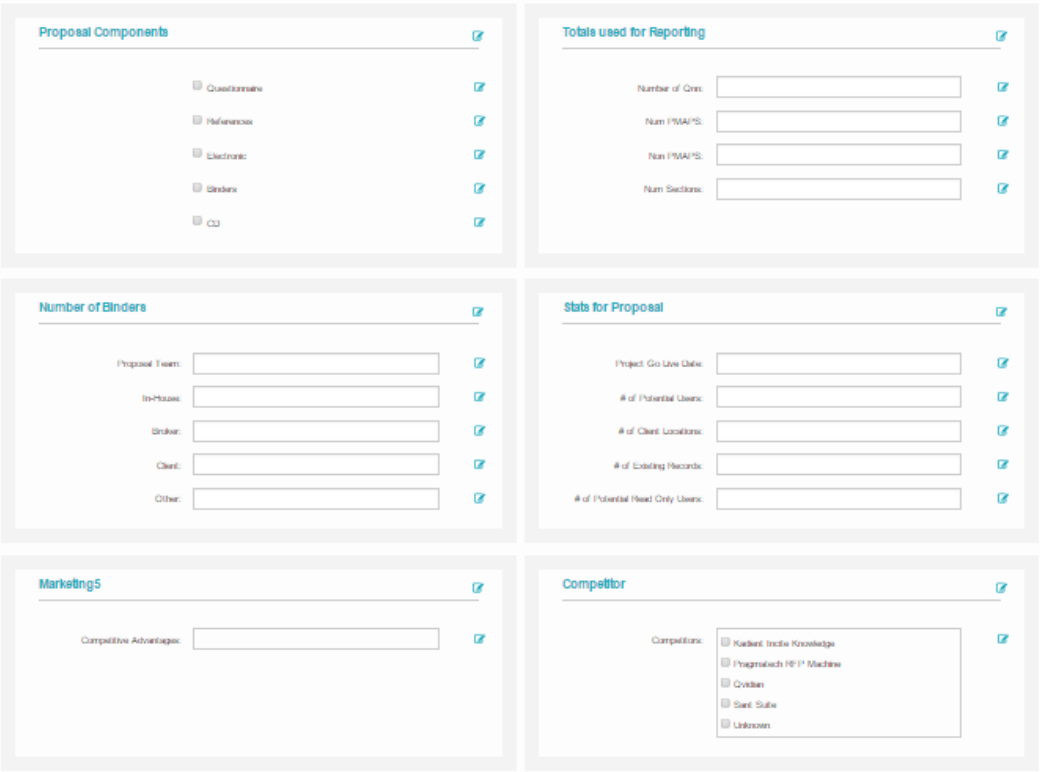
Marketing



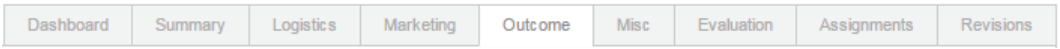
The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Marketing tab).

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

- Checkbox (multi-select picklist) fields: 1



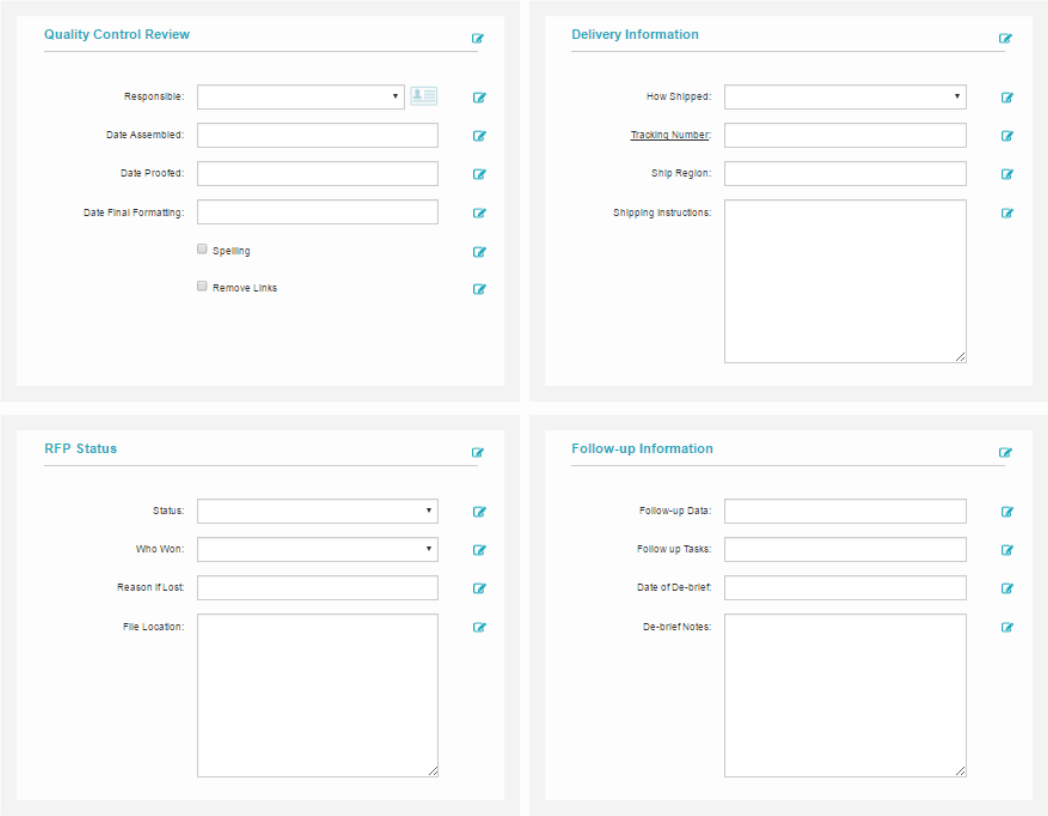
Outcome



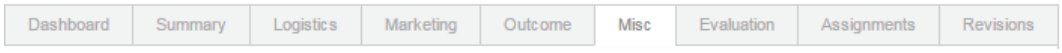
The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Outcome tab).

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

- Date fields: 7



Misc

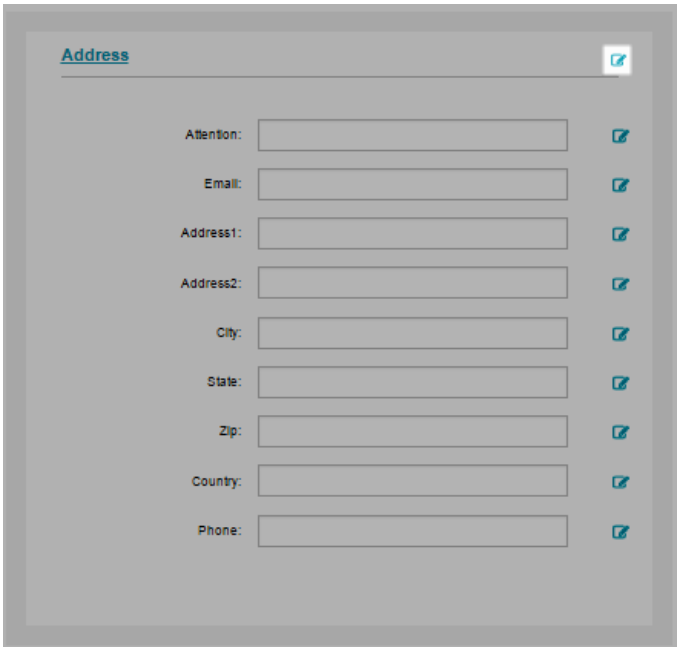


The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Misc tab).

- 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.



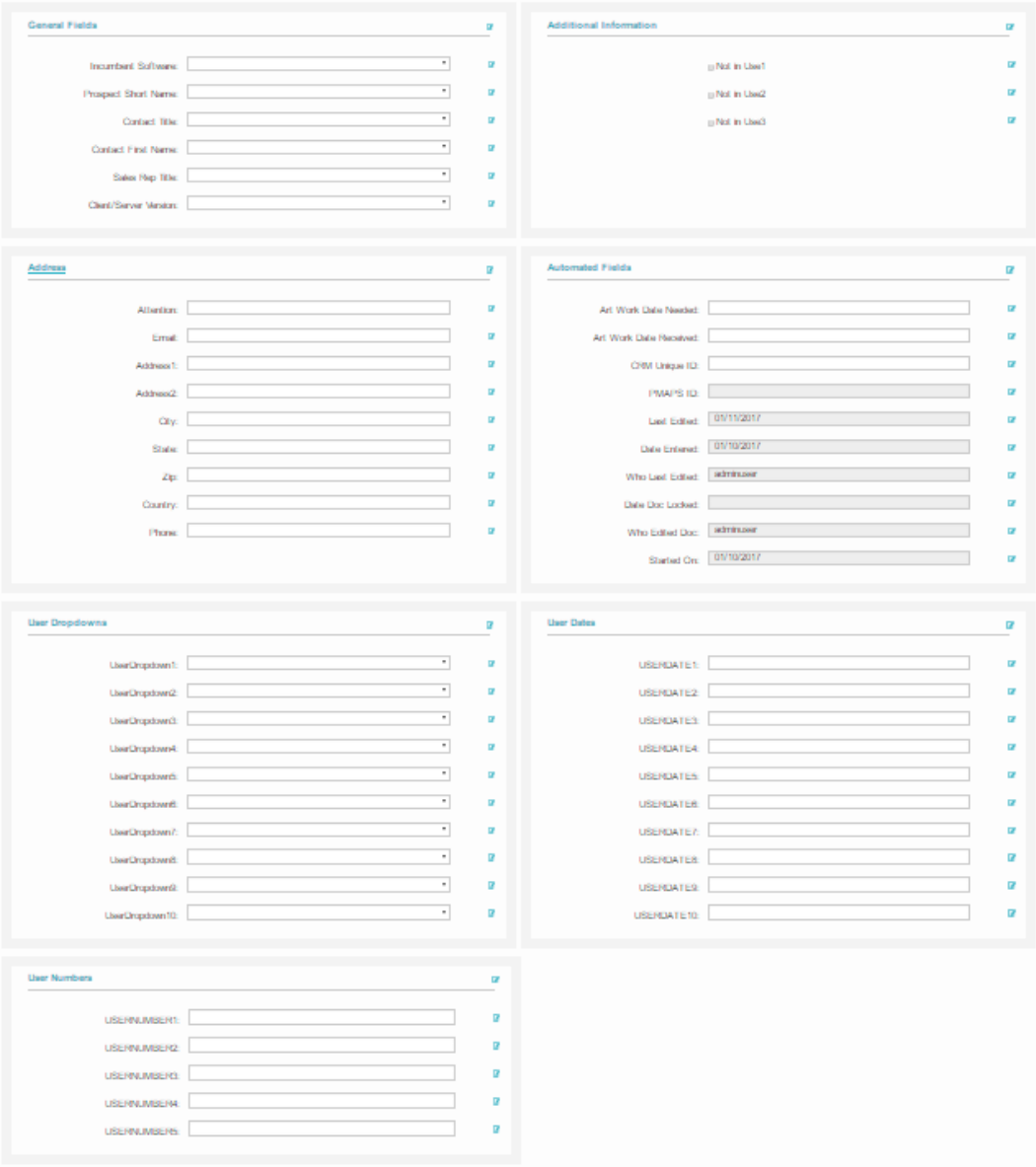
  - Attention
  - Email
  - Address1
  - Address2
  - City
  - State
  - Zip
  - Country
  - Phone

- Automated fields: 5

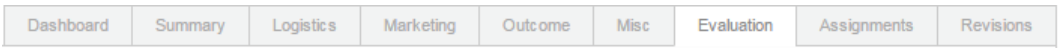
  The following fields are automatically populated as the action is performed in PMAPS.

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

- Started On

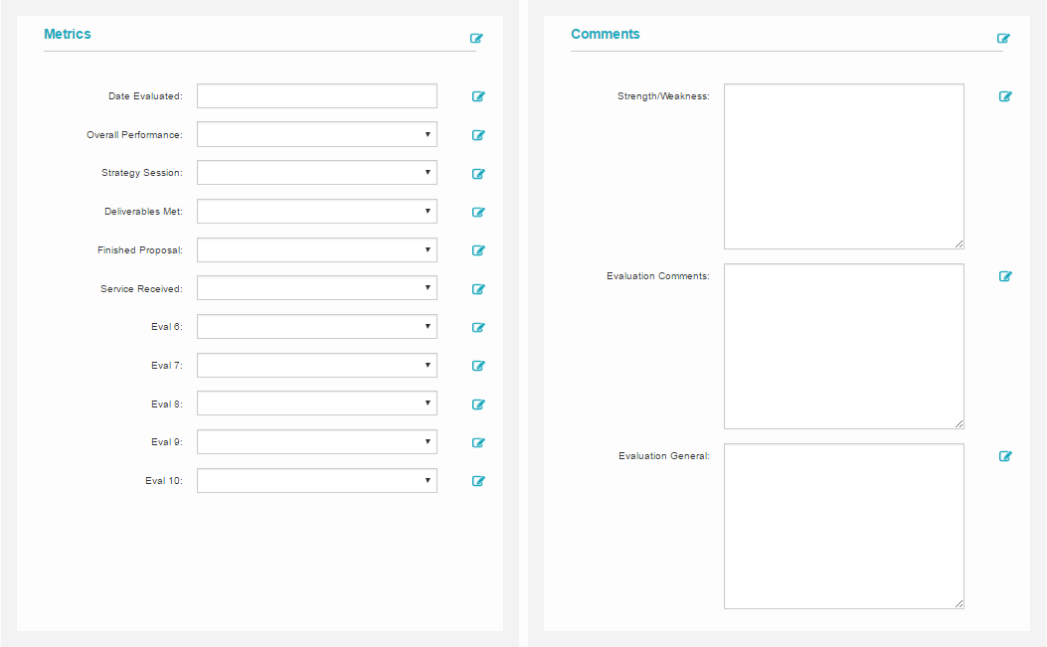


Evaluation

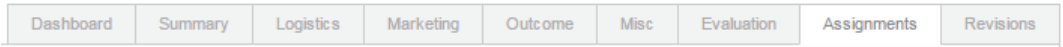


The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Evaluation tab).

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

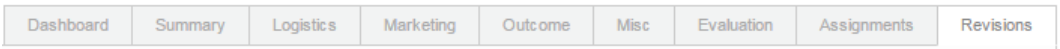


Assignments



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.

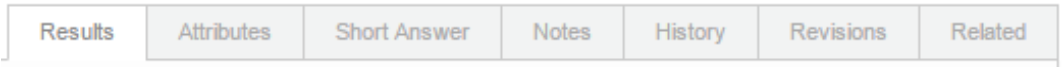
Revisions



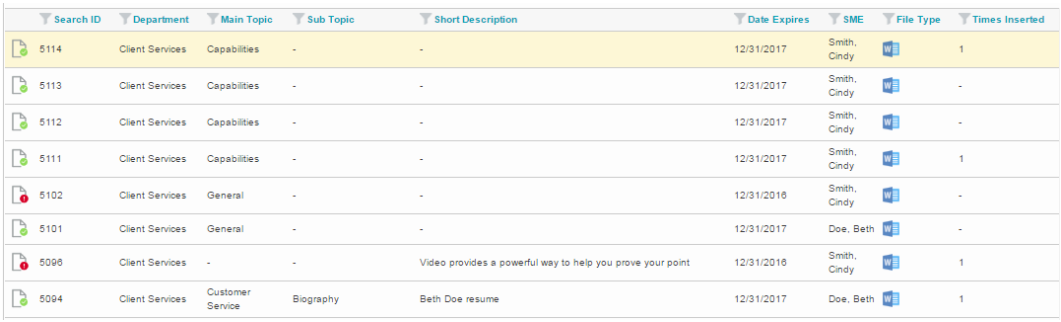
The Revisions tab displays all revisions made to a dashboard record and includes the ability to view prior versions and compare the current version with prior versions. The information available here and its labels, functions and meanings are not customizable. Refer to the user manual for instructions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

Search Tabs

Results

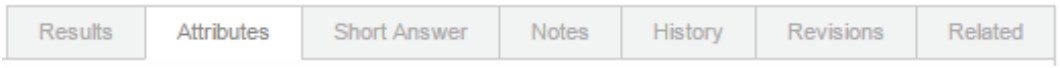


The Results tab displays all search records according to the user established preferences. The screen shot displays the layout of the Results tab:



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		1
5113	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy		-
5112	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy		-
5111	Client Services	Capabilities	-	-	12/31/2017	Smith, Cindy		1
5102	Client Services	General	-	-	12/31/2016	Smith, Cindy		-
5101	Client Services	General	-	-	12/31/2017	Doe, Beth		-
5096	Client Services	-	-	Video provides a powerful way to help you prove your point	12/31/2016	Smith, Cindy		1
5094	Client Services	Customer Service	Biography	Beth Doe resume	12/31/2017	Doe, Beth		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

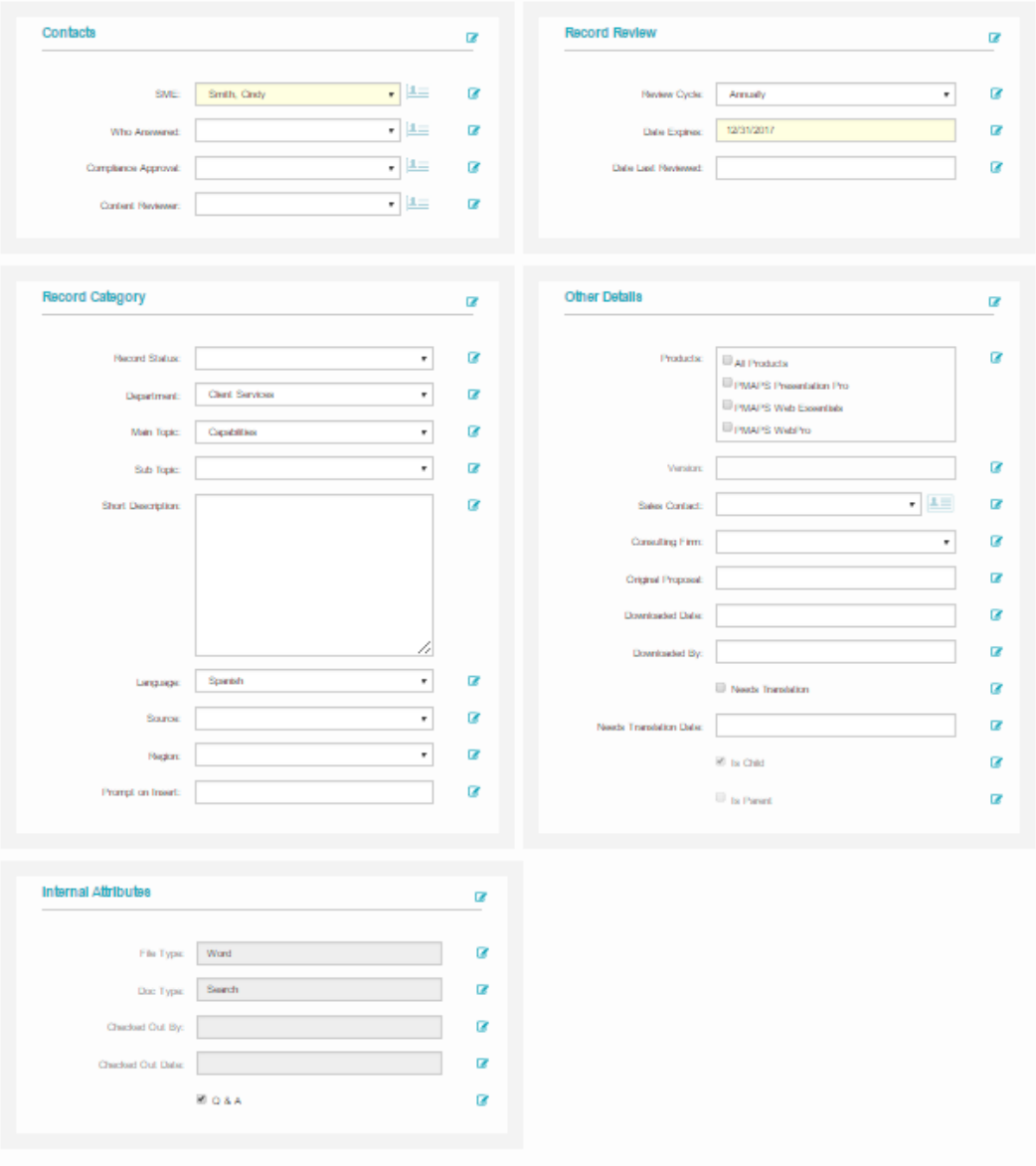
  The following fields are automatically populated when a record is added to PMAPS.

  - File Type
  - Doc Type

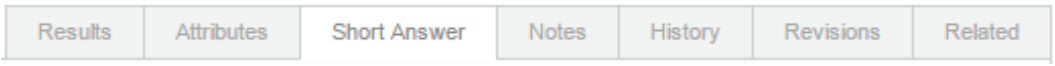
  The following fields are automatically populated when these features are used in PMAPS.

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

- Is Parent

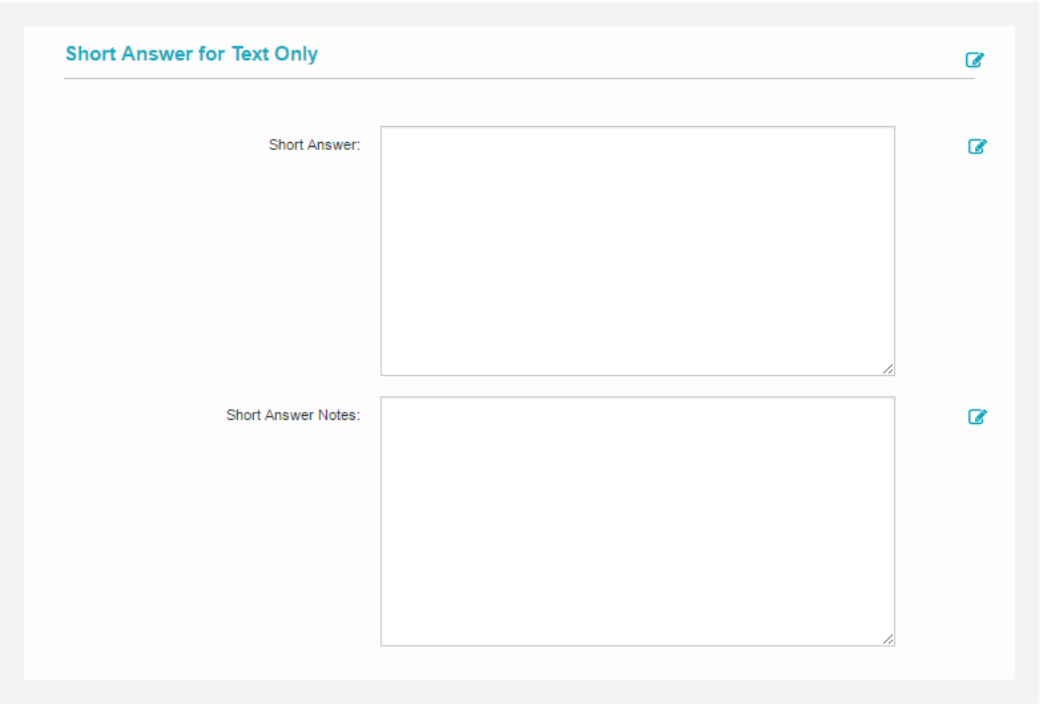


Short Answer

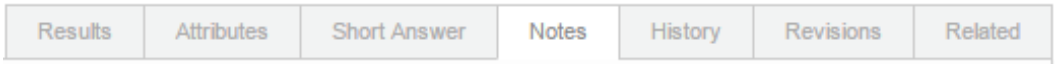


The Short Answer tab contains the short answer and notes for a PMAPS record. The tab illuminates in yellow when selecting a record with a short answer. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Short Answer tab):

- Memo text entry fields: 2



Notes



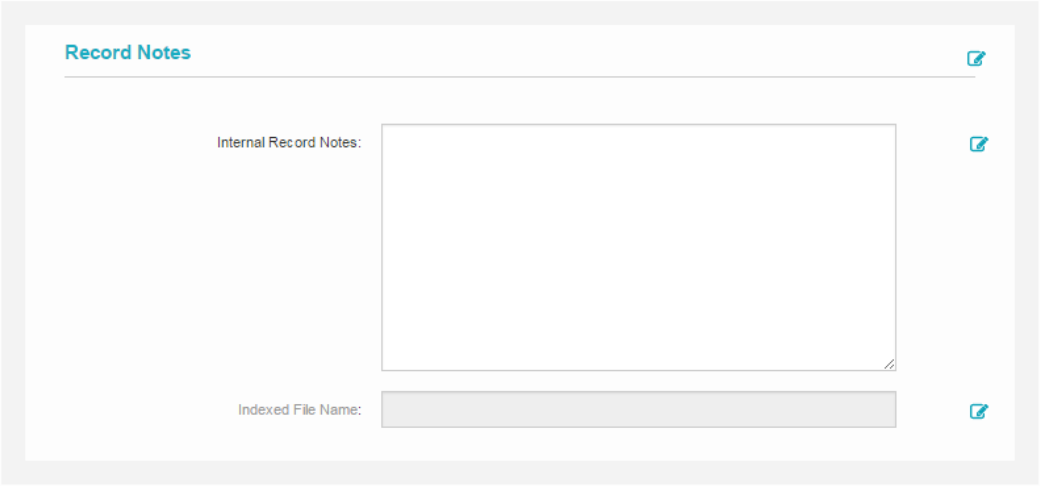
The Notes tab contains internal information about a record in text format. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Notes tab):

- Memo text entry fields: 1

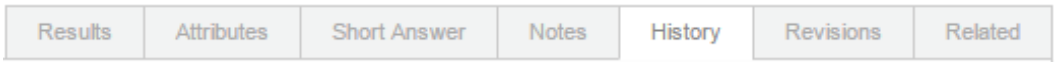
- Automated fields: 1

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

  - Indexed File Name



History



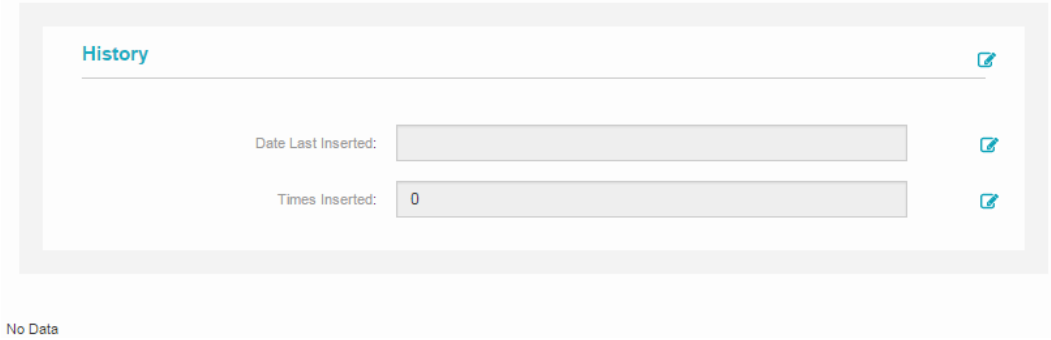
The History tab displays insertions of a search record and includes automated fields. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the History tab):

- Automated fields: 2

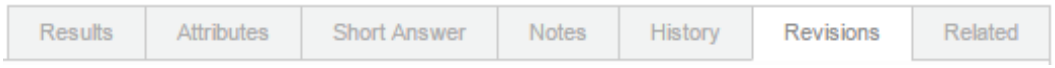
  The following fields are automatically populated when a record is inserted to a document using the Insert Full feature.

  - Date Last Inserted

- Frequency



Revisions



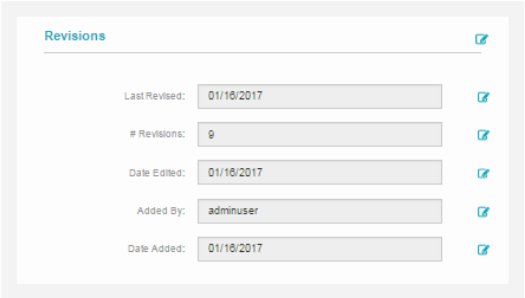
The Revisions tab displays all revisions made to a search record and includes automated fields. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Revisions tab):

- Automated fields: 5

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

  - Last Revised
  - # Revisions
  - Date Edited
  - Added By

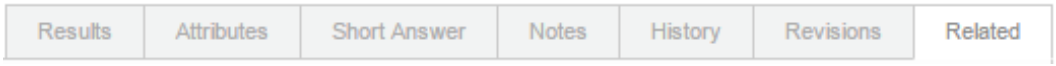
- Date Added



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



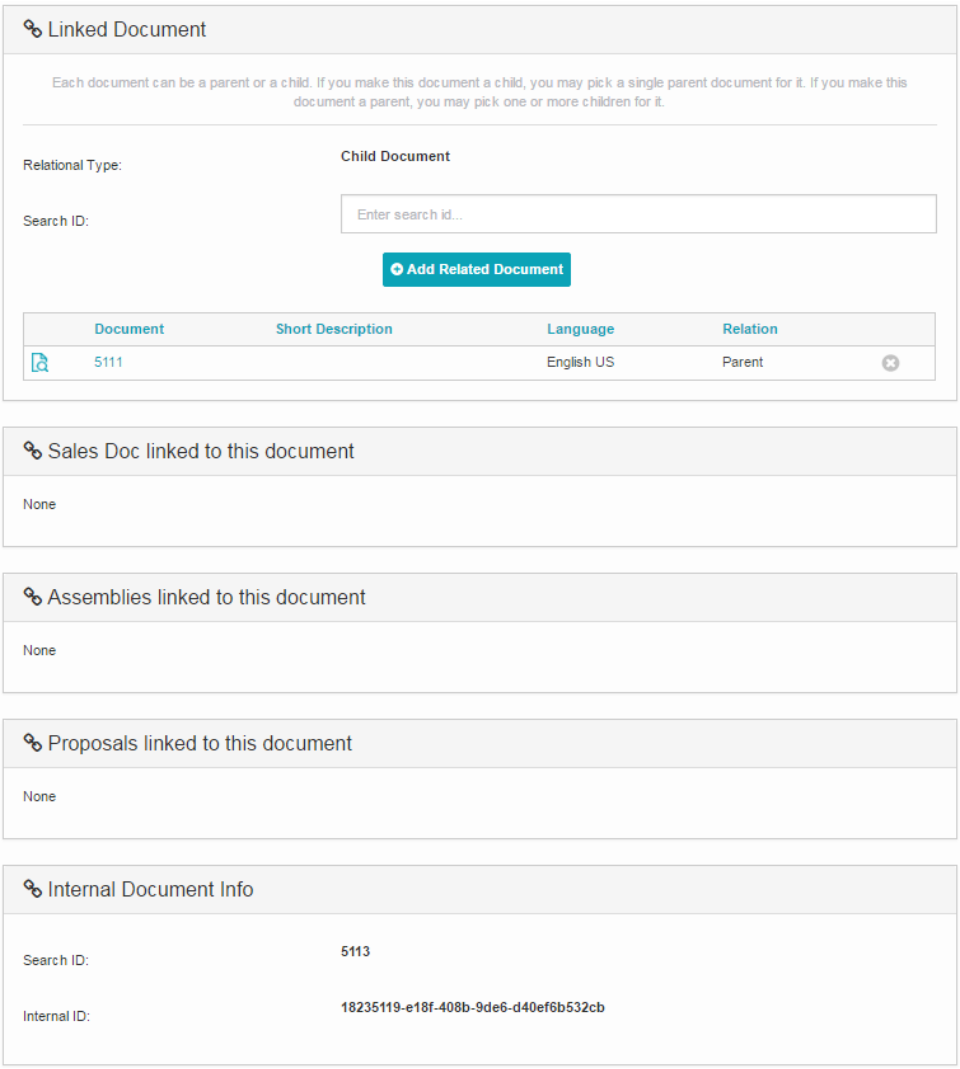
The Related tab displays all relations for an existing search record and includes automated fields. The default application comes with the following numbers and types of fields (the screen shot displays the layout of the Related tab):

- 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



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.

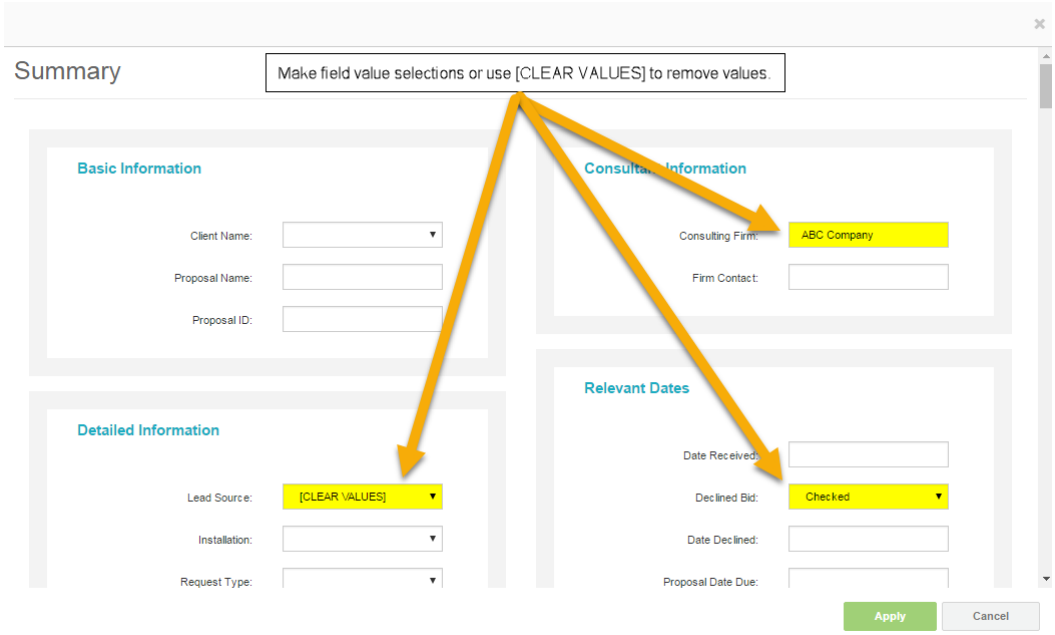
To make global changes to Dashboard records, follow the steps below.

1. Go to the Dashboard.

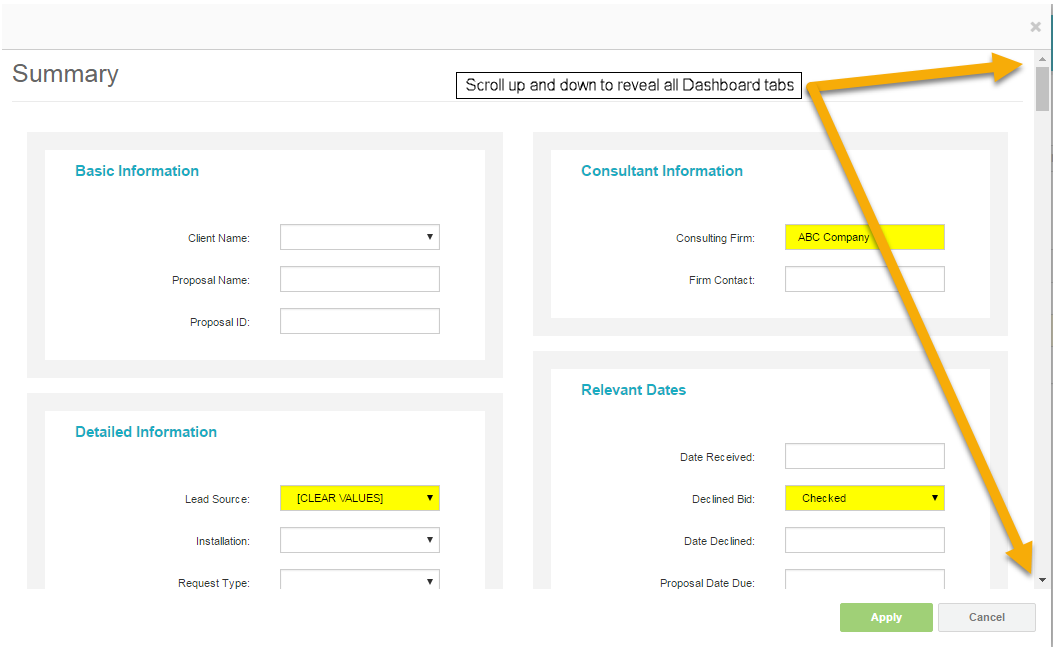
2. Apply the desired filter(s) to narrow down to only those records where you would like to make global changes.

3. Click on the Global Attribute Changes icon.

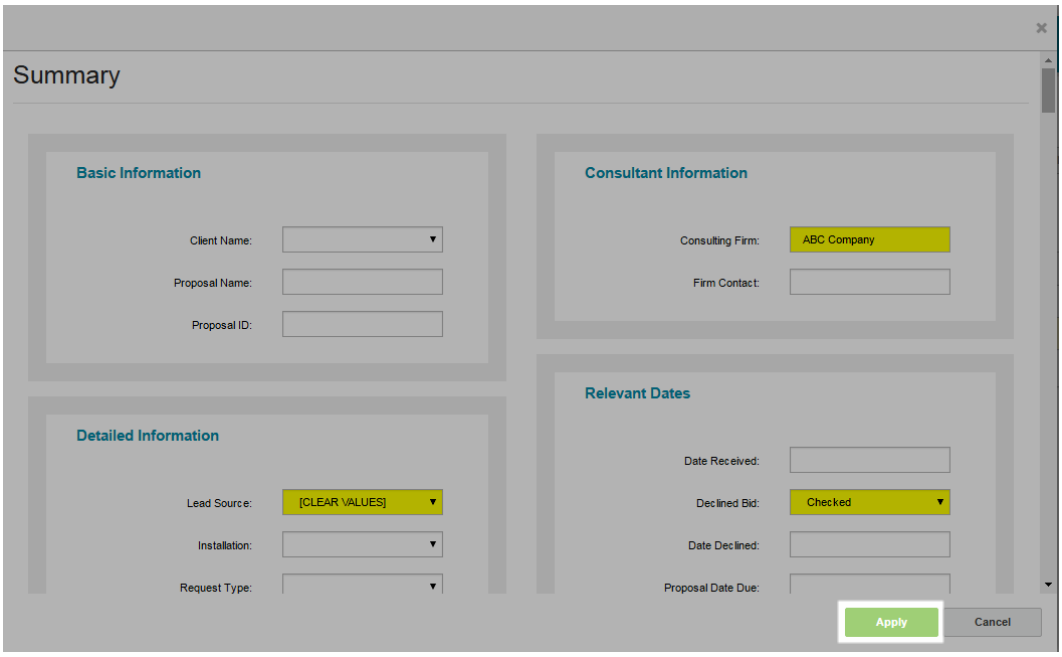
4. Make changes to one or more field values. Use the [CLEAR VALUES] option to clear any then-existing values from a field within the selected records (available only for applicable field types.



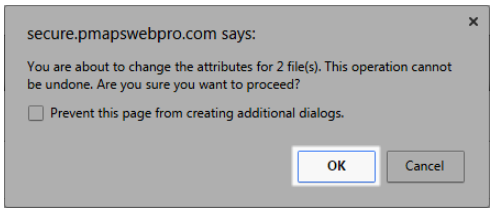
5. Scroll up and down to reveal fields in other tabs.



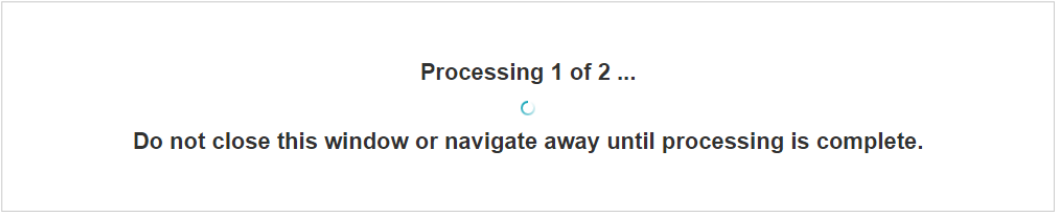
6. When you have made all changes, click Apply



7. 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.



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



TIP

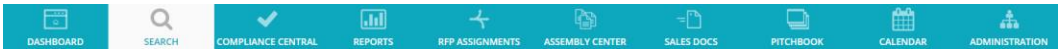
- After completing step 8 (once the page refreshes), you may need to remove any filters and sorting to reveal the global changes made.

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.

1. Go to the Search module.

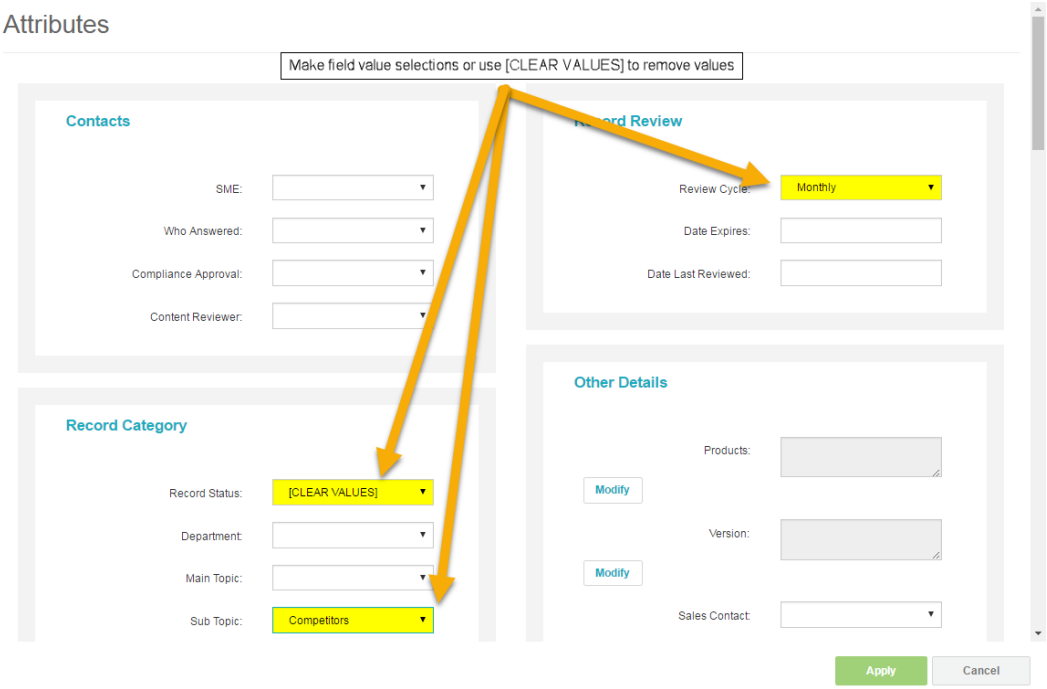


2. Apply the desired filter(s) to narrow down to only those records where you would like to make global changes.

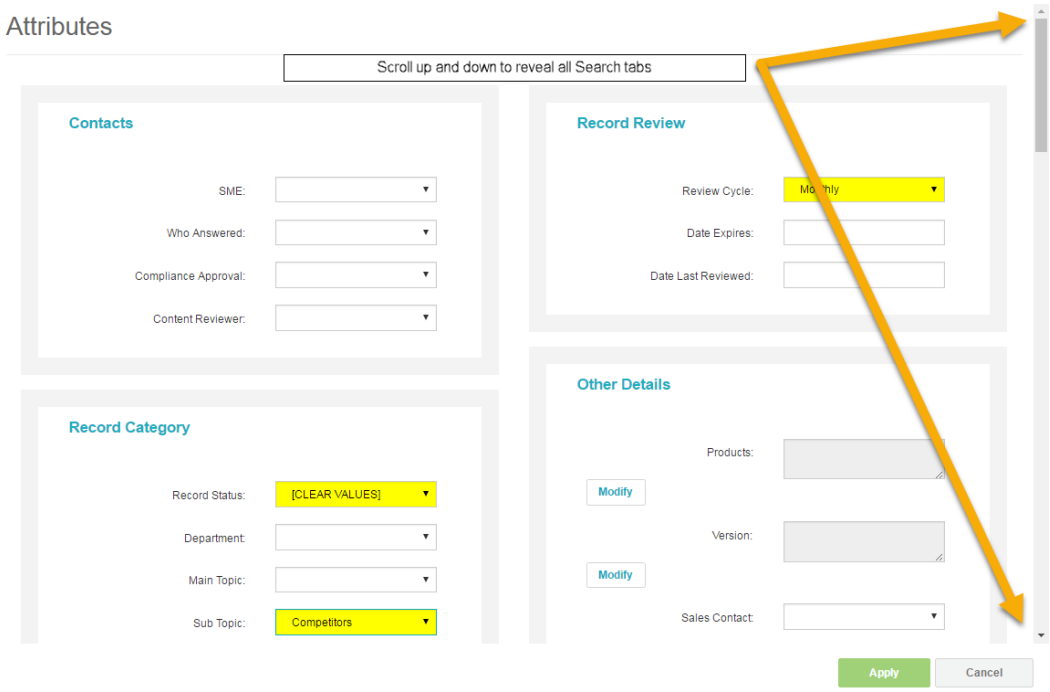
Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	File Type
4987	RFP Responses	Company Information	-	brief overview of your company, identifying any parent, subsidiary, and/or affiliate relationships	3/31/2016	Smith, Cindy	
4859	RFP Responses	Company Information	-	-	3/31/2017	Smith, Cindy	
3484	RFP Responses	Company Information	-	Core Service Offering	3/31/2017	Smith, Cindy	
2319	RFP Responses	Company Information	-	Competitive Advantage	3/31/2017	Smith, Cindy	
2306	RFP Responses	Company Information	-	Financial Condition / Statements	3/31/2017	Smith, Cindy	
2302	RFP Responses	Company Information	-	History	3/31/2017	Smith, Cindy	
2300	RFP Responses	Company Information	-	Ownership	3/31/2017	Smith, Cindy	

3. Click on the Global Attribute Changes icon.

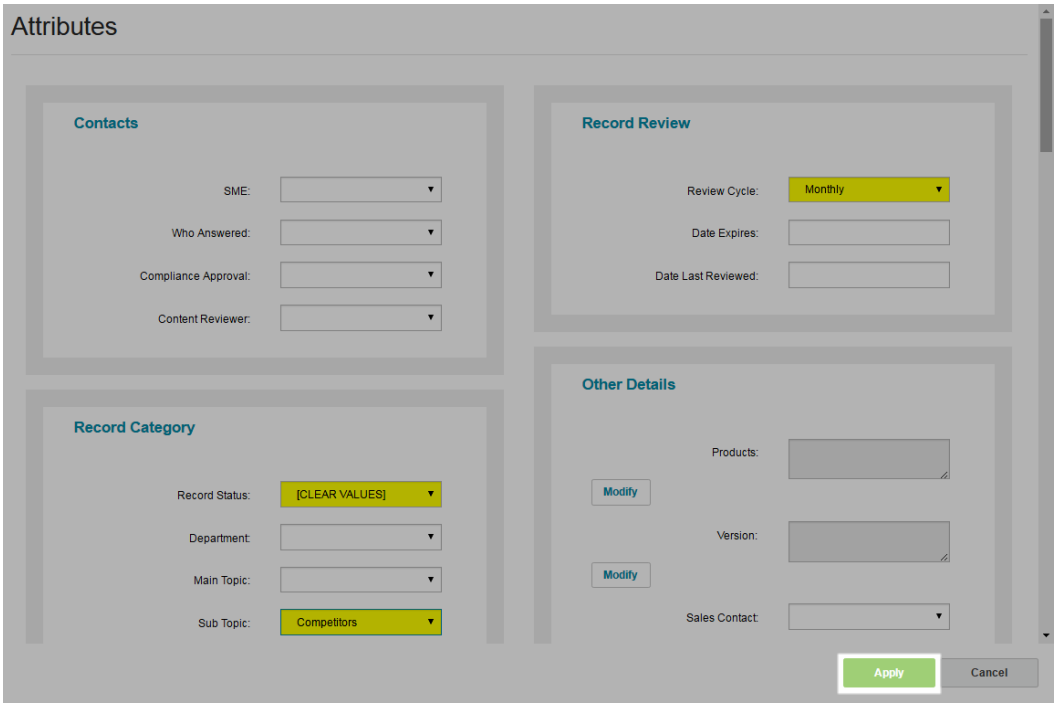
4. Make changes to one or more field values. Use the new [CLEAR VALUES] option to clear any then-existing values from a field within the selected records (available only for applicable field types.



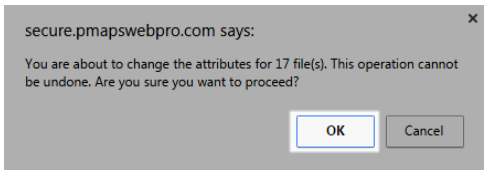
5. Scroll up and down to reveal fields in other tabs.



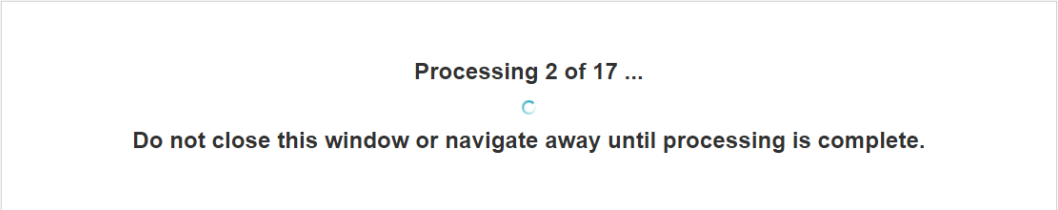
6. When you have made all changes, click Apply



7. 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.



8. 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

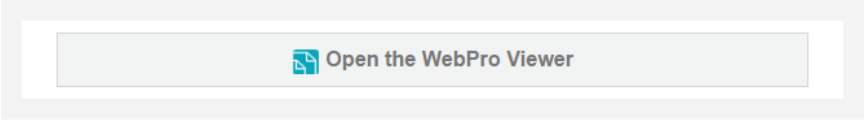
On the Account page, all users may open the Viewer and change their password.

Open the WebPro Viewer

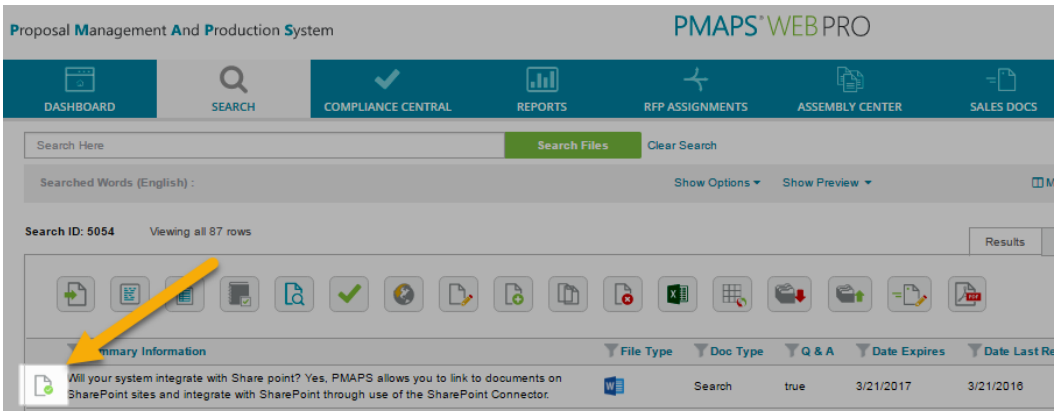
No administrative rights are necessary to open the Viewer. Once the steps below are complete the Viewer will open automatically when needed.

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.



5. Once the Viewer opens, go to the Search page and view any document by clicking the preview icon.

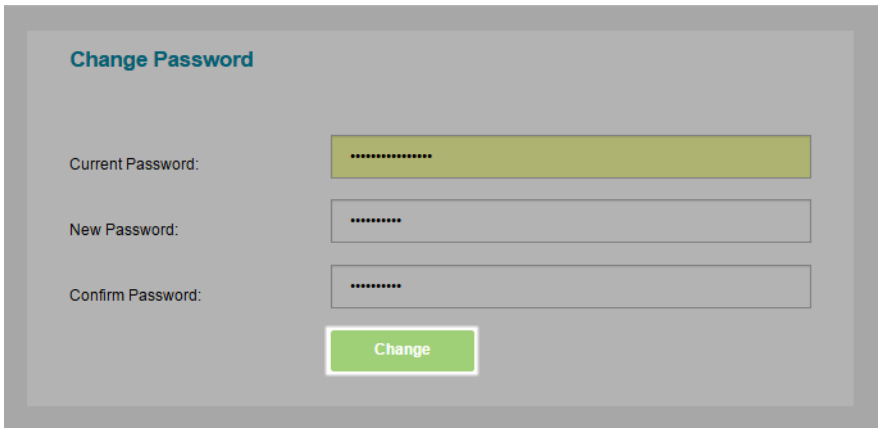


To review the full documentation for the PMAPS Viewer, including common troubleshooting steps and resolutions, download the file below:

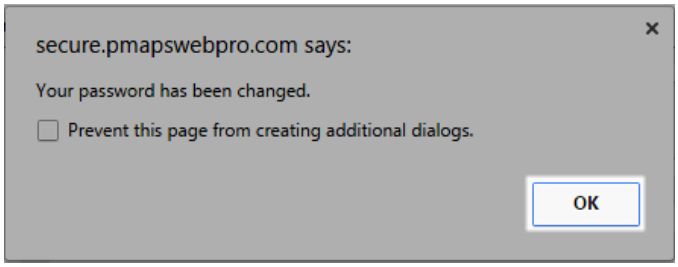
www.pmapswebpro.com/documentation/pmaps_open_viewer_instructions.pdf

Change Password

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.



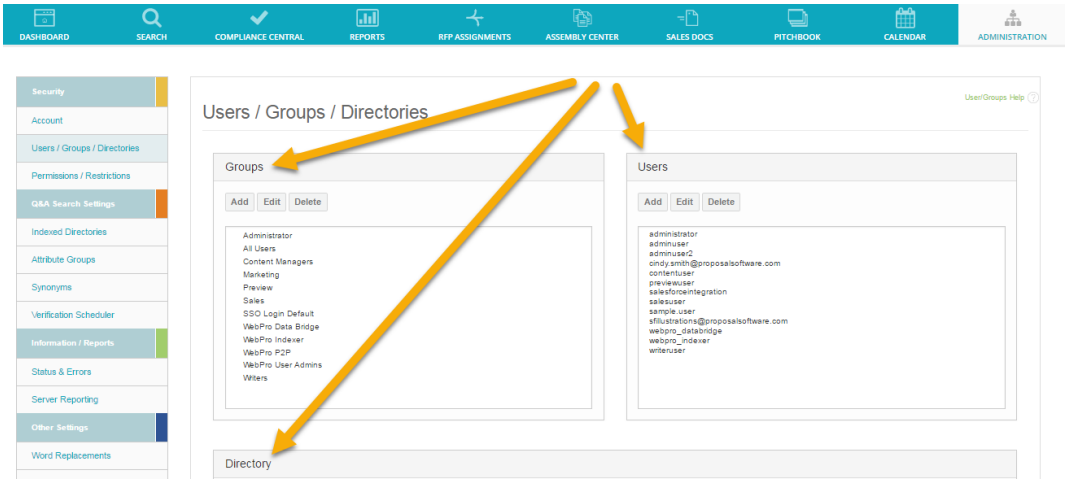
2. Wait for the confirmation your password was changed and then click OK.



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: ~!@#$%^*()_-“;’?/><.,.

Users / Groups / Directories

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



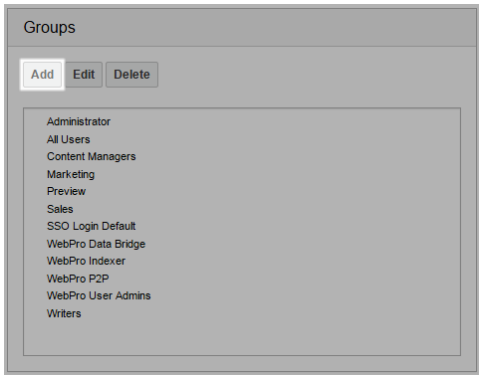
Groups

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:

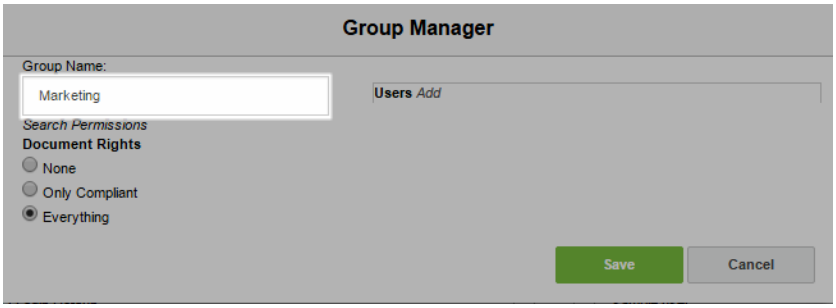
- Administrator
- All Users
- WebPro User Admins

Add Group

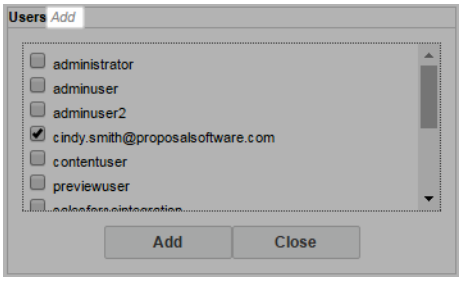
1. Click the Add icon.



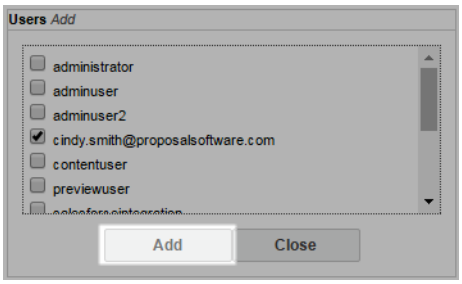
2. Enter a name for the group; e.g., "Marketing."



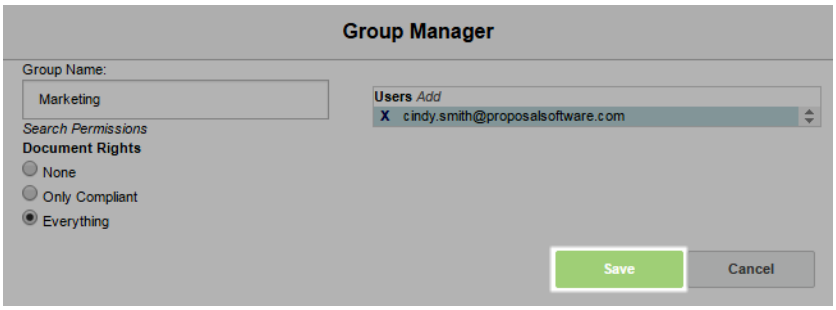
3. Click the Add link next to the Users header. The link will display in underline in hover mode.



4. Click the Add icon in the Users section.

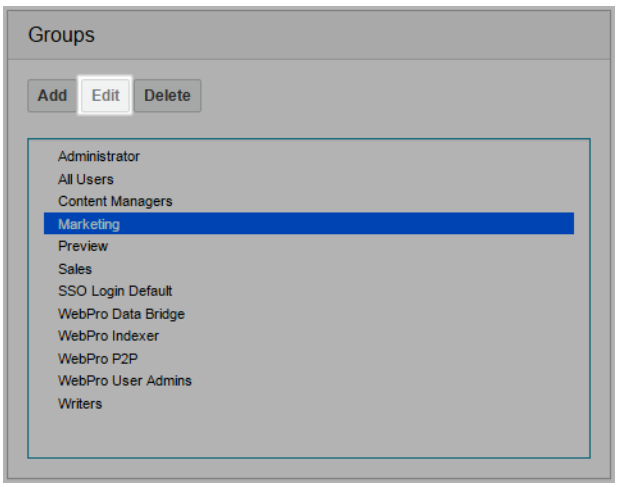


5. Review the Users section to confirm the users you are adding to this group are correct, and then click Save.

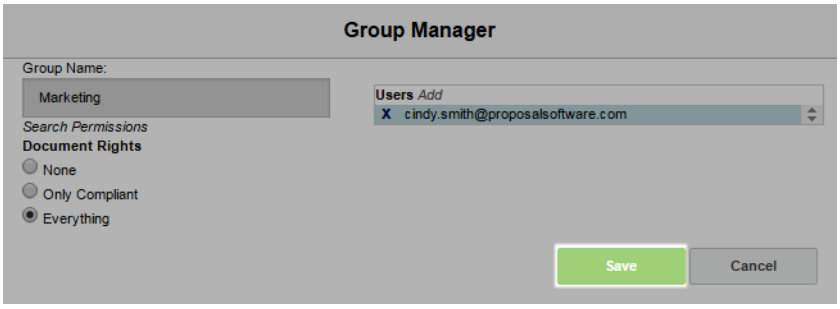


Edit Group

1. Select the group you would like to change, and click Edit.

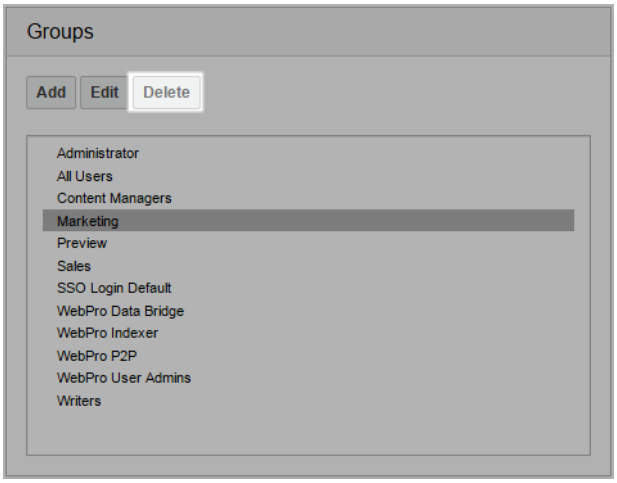


2. Add or edit users, update the document rights if needed, and then click Save.



Delete Group

1. Select the group from the window, and then click Delete.

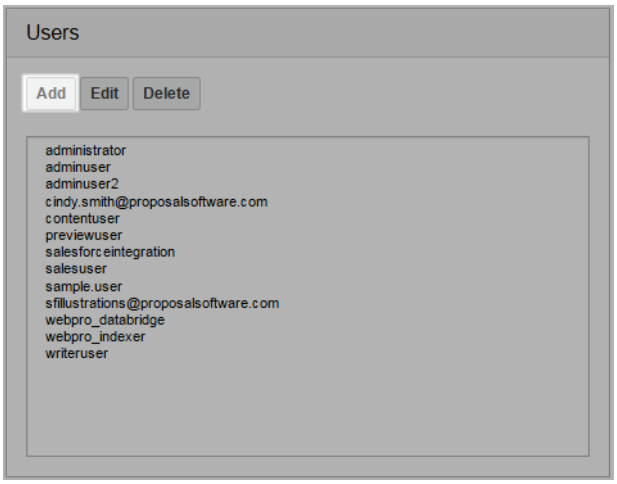


Users

Add User

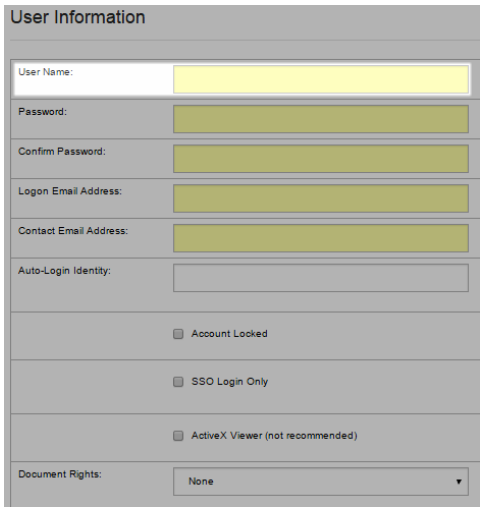
1. Go to the Administration page.

2. Click the Add icon.

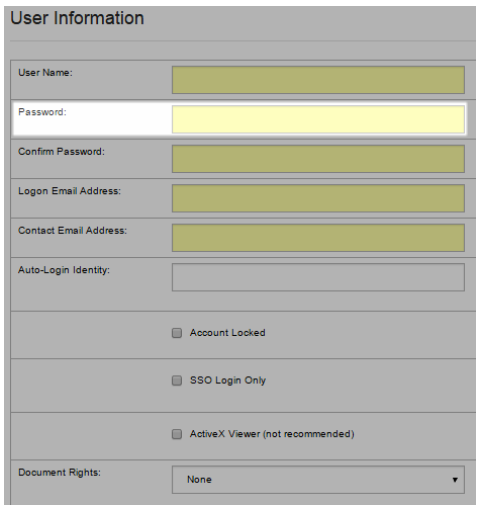


User Information

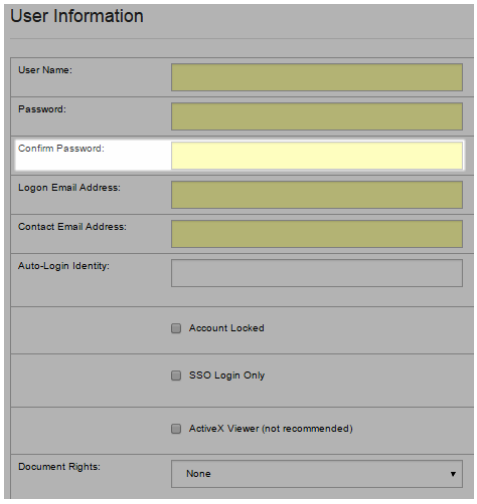
1. Enter a user name. The user name is not case sensitive and may contain any combination of alphabetic and numeric characters, without spaces. It must be between 4-25 characters, and may include the following non-alphanumeric characters: period (.); underscore (_); and at (@) symbol. User names may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



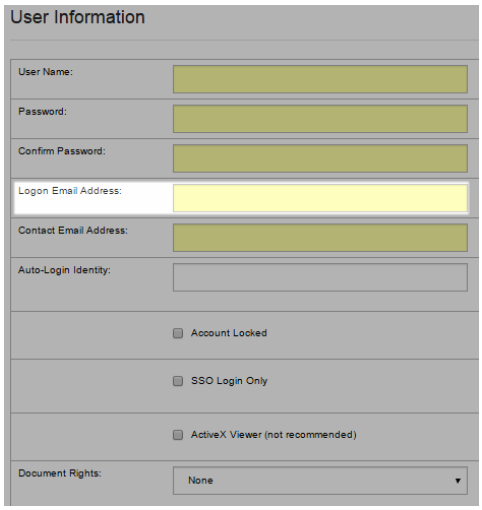
2. Enter a temporary password in the Password field. The password must be at least eight characters and include at least one capitalized letter, one number, and one non-alphanumeric character.



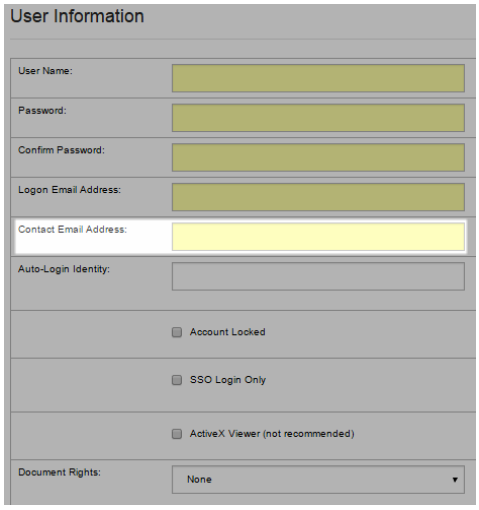
3. Enter the same temporary password in the Confirm Password field.



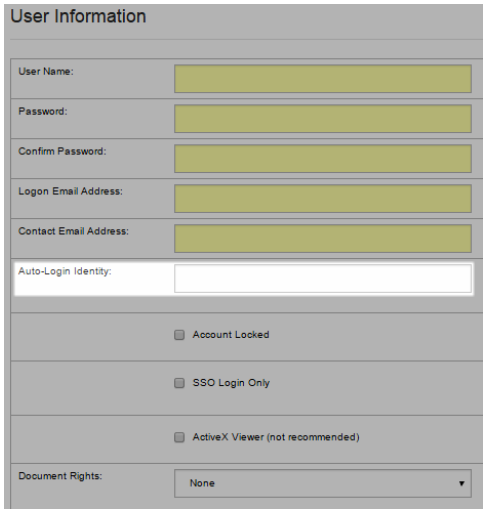
4. Enter the user's email address in the Logon Email Address field.



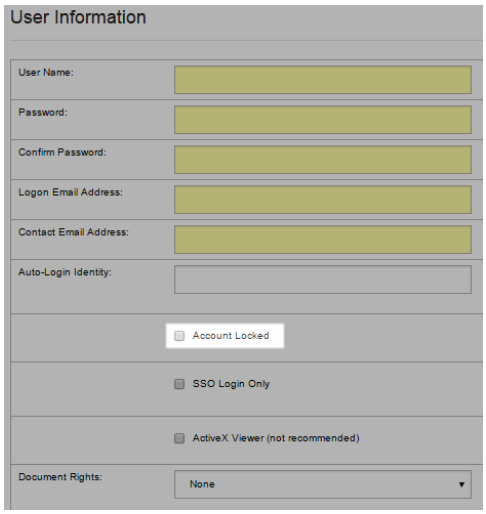
5. Enter the user's email address in the Contact Email Address field.



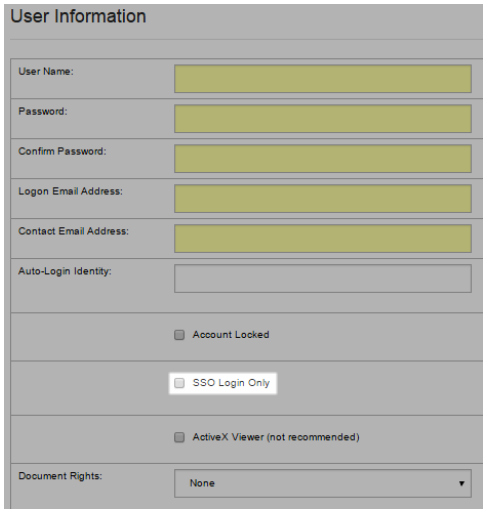
6. Leave the Auto-Login Identity field empty. This feature is only available for clients who have PMAPS installed on premises.



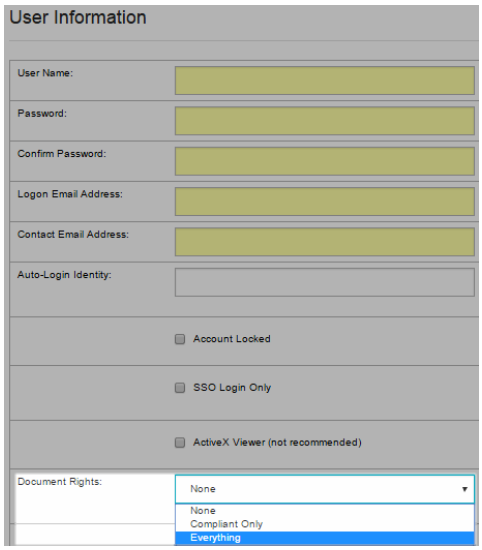
7. Leave the Account Locked box unchecked. This option prevents a user from logging in to PMAPS.



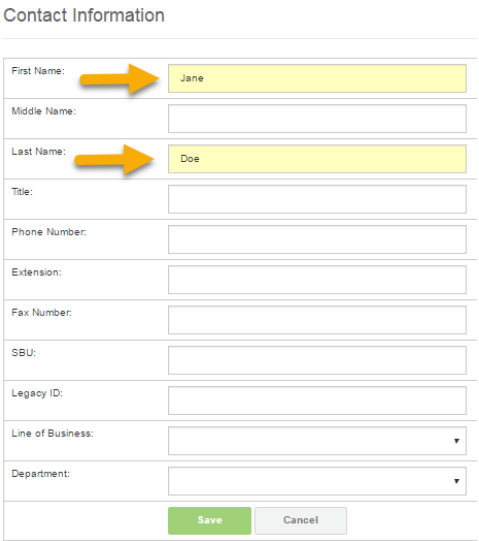
8. For most clients, leave the SSO Login Only box unchecked. This option prevents the user from manually logging in with a user name and password. If your company uses single-sign on, you may want to have the user log in using single sign on. A single sign on certificate must already be in place to use 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.



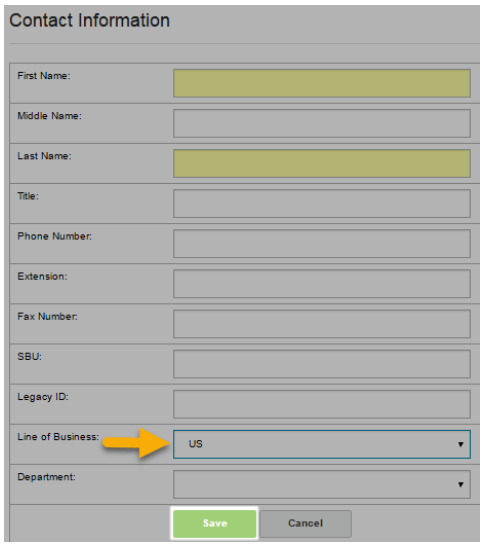
9. For Document Rights, choose the option desired for the user's Search page results:
   - None = the user will not see any records
   - Compliant Only = the user will see only records with a valid Date Expires
   - Everything = the user will see all records



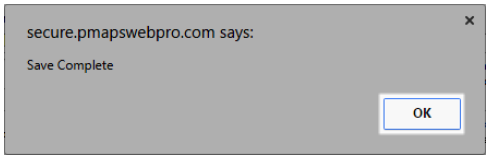
10. On the same page, scroll down to the Contact Information section and fill in the appropriate fields. First Name and Last Name are required.



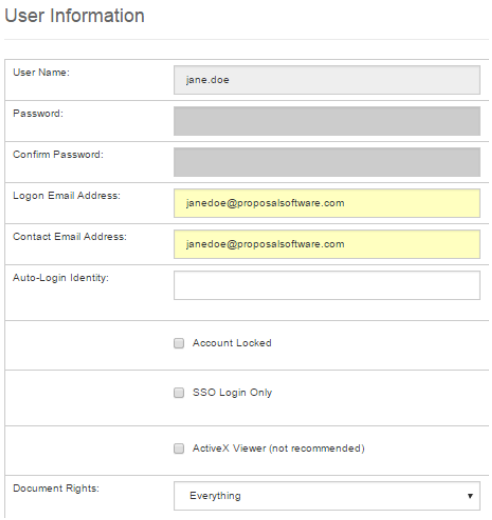
11. If the user should be automatically placed in a Line of Business, choose the correct option from the dropdown list, and then click Save.



12. Click OK at the prompt.

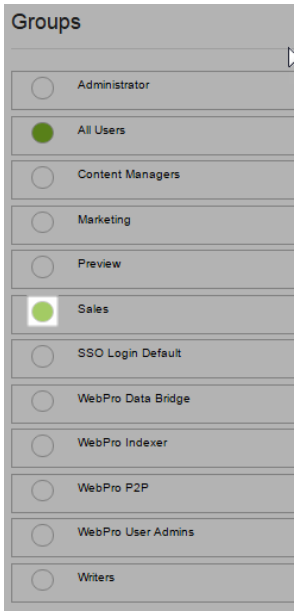


13. Wait for the page to refresh and the user name to become locked.



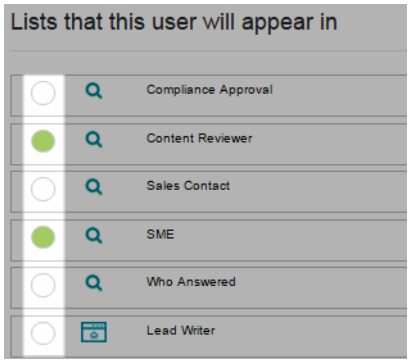
Groups

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.



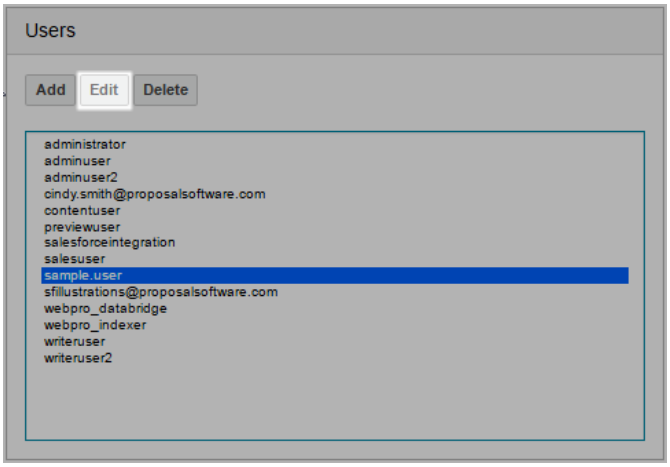
Lists

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.

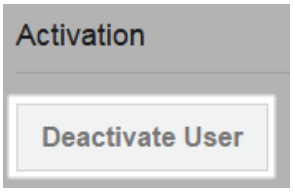


Deactivate User

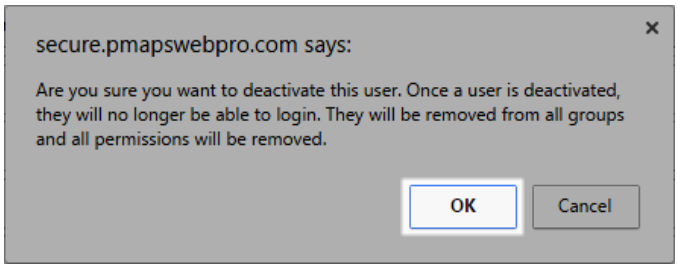
1. Click on the user name, and then click the Edit icon.



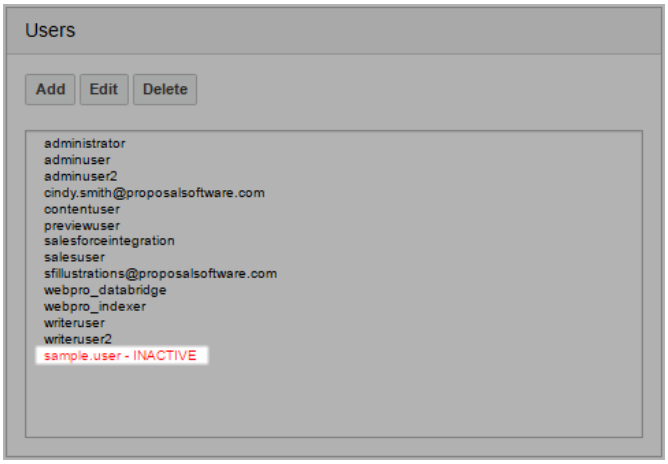
2. Scroll to the bottom of the window, and then click the Deactivate User icon.

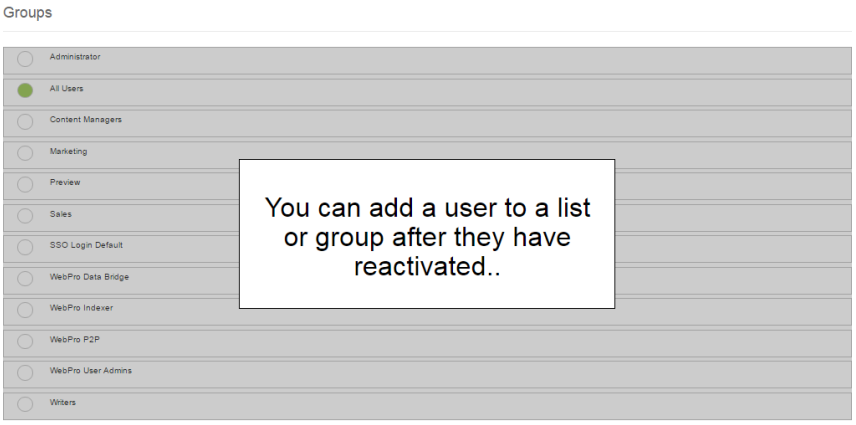


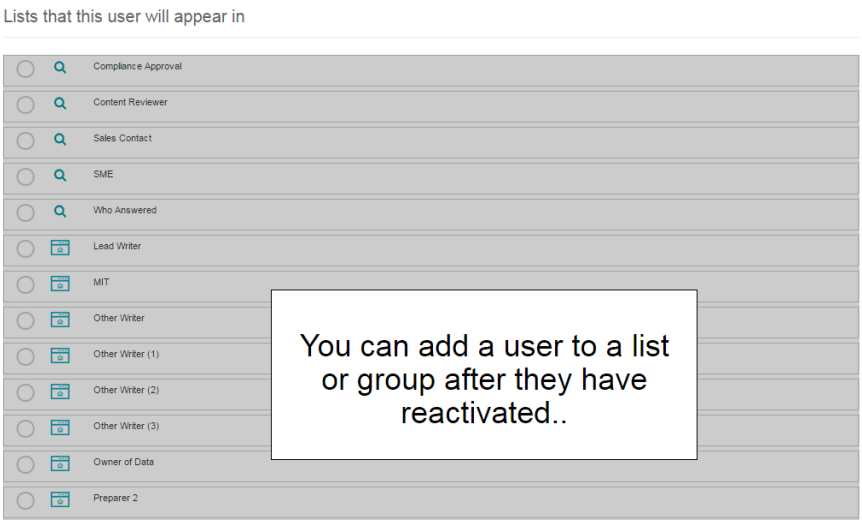
3. Review the prompt, and the click OK to continue with the deactivation.



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.







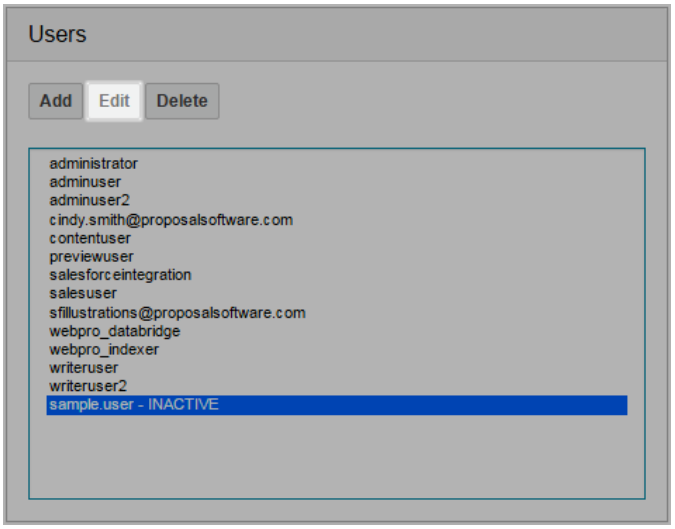
A deactivated user's User Information may not be edited. The following prompt appears at the top of the page for deactivated users.

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

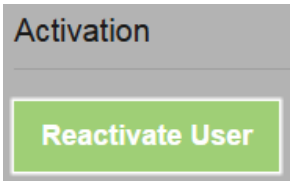
If you would like the contact to remain in the system, edit the existing contact field picklist from any contact picklist field control panel by locating the contact name and assigning the desired picklists.

Reactivate User

1. Click on the inactive user name, and then click the Edit icon.



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).

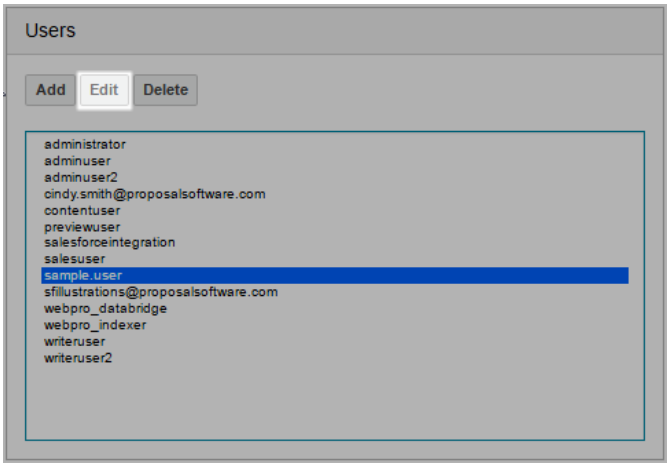
4. Place the user in the appropriate picklist(s) using the instructions above (click here to go back).

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.

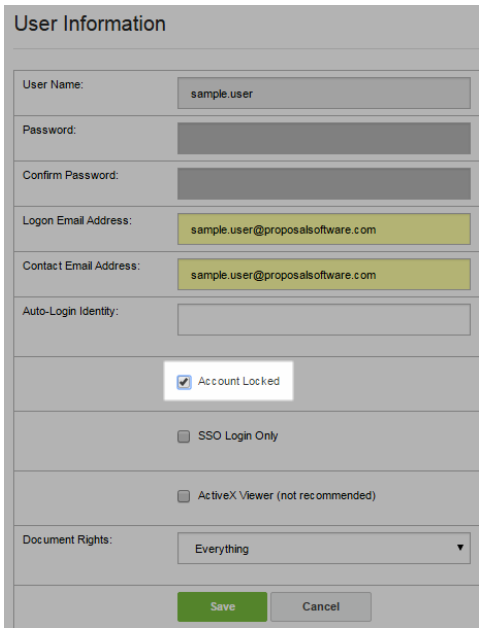
Unlock User Account

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.



2. Uncheck the Account Locked box, and then click Save. Do not enter a new password during this step.

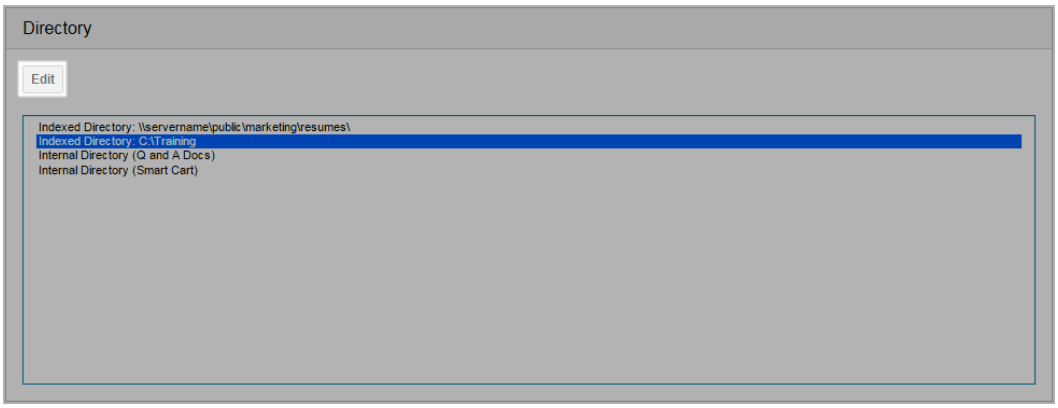


3. Instruct the user to click the Forgot Password link from the login page and follow the on screen instructions to receive a temporary password.

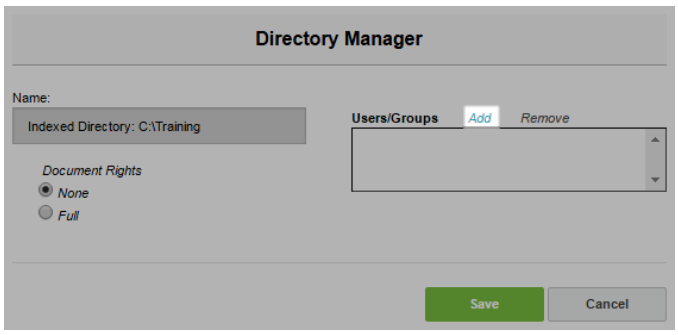
Directories

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.

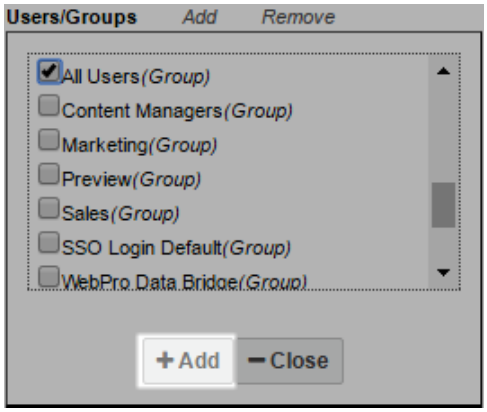
1. To edit document rights for a directory, select it from the Directory window and click the Edit icon.



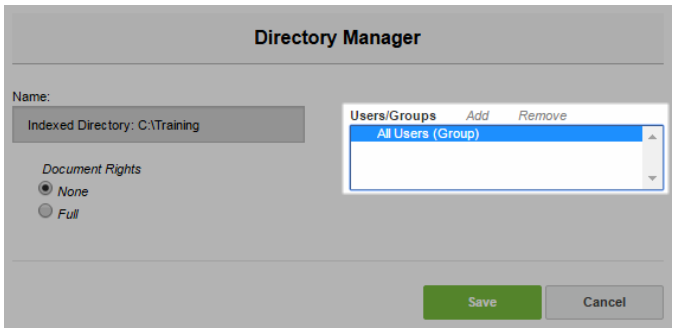
2. In the Directory Manager window, click the Add.



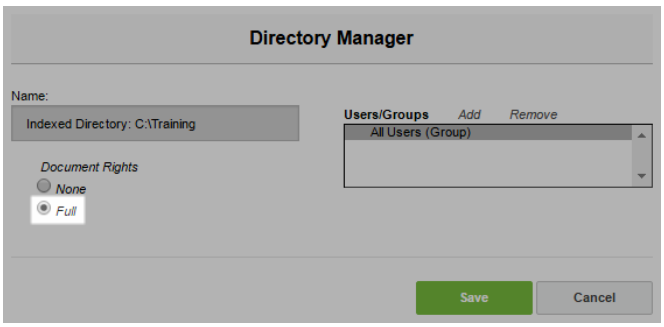
3. Check the box next to the user(s) or group(s) who should have document rights from this directory, and then click Add.



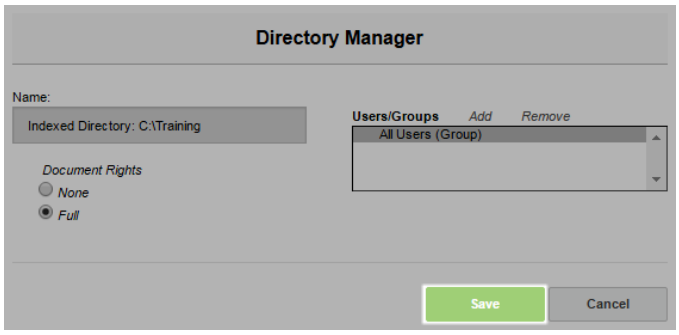
4. Select all users or groups in the window (press CTRL key while selecting each). Selected groups display with a blue background.



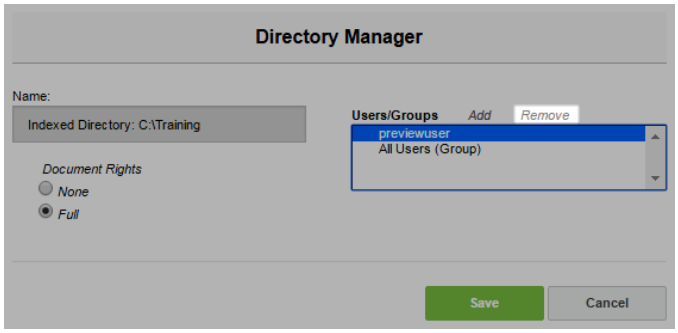
5. Under Document Rights, change the selection from None to Full.



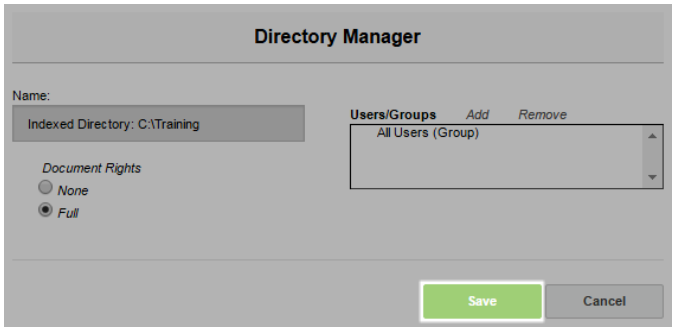
6. Review the selections, and then click Save.



7. To remove document rights, select the users or groups and click the Remove link



8. Click Save.



TIPS

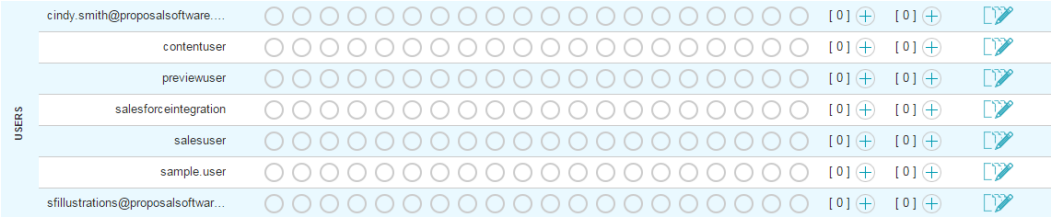
- We strongly recommend that you assign permissions using groups so new users added to the permitted groups will automatically have access to the directory documents.
- The most common support troubleshooting issue related to indexed directories is forgetting these important steps needed to assign document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

Permissions and Restrictions

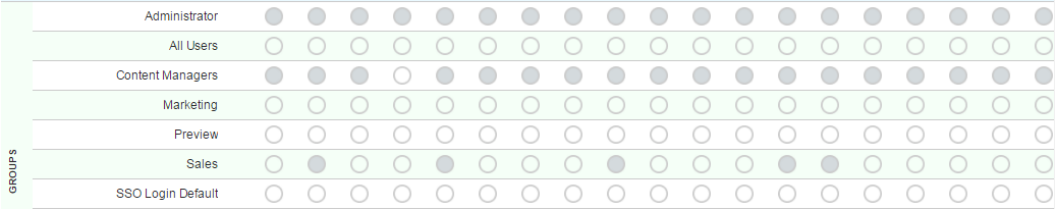
Administrator users are able to control user permissions, viewing restrictions and file type permissions from this control panel.

Permissions

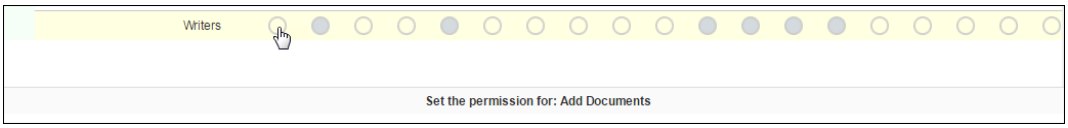
- Hover over the User or Group (row) to highlight.
  - Users



  - Groups



- Hover over the icon to display the affected permission.



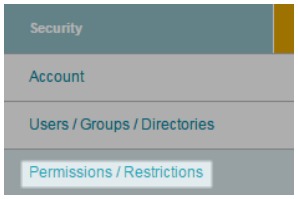
- A solid circle indicates the permission is enabled.

- An open circle indicates the permission is disabled.

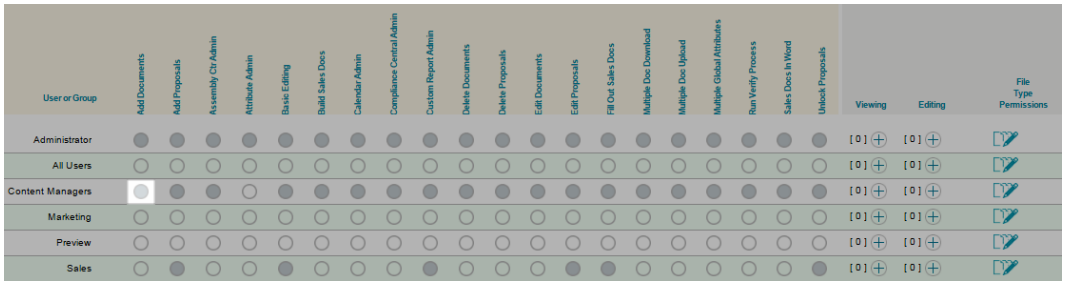
Add Documents

To allow users to add new search records to Search, enable the Add Documents permission. Once you enable this permission, assign File Type Permissions next.

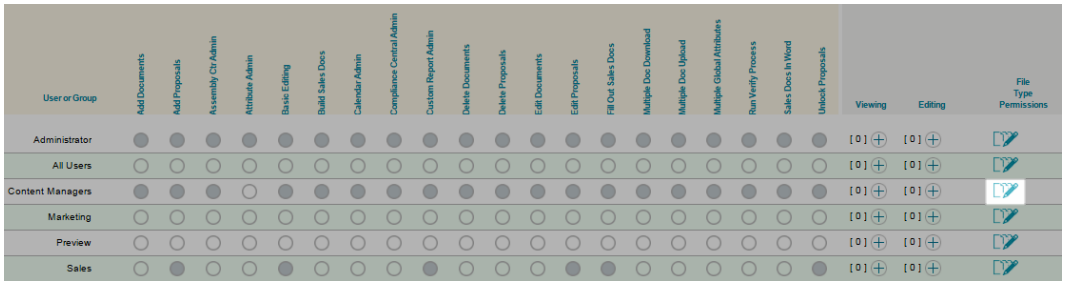
1. Go to the Permissions / Restrictions page.



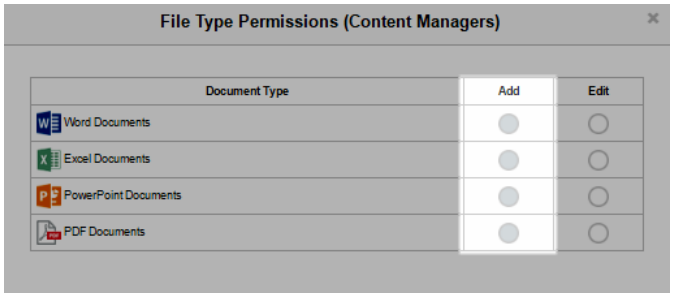
2. Click on the icon under the Add Documents column to display a solid circle.



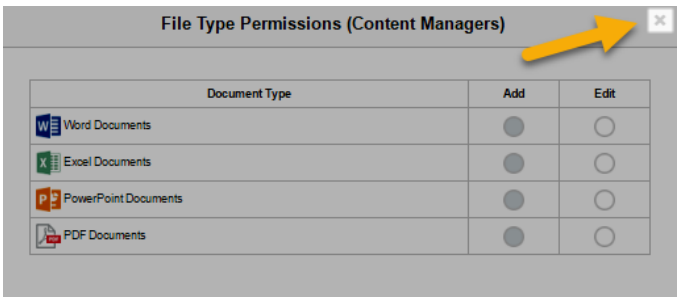
3. Under the File Type Permissions column, click the clipboard icon for the same user or group.



4. Click on the icon under the Add column for the document types the user should be permitted to add.



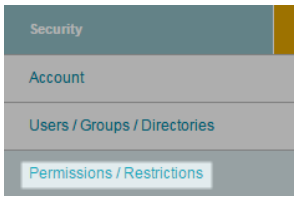
4. Click the Close icon.



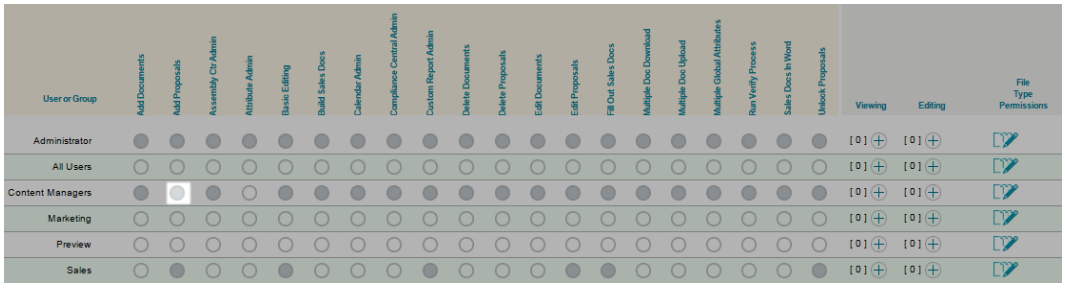
Add Proposals

To allow users to add new proposals to the Dashboard, enable the Add Proposals permission.

1. Go to the Permissions / Restrictions page.



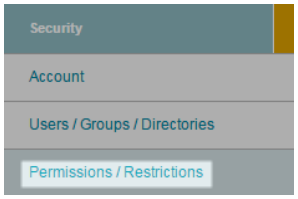
2. Click on the icon under the Add Proposals column to display a solid circle.



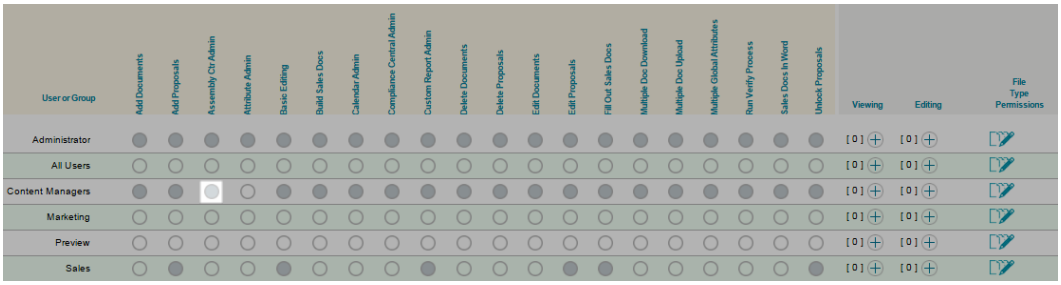
Assembly Ctr Admin

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.



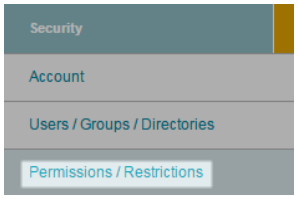
2. Click on the icon under the Assembly Ctr Admin column to display a solid circle.



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.

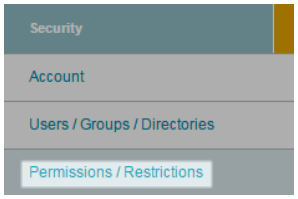


2. Click on the icon under the Attribute Admin column to display a solid circle.

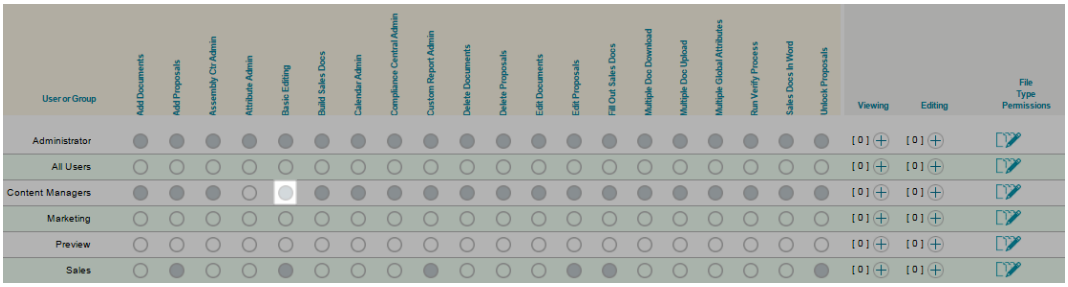
Basic Editing

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.



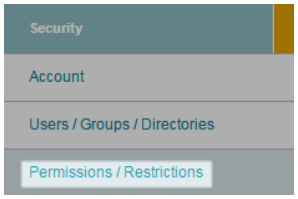
2. Click on the icon under the Basic Editing column to display a solid circle.



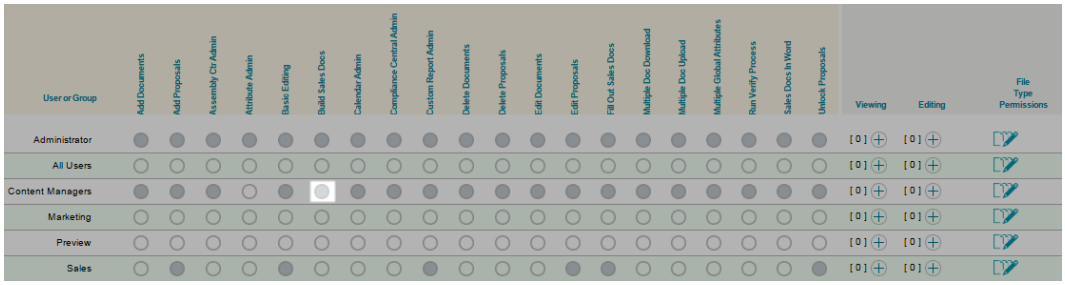
Build Sales Docs

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.



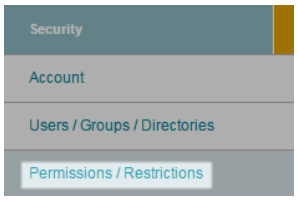
2. Click on the icon under the Build Sales Docs column to display a solid circle.



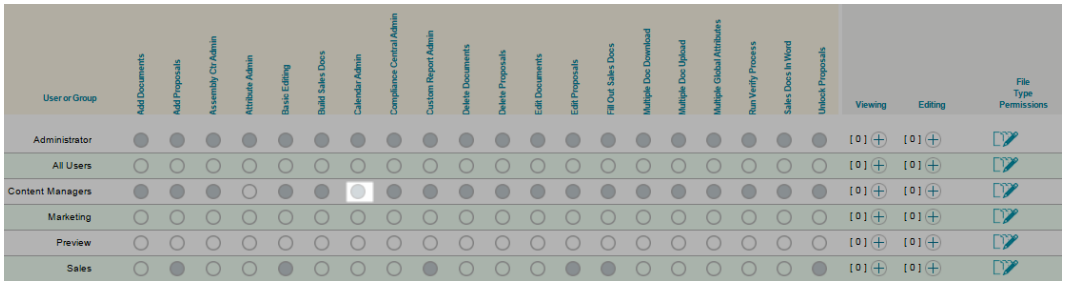
Calendar Admin

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

1. Go to the Permissions / Restrictions page.



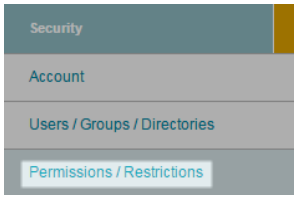
2. Click on the icon under the Calendar Admin column to display a solid circle.



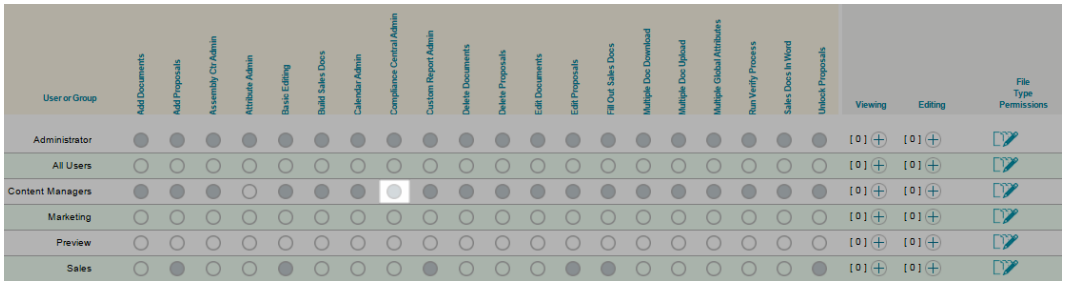
Compliance Central Admin

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.



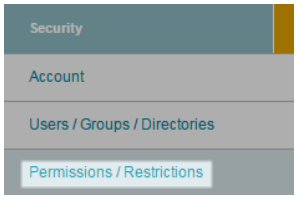
2. Click on the icon under the Compliance Central Admin column to display a solid circle.



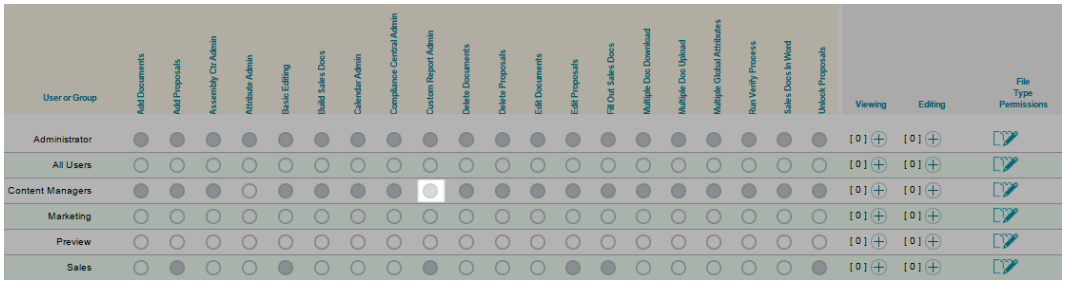
Custom Report Admin

To allow users to view, create, and edit all custom reports, enable the Custom Report Admin permission.

1. Go to the Permissions / Restrictions page.



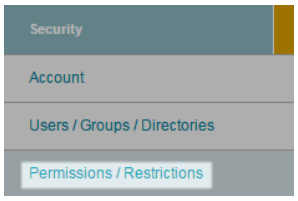
2. Click on the icon under the Custom Report Admin column to display a solid circle.



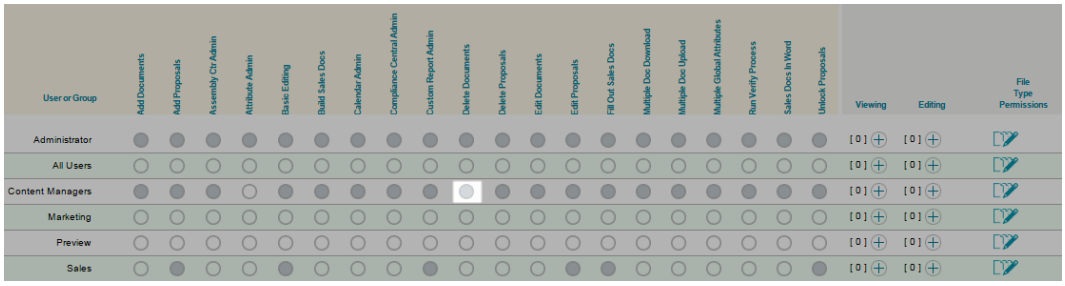
Delete Documents

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.



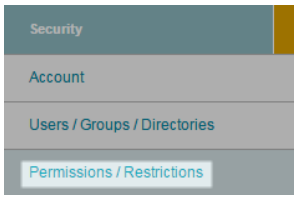
2. Click on the icon under the Delete Documents column to display a solid circle.



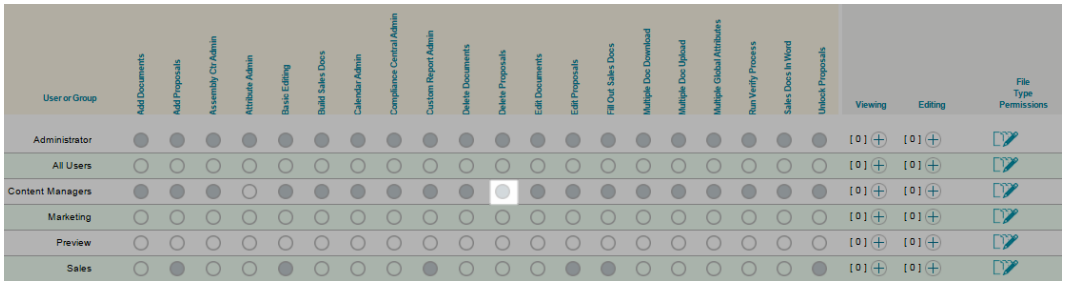
Delete Proposals

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.



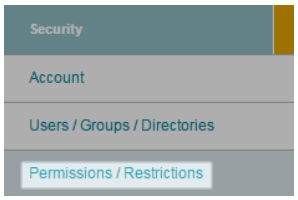
2. Click on the icon under the Delete Proposals column to display a solid circle.



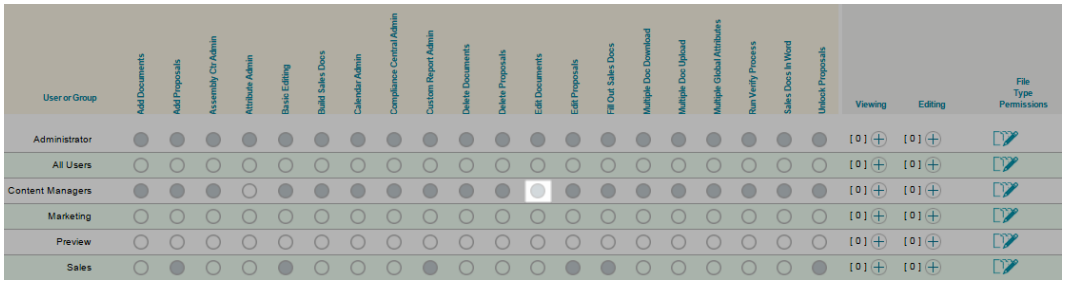
Edit Documents

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.

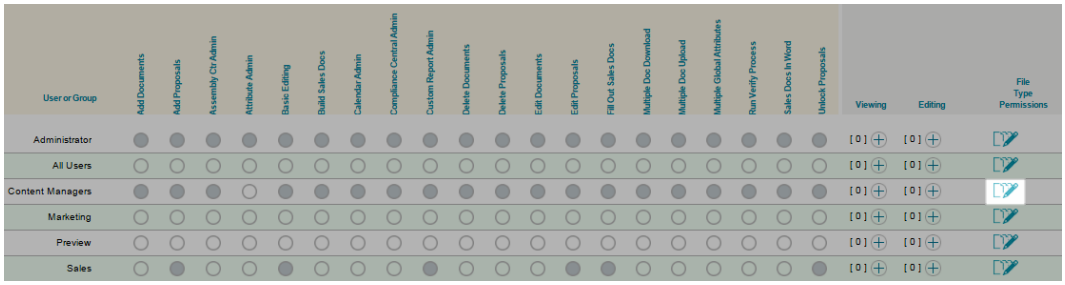
1. Go to the Permissions / Restrictions page.



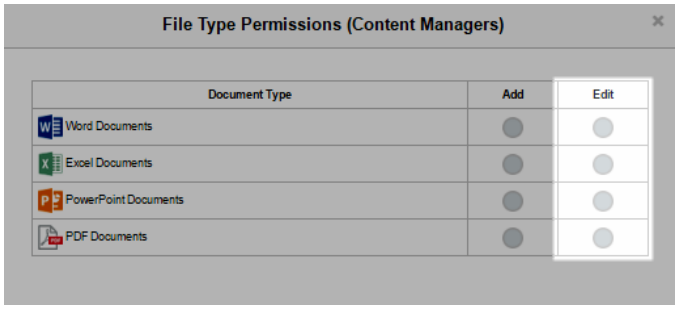
2. Click on the icon under the Edit Documents column to display a solid circle.



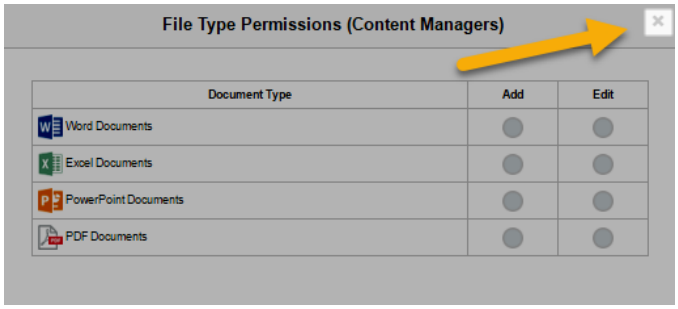
3. Under the File Type Permissions column, click the clipboard icon for the same user or group.



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



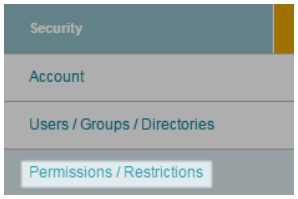
4. Click the Close icon.



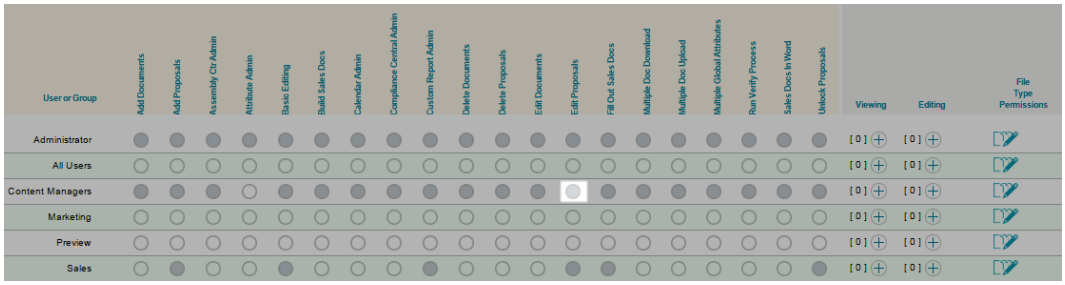
Edit Proposals

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.



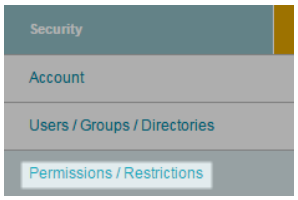
2. Click on the icon under the Edit Proposals column to display a solid circle.



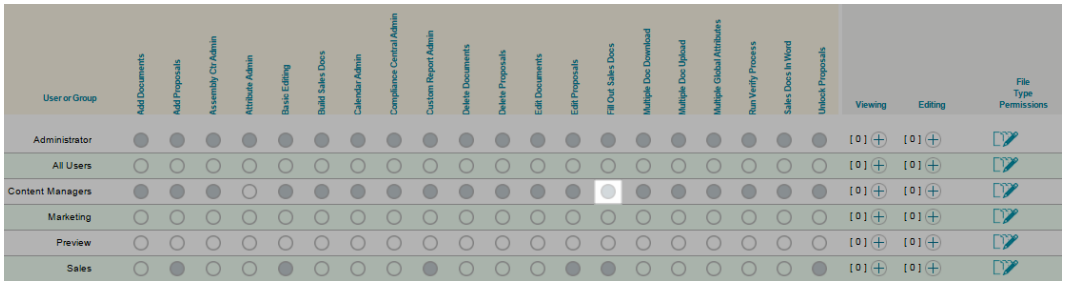
Fill Out Sales Docs

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.



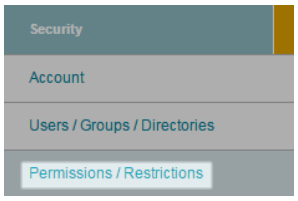
2. Click on the icon under the Fill Out Sales Docs column to display a solid circle.



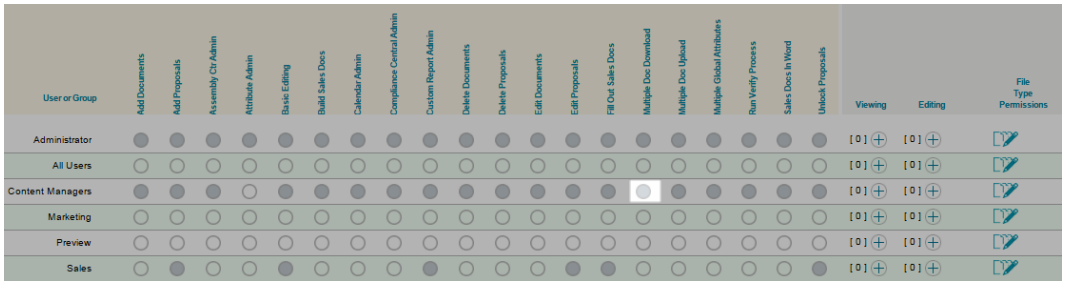
Multiple Doc Download

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.



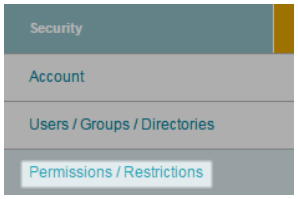
2. Click on the icon under the Multiple Doc Download column to display a solid circle.



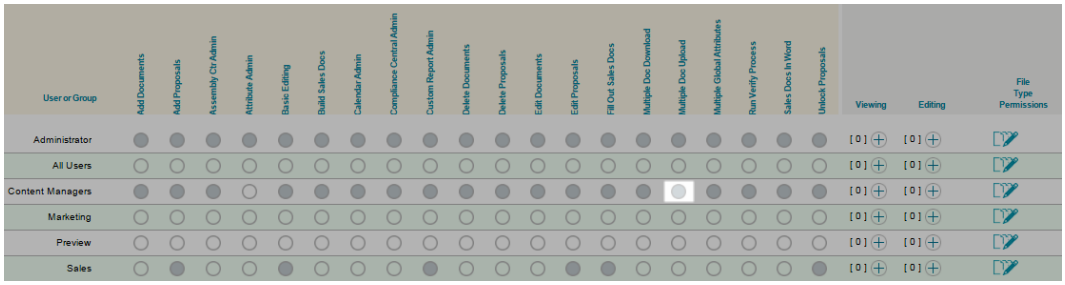
Multiple Doc Upload

To allow users to upload checked out documents, enable the Multiple Doc Upload permission.

1. Go to the Permissions / Restrictions page.



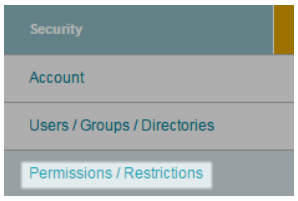
2. Click on the icon under the Multiple Doc Upload column to display a solid circle.



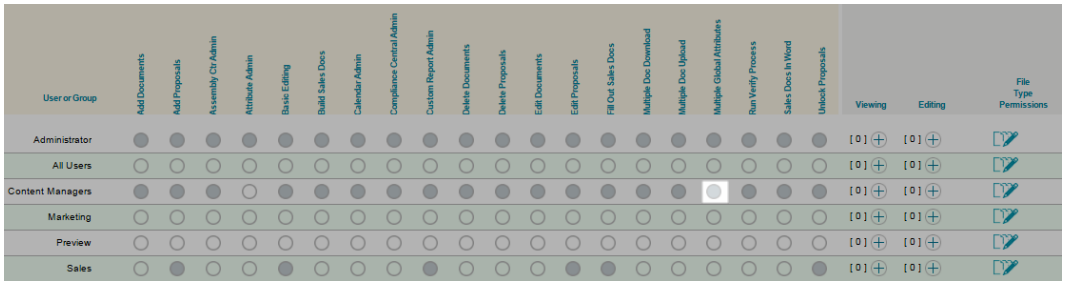
Multiple Global Attributes

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

1. Go to the Permissions / Restrictions page.



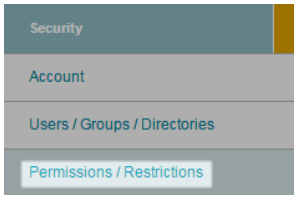
2. Click on the icon under the Multiple Global Attributes column to display a solid circle.



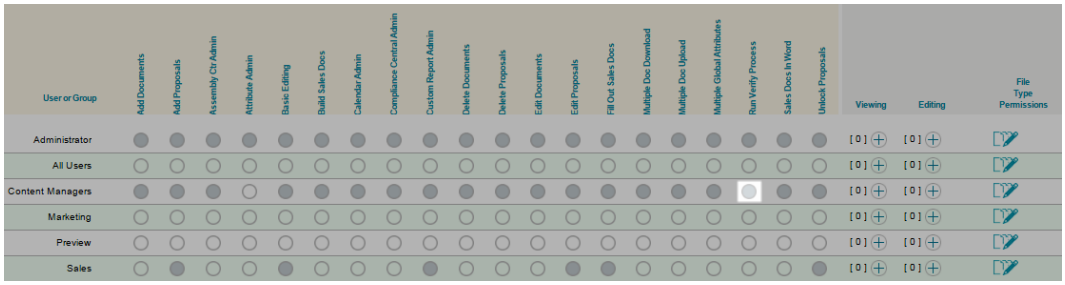
Run Verify Process

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.



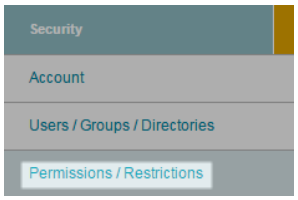
2. Click on the icon under the Run Verify Process column to display a solid circle.



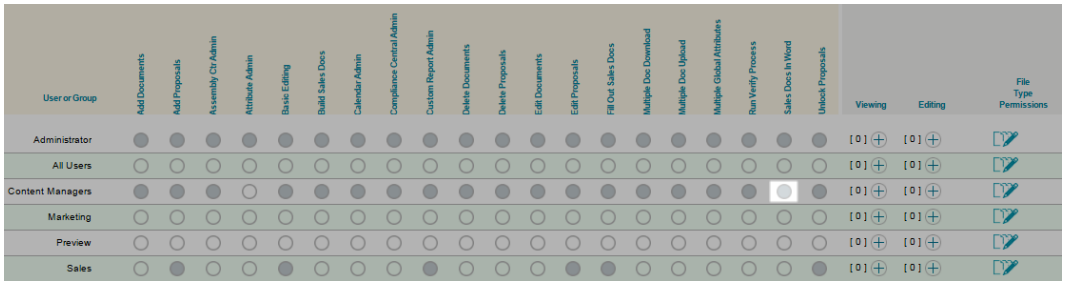
Sales Docs In Word

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.



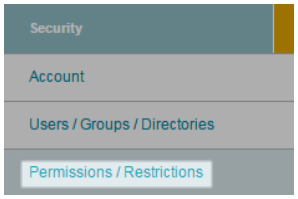
2. Click on the icon under the Sales Docs In Word column to display a solid circle.



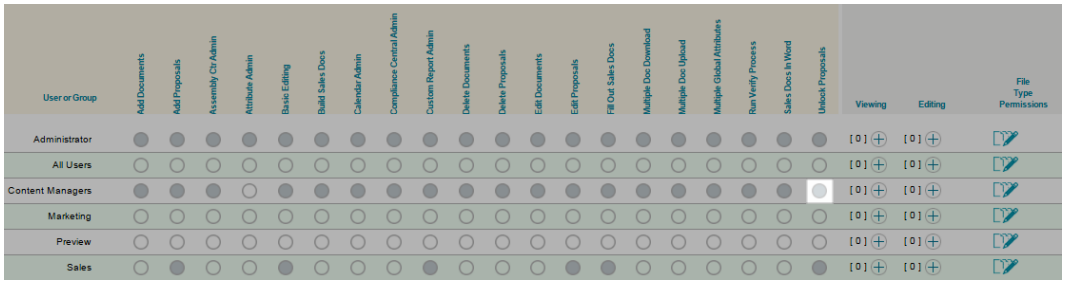
Unlock Proposals

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.



Restrictions

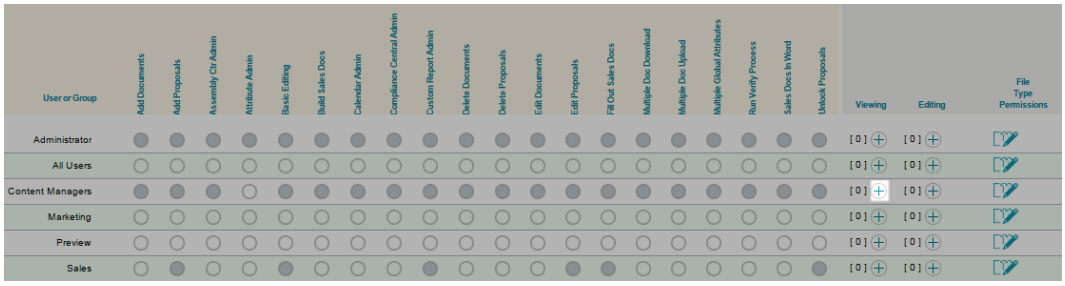
Administrators have the ability to establishing document access restrictions to dashboard and search records using attribute picklist values. Viewing restrictions affect what records users see when logged into PMAPS. Editing restrictions affect what records users may edit (only applies if the Edit Document 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

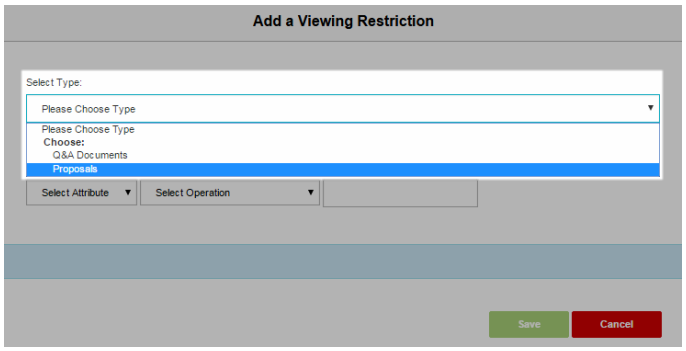
Viewing

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.

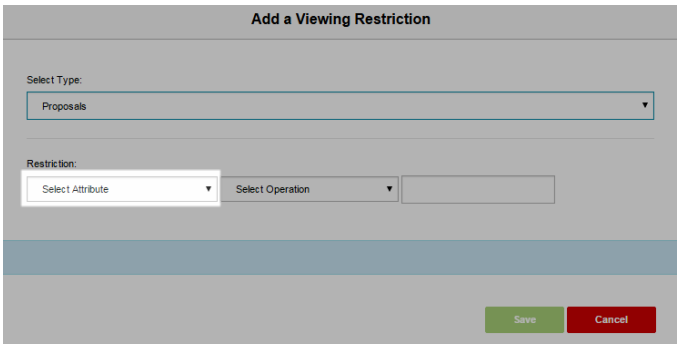


2. From the Select Type picklist, choose from search records or dashboard records.

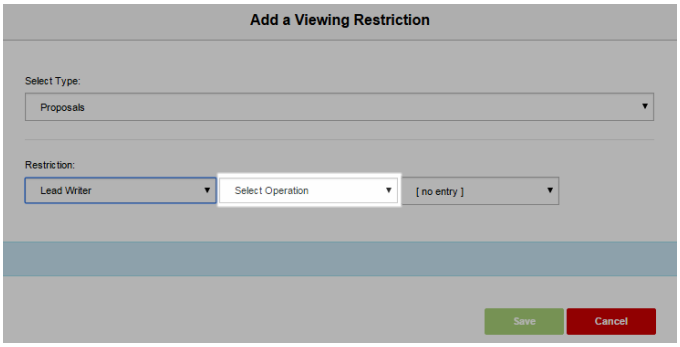
   - For Search records, select Q&A Documents
   - For Dashboard records, select Proposals



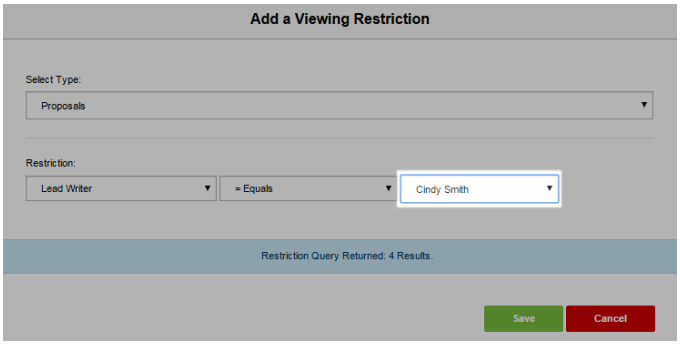
3. Select an attribute on which the restriction should be based.



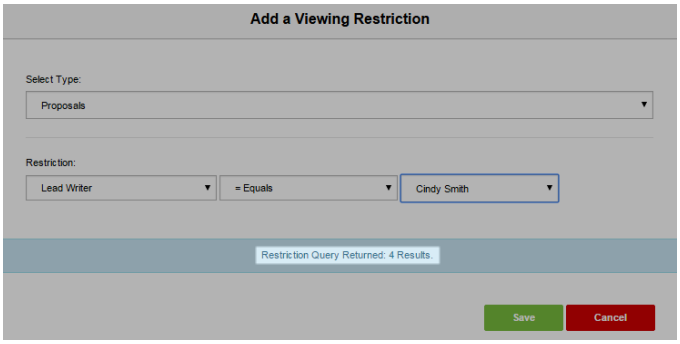
4. Select the operation to use for this restriction.



4. Select the value to use for this restriction.



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



6. Click Save.

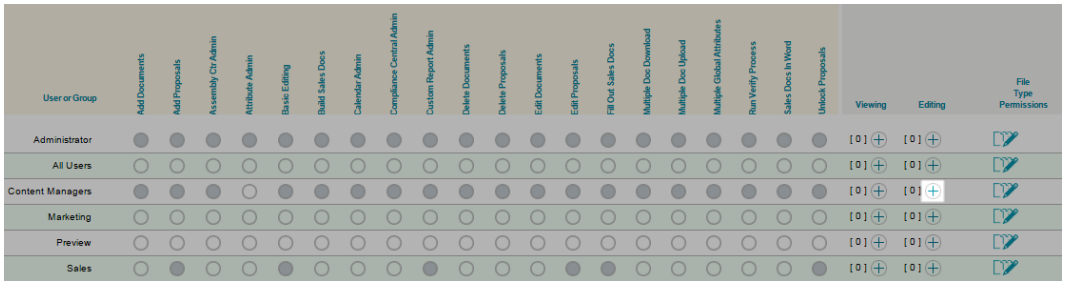
TIPS

- 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.

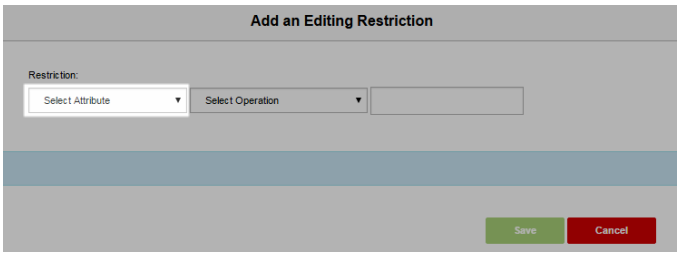
Editing

Editing restrictions are only available for Search records.

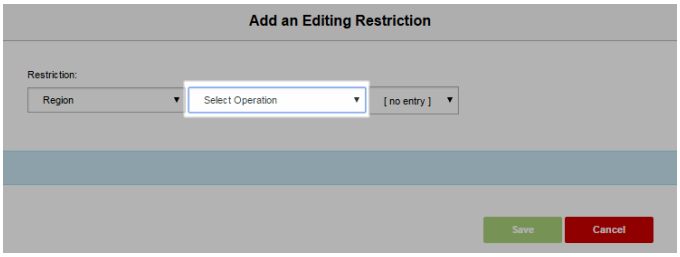
1. Click on the plus sign icon in the Editing column next to the group or user to which you would like to apply the restriction.



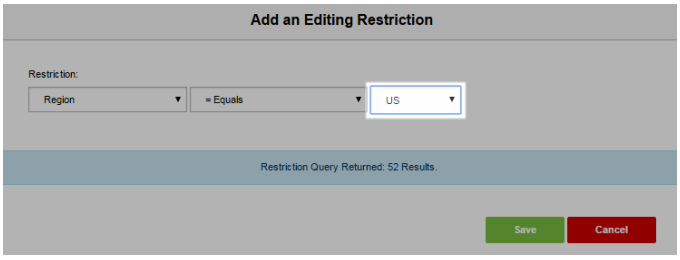
2. Select an attribute on which the restriction should be based.



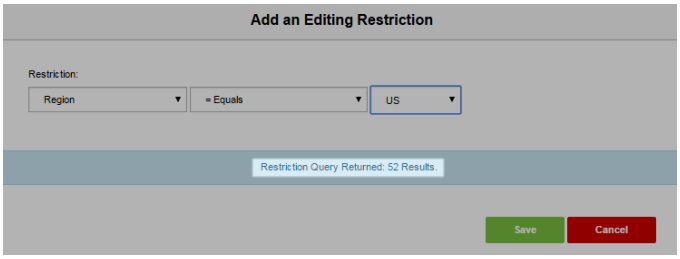
3. Select the operation to use for this restriction.



4. Select the value to use for this restriction.



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



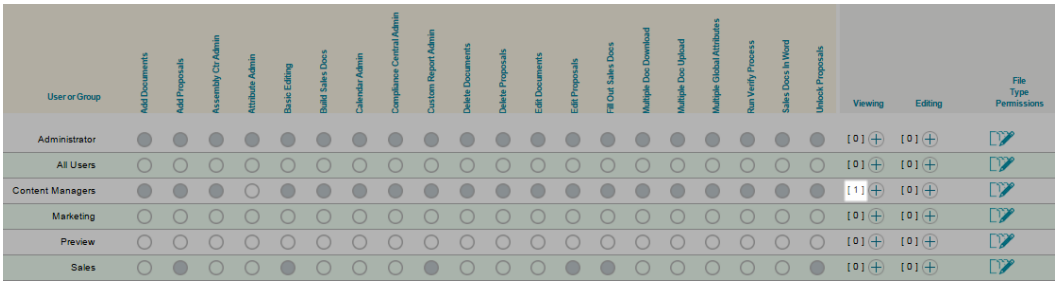
6. Click Save.

TIPS

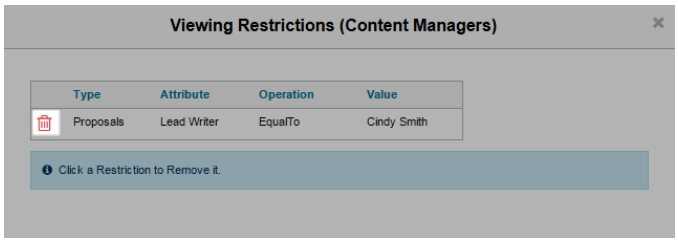
- When using Not Equal To for multiple options, all records must have a value populated in the field selected as the attribute type for the restriction.

Remove Restriction

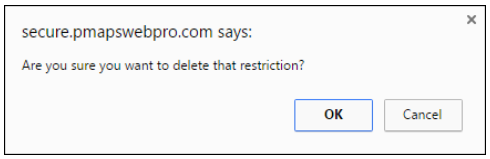
1. Click on the number icon in the Viewing or Editing column next to the group or user.



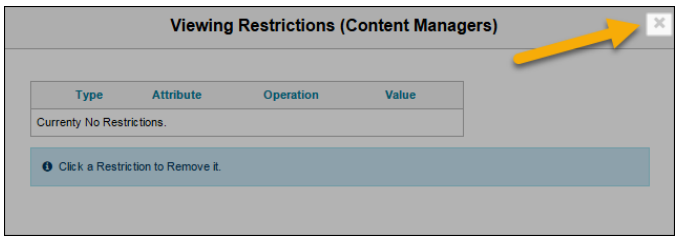
2. Click the trash icon next to the restriction you would like to remove.



3. Click OK to confirm deletion.



5. 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.

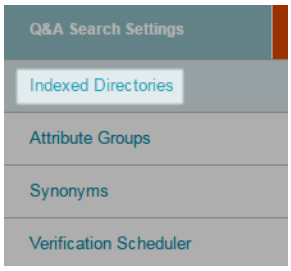
The Indexer allows clients to synchronize documents into their PMAPS WebPro application using secure Web Services (SOAP, SSL Port: 443). The Indexer continuously scans for files from folder directories. Permitted file types include .doc, .docx, .xls, .xlsx, .ppt, .pptx, .html, and .pdf. These documents 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.

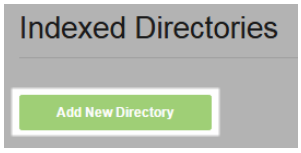
Add a New Directory

1. Go to the Administration page.

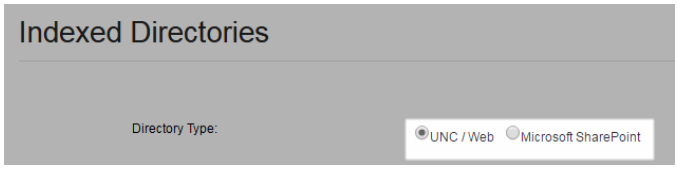
2. Under Q&A Search Settings, select Indexed Directories.



3. Click Add New Directory.



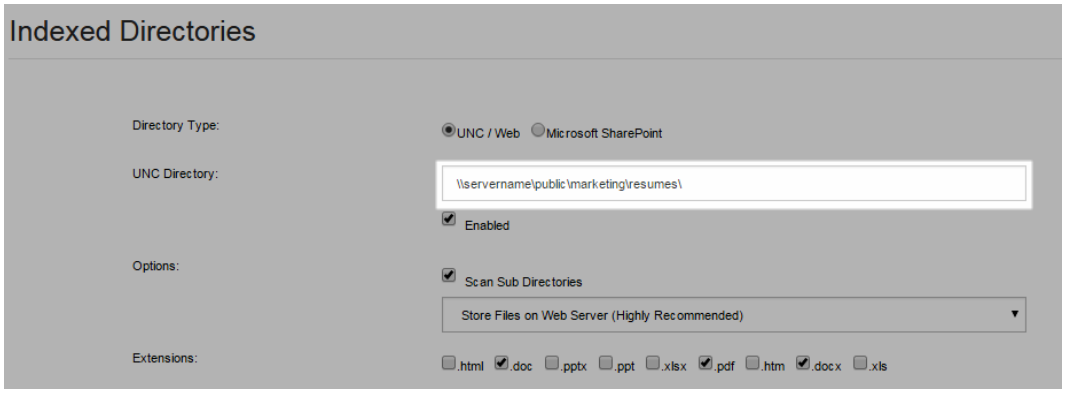
4. Select the type of directory UNC/Web or Microsoft SharePoint.



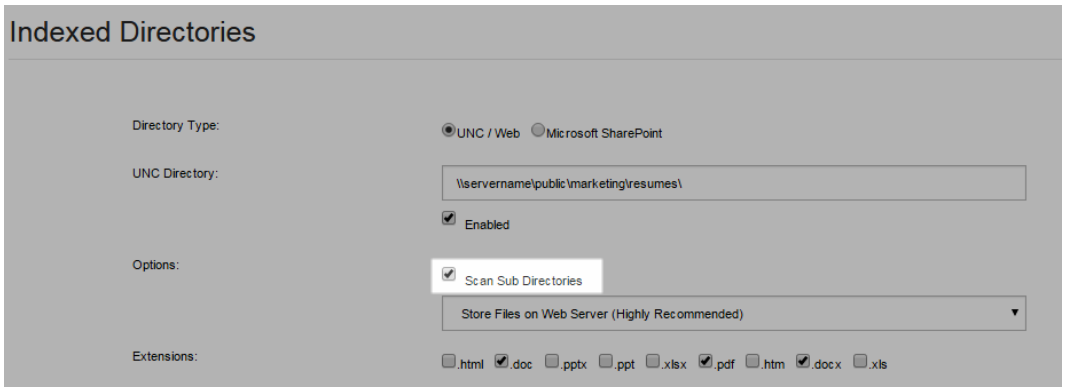
Follow the instructions below for UNC Directory or Microsoft SharePoint depending on the directory type.

UNC Directory

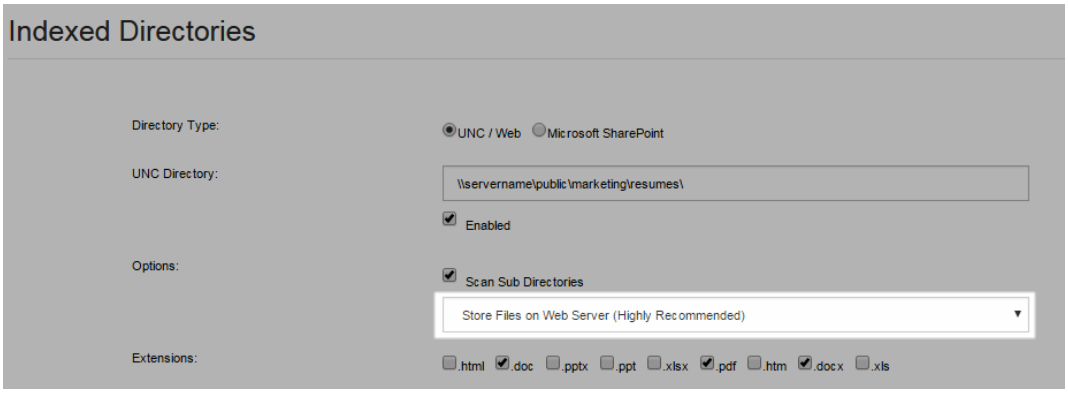
5. In the UNC Directory field, enter the complete UNC folder path directory for the location of the files. Do not use mapped network drive paths. Leave the Enabled box checked.



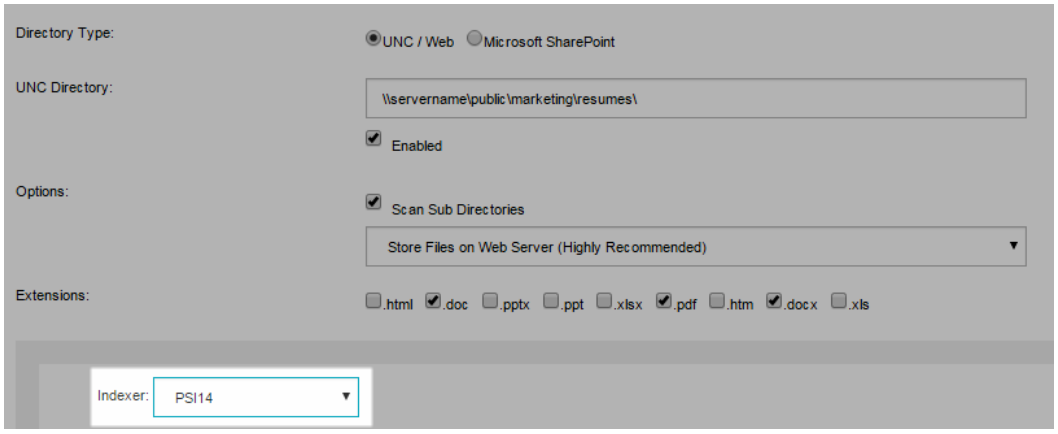
6. If you would like to scan all sub directories contained within the listed folder, check the box next to Scan Sub Directories.



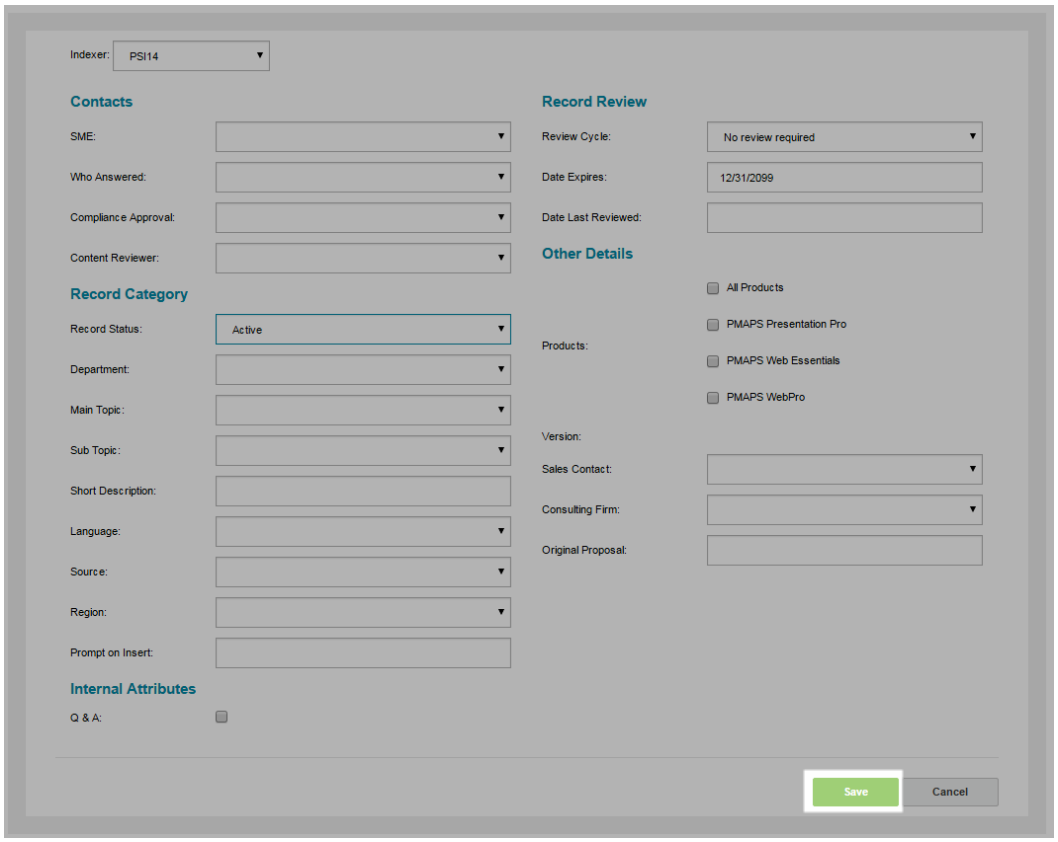
7. To store a copy of indexed files in your PMAPS hosted server folder (highly recommended for faster/confirmed retrieval), leave the option set to Store Files on Web Server (Highly Recommended). If you choose to Keep file in existing location, any users that view these documents in their search results 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.



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

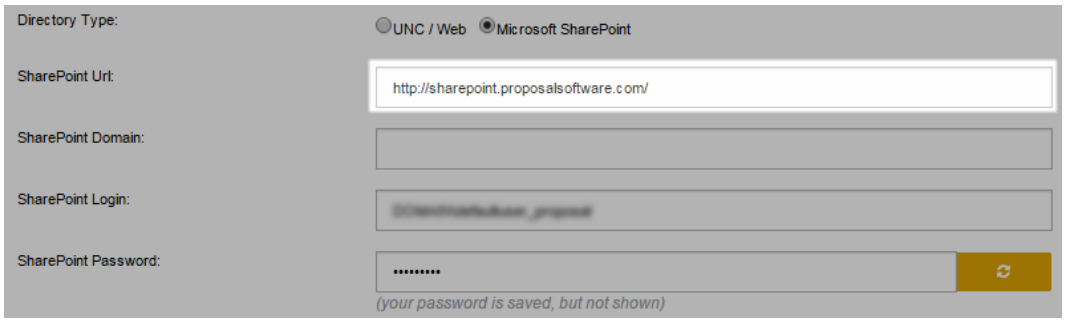


9 Select attributes appropriate to the files contained within the directory folder, and then click Save. Note: if you choose to scan sub directories, all documents will be added using the same set of attributes.

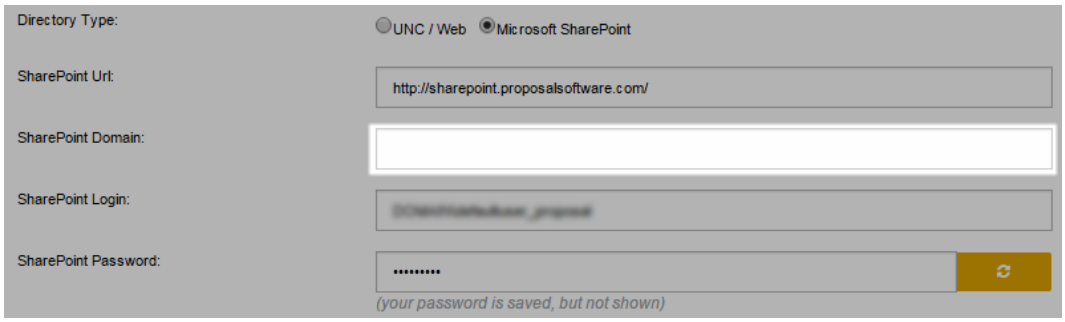


Microsoft SharePoint

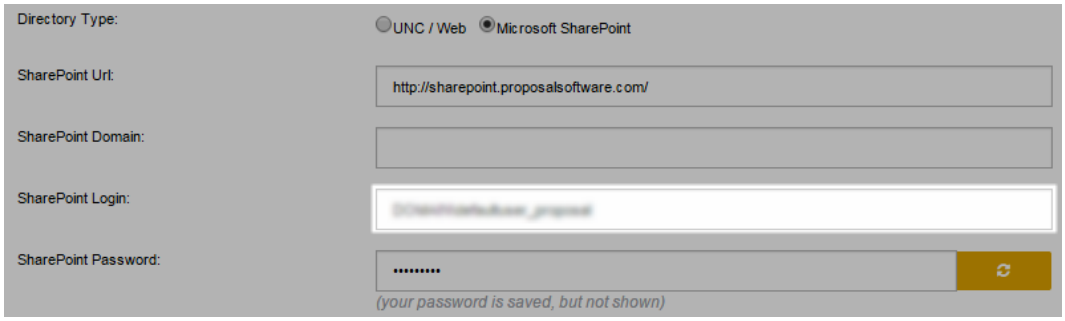
5. Enter the SharePoint Url that contains the documents or folders you would like to index to your PMAPS application.



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.

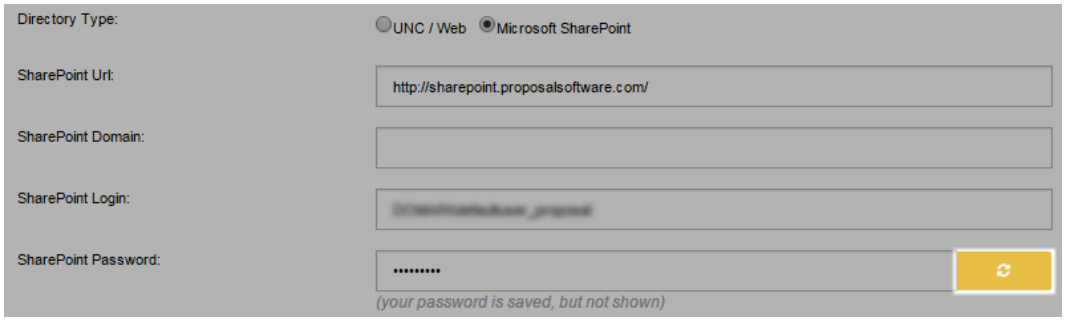


7. Enter the SharePoint Login for the user account with access to the SharePoint directories.

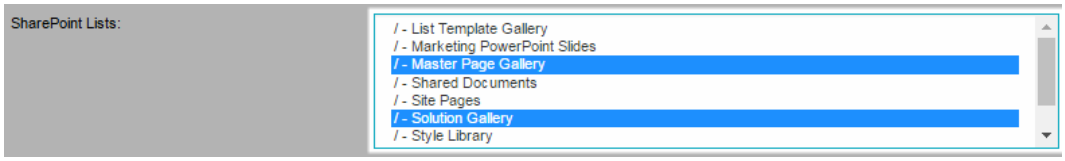


8. Enter the SharePoint Password for the SharePoint Login

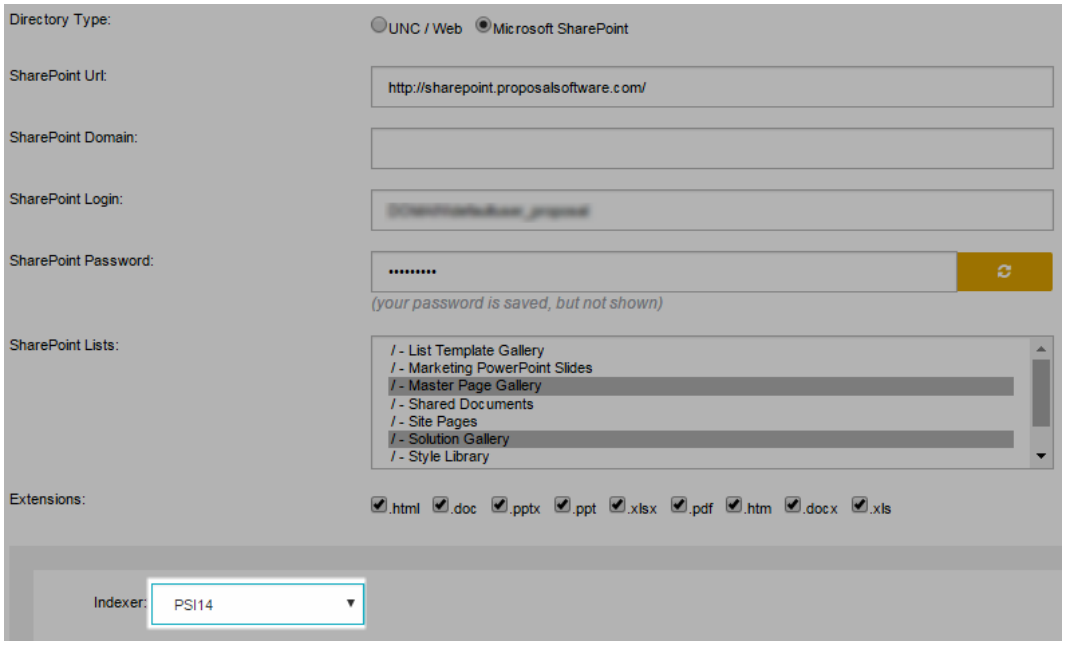
9. Click Refresh.



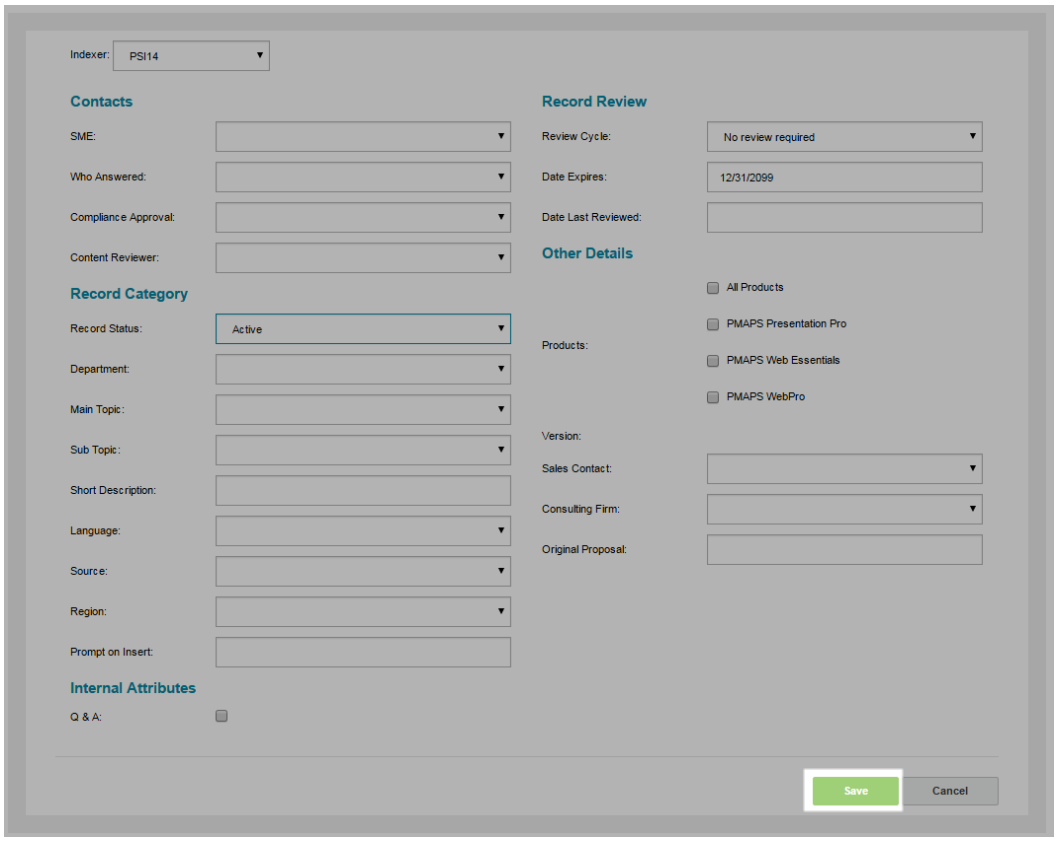
10. Select one or more folders that contain documents you would like to index (use the CTRL key simultaneously with the selections to select more than one).



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



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.



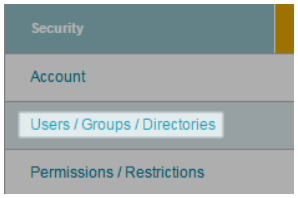
TIPS

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

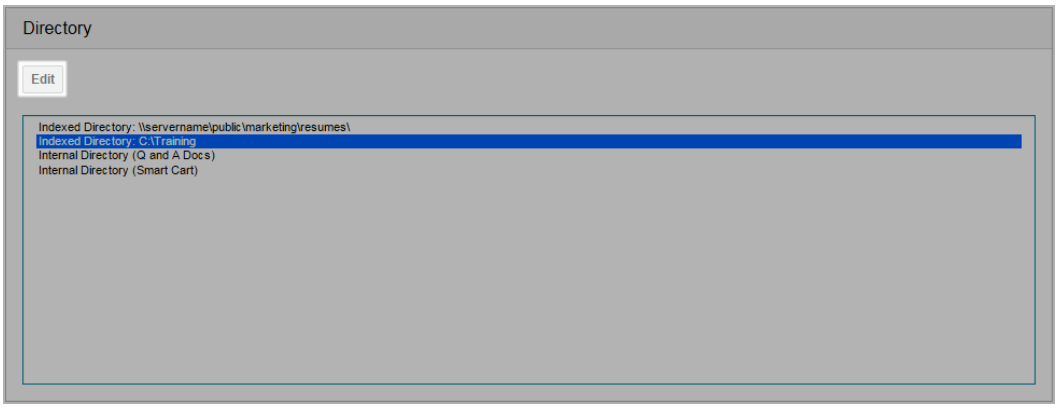
Directory Manager

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.

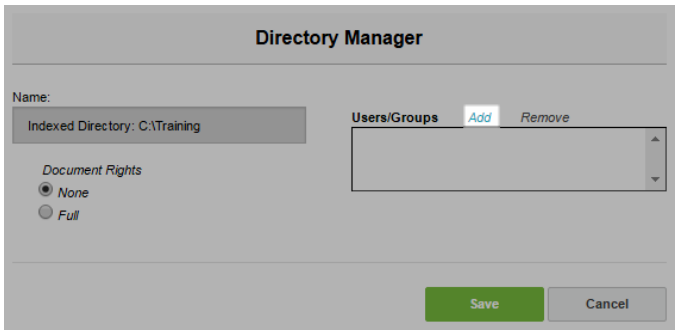
1. Go to the Security tab and select Users/ Groups/ Directories.



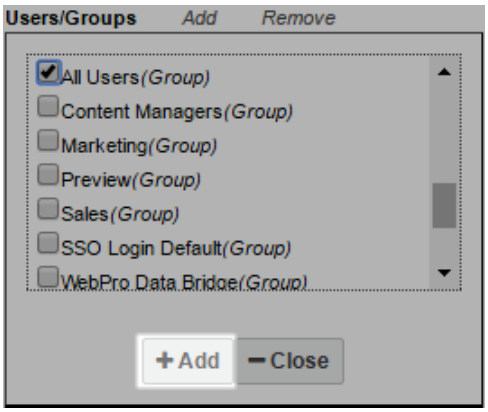
2. To edit document rights for a directory, select it from the Directory window and click the Edit icon.



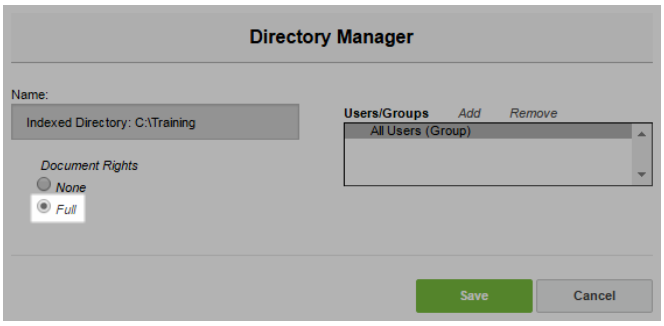
3. Click the Add button.



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

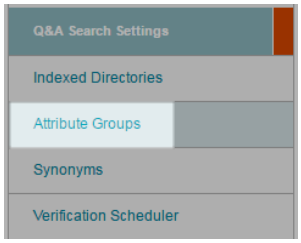
Attribute groups are used as templates to pre-populate attributes when adding new Search records to PMAPS. Attribute groups are not linked to the records added using them as a template.

Administrators can add, edit and delete attribute groups.

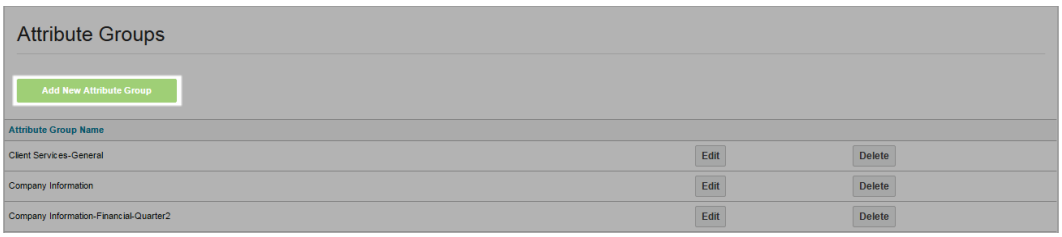
Add New Attribute Group

1. Go to the Administration page.

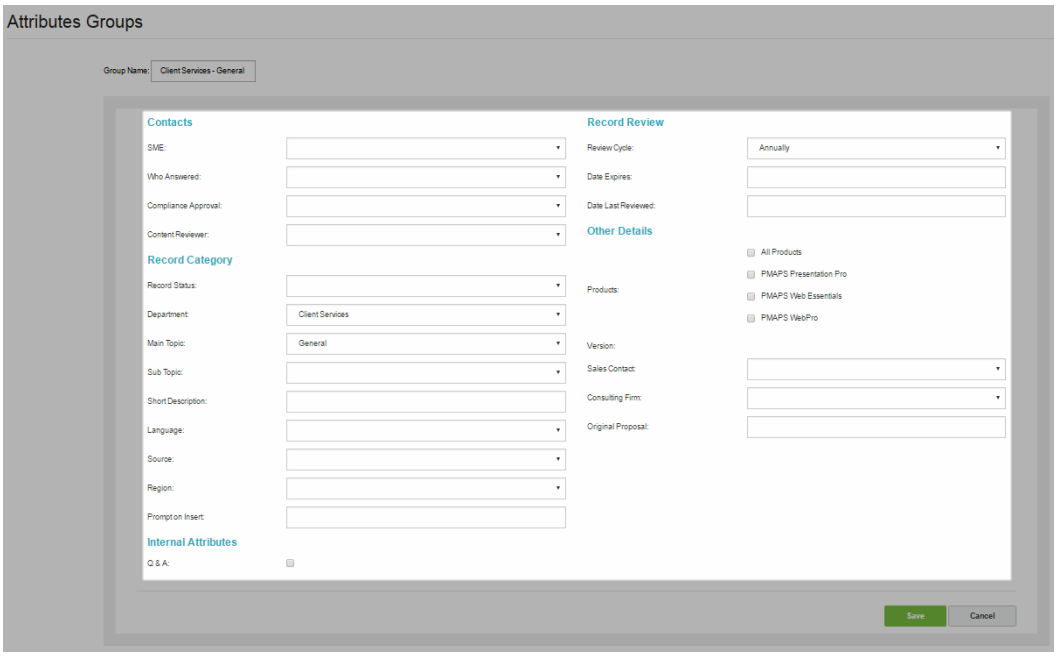
2. Under Q&A Search Settings, click Attribute Groups.



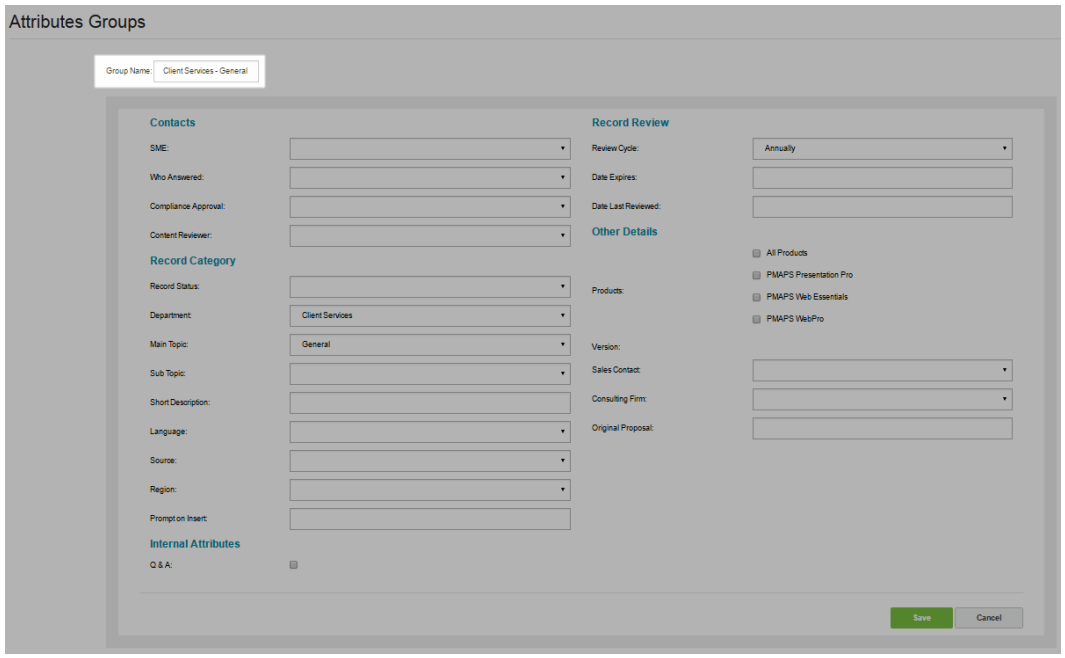
3. Click Add New Attribute Group.



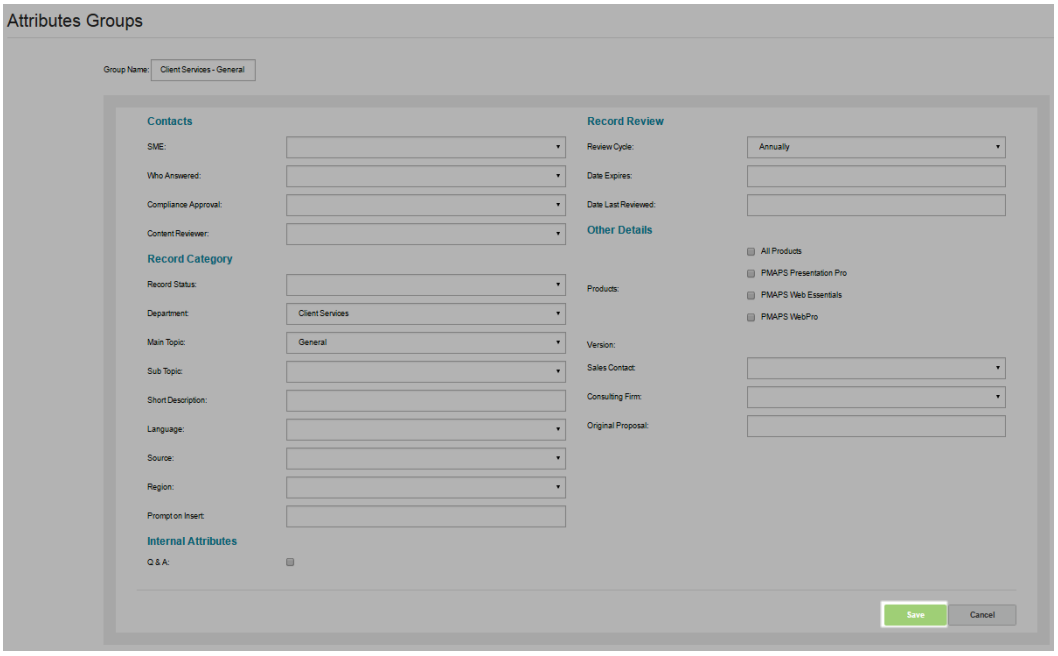
4. Add a Group Name and complete the attributes that should be pre-populated when selected in the Template to Load picklist.



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



6. Click Save.



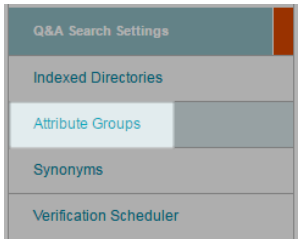
TIPS

- 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.

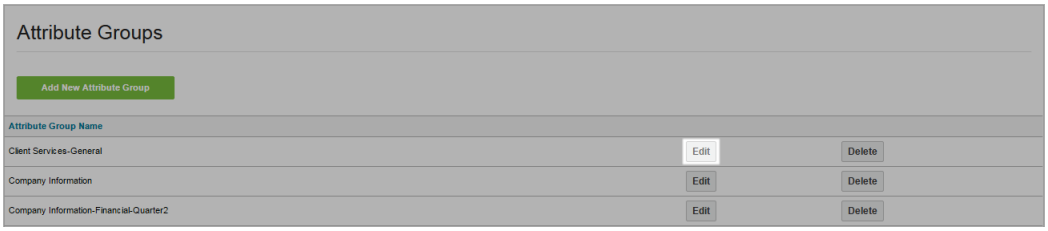
Edit Existing Attribute Group

1. Go to the Administration page.

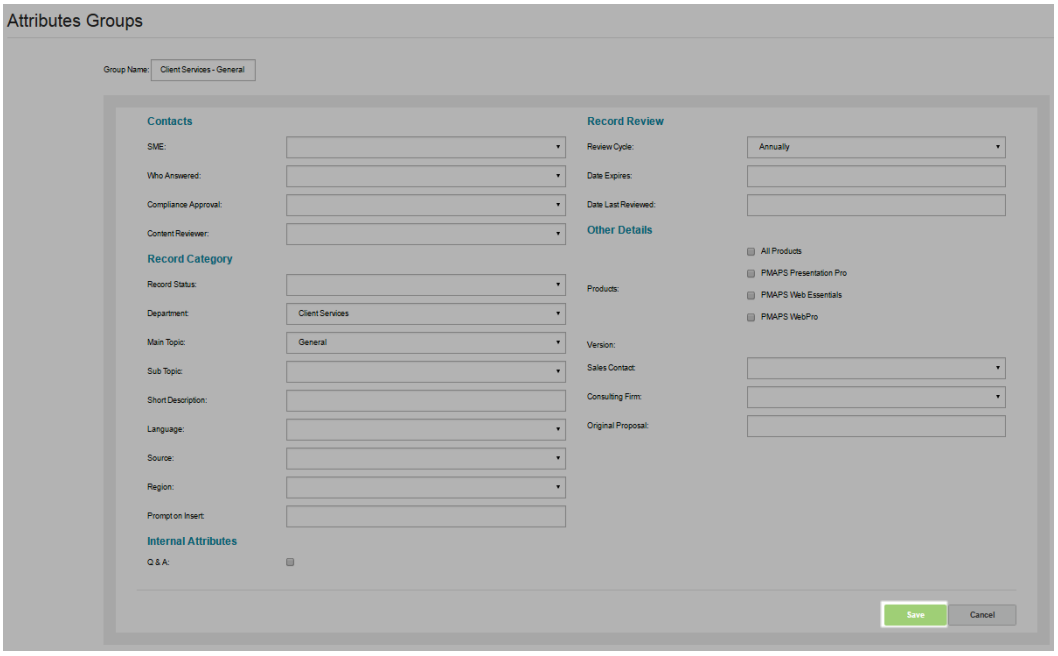
2. Under Q&A Search Settings, click Attribute Groups.



3. Click Edit on the line of attribute group you would like to modify.



4. Make appropriate changes to the attributes and then click Save.



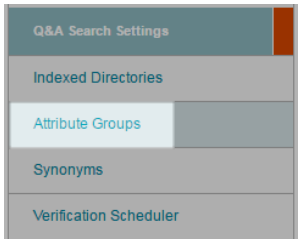
TIPS

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

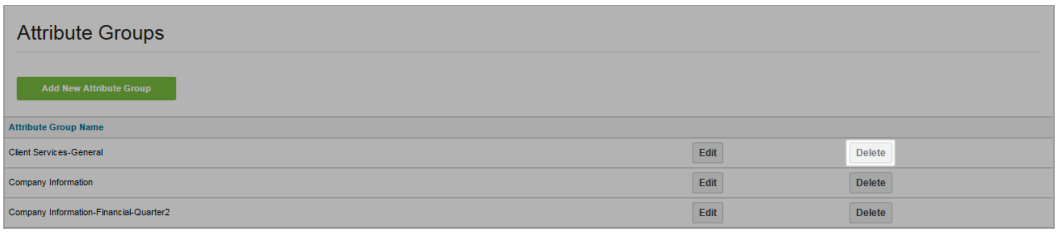
Delete Existing Attribute Group

1. Go to the Administration page.

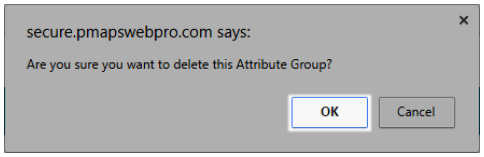
2. Under Q&A Search Settings, click Attribute Groups.



3. Click Delete on the line of attribute group you would like to remove.



4. Click OK to confirm deletion.



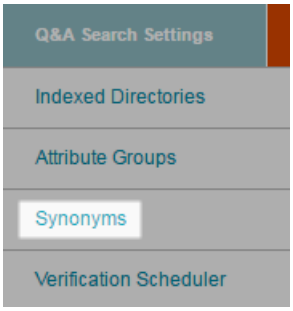
Synonyms

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.

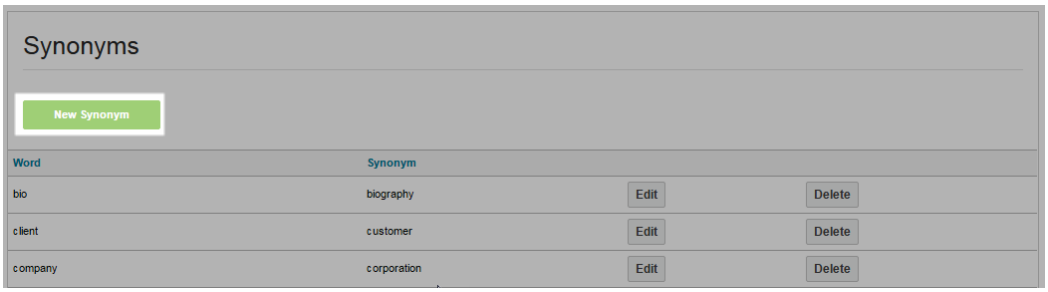
Add a New Synonym

1. Go to the Administration page.

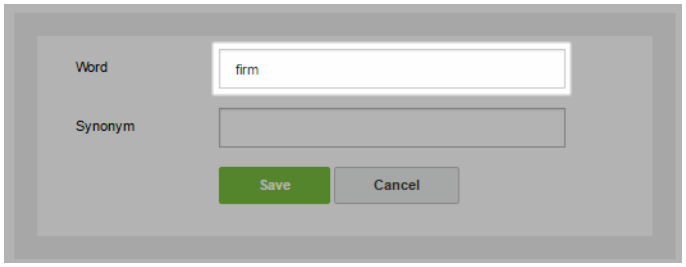
2. Click on Synonyms.



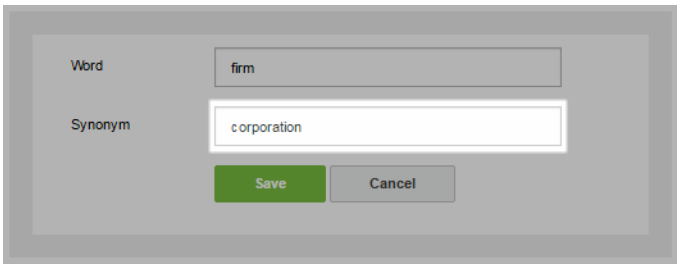
3. Click New Synonym.



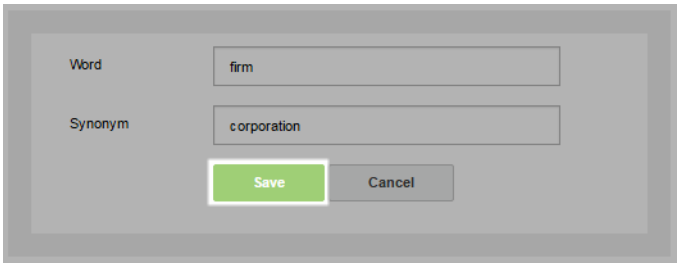
4. In the Word field, enter the word or phrase for which you would like to add a search synonym.



5. In the Synonym field, enter the synonym for the Word.



6. Click Save.



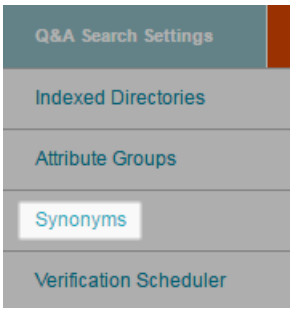
TIPS

- 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.

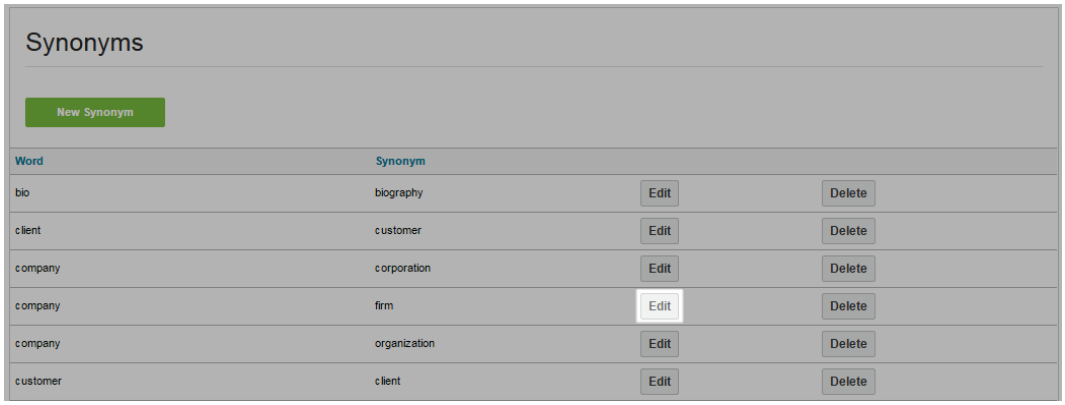
Edit an Existing Synonym

1. Go to the Administration page.

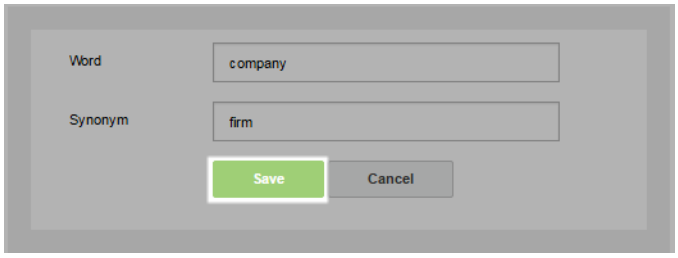
2. Click on Synonyms.



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

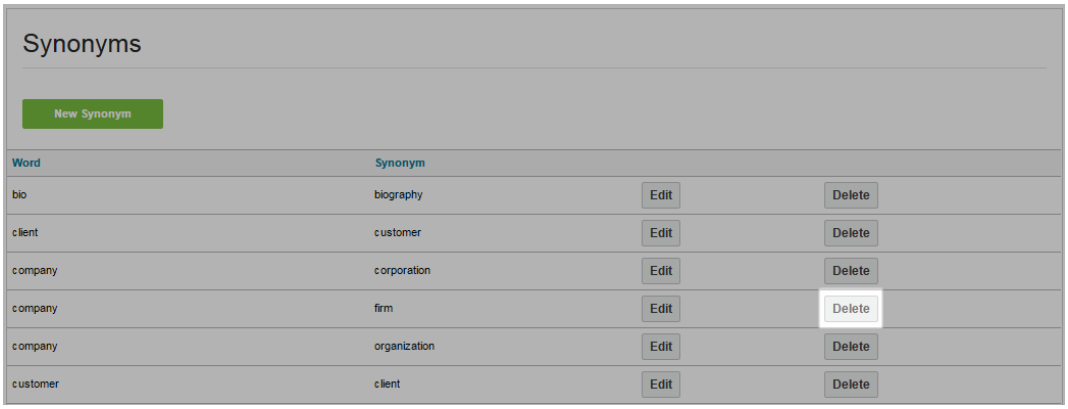


2. Make the changes and click Save.



Delete Existing Synonym

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



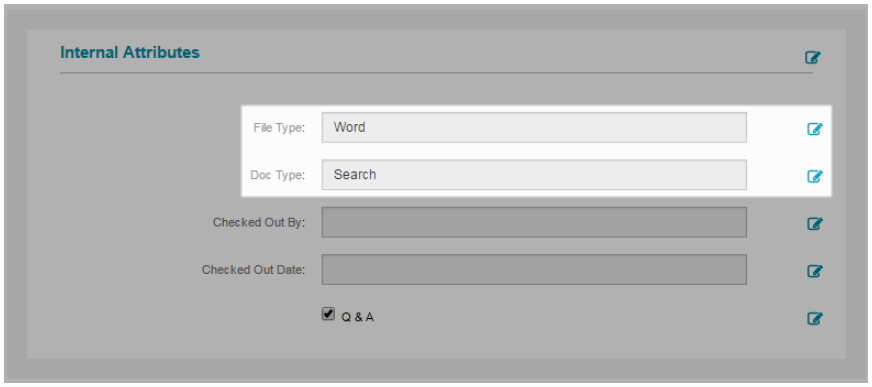
Verification Scheduler

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

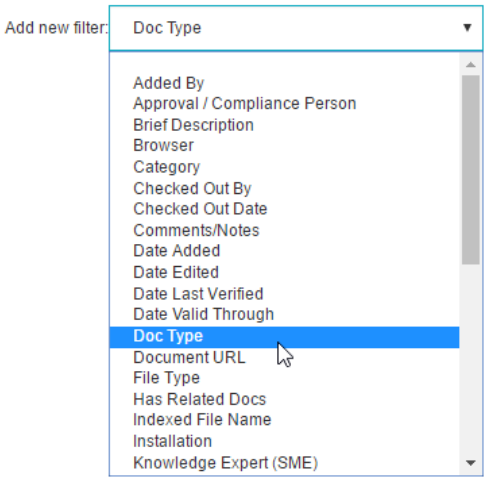
The first step in using the scheduler is to establish a Saved Search. This is mandatory for all schedules. Only records in the Doc Type "Search" and File Type "Word" are permitted in compliance central, and therefore, when using the scheduler.



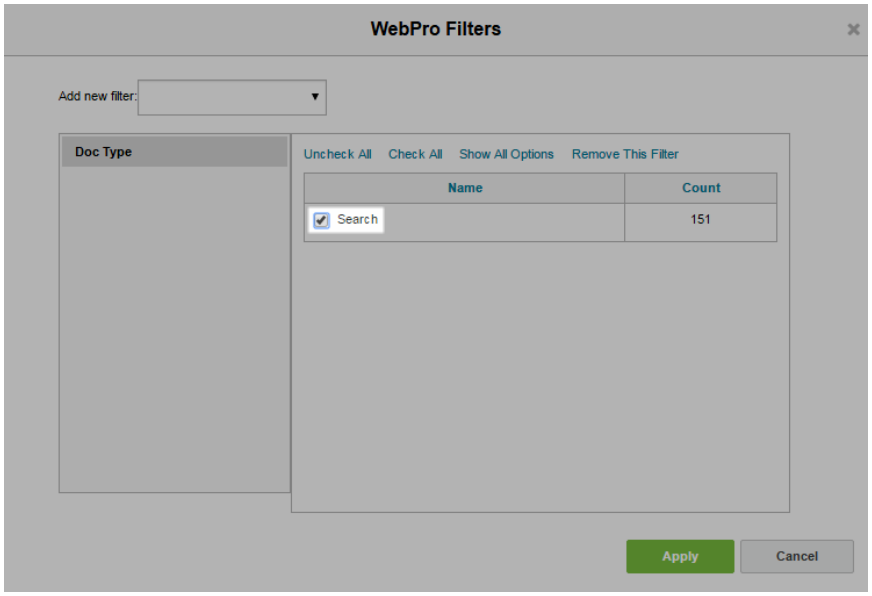
1. Go to the Search page.

2. Click on Modify Filters button.

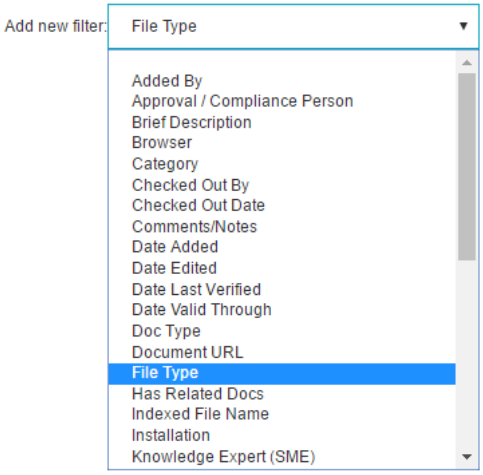
3. Under Add new filter, select Doc Type.



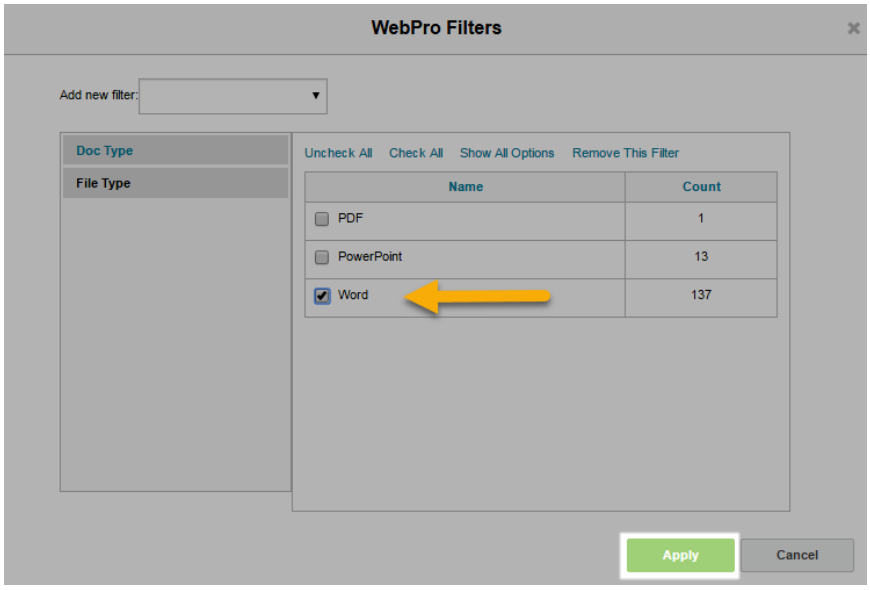
4. Check the box next to Search.



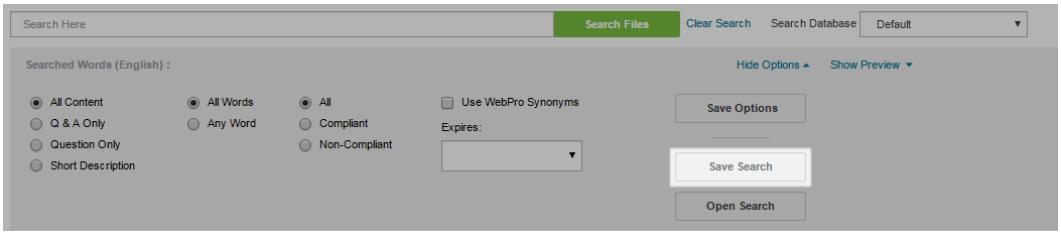
5. Under Add new filter, select the File Type field.



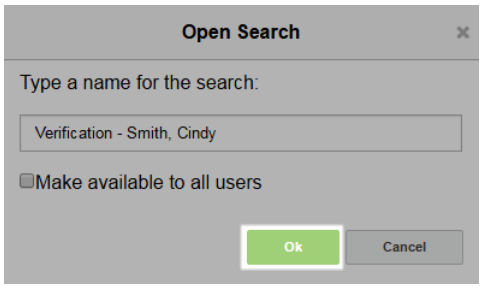
6. Check the box next to Word, and then click Apply.



7. 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.



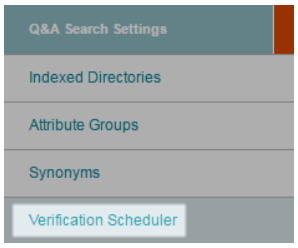
8. Name the saved search with an appropriate name and click OK.



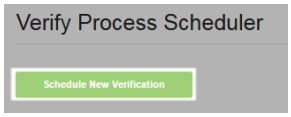
Create Schedule

1. Go to the Administration page.

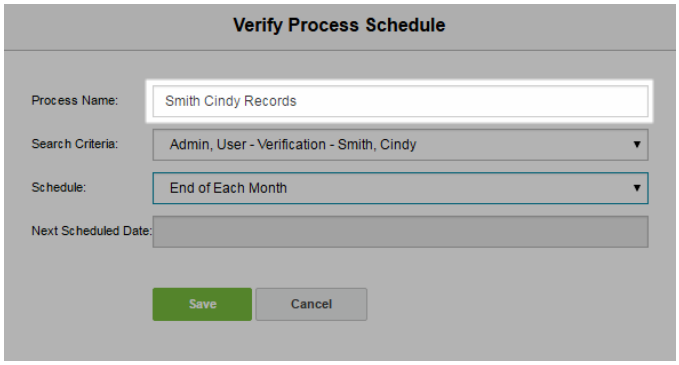
2. From Q&A Search Settings, select Verification Scheduler.



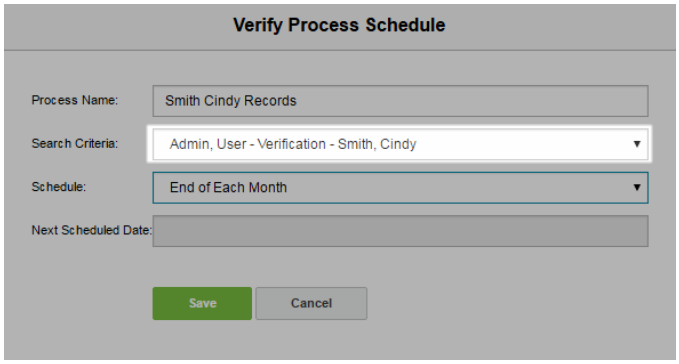
3. Click Schedule New Verification.



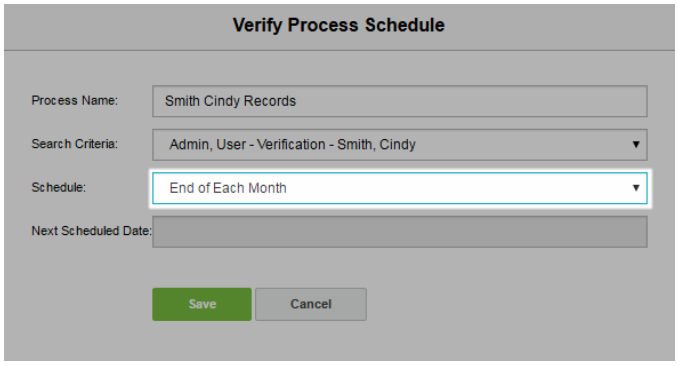
4. Enter an appropriate name for the schedule in the Process Name field.



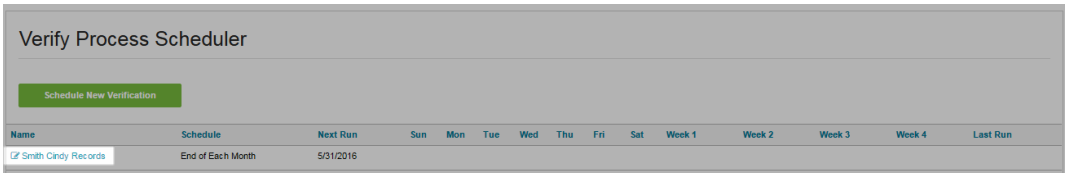
5. Select your Saved Search from the Search Criteria picklist. Your user name will appear in front of the Saved Search name you created.



6. Select the desired frequency from the Schedule options.



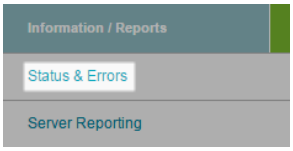
7. Click Save. When the page refreshes the new schedule appears on the page.

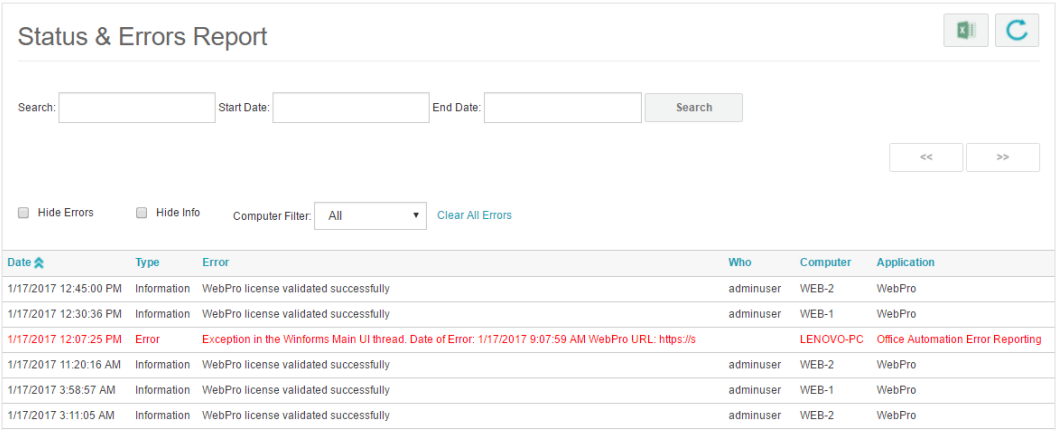


Information/Reports

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.



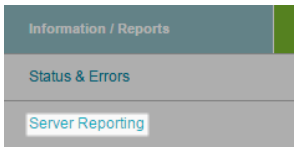


TIPS

- 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.

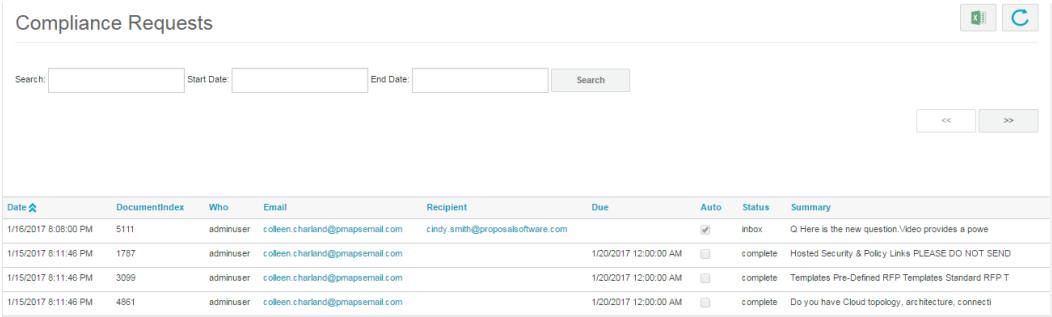
Server Reporting

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.



Date	DocumentIndex	Who	Email	Recipient	Due	Auto	Status	Summary
1/16/2017 8:08:00 PM	5111	adminuser	colleen.charland@pmapsemail.com	cindy.smith@proposalsoftware.com		✓	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		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		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		complete	Do you have Cloud topology, architecture, connecti

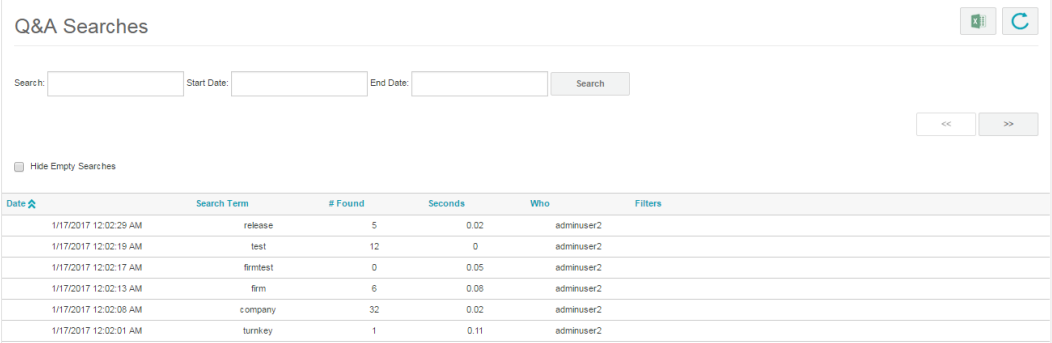
Q&A Searches

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.



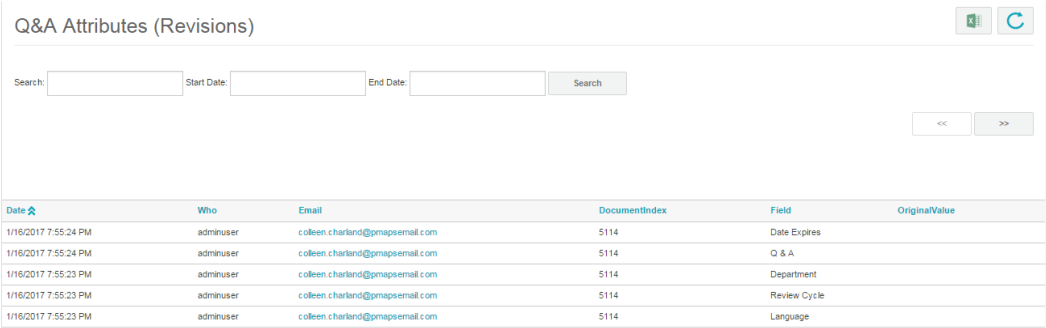
Date	Search Term	# Found	Seconds	Who	Filters
1/17/2017 12:02:29 AM	release	5	0.02	adminuser2	
1/17/2017 12:02:19 AM	test	12	0	adminuser2	
1/17/2017 12:02:17 AM	firmtest	0	0.05	adminuser2	
1/17/2017 12:02:13 AM	firm	6	0.08	adminuser2	
1/17/2017 12:02:08 AM	company	32	0.02	adminuser2	
1/17/2017 12:02:01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

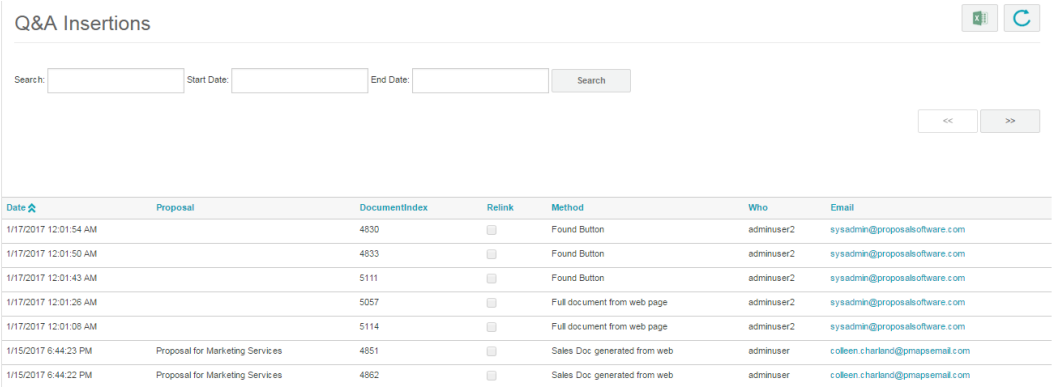
This tab reports all changes made to any search record attributes.



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

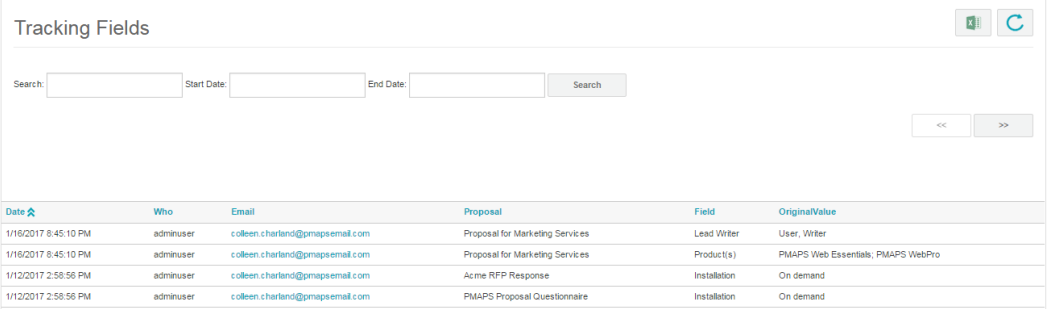
To view a report of all Q&As that have been inserted, click the Q&A Insertions tab. When users are working in the cloud, the proposal name will automatically be tracked in addition to the date, document ID, method of insertion, and user who inserted the record.



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

Tracking Fields

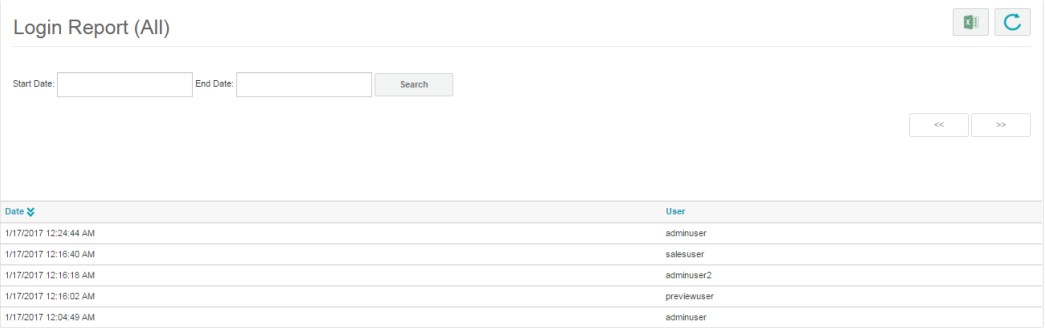
This tab reports all changes made to dashboard record attributes.



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 2:58:56 PM	adminuser	colleen.charland@pmapsemail.com	Acme RFP Response	Installation	On demand
1/12/2017 2:58:56 PM	adminuser	colleen.charland@pmapsemail.com	PMAPS Proposal Questionnaire	Installation	On demand

Login Report (All)

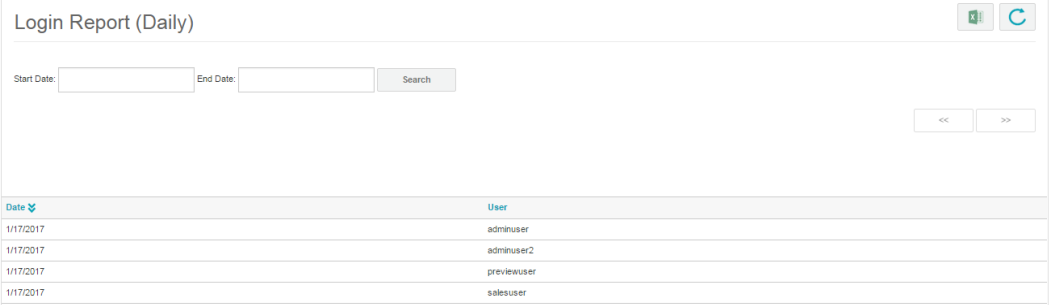
This tab reports every single log in by per user with a date and time stamp.



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)

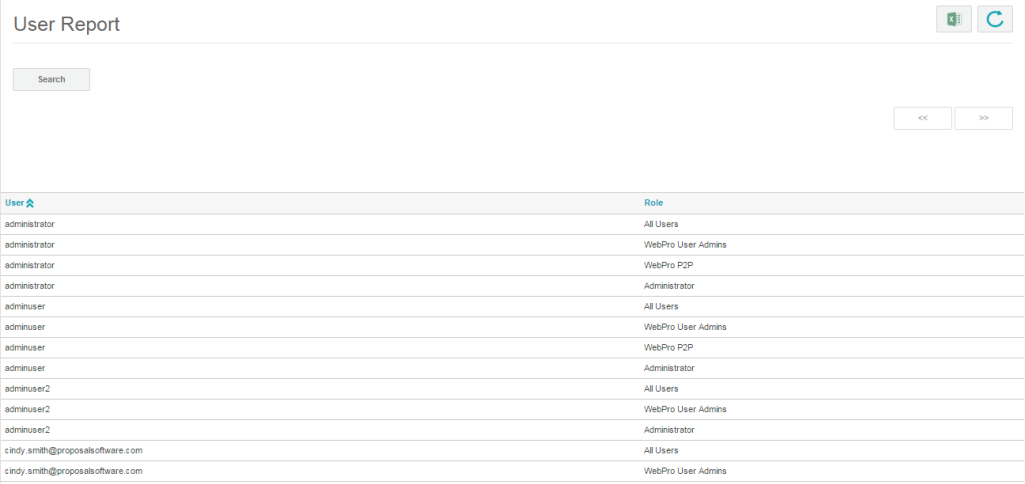
This tab reports every unique log in per user with a date stamp.



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

User Report

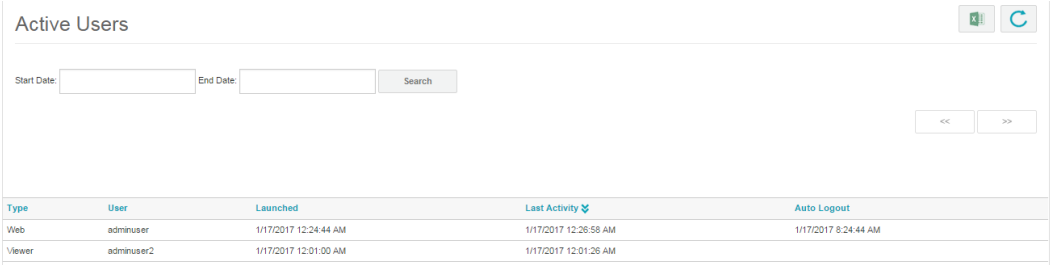
This tab reports every user in the system by role (group).



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.



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:

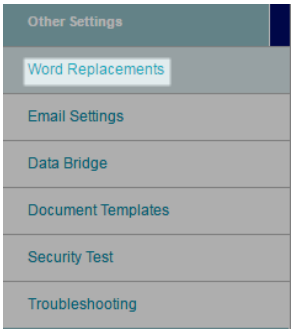
- Insert Full or Insert Selected Text
  - Codes in records that are inserted using this feature are automatically replaced

  - 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

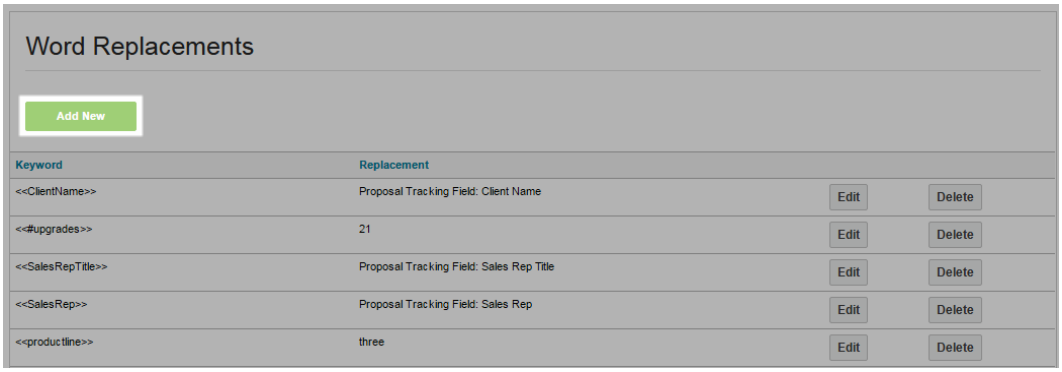
Add Code

1. Go to the Administration page.

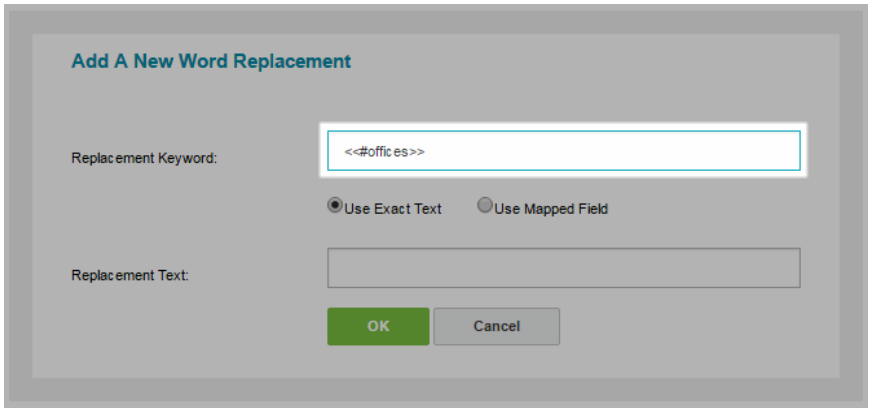
2. Under Other Settings, click Word Replacements.



3. Click Add New.

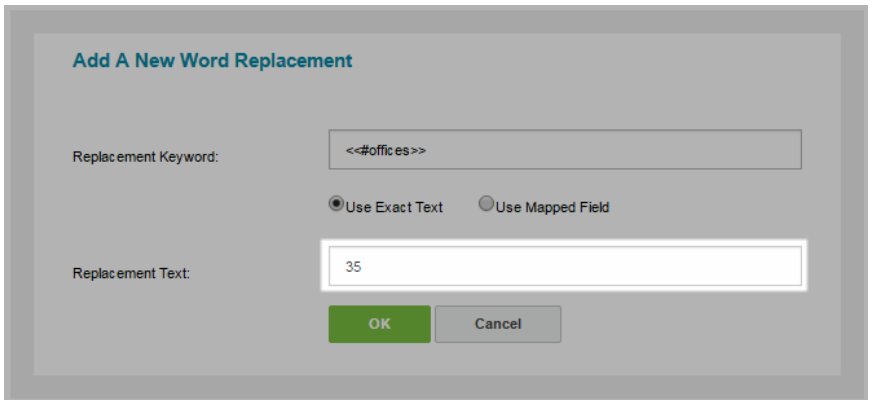


4. Enter the Replacement Keyword surrounded by two greater than and less than symbols (<< >>) or other unique surrounding characters. The Replacement Keyword is not case sensitive.

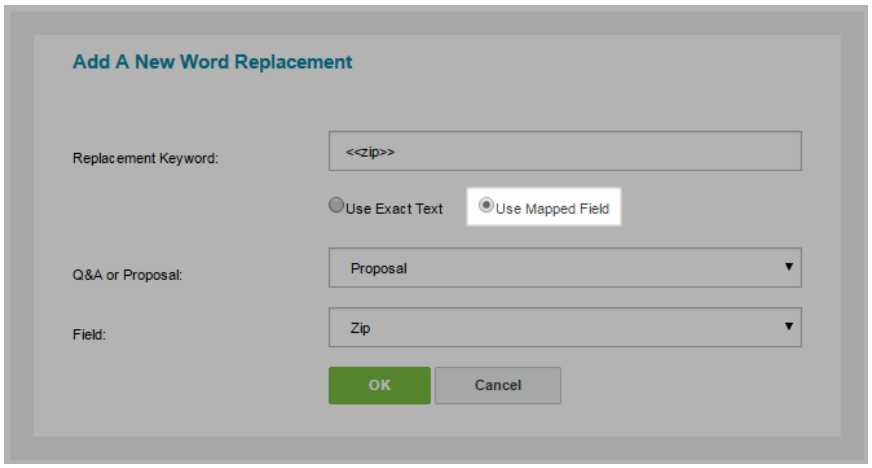


5. Select Use Exact Text or Use Mapped Field:

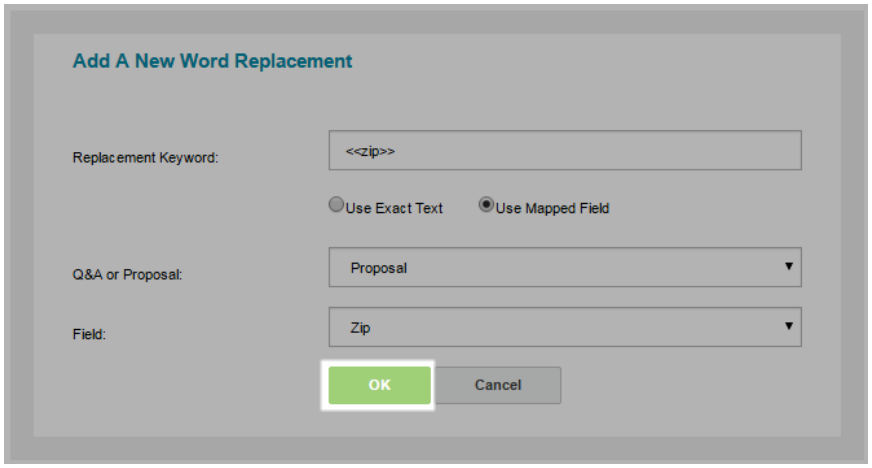
   a. The Use Exact Text options replaces the Replacement Keyword with the exact value from the Replacement Text field. The Replacement Text field is case sensitive—it will be replaced exactly as entered here.



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

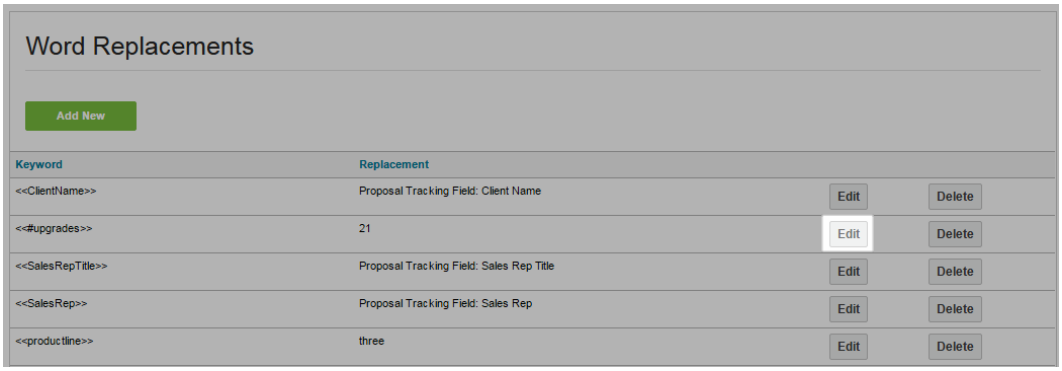


6. Click OK.

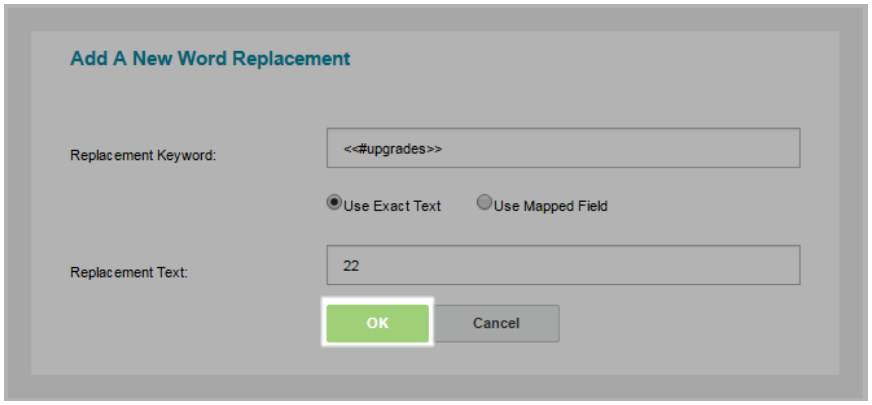


Edit Code

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

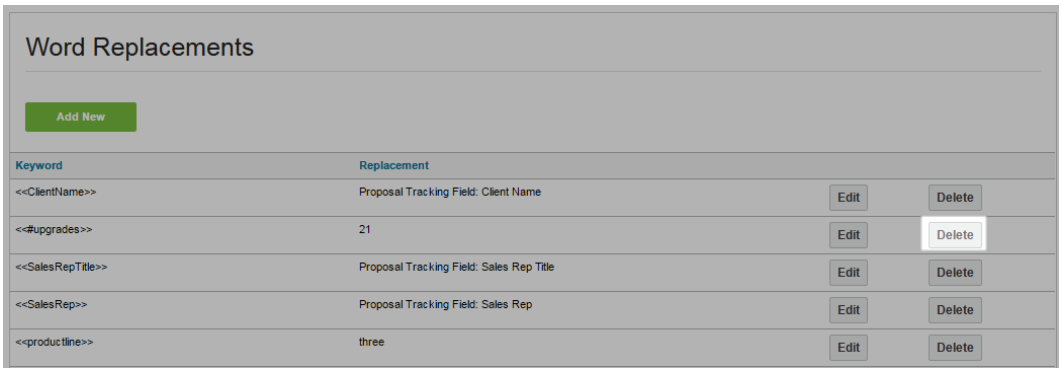


2. Make changes and click OK.



Delete Code

1. Click Delete on the line of the code you would like to remove. The code is immediately removed.



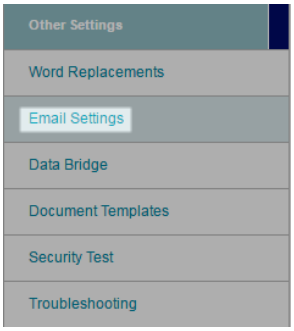
Email Settings

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

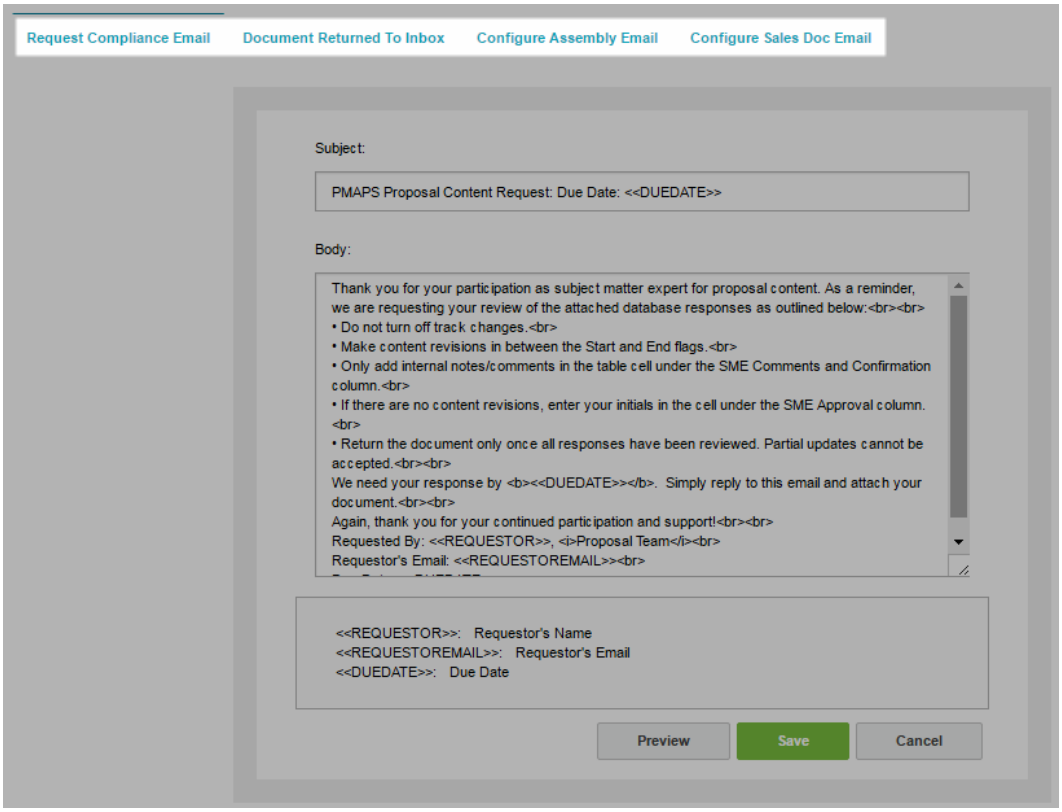
- Request Compliance Email – outgoing message for new compliance central requests
- Document Returned to Inbox – outgoing message for returned compliance central requests
- Configure Assembly Email – outgoing message for assembly center assignments
- Configure Sales Doc Email – outgoing message for completed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

1. Go to the Administration page.

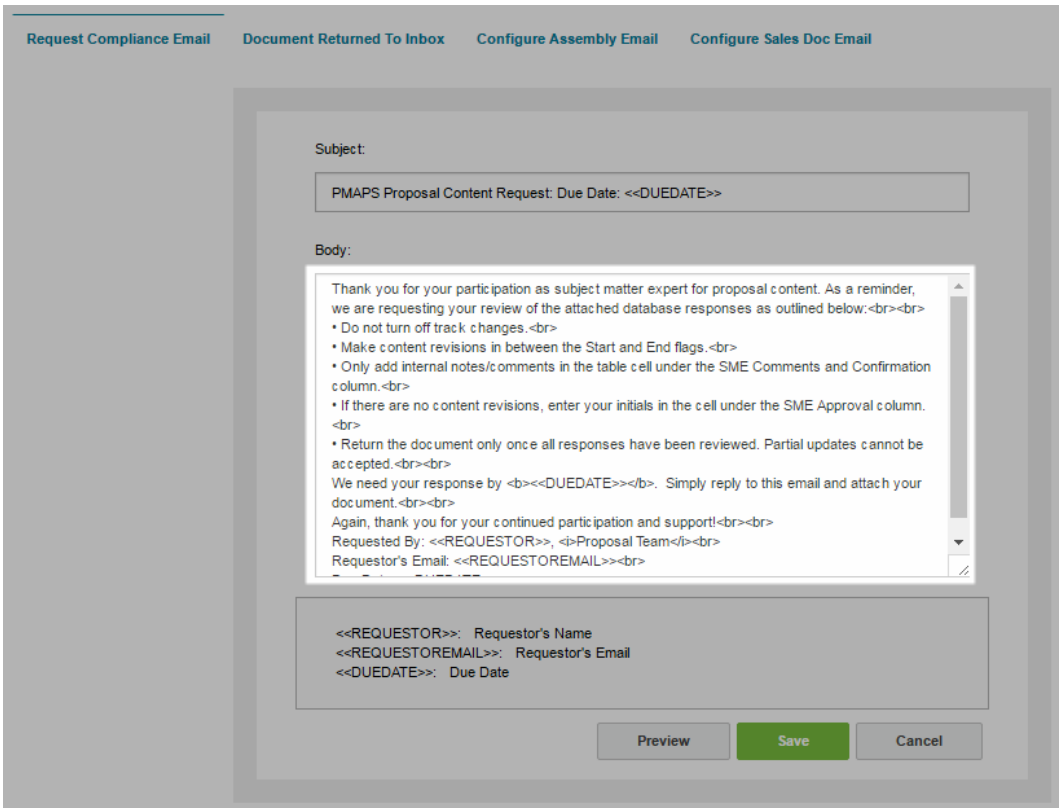
2. From Other Settings, click Email Settings.



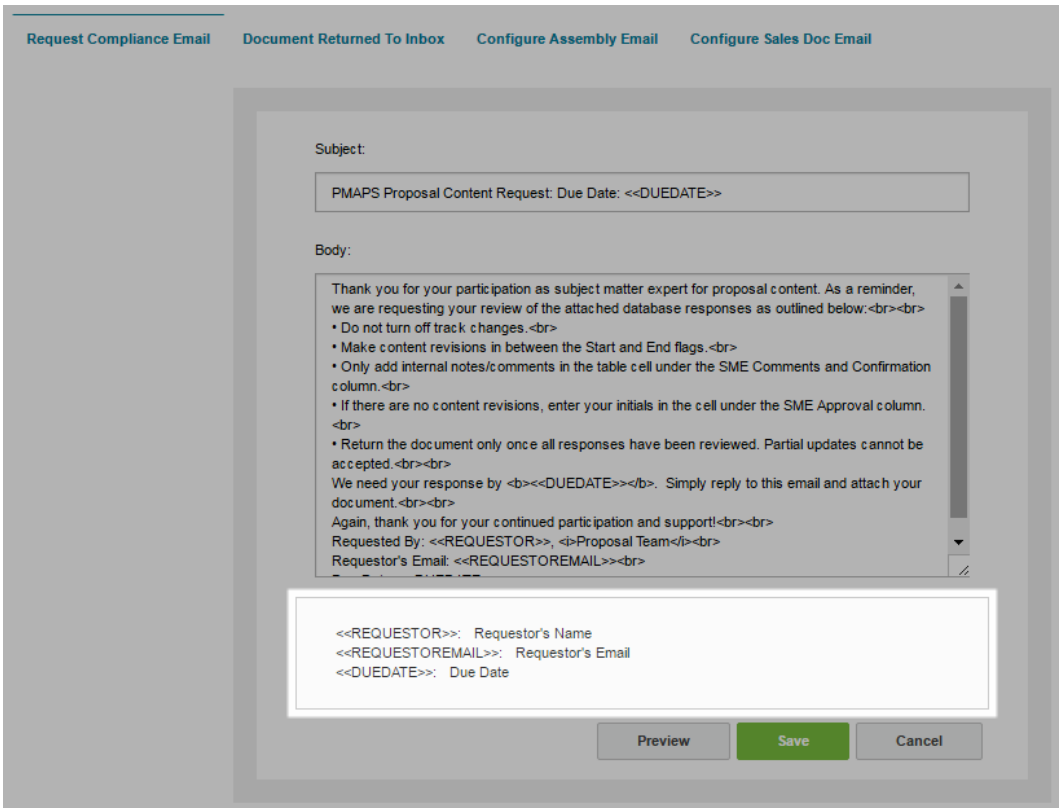
3. Click on the tab for the email template you would like to modify.



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.



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



6. 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
****	Begins italicized text (must use the code for ends italic text where italics should end)
****	Ends italicized text

Data Bridge

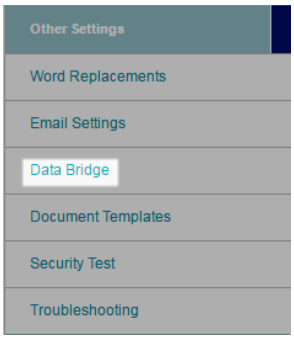
The PMAPS WebPro Data Bridge is an optional module used to import and/or export data between external applications and the PMAPS dashboard.

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.

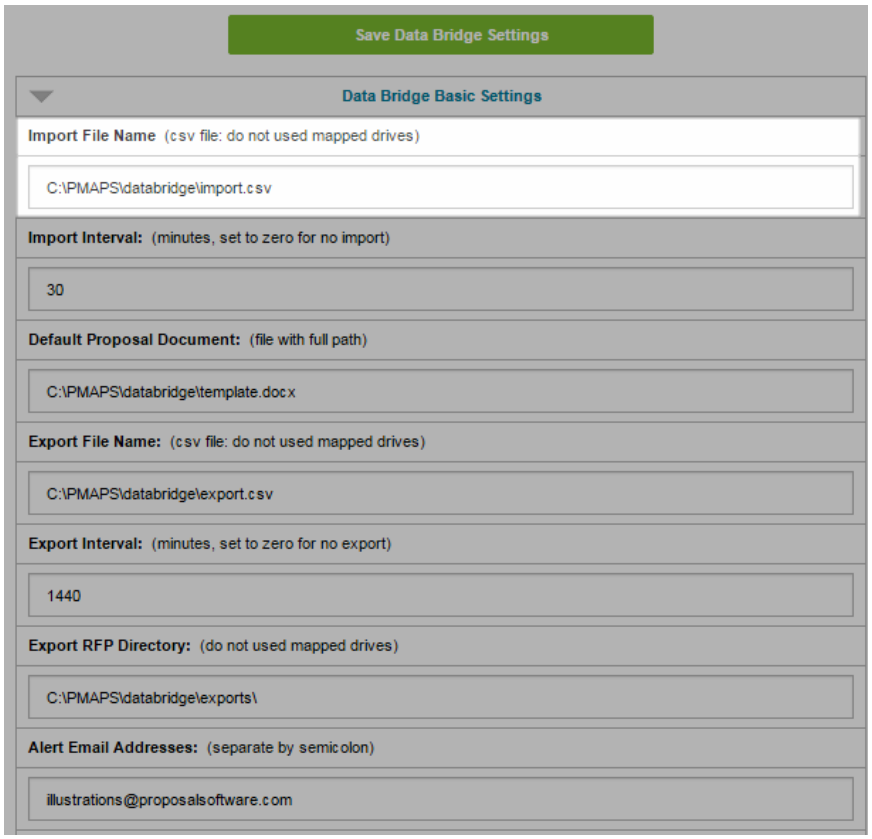
Configure Data Bridge Basic Settings

1. Go to the Administration page.

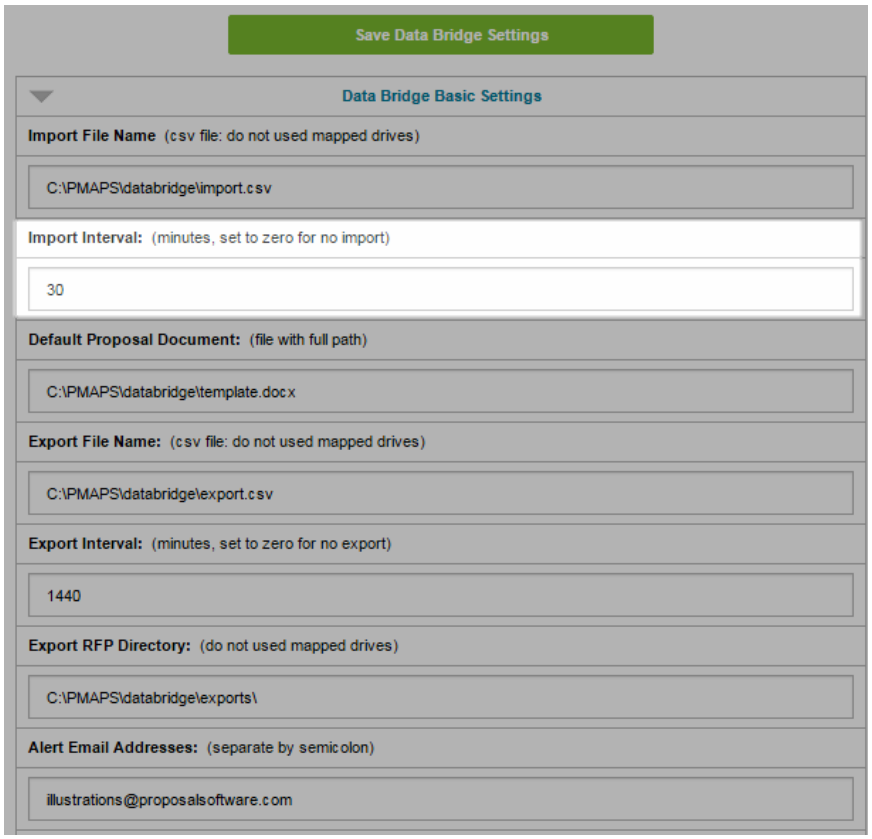
2. From the Other Settings tab, click on Data Bridge.



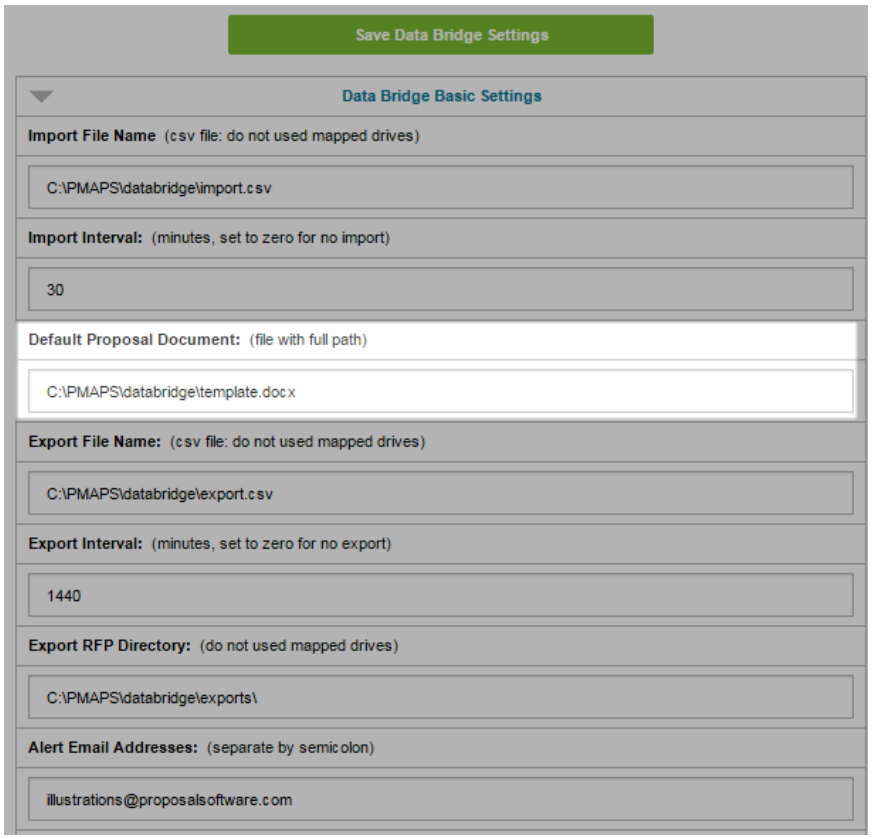
3. In the Import File Name field, enter the full path for where the import file resides, including the file name and extension (must be a .csv file).



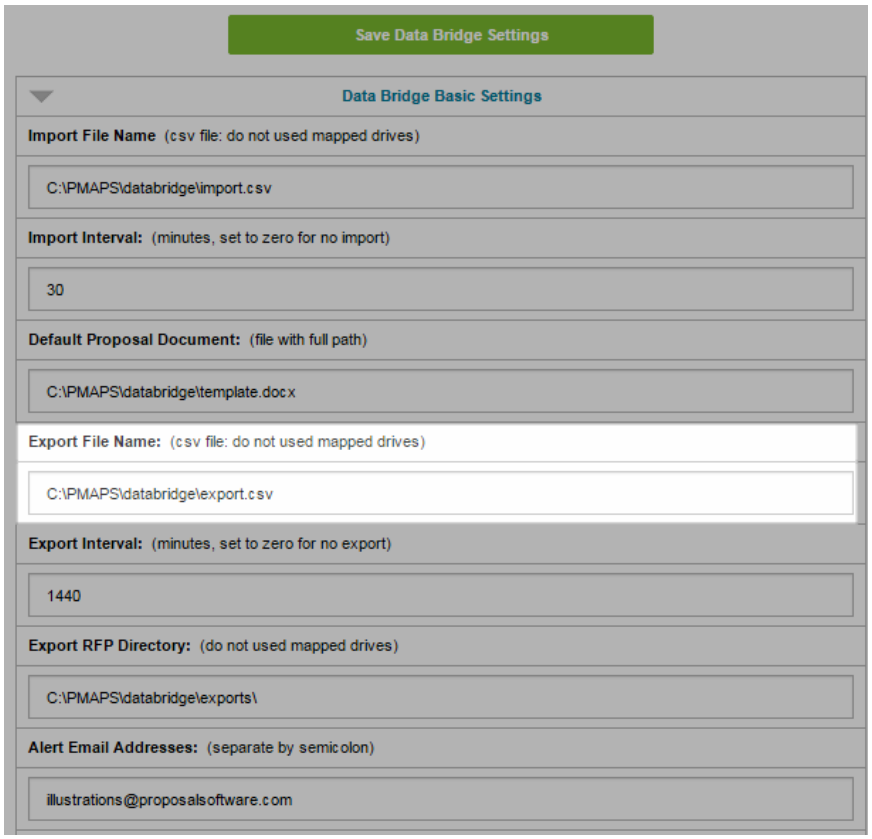
4. In the Import Interval field, enter the frequency for how often data bridge should import proposal data when the application is running.



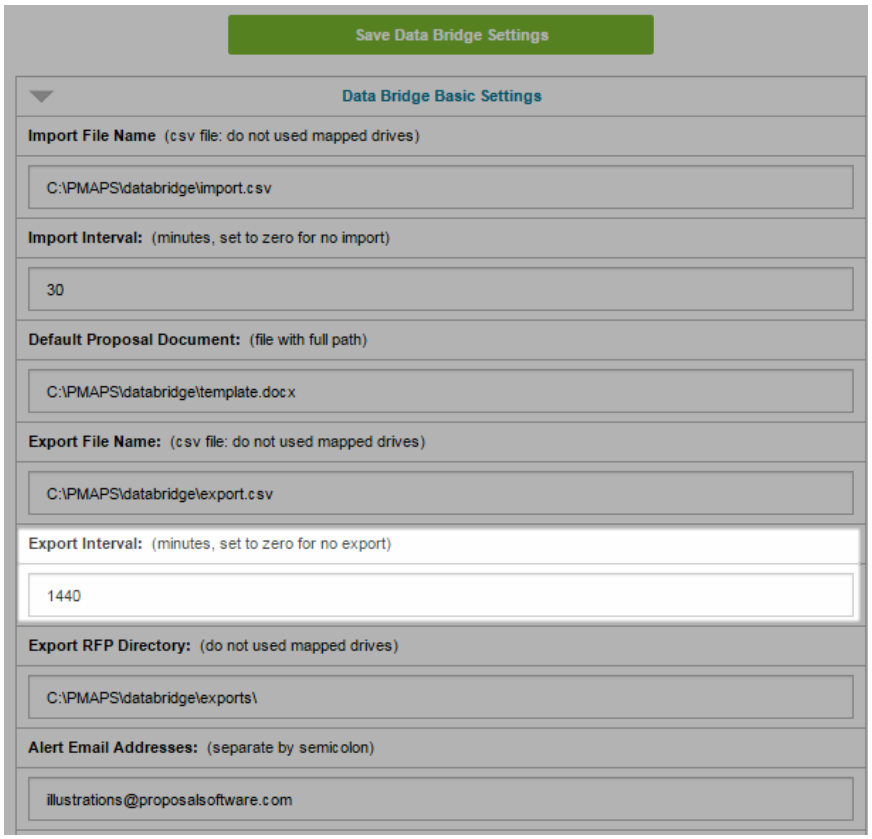
5. In the Default Proposal Document field, enter the full path for where the document template file resides, including the file name and extension.



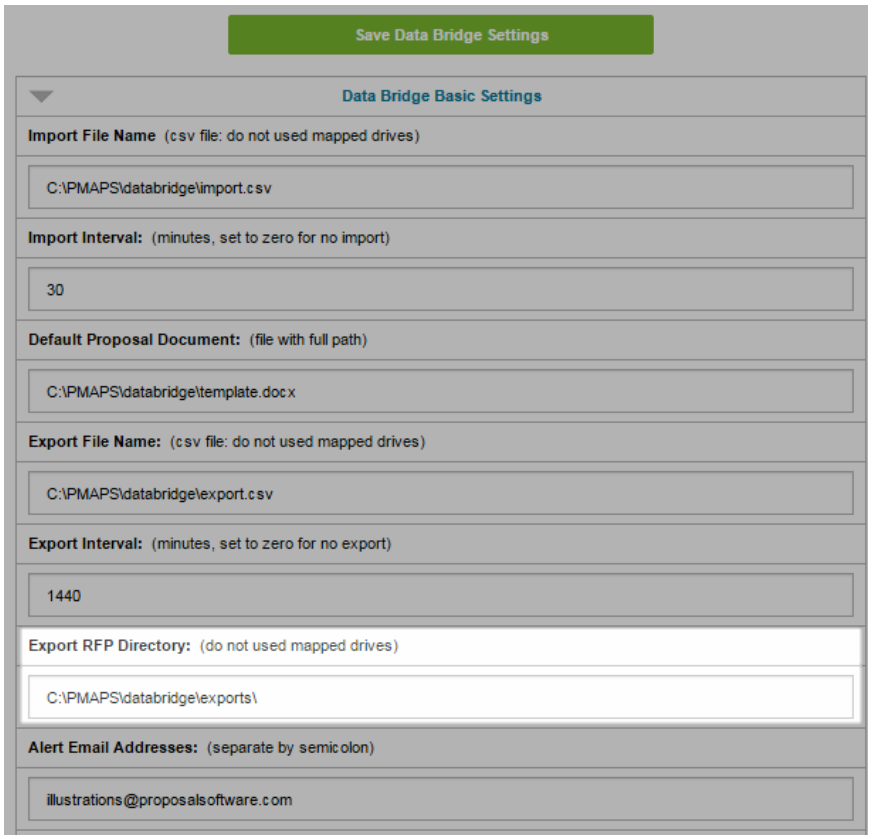
6. In the Export File Name field, enter the full path for where the export file resides, including the file name and extension (must be a .csv file).



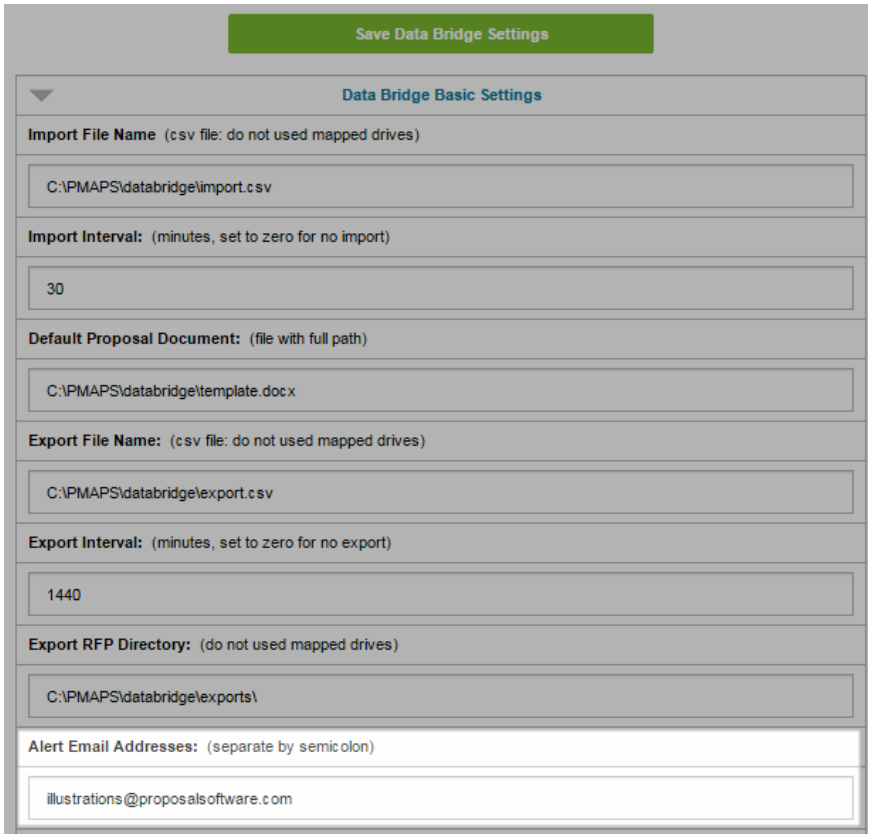
7. In the Export Interval field, enter the frequency for how often data bridge should export proposal data when the application is running.



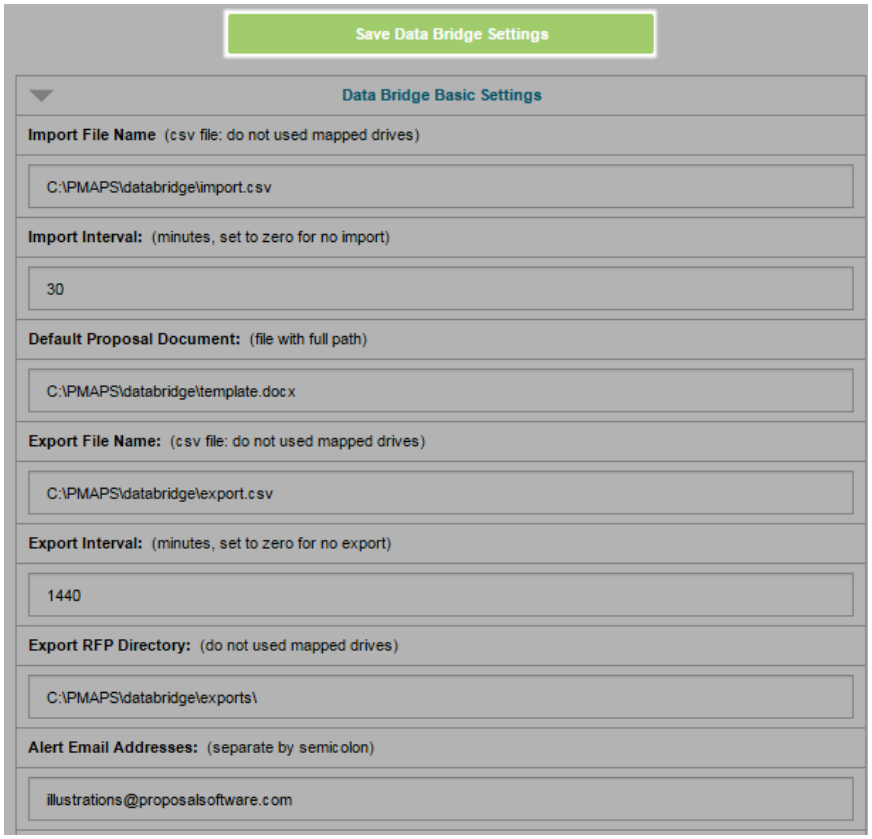
8. In the Export RFP Directory field, enter the full path for where to save the exported proposals proposal documents.



9. 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.



10. Click Save Data Bridge Settings.



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

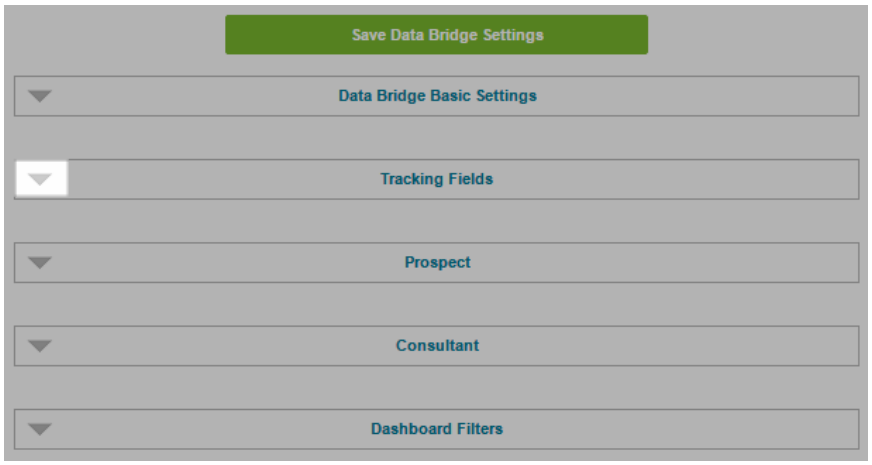
The Tracking Fields section is where you designate the attribute fields you would like to import. If you plan to import and export data, note that each field may be used for either import or export, not both.

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.

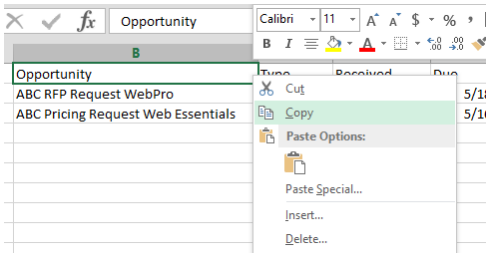
With the import file open, map each column to be imported by clicking the button under the Import column and copying the column header into the Export/Import Field Heading field.

1. Go to the Administration page.

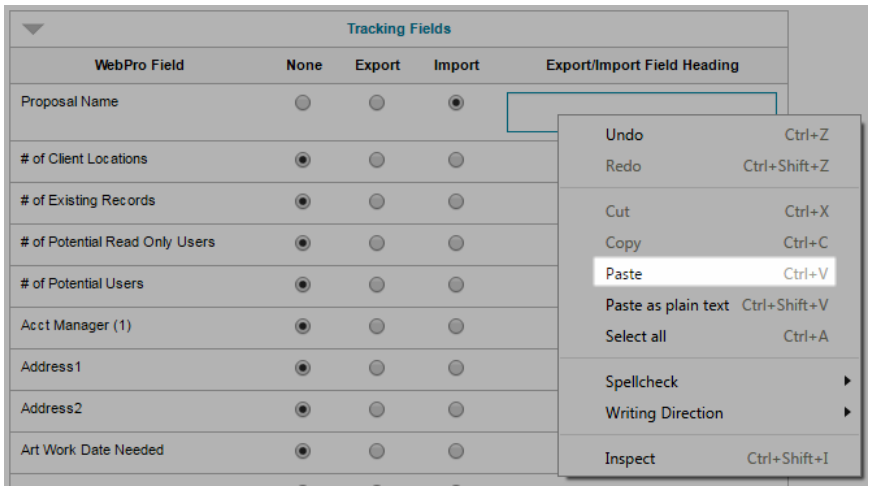
2. Expand the Tracking Fields section by clicking the plus sign.



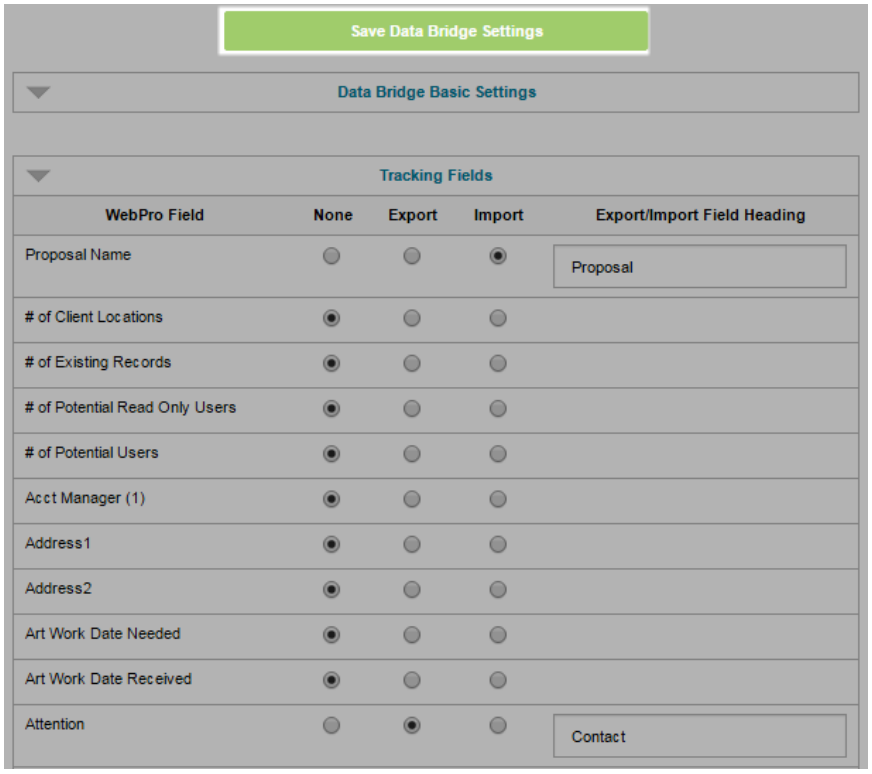
3. Go to the import file and click into the column row header for the opportunity or proposal name and copy to clipboard.



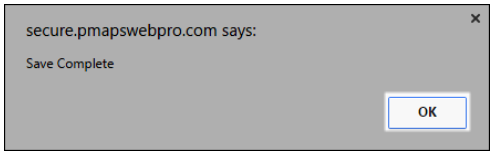
4. Click the Import button for the first row (the Proposal Name field in the screen shot) and paste. If the value "null" is in the field, select it and overwrite by pasting.



5. 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.



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

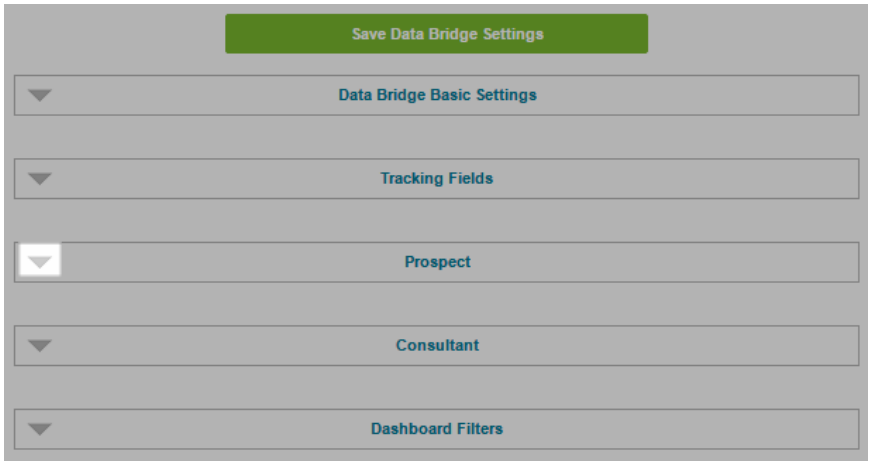


7. If you have specified a document to import in the UNC column, verify the document is in the directory specified in the Default Proposal Document basic setting.

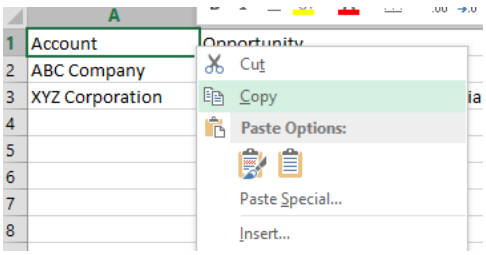
Select Prospect Fields

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

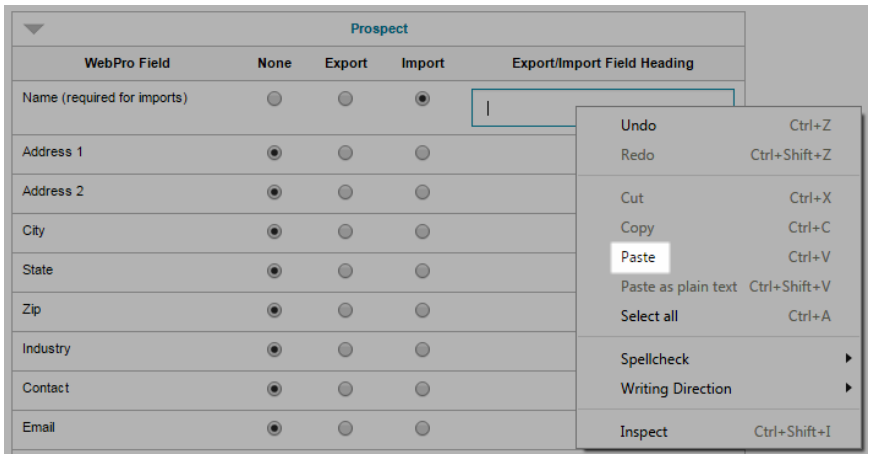
1. Expand the Prospect section by clicking the plus sign.



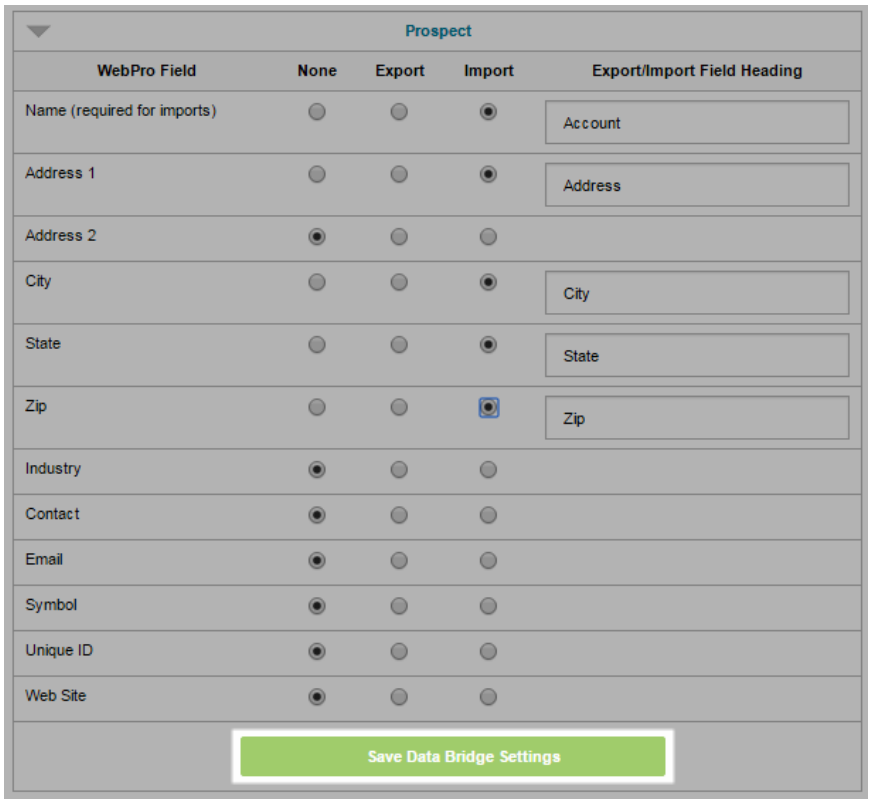
3. Go to the import file and click into the row header for the prospect name and copy to clipboard.



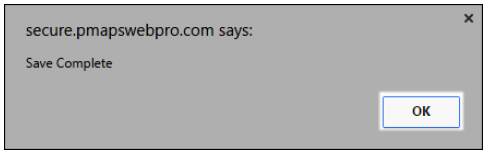
4. Click the Import button for the first row (the Name (required for imports) field in the screen shot) and paste. If the value "null" is in the field, select it and overwrite by pasting.



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



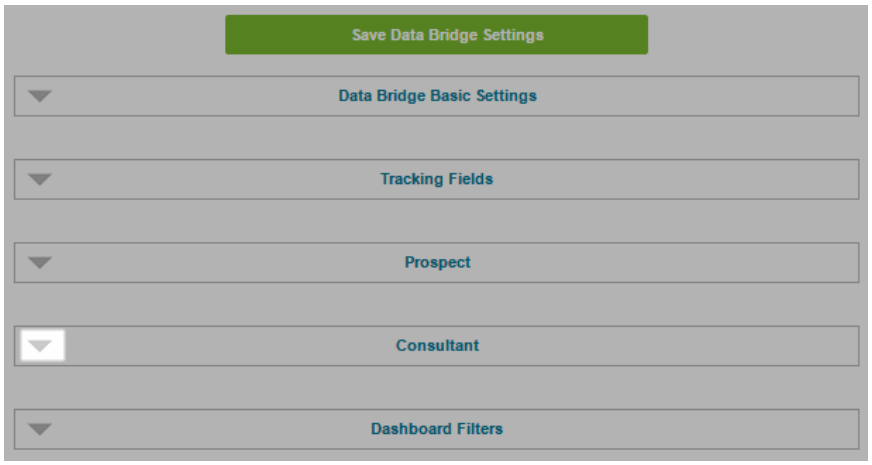
6. Wait for the prompt confirming the save is complete and click OK.



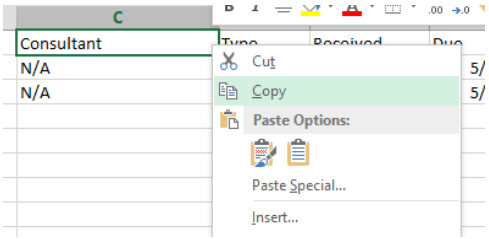
Select Consultant Fields

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

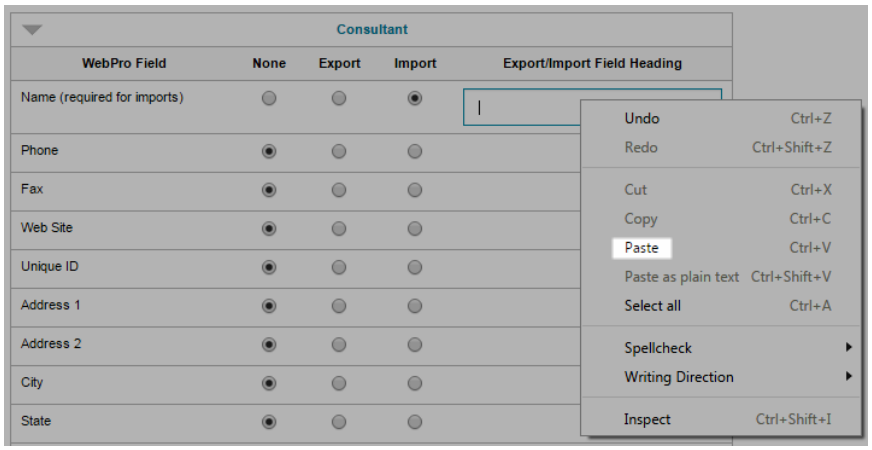
1. Expand the Consultant section by clicking the plus sign.



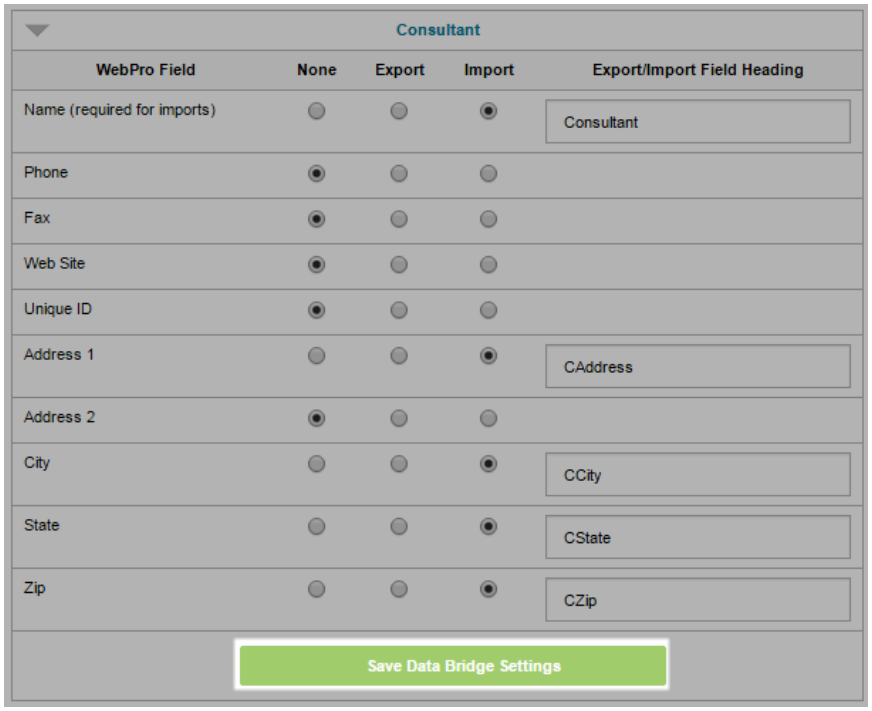
2. Go to the import file and click into the row header that contains the consultant name and copy to clipboard.



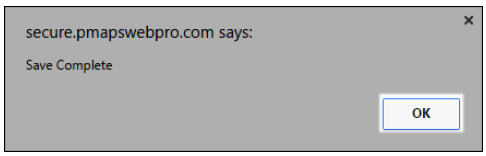
3. Click the Import button for the first row (the Name (required for imports) field in the screen shot) and paste. If the value "null" is in the field, select it and overwrite by pasting.



4. Import address fields if appropriate (in import file), and then click 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

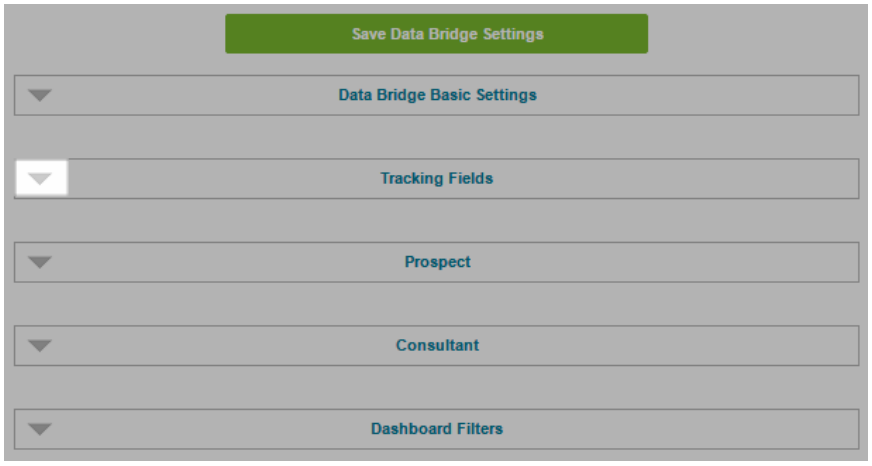
The Tracking Fields section is where you designate the attribute fields you would like to export. If you plan to import and export data, note that each field may be used for either import or export, not both.

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.

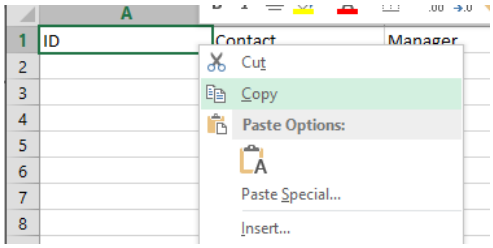
With the export file open, map each column to be exported by clicking the button under the Export column and copying the column header from the export file into the Export/Import Field Heading field.

1. Go to the Administration page.

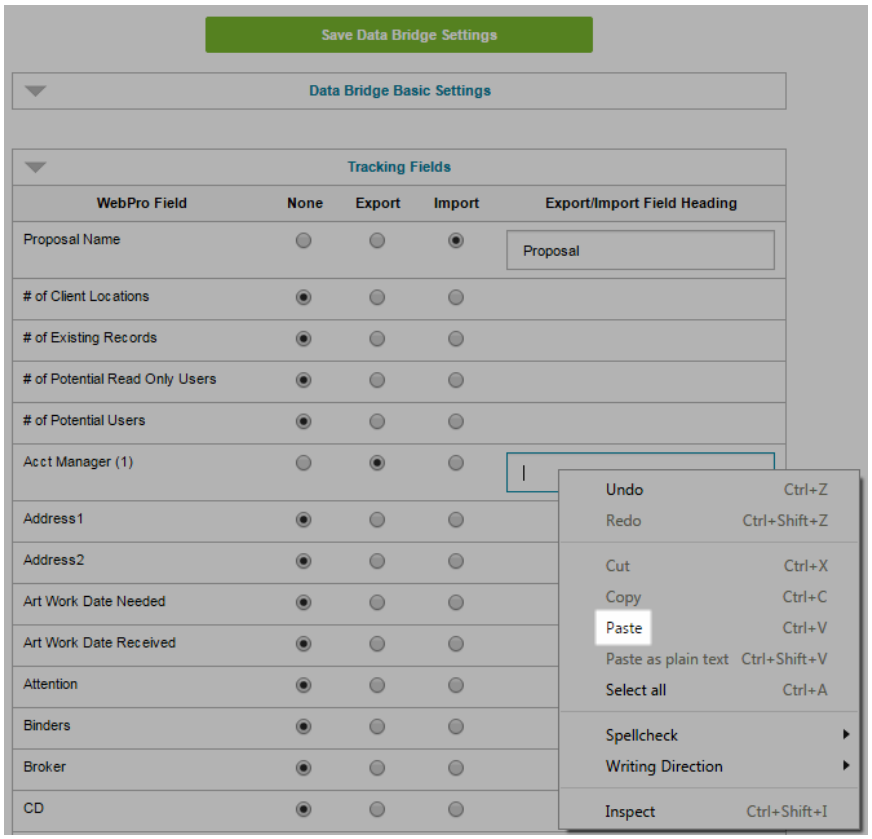
2. Expand the Tracking Fields section by clicking the plus sign.



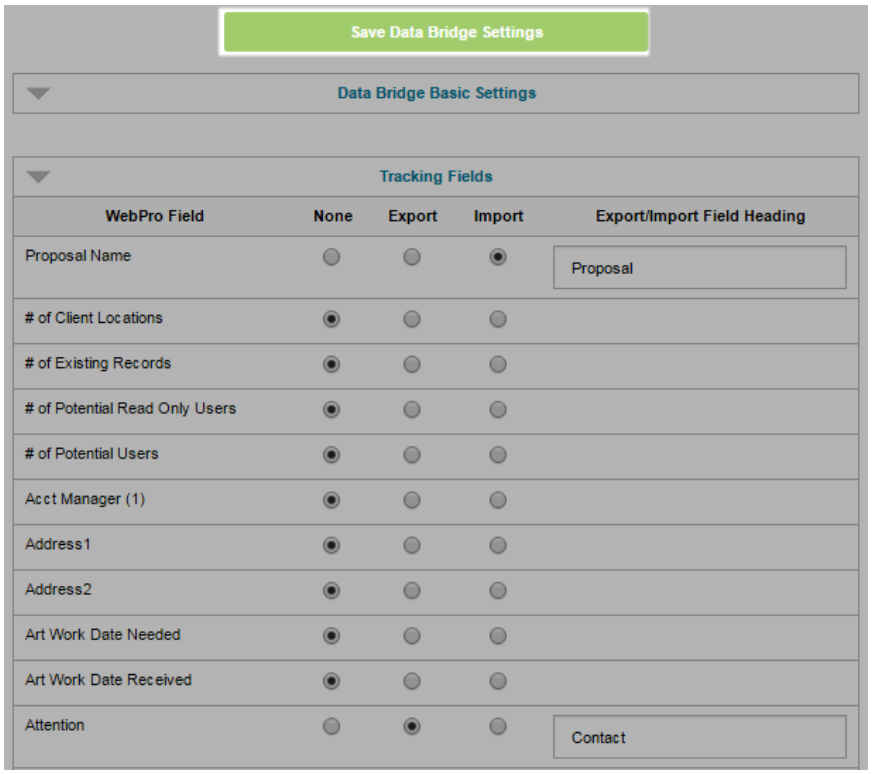
3. Go to the export file and click into the first column row header and copy to clipboard.



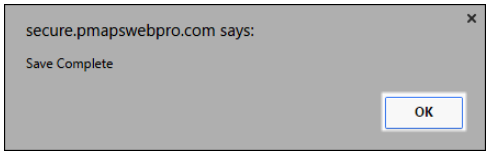
4. Click the Export button for the first field and paste. If the value "null" is in the field, select it and overwrite by pasting.



5. Repeat steps 3 and 4 for all columns in the export file, and then click Save Data Bridge Settings.

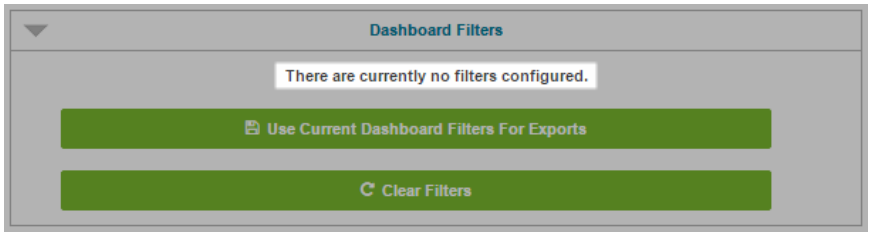


6. Wait for the prompt confirming the save is complete and click OK.

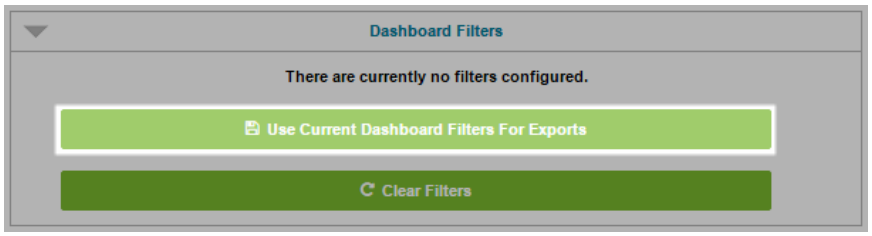


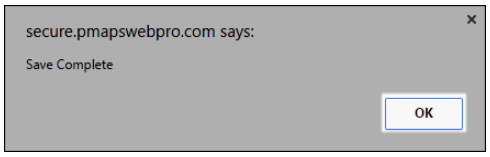
Dashboard Filters

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.

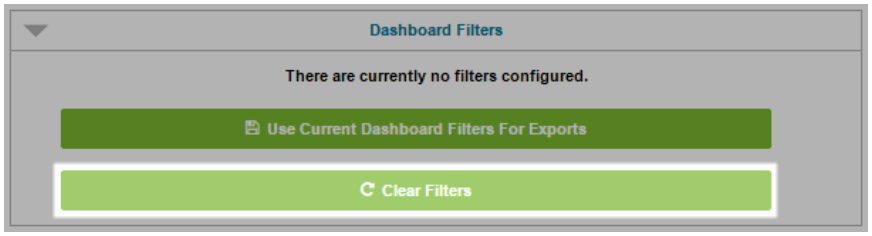


To use existing dashboard filters, click Use Current Dashboard Filters For Exports and click OK when complete.



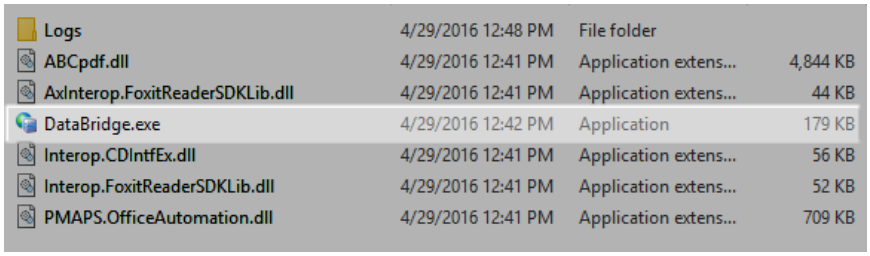


To remove dashboard filters in use, click Clear Filters and click OK when complete.



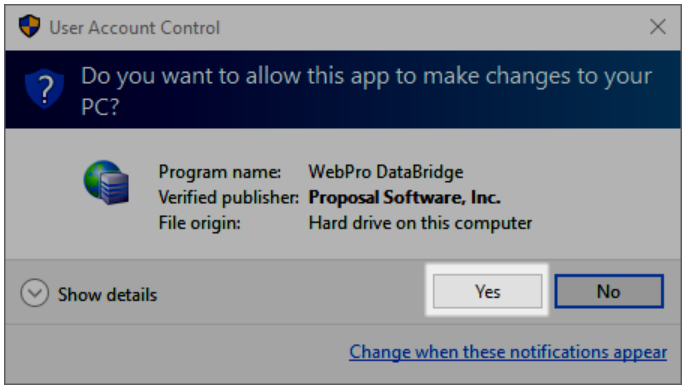
Start Data Bridge Application

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.

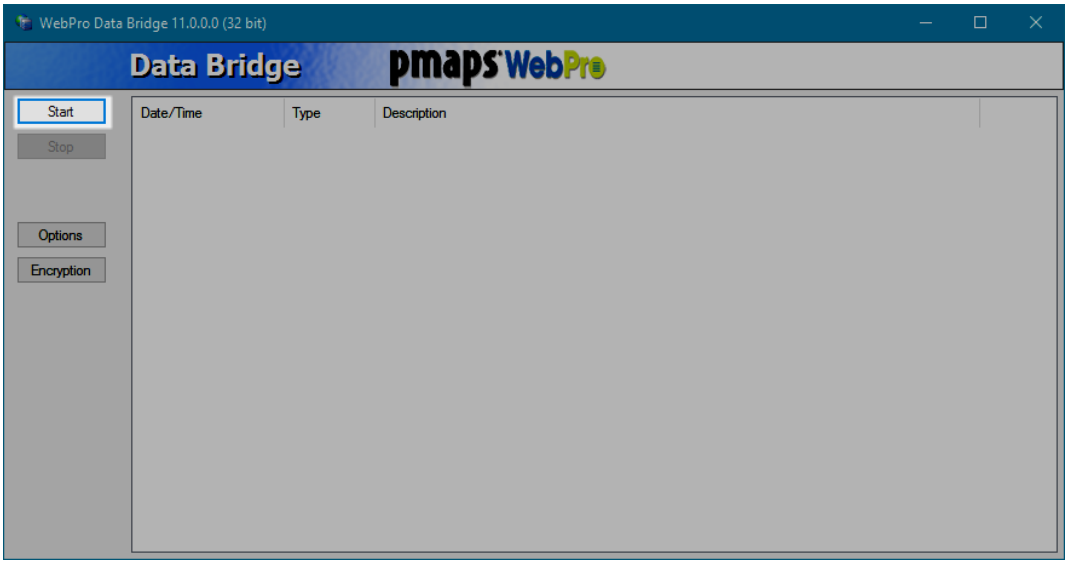


Logs	4/29/2016 12:48 PM	File folder	
ABCpdf.dll	4/29/2016 12:41 PM	Application extens...	4,844 KB
AxInterop.FoxitReaderSDKLib.dll	4/29/2016 12:41 PM	Application extens...	44 KB
DataBridge.exe	4/29/2016 12:42 PM	Application	179 KB
Interop.CDIntfEx.dll	4/29/2016 12:41 PM	Application extens...	56 KB
Interop.FoxitReaderSDKLib.dll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

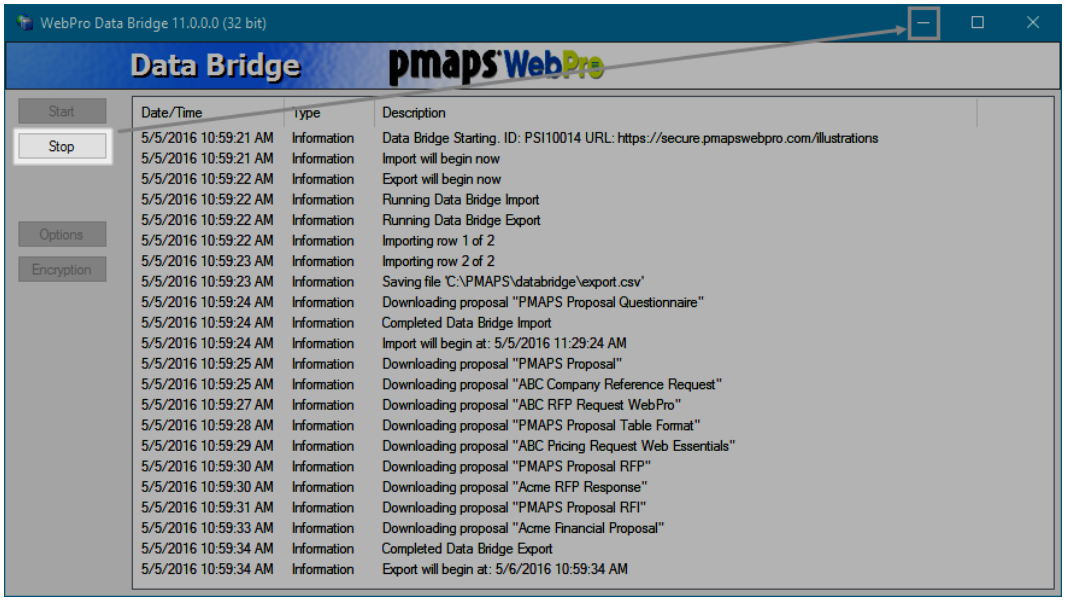


4. Click the Start icon.

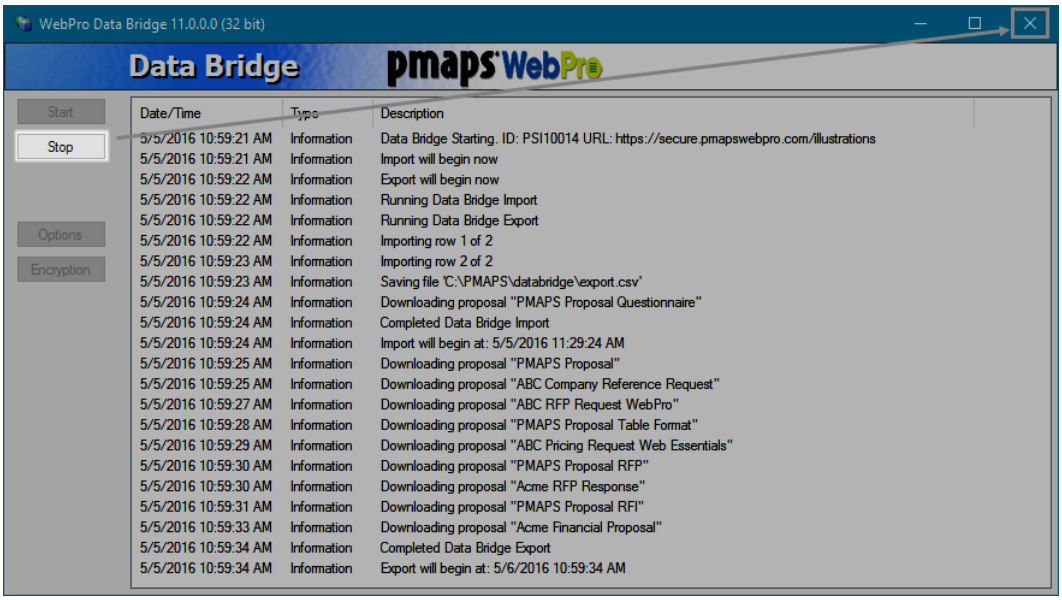


5. Wait for the application to complete, and choose one of the following:

   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

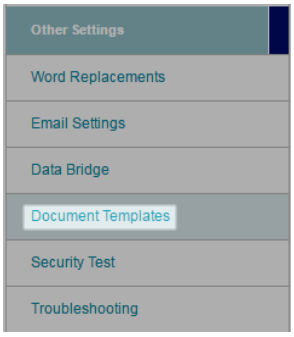
Microsoft Word and PowerPoint templates may be stored in PMAPS so that users can select them when adding new records to PMAPS. Each template can be associated with a language if using the language field.

Microsoft Word

Add New Word Template

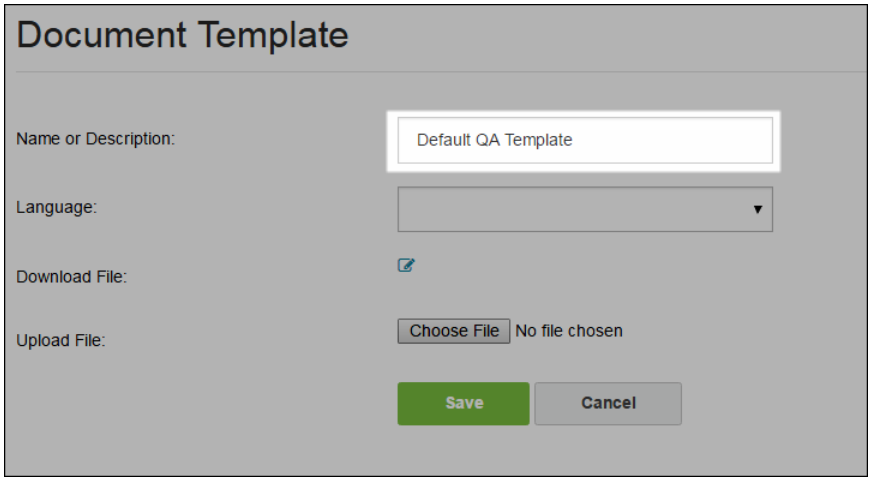
1. Go to the Administration page.

2. Under Other Settings, click Document Templates.

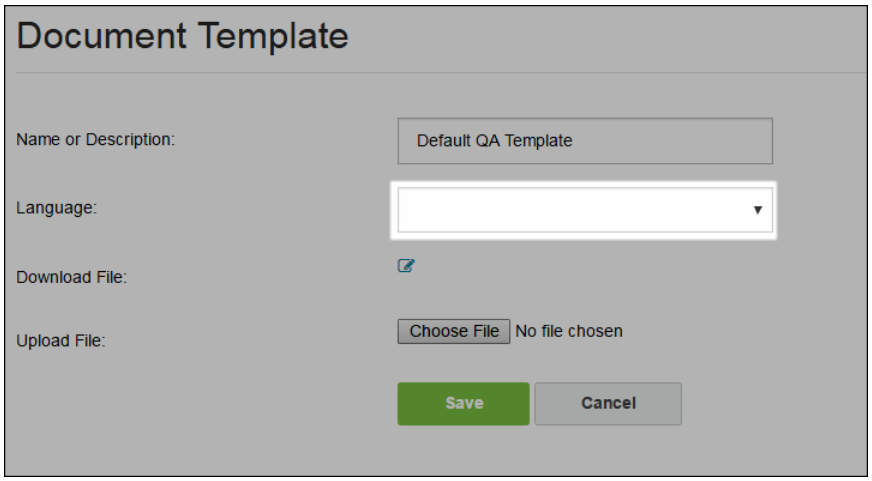


3. Under Microsoft Word Templates click Add New Word Template.

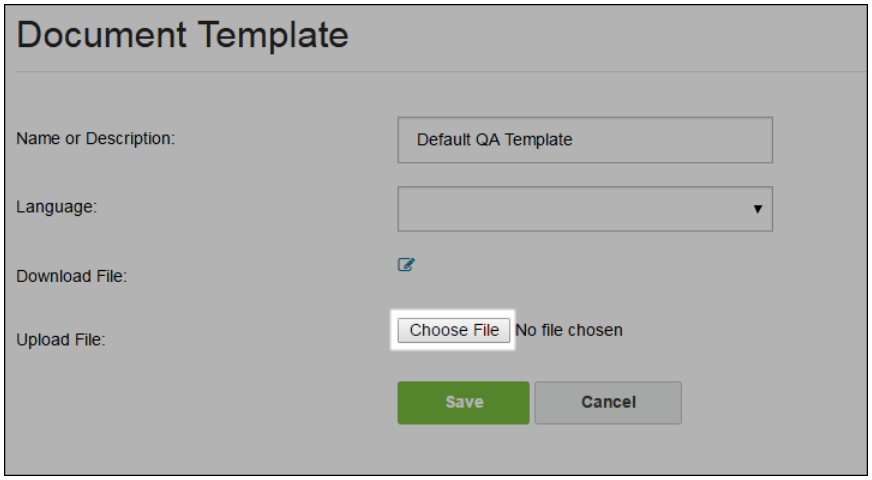
4. In the Name or Description field enter an appropriate name for this template.



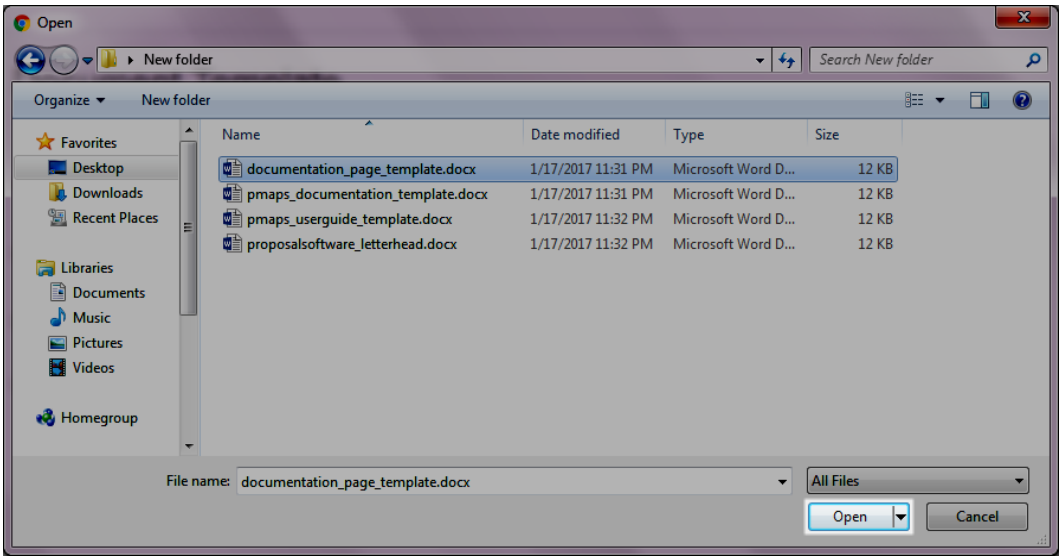
5. If applicable, choose a Language from the picklist (this is not required but should be used if storing multiple language records and/or using parent/child relationships).



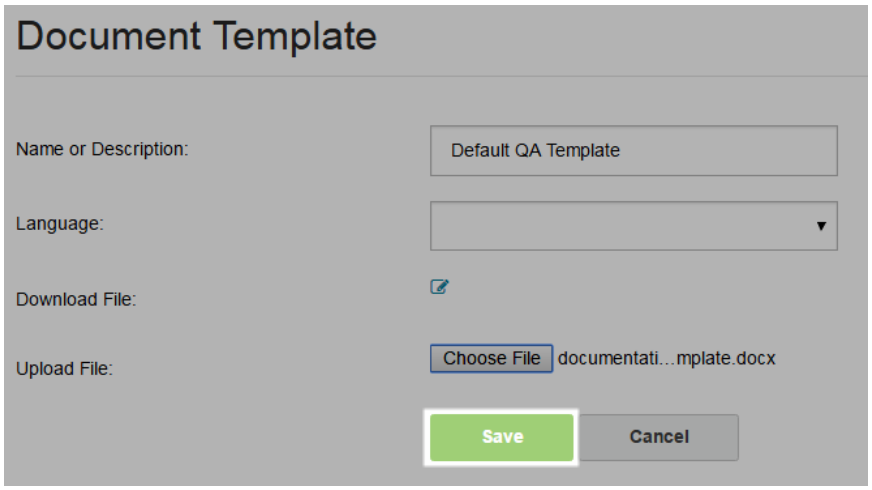
6. Next to Upload File, click Choose File.



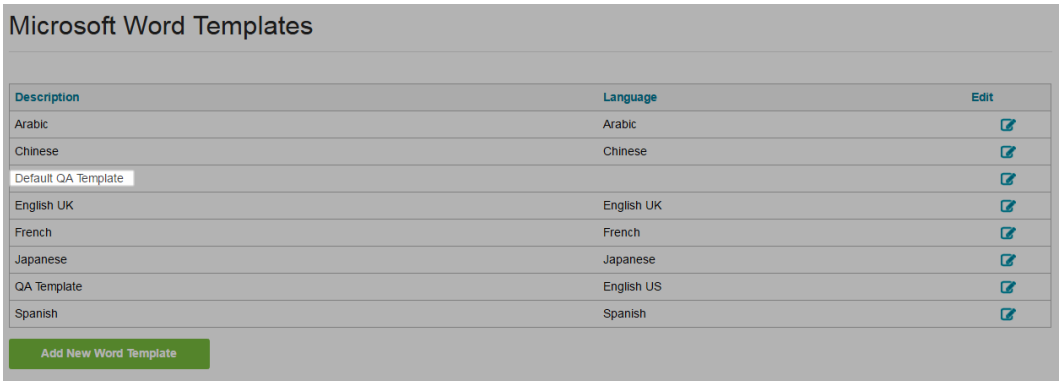
7. Select the Word template file and click Open. PMAPS only accepts Word documents with extension .doc or .docx.



8. Click Save.



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

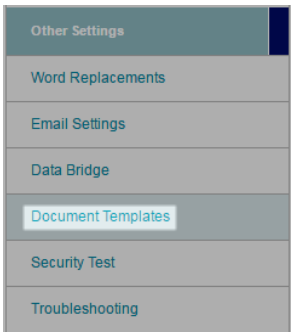


Edit Template

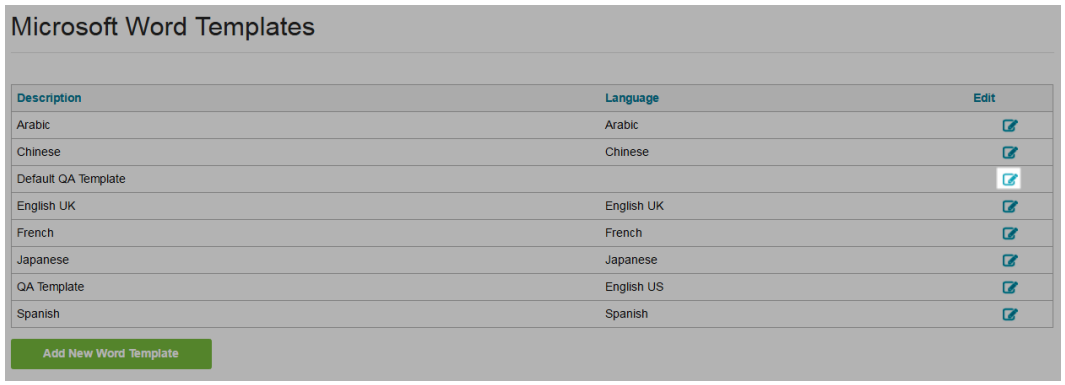
If you need to update the properties of or the document for an existing template, follow the steps below.

1. Go to the Administration page.

2. Under Other Settings, click Document Templates.



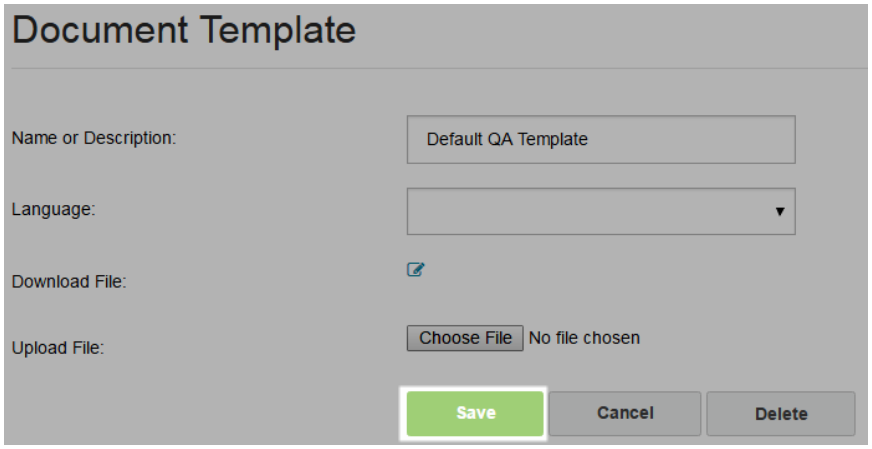
3. Under Microsoft Word Templates, click the Edit icon next to the template you would like to modify.



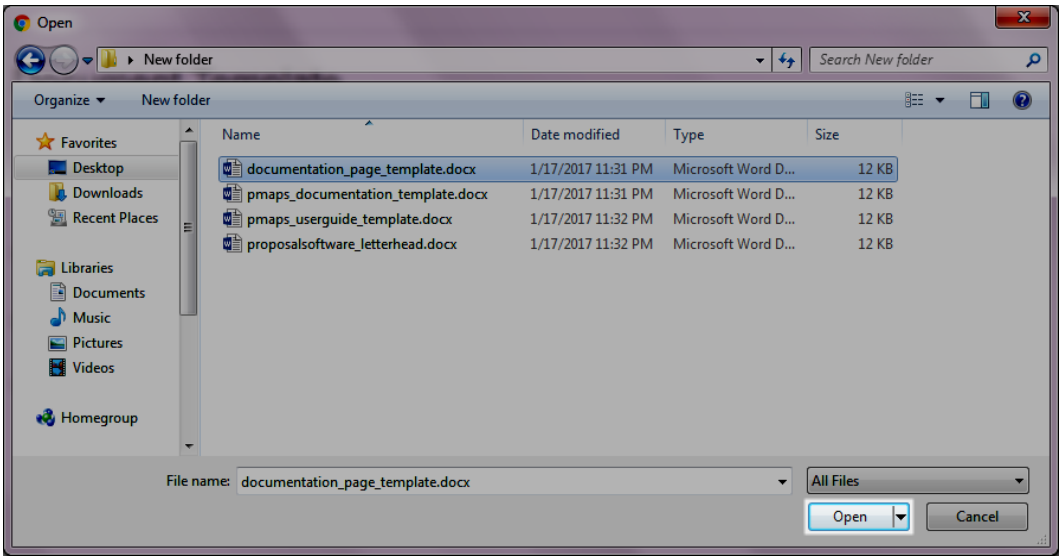
Follow step 4 to replace the document, follow step 5 to modify the document template properties.

4. To replace the document:

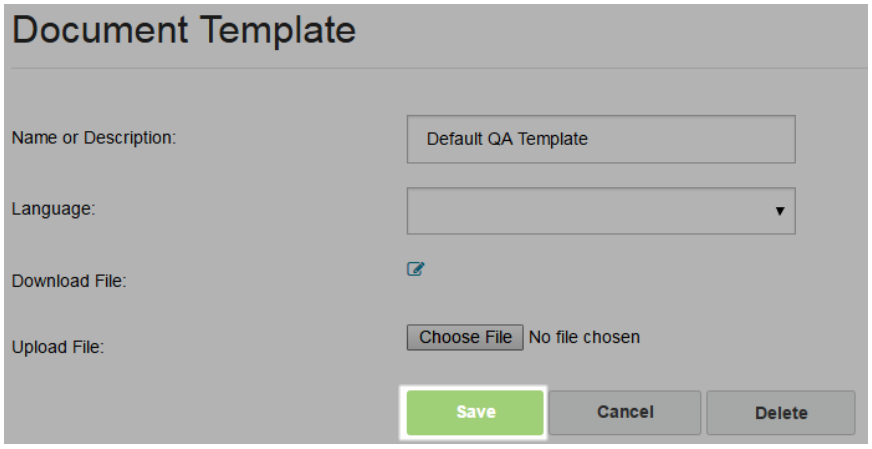
   a. Next to Upload File, click Choose File.



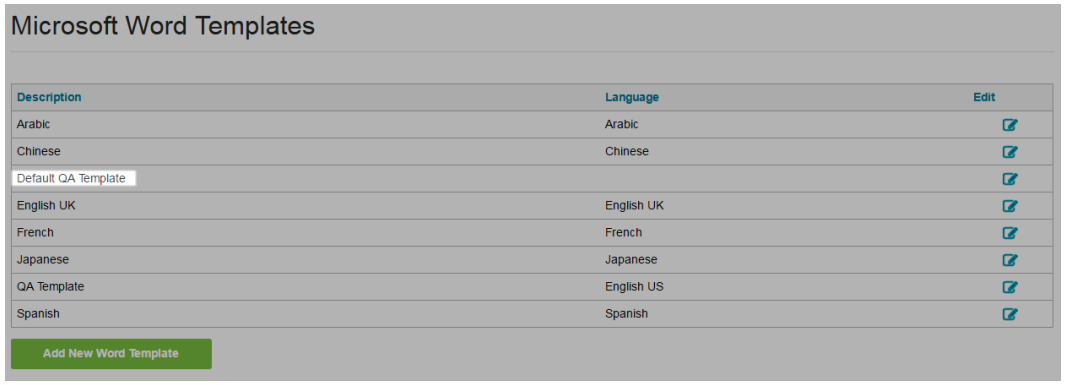
b. Select the Word template file and click Open. PMAPS only accepts Word documents with extension .doc or .docx.



c. Click Save.

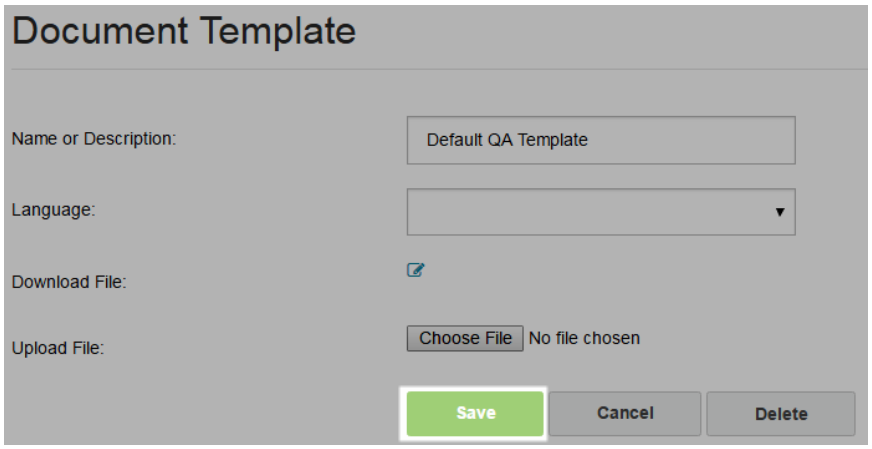


d. Wait for the page to refresh and display the templates page.

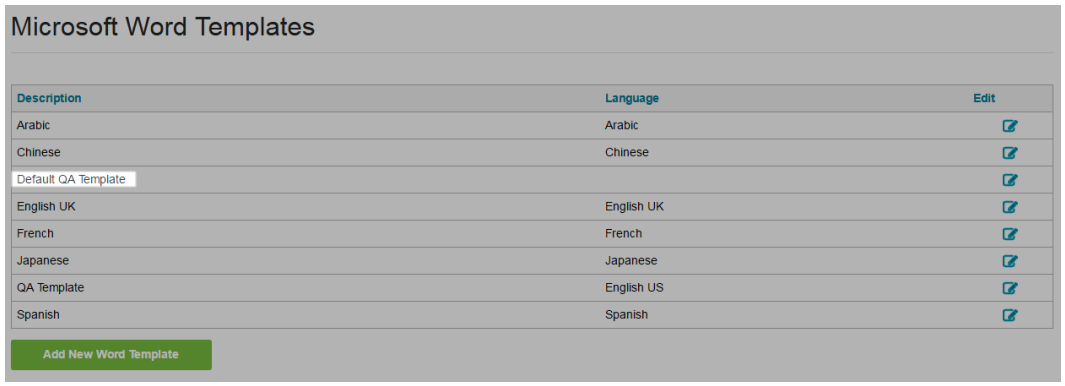


5. To modify the document template properties:

a. Make desired changes, and then click Save.

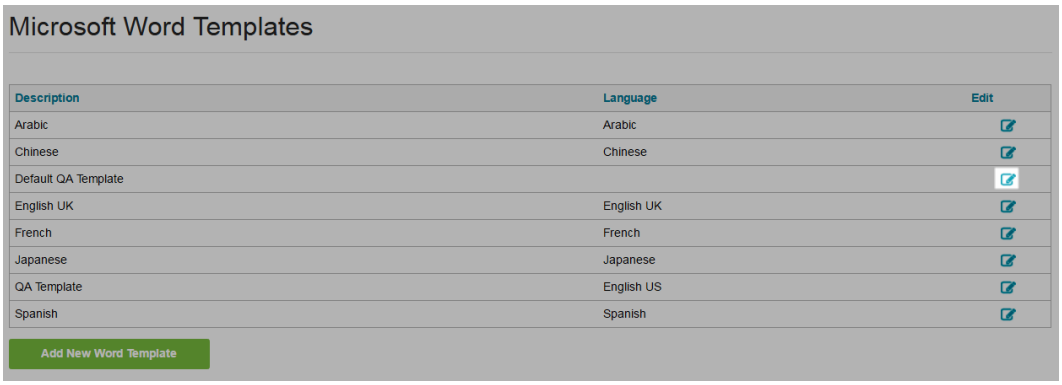


b. Wait for the page to refresh and display the templates page.

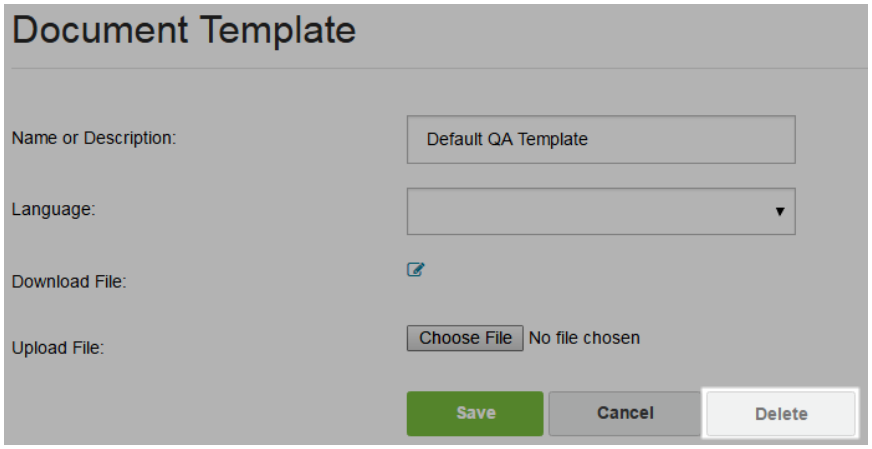


Delete Template

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.

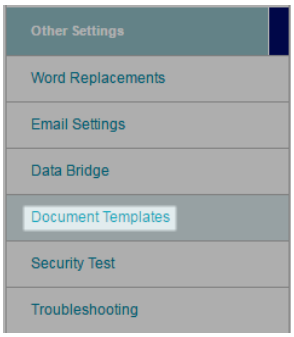
4. Wait for the page to refresh and display the templates page.

Microsoft PowerPoint

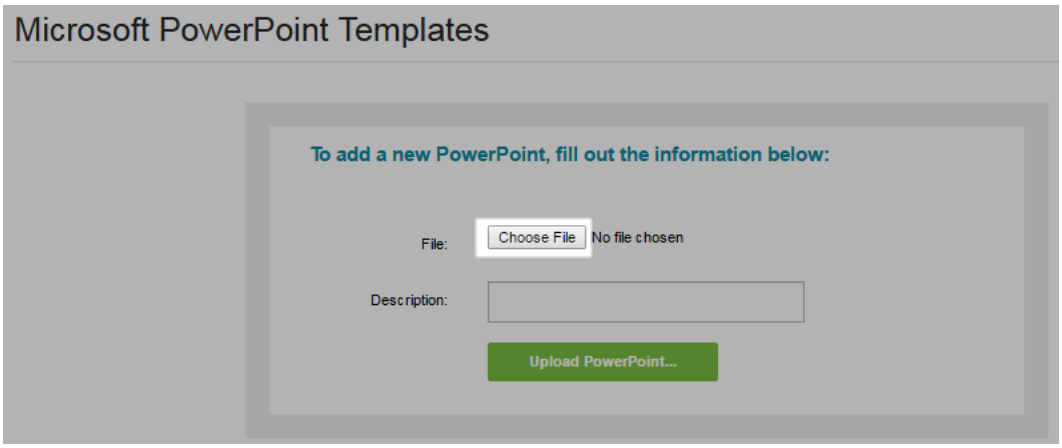
Add Template

1. Go to the Administration page.

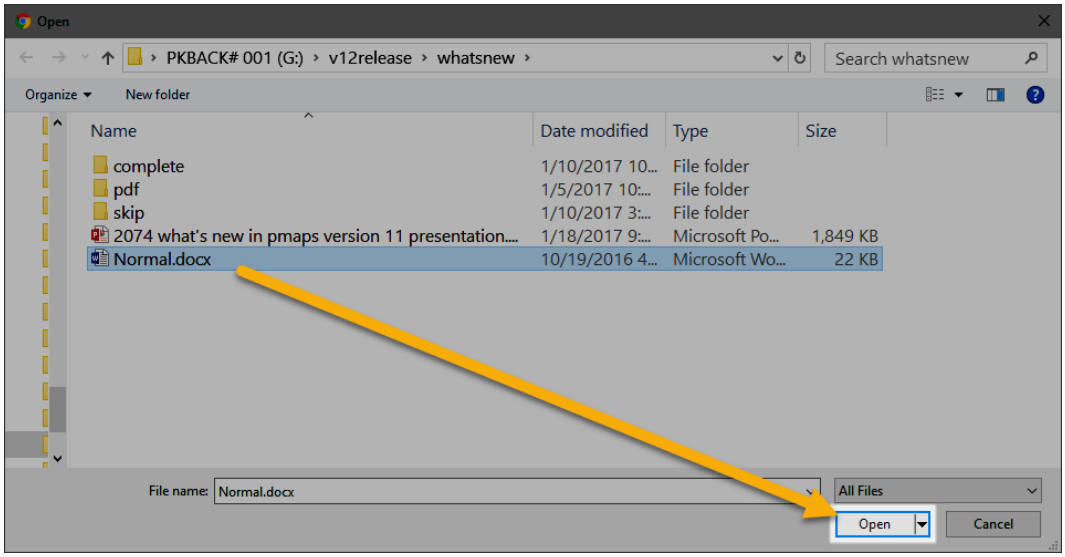
2. Under Other Settings, click Document Templates.



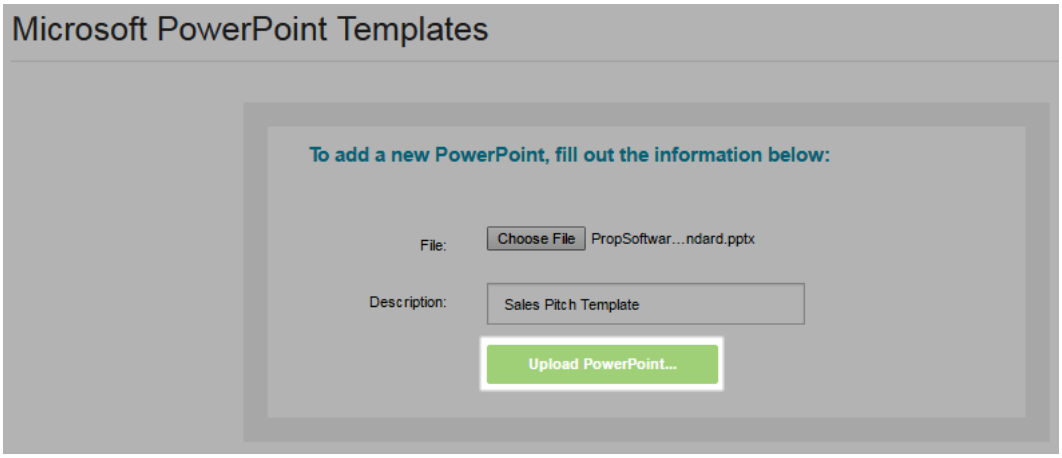
3. Under Microsoft PowerPoint Templates, click the Choose File icon in the space provided for a new template.



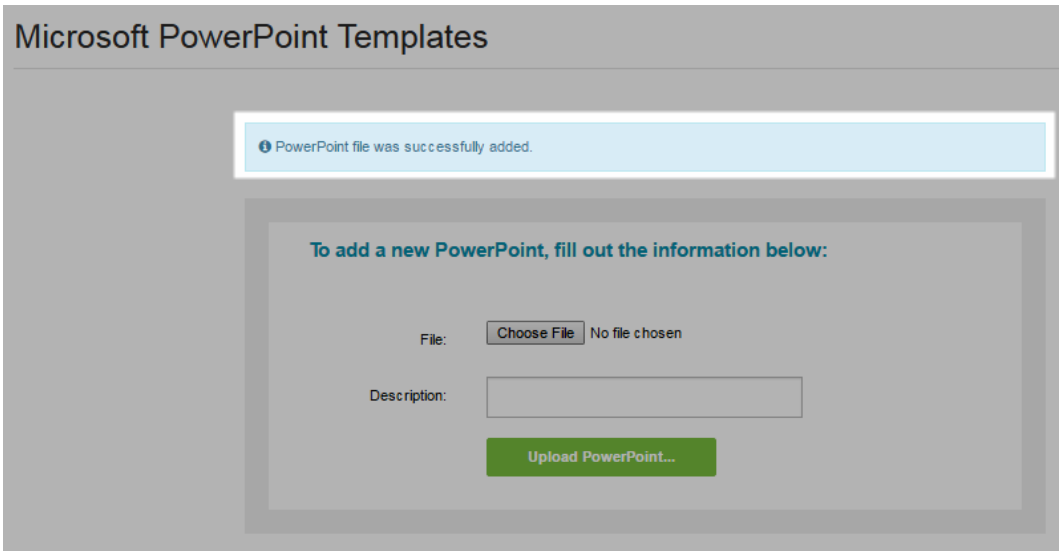
4. Select the PowerPoint template file and click Open. PMAPS only accepts PowerPoint files with extension .ppt or .pptx.



3. Enter a description for the template, and then click Upload PowerPoint….



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

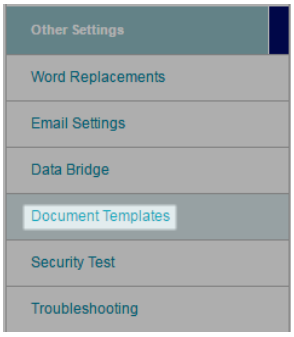


Edit Template

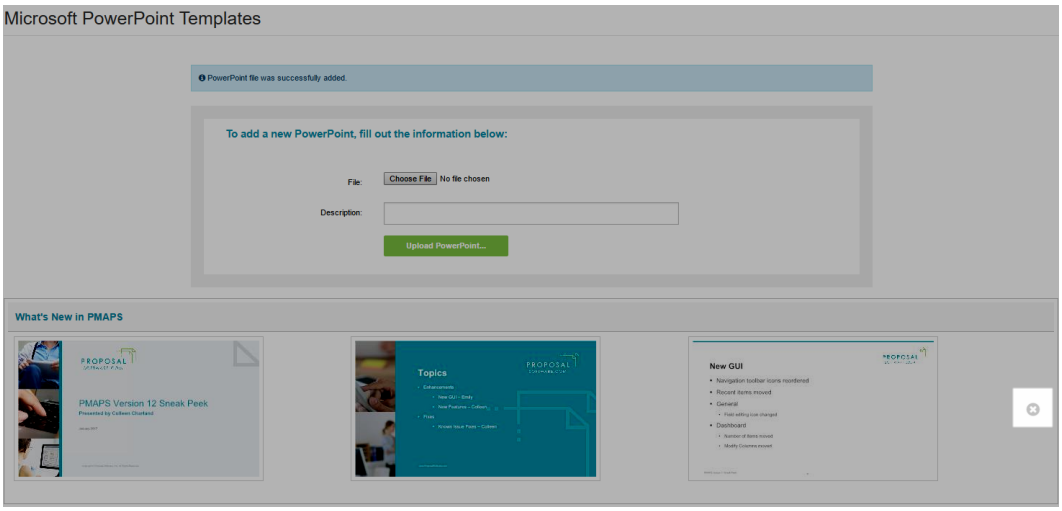
If you need to edit an existing template, follow the steps below.

1. Go to the Administration page.

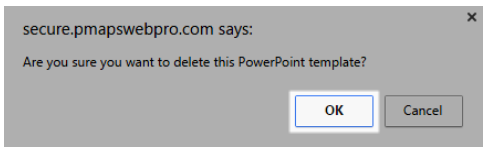
2. Under Other Settings, click Document Templates.



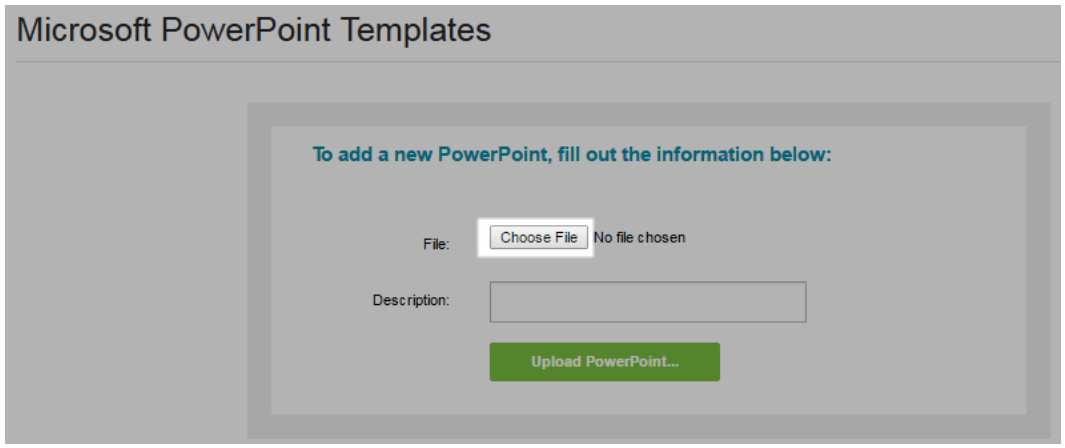
3. Under Microsoft PowerPoint Templates, find the template you would like to replace and click the delete icon.



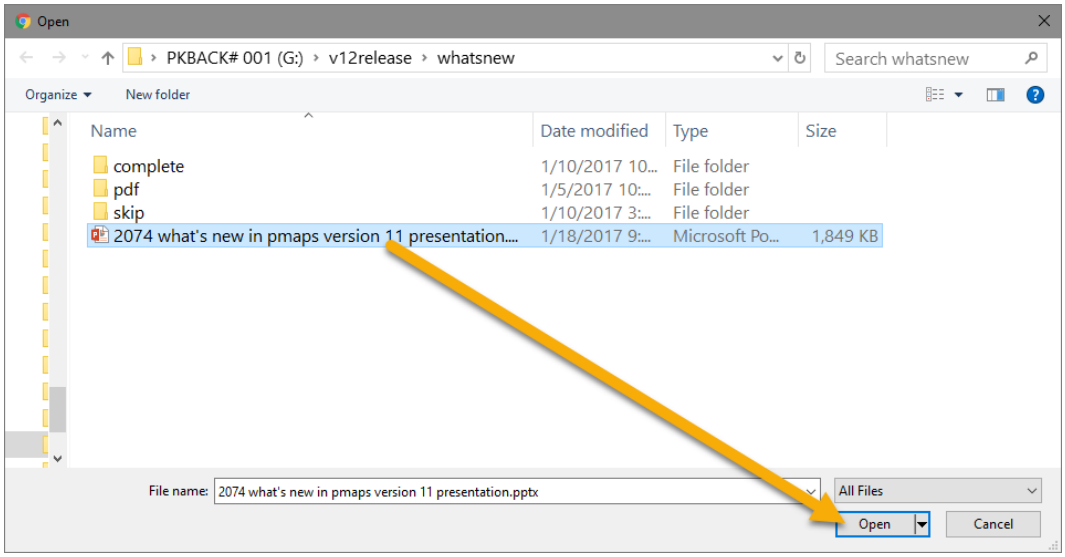
4. Click OK to confirm.



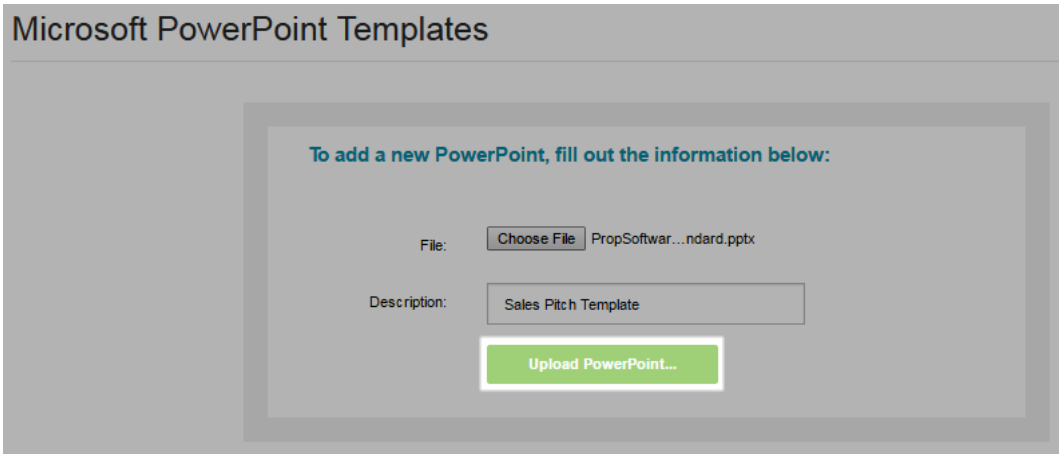
5. Under Microsoft PowerPoint Templates, click the Choose File icon in the space provided for a new template.



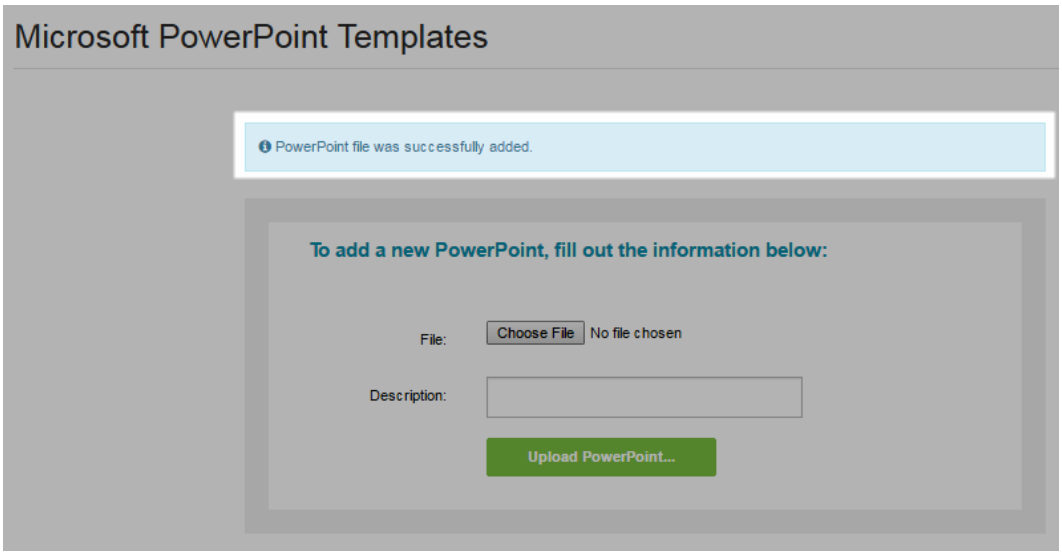
6. Select the PowerPoint template file and click Open. PMAPS only accepts PowerPoint files with extension .ppt or .pptx.



7. Enter a description for the template, and then click Upload PowerPoint….



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



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

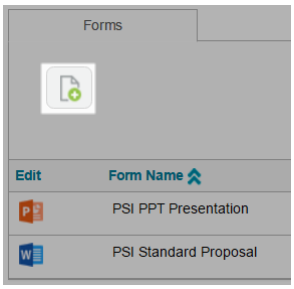
The planning stage is important because it will save you time when it comes time to create the template. The best way to plan is to deconstruct a sales or proposal document that already exists. As you deconstruct the document, compose a document that includes the following:

- 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

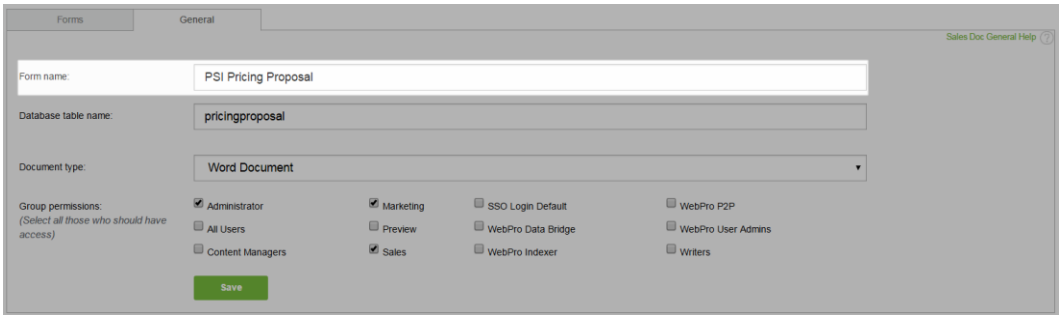
Create

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

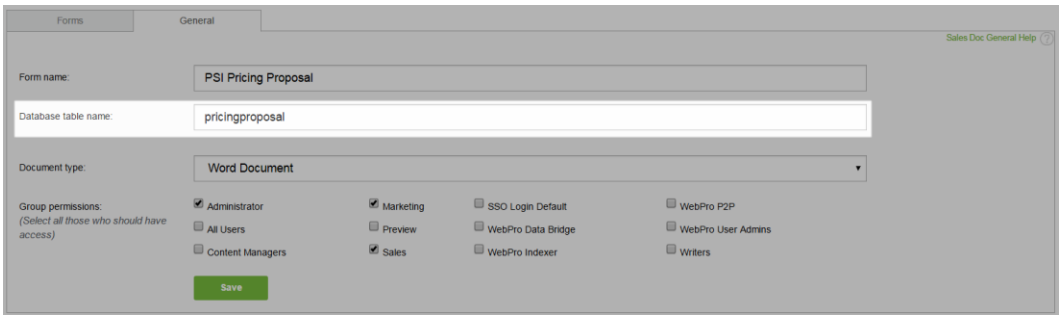
2. Click the New Form icon.



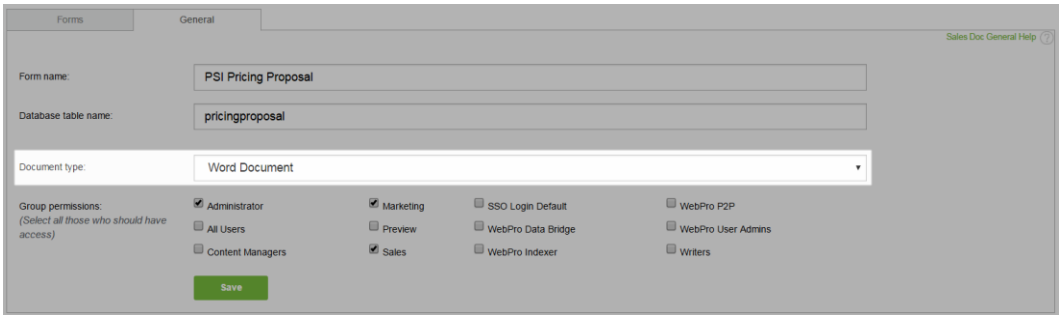
3. In the Form name field, enter the name of your form (this will be the name your users see in the drop down list of Sales Doc forms available to them).



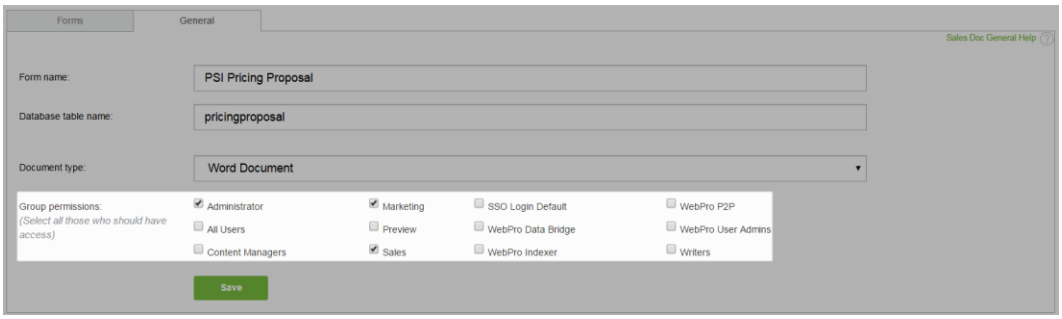
4. In the Database Table name field, enter a unique name which does not include any spaces (this is an internal database name, and will not be seen by your users).



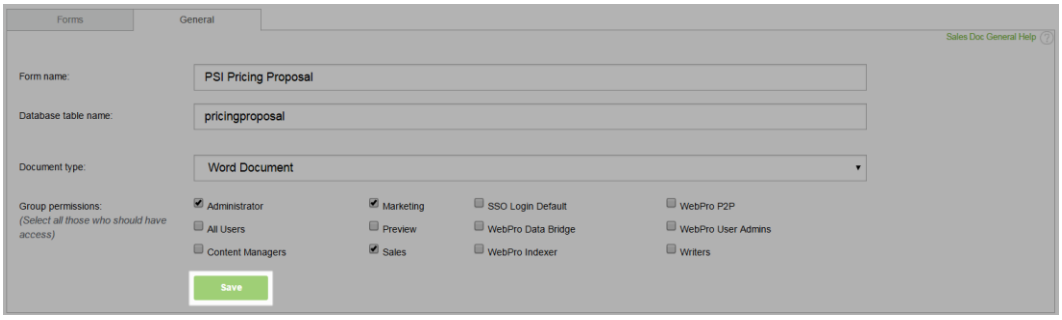
5. From the Document Type field, select Word Document or Power Point Document.



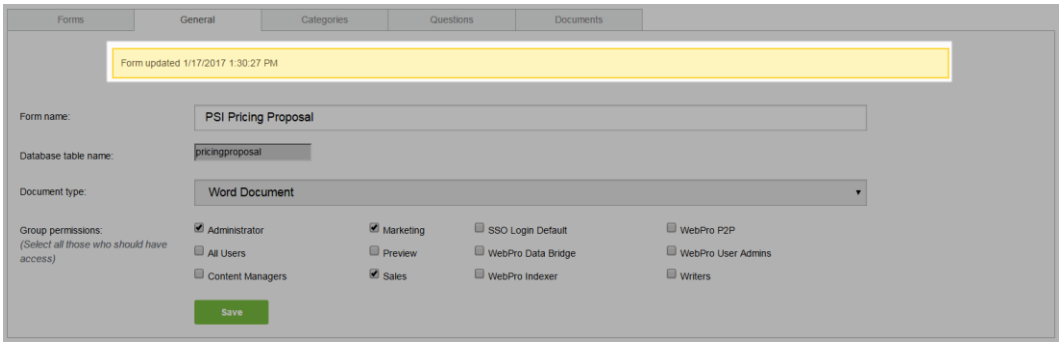
6. Check the Group Permissions boxes to make this Sales Doc form available to the appropriate user groups.



7. Click Save.



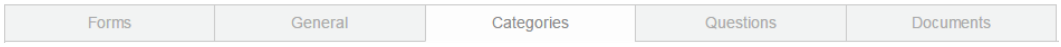
8. Wait for the save to complete as confirmed on screen.



Categorize

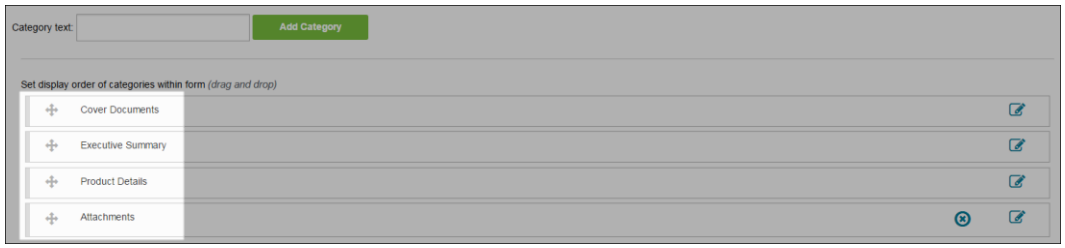
Once you have created the form, the next step is to add categories (sections). Categories help you structure your questions, and make it easier for your users to fill out the form. You can enter categories in any order and simply drag-and-drop to place them in the correct order later.

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

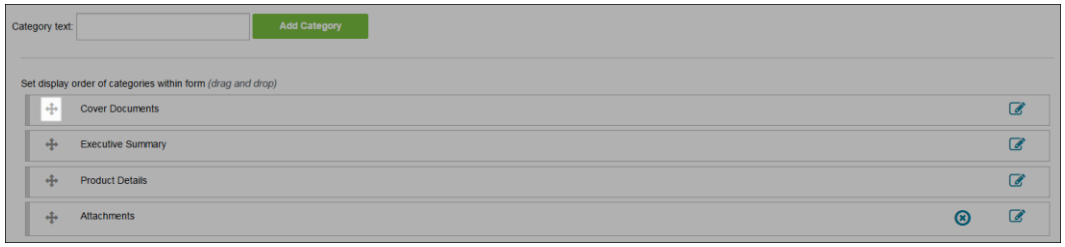


2. In the Category text field, enter a category name, and then click Add Category.

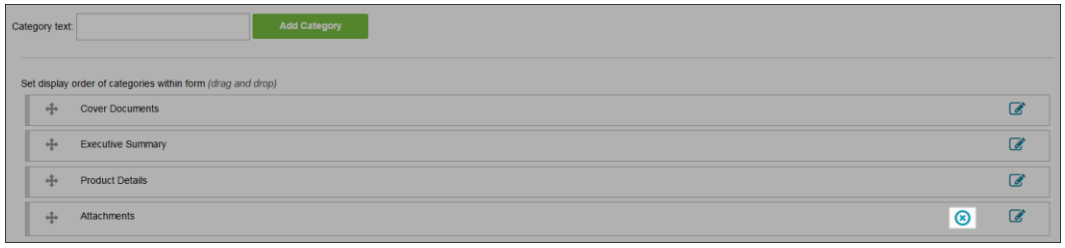
3. Wait for the page to refresh and the new category displays. Repeat step 2 until all you have added all categories.



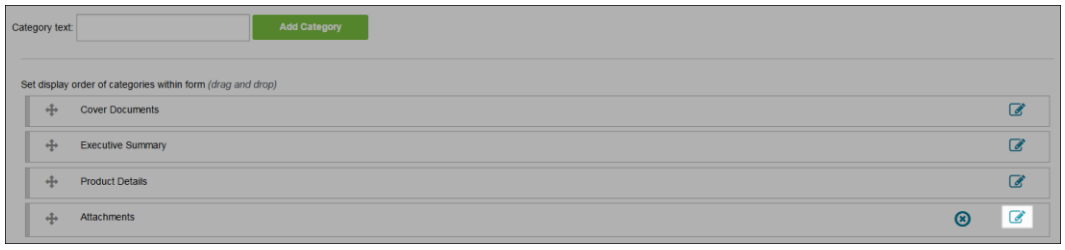
a. To reorder a category click on the move icon and drag the row. Look for the Move Here placeholder and release the mouse.



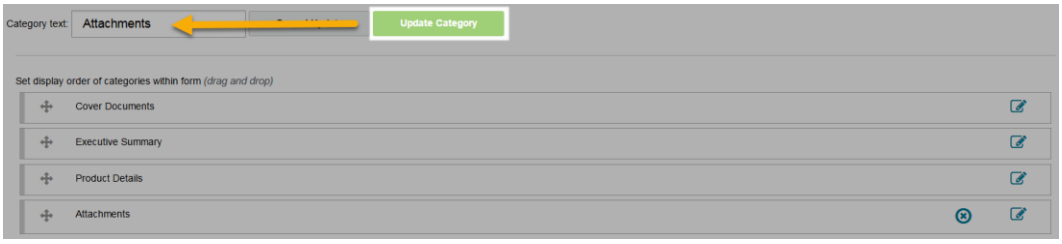
b. To remove a category click the Delete icon. This option is no longer available once there are questions associated with the category.



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



d. Edit the Category Text and click Update Category.



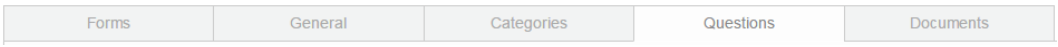
TIP

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

Build

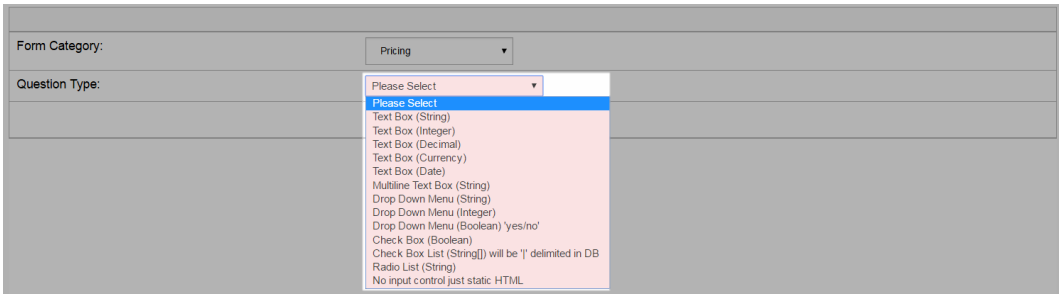
Once you have added the categories, the next step is to add questions or statements from which your users will select options in order to compile their Sales Doc. The steps below will help you build the basic form.

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

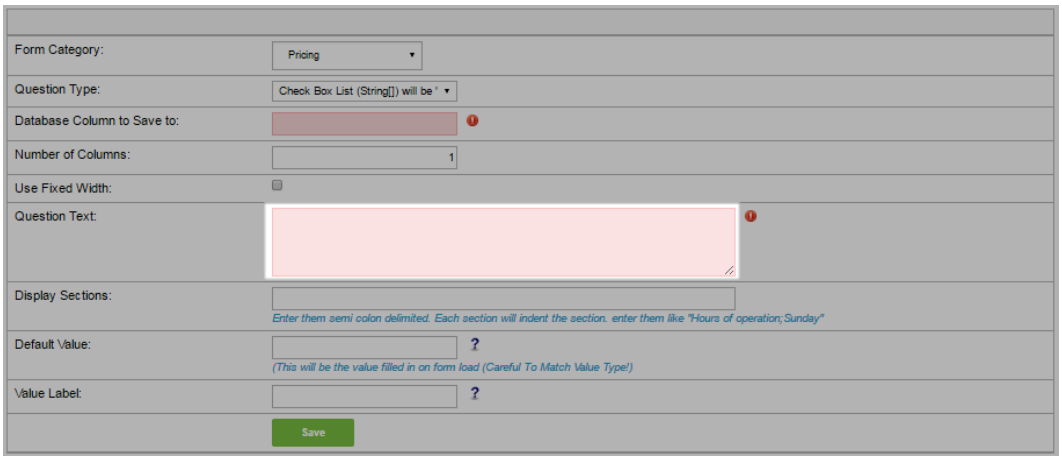


2. Click Add Question To Section next to the appropriate Category.

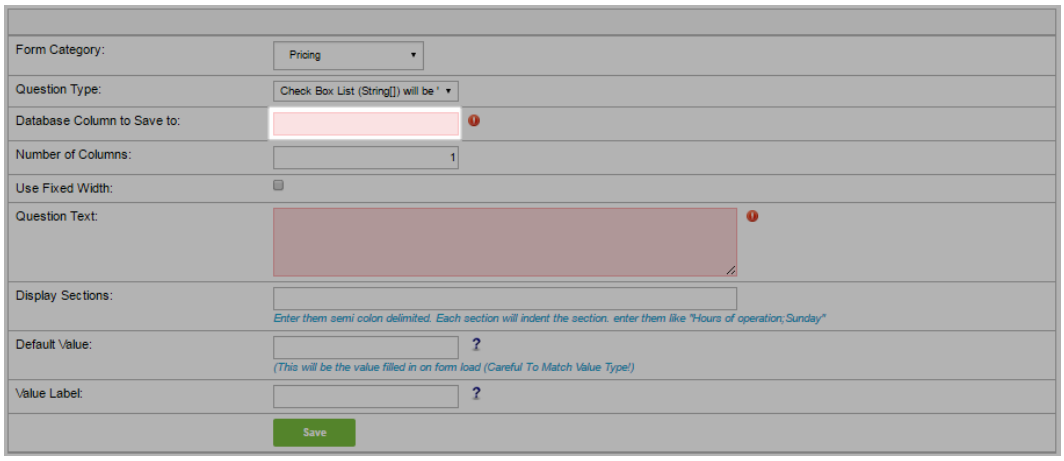
3. From the Question Type field, choose the type of field for this question. The Form Category is pre-populated based on step 2. Refer to the Question Types section to review all options.



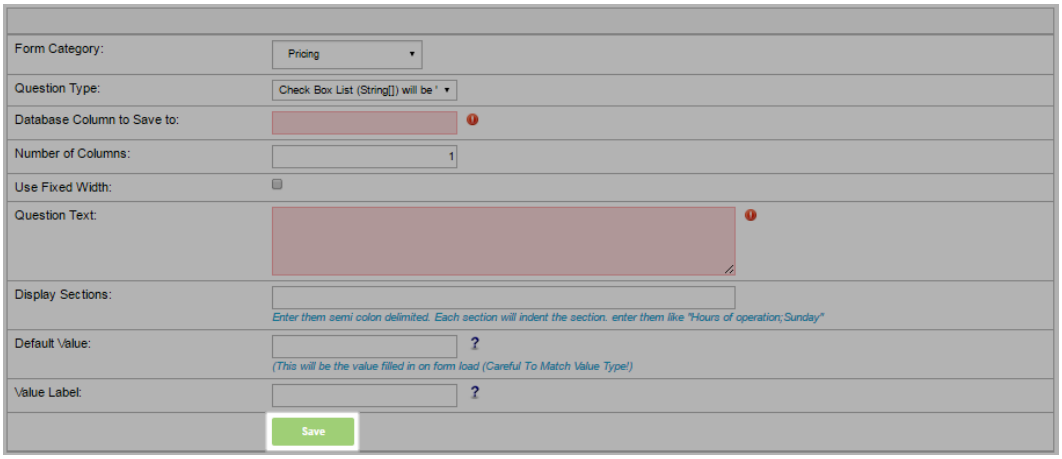
4. Enter the question or statement in the Question Text field. This is the information users will see in the final form.



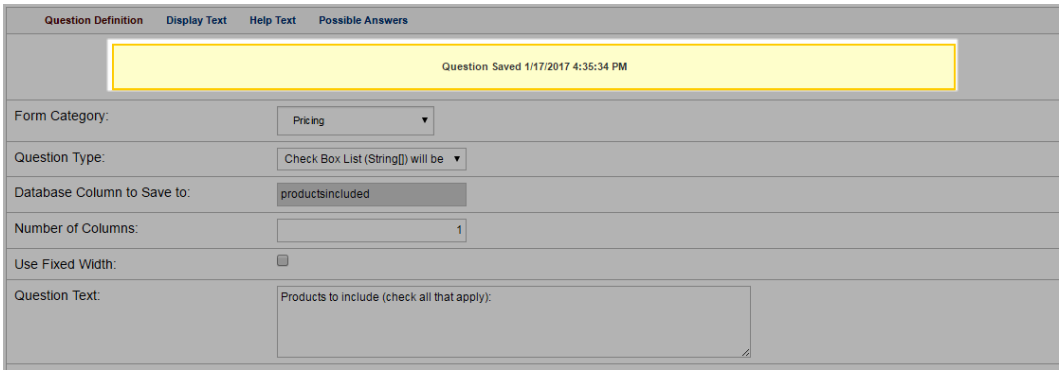
5. In the Database Column to Save to, enter a unique name without spaces or symbols for the database table (your users will not see this information).



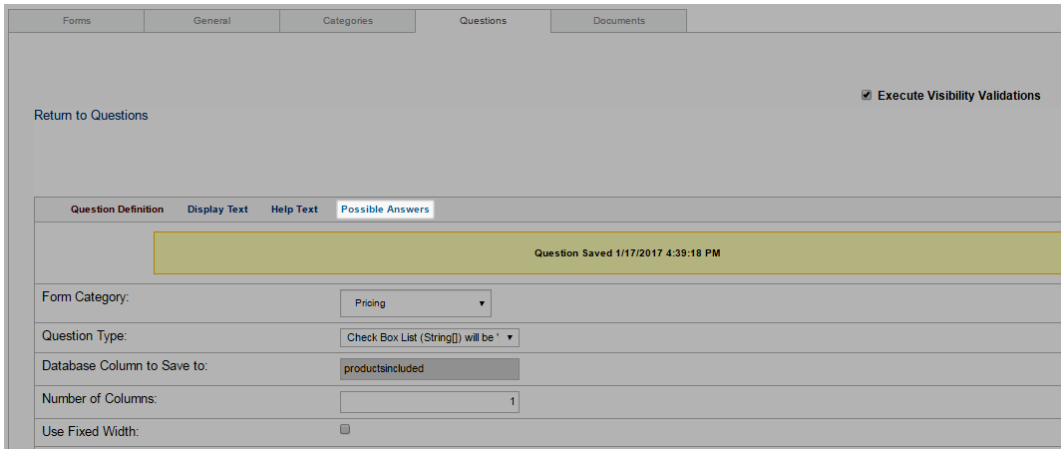
6. Click Save.



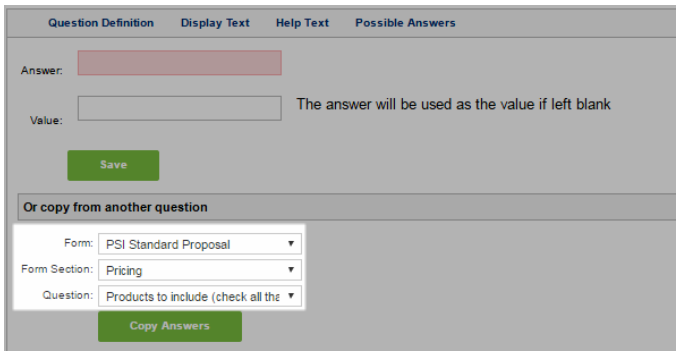
7. Wait for the page to refresh and confirm the question saved.



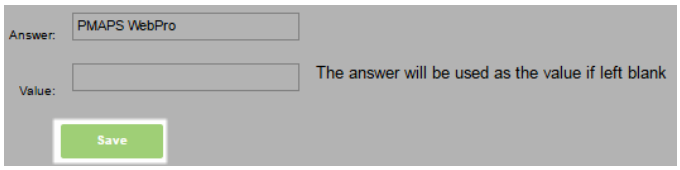
8. Next, click on Possible Answers.



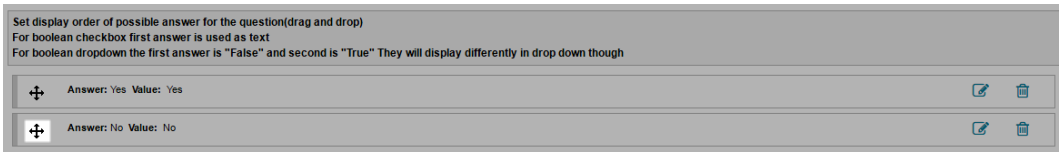
9. Verify that the selections for Form, Form Section, and Question point to the correct place for your answers.



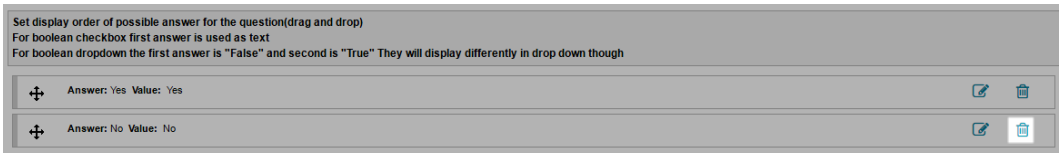
10. In the Answer field, enter an answer value, and then click Save. Repeat until all possible answers for this question have been added.



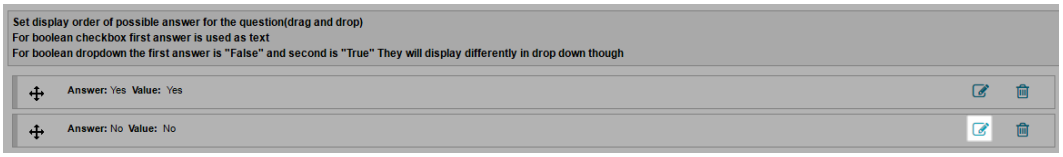
a. To reorder possible answers, click on the move icon and drag the row. Look for the Move Here placeholder and release the mouse.



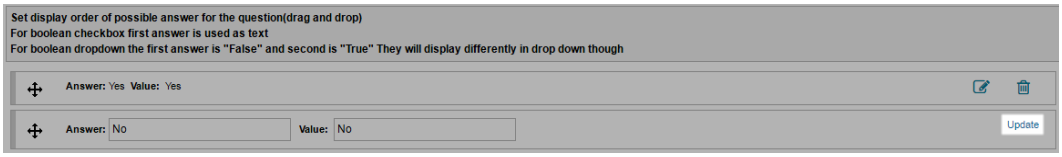
b. To remove a possible answer click delete.



c. To edit a possible answer click edit.



d. Edit the Answer and Value, and then click Update.



11. Repeat steps 1-10 until you have added all questions.

12. 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.

13. Refer to the Validations & Warnings section if you would like to establish a warning or validation.

    a. A validation can be used to check for a specific action and require a correction to proceed.

    b. A warning alerts the user but the user can proceed.

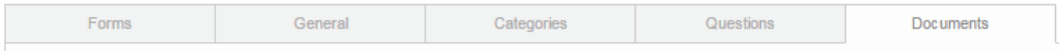
    c. A visibility validation can be used to set conditional actions where a specific selection displays additional selection options.

14. Refer to the Advanced Options section if you would like to delete a question.

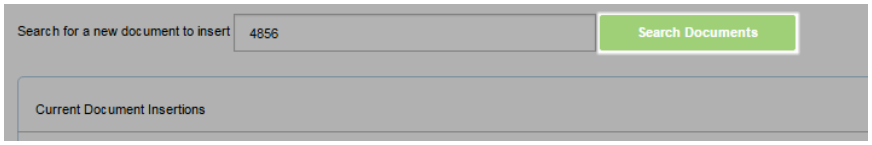
Assign

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

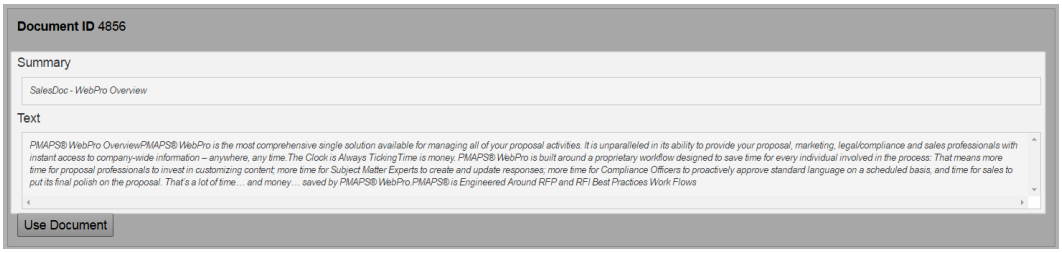
1. With the correct Form selected, click on the Documents tab.



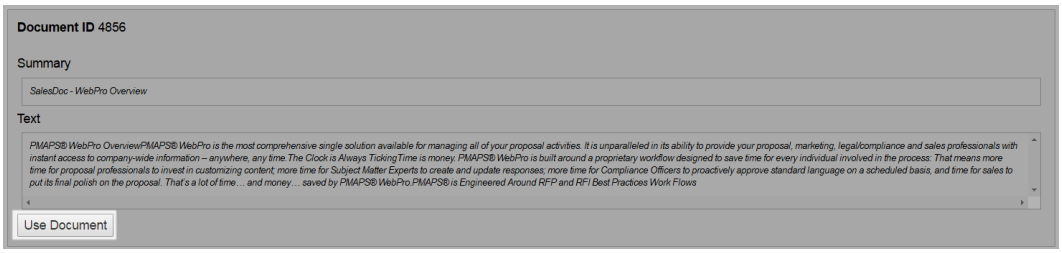
2. Enter the Search ID for the record you would like to assign, and then click Search Documents.



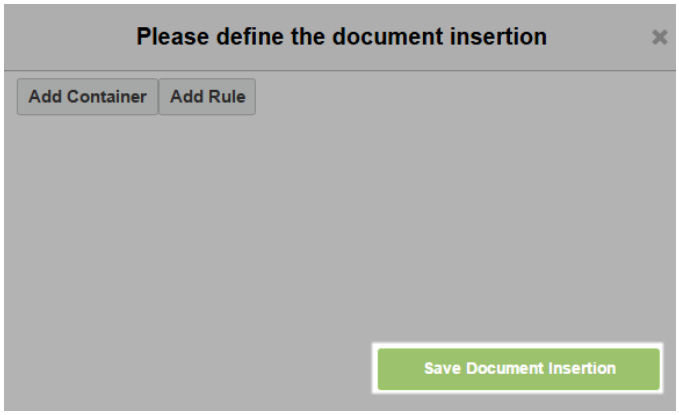
3. Review the Summary and/or Text to verify this is the document you would like to assign.



4. Click Use Document.

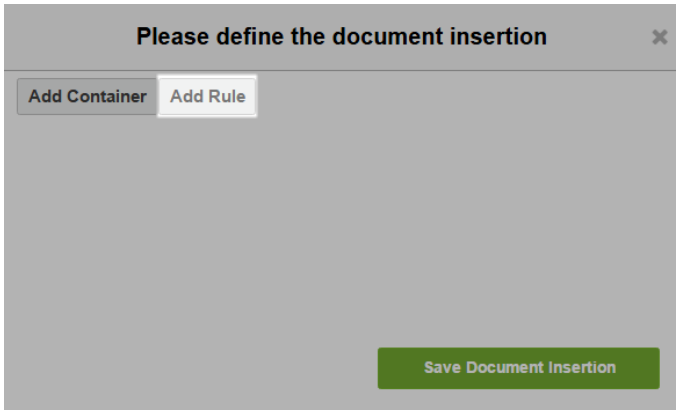


5. To always include the document regardless of user selections, click Save Document Insertion and move to step 7.

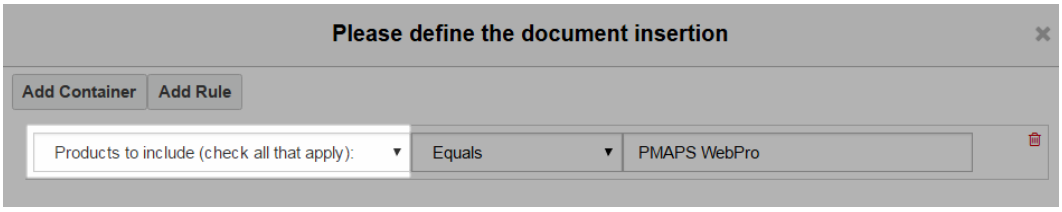


6. To define the document insertion so that the document is inserted only when a specific selection is made by the user, follow the steps below:

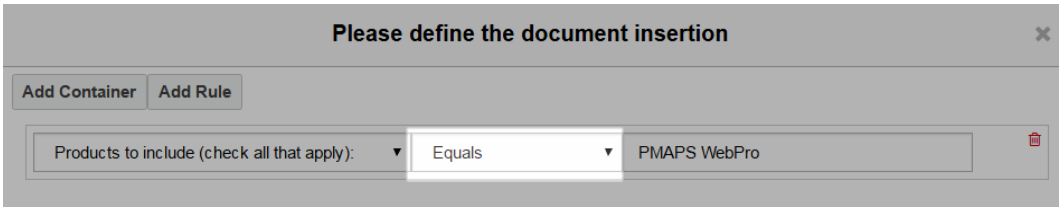
   a. Click on the Add Rule icon.



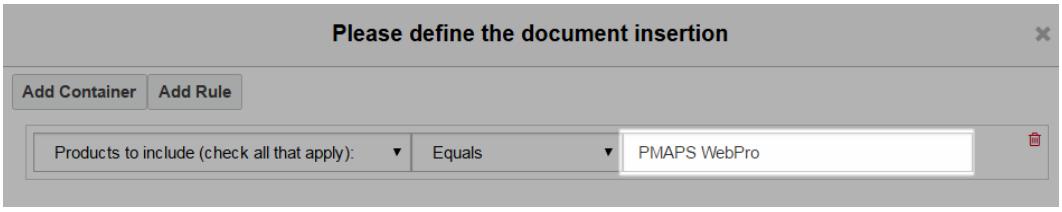
   b. From the first picklist to select the applicable question or definition statement.



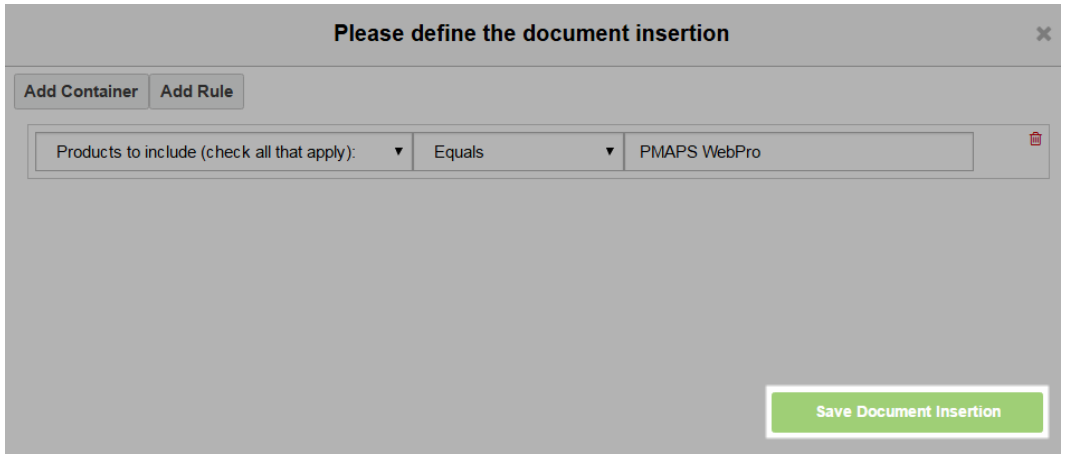
   c. From the second picklist, select the operator you would like to use for the rule. Refer to the Document Insertion Operators section to review all options.



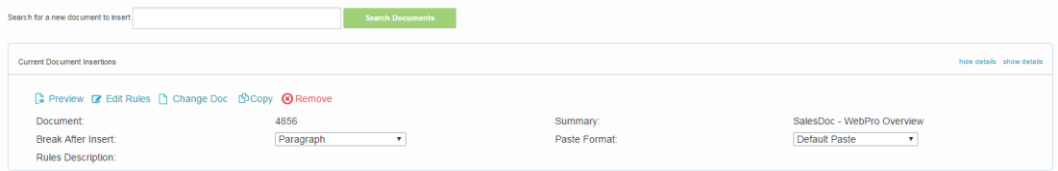
   d. In the last field, enter the matching value from the Possible Answers for this document.



e. Click Save Document Insertion.



f. Wait for your record to appear in the Current Document Insertions.

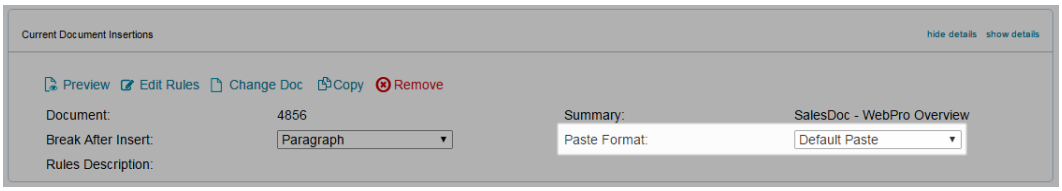


7. Choose the appropriate page break option by making a selection from the Break After Insert picklist.

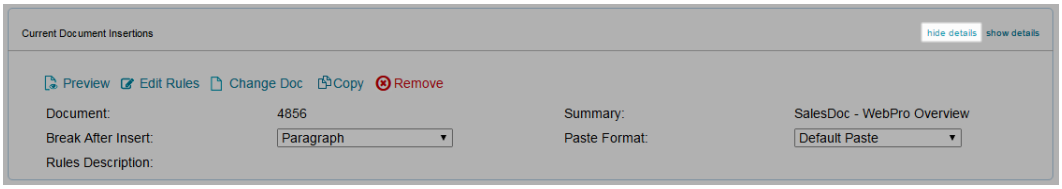
- Paragraph: inserts a paragraph line after adding this document
- Page Break: inserts a page break after adding this document
- Section Break Continuous: inserts a continuous section break after adding this document
- Section Break Next Page: inserts a new page section break after adding this document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

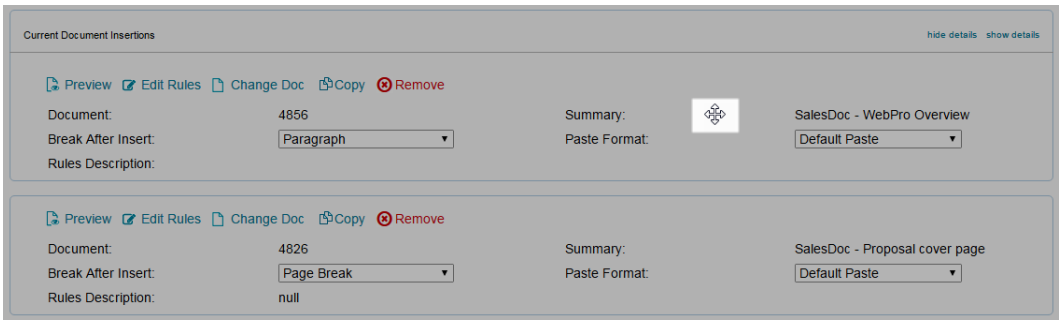
8. Choose the paste option for this document from the Paste Format picklist.

   - 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.

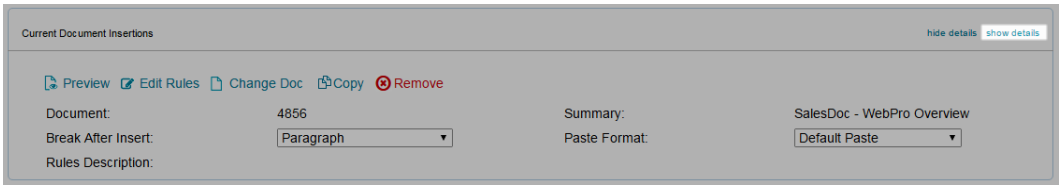


9. Reorder documents by using drag-and-drop. To simplify this process, click the hide details link to hide the document insertion details. Click anywhere in the document window and drag it to the desired location and release the mouse.

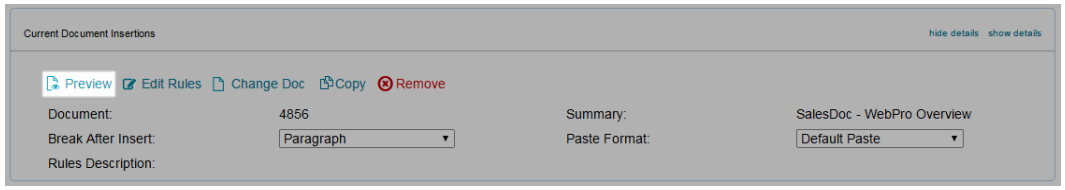




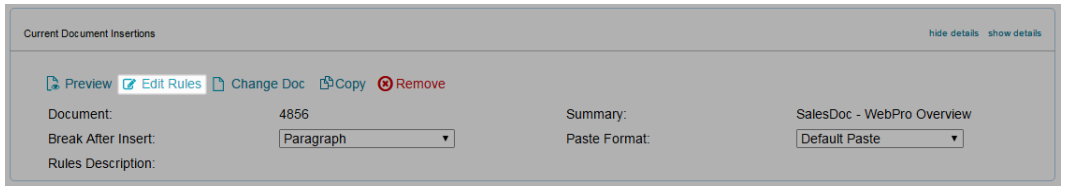
Click show details to view the full document insertion details.



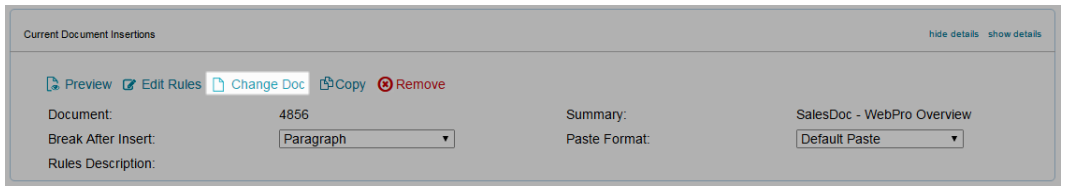
10. To preview a document configured for insertion, click the Preview icon.



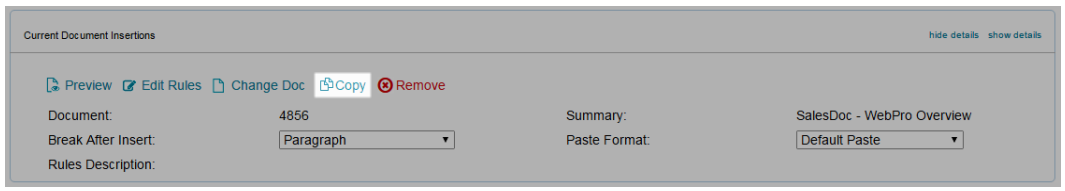
11. To make changes to the rules for insertion, click the Edit Rules icon.



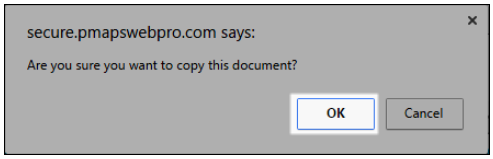
12. To change the document for insertion, click the Change Doc icon.



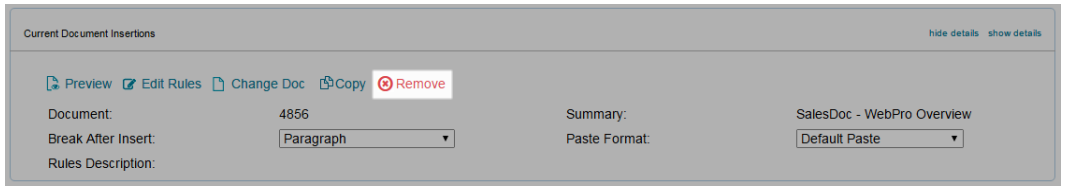
13. To make a copy of a document, click the Copy icon.



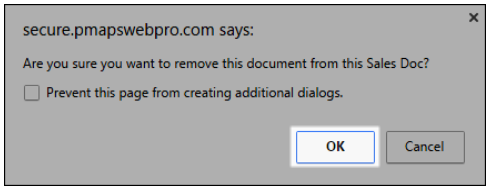
At the prompt, click OK to confirm. The copy will be added as the last document.



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)

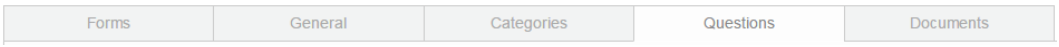
- Checkbox
  - Check Box (Boolean)
  - Check Box List (String []) will be ' | ' delimited in DB
- Other
  - No input control just static HTML

Document Insertion Operators

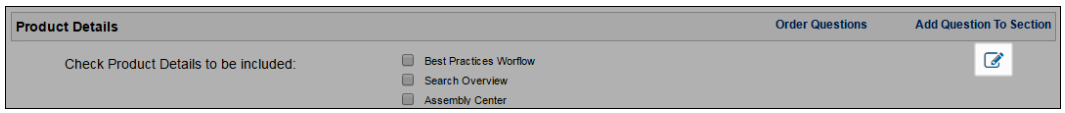
- Has Value
  - There is a value in the related Possible Answer
- Does not have Value
  - There is no value in the related Possible Answer
- Equals
  - The value must exactly match the related Possible Answer
- Contains
  - The value contains all or a portion of the text in the related Possible Answer
- 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

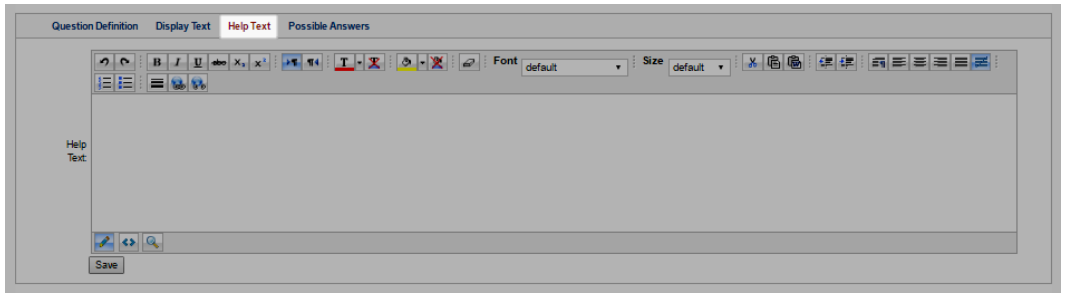
1. With the correct Form selected, click on the Questions tab.



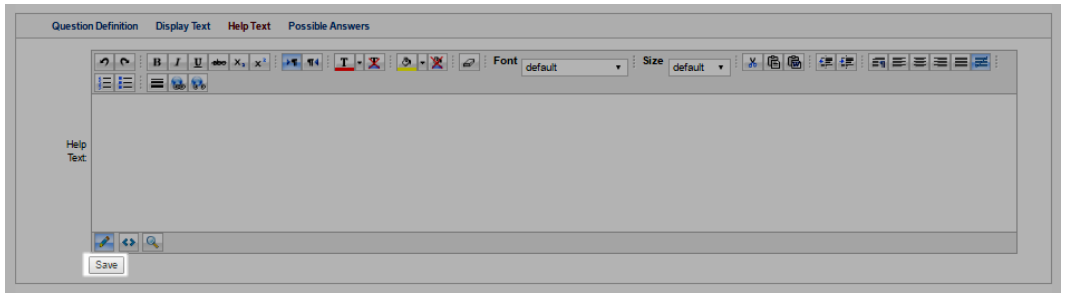
2. Locate the question you want to add Help Text for, and then click the Edit icon.



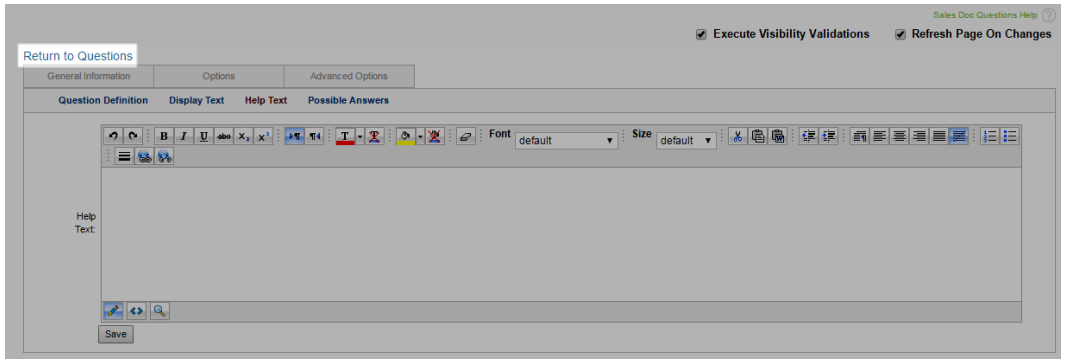
4. Click the Help Text link above the formatting toolbars.



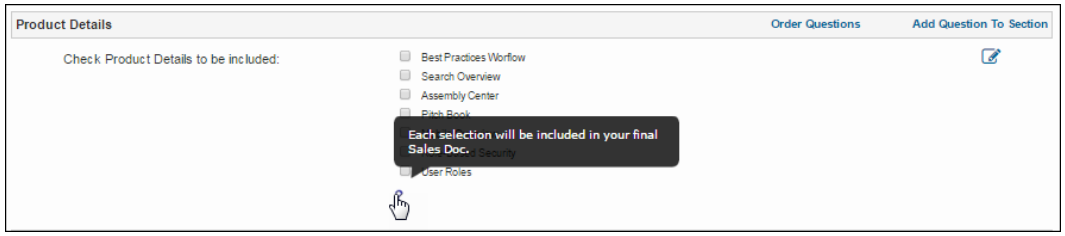
5. Enter and format desired instructional text for the question or statement, and then click Save.



6. Click Return to Questions.

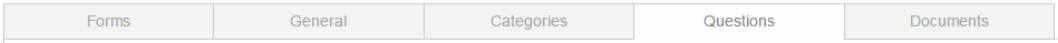


7. Hover over the question mark icon to display the help text.

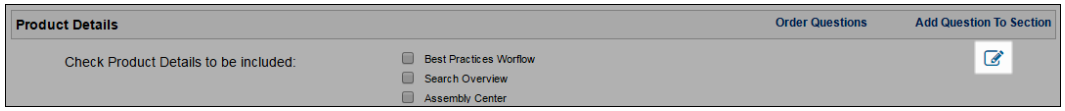


Validations & Warnings

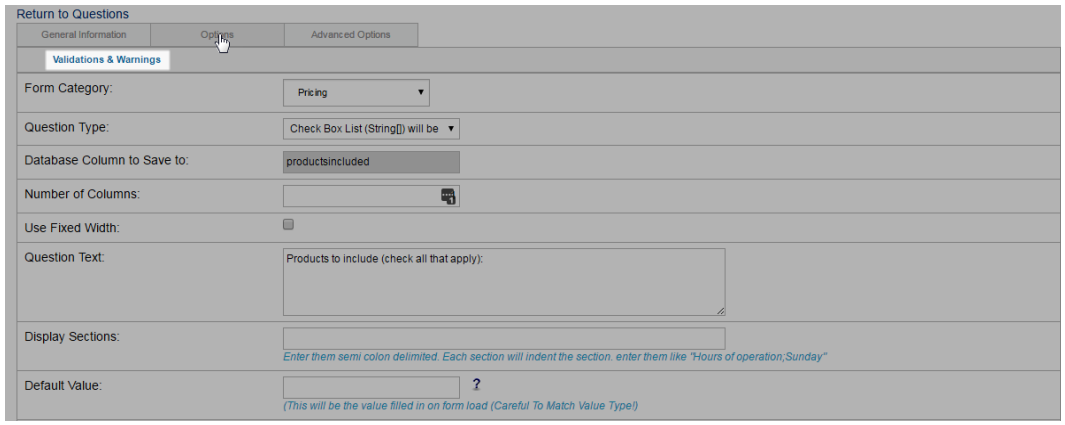
1. With the correct Form selected, click on the Questions tab.



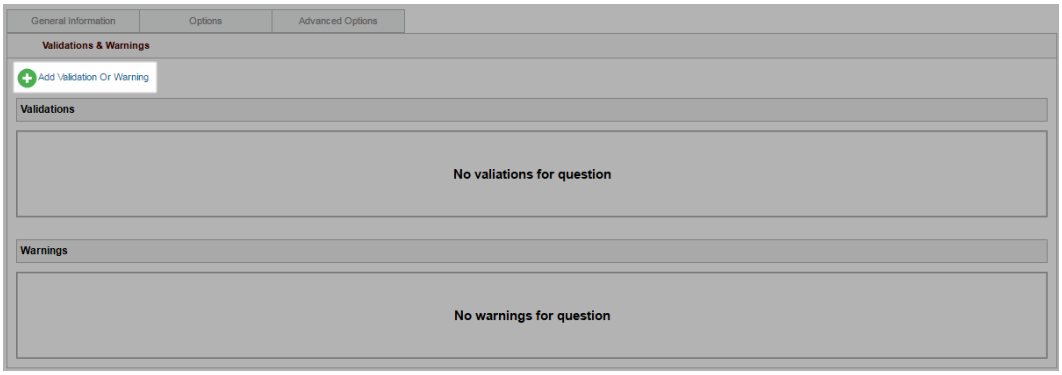
2. Click edit next to the question for which you would like to establish a validation or warning.



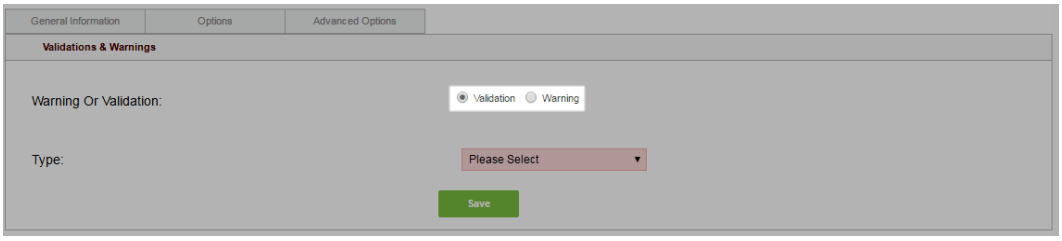
3. Hover over the Options tab, and then click on Validations & Warnings.



4. Click Add Validation Or Warning.

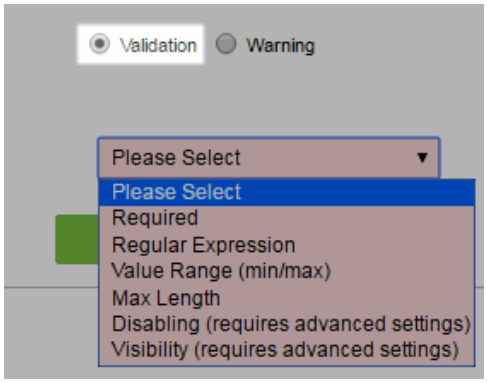


5. Choose Validation or Warning by clicking on the appropriate radio button and follow the instructions below for your selection.



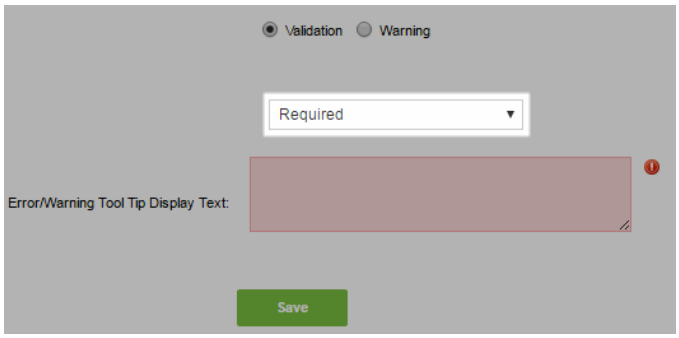
Validation

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).

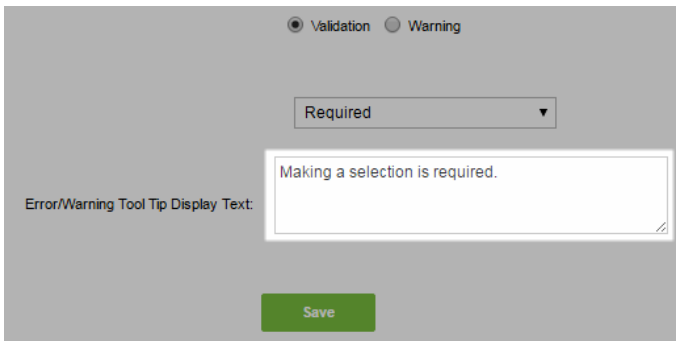


2. To make this selection Required:

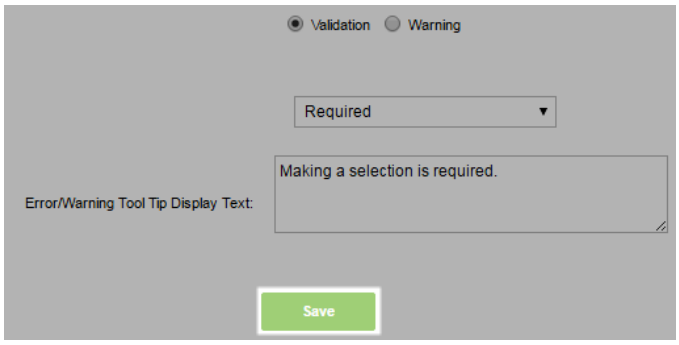
   a. Select Required from the Type picklist.



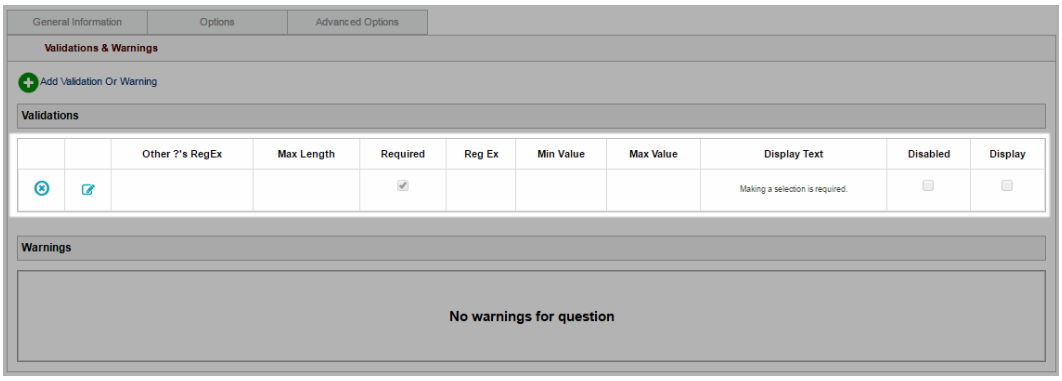
   b. Enter text to display in the space provided.



   c. Click Save.

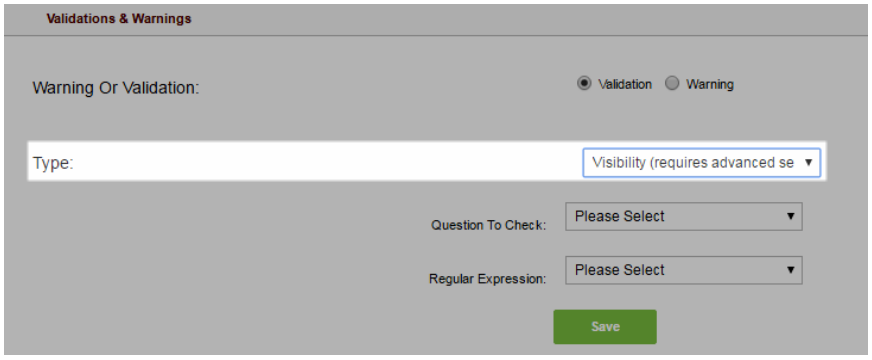


d. Wait for the save to complete and return to the Validations & Warnings window where the new validation displays under Validations.

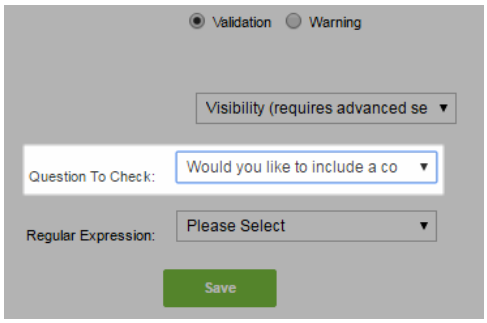


3. To apply a Visibility validation:

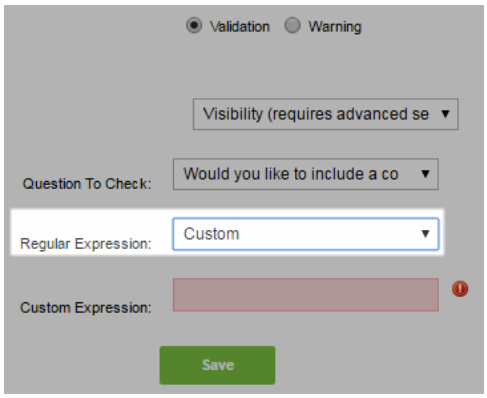
a. Select Visibility (requires advanced settings) from the Type picklist.



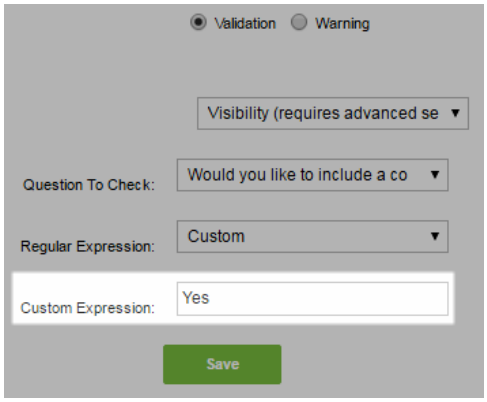
b. From the Question To Check picklist, select the question for this visibility validation. When a user makes a selection from the question to check, this additional question or statement will appear.

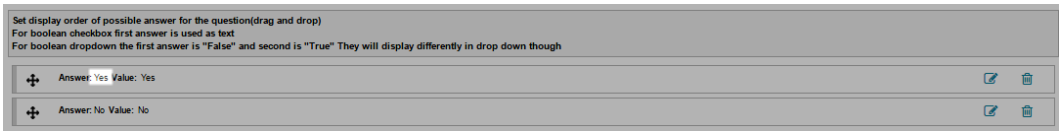


c. From the Regular Expression picklist, choose the appropriate option. The most widely used option is Custom.

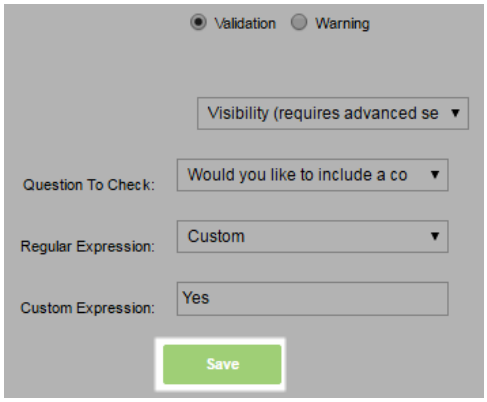


d. In the Custom Expression field, enter the text of the option that will activate this visibility validation. This is the corresponding Possible Answer for the Question to Check—when the user makes the selection here, the dependent section will appear.

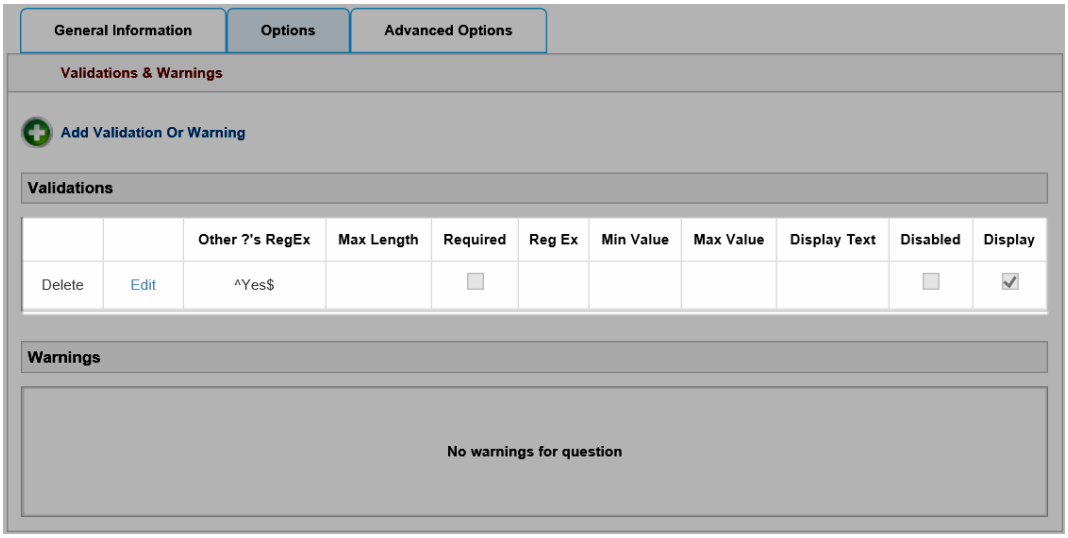




e. Click Save.

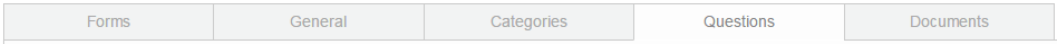


f. Wait for the save to complete and return to the Validations & Warnings window where the new validation displays under Validations.

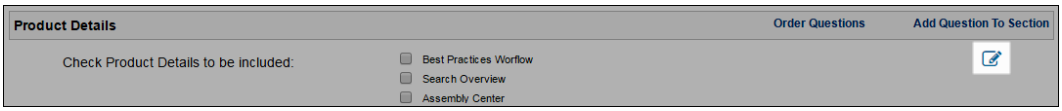


Advanced Options

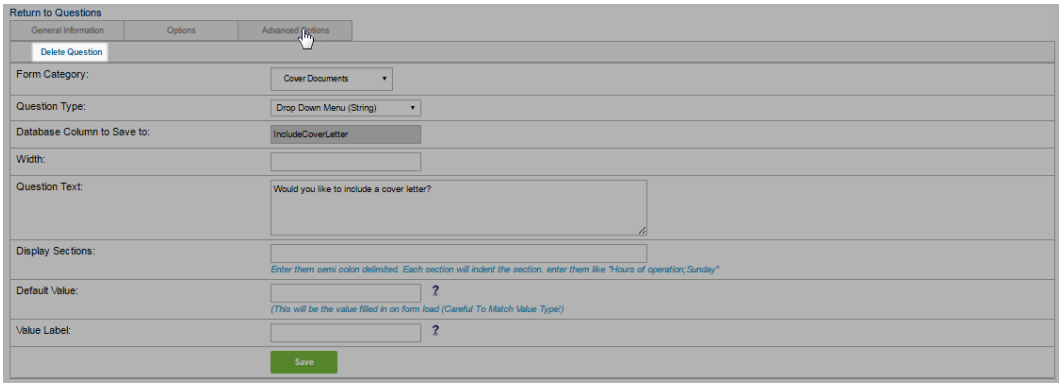
1. With the correct Form selected, click on the Questions tab.



2. Click edit next to the question you would like to delete.

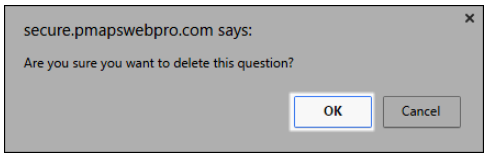


3. Hover over the Advanced Options tab, and then click on Delete Question.

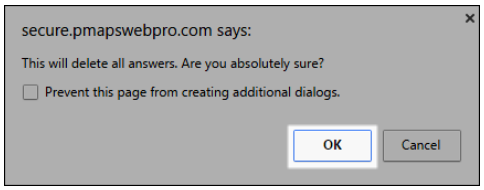


4. Click the DELETE QUESTION button.

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.

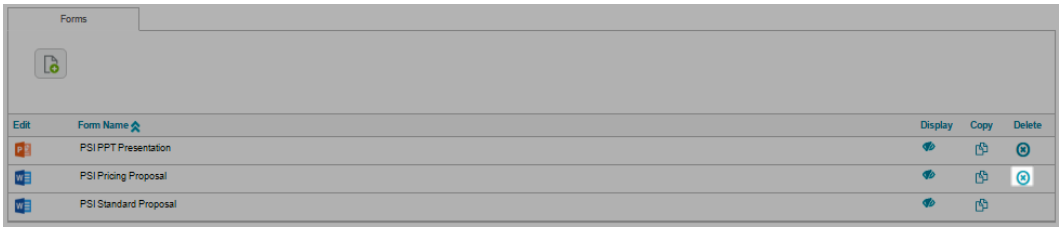


Delete Template

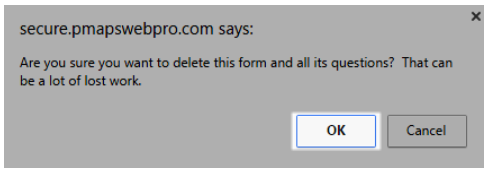
To delete an entire sales doc template (form):

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

2. 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.



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

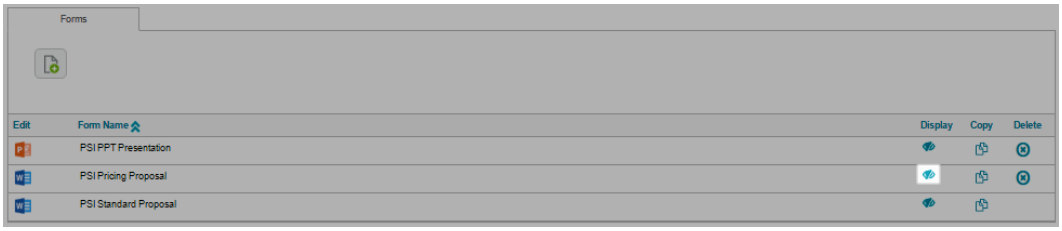


Hide Template

To hide a template:

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

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



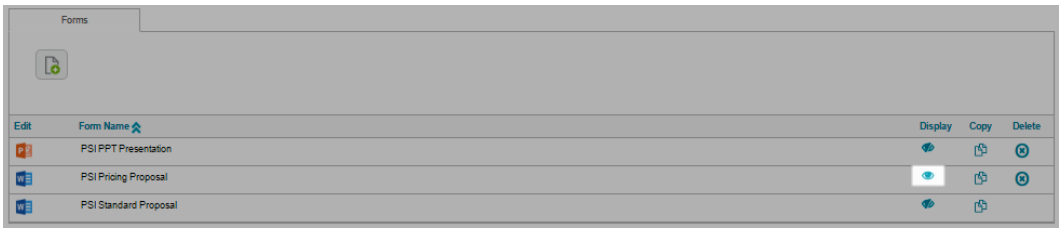
3. Wait for the page to refresh and note the sales doc template is no longer showing. This sales doc will not be available for end users until you choose to display the template.

To display a hidden template:

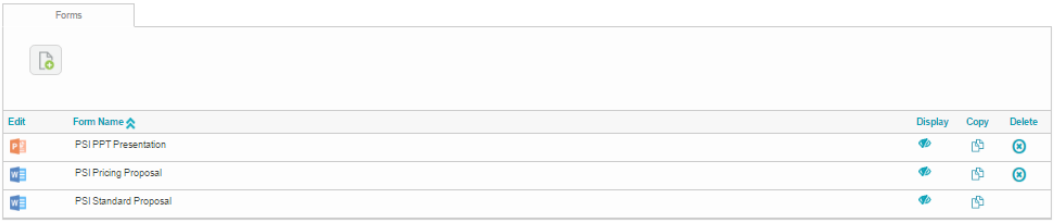
1. From the navigation toolbar, go to the Sales Docs page.

2. Click the checkbox next to Show Hidden Forms, and then click Search.

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



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

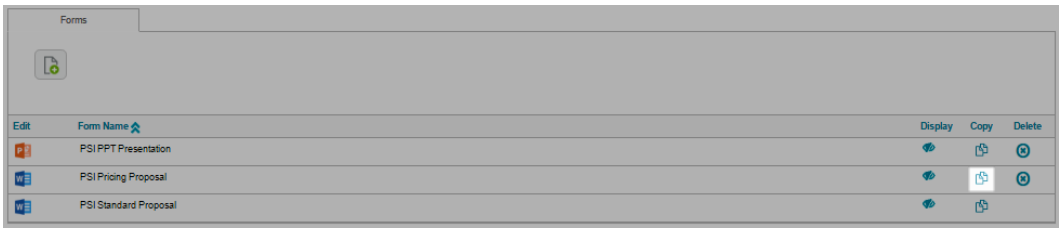


Copy Template

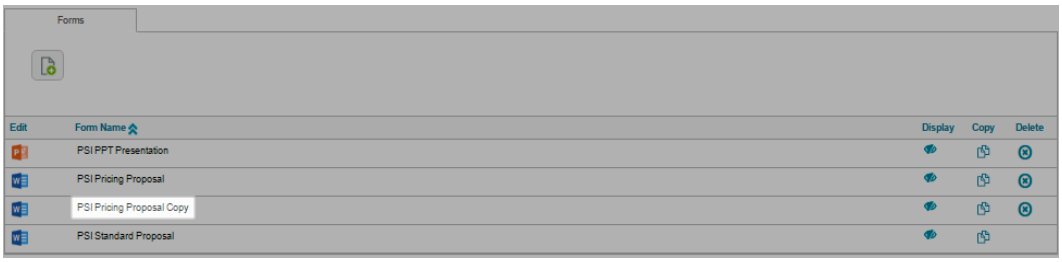
To make a copy of an existing template:

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

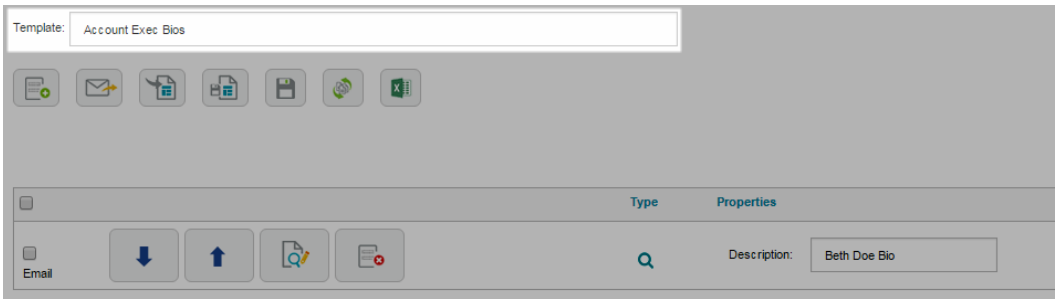
The assembly/project center is a file and project management utility that may be used on any proposal in the dashboard. The assembly project can combine predefined templates with ad hoc sections using documents linked to PMAPS or uploaded to your document network. Each section (or document) has several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

The following file types are permitted in assembly projects:

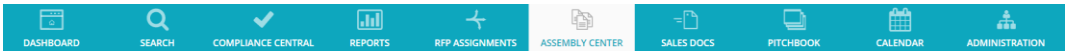
- Word (.doc and .docx file type)
- Excel (.xls and .xlsx file type)
- PowerPoint (.ppt and .pptx file type)
- Portable Document Format (.pdf file type)

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.



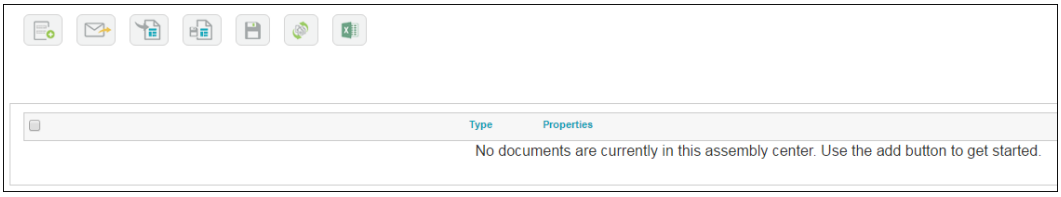
To build a new or edit an existing template, click on the Assembly Center icon on from the navigation toolbar.



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.

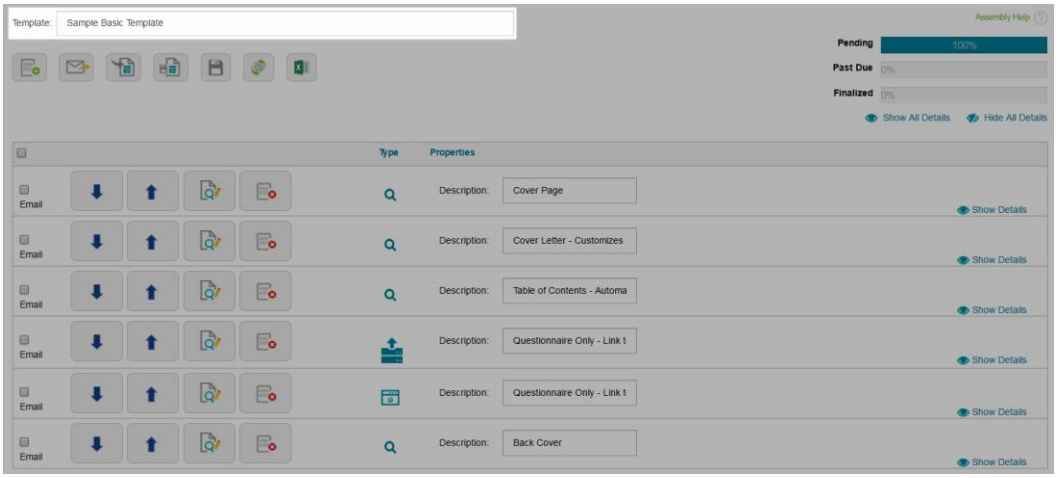
Create a New Template

By default each new assembly project template is empty.

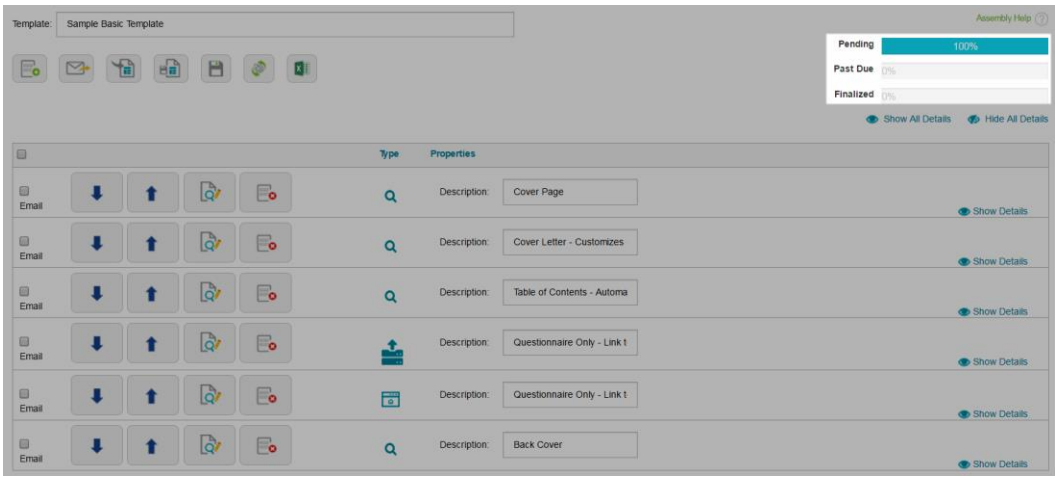


Each assembly project template displays the standard layout consisting of:

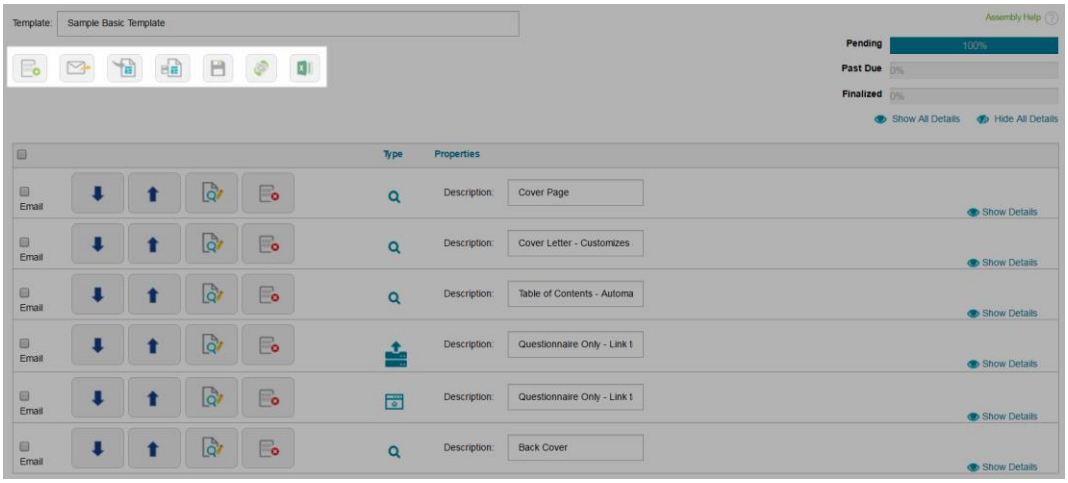
- Template name



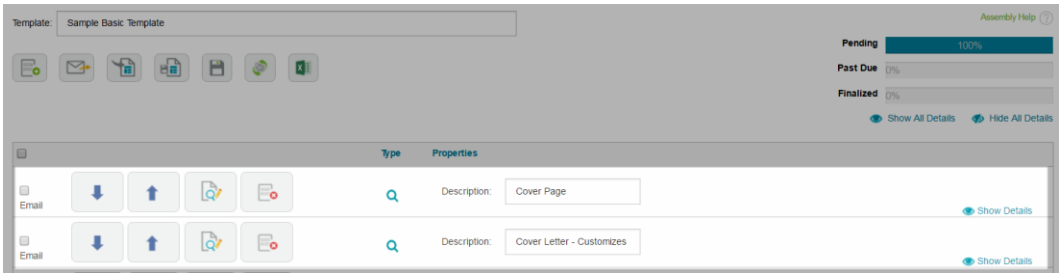
- Progress summary



- Function toolbar



- Sections

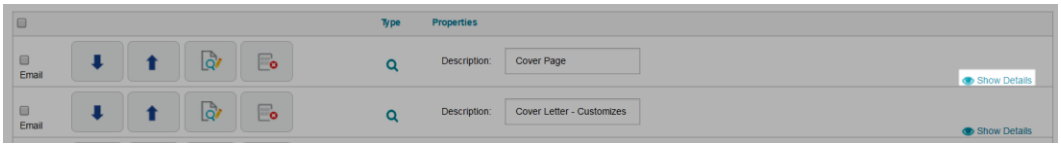


You can show or hide the section properties one section at a time or all at once. While building a template, it is recommended that you show details for all sections.

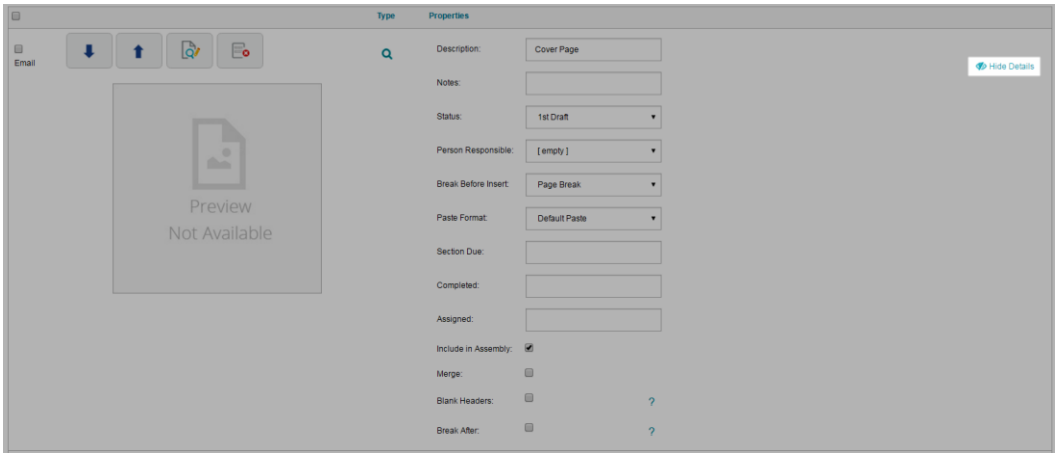
- To show all details for all sections at once, click the Show All Details icon from the right side of the screen.

- 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.

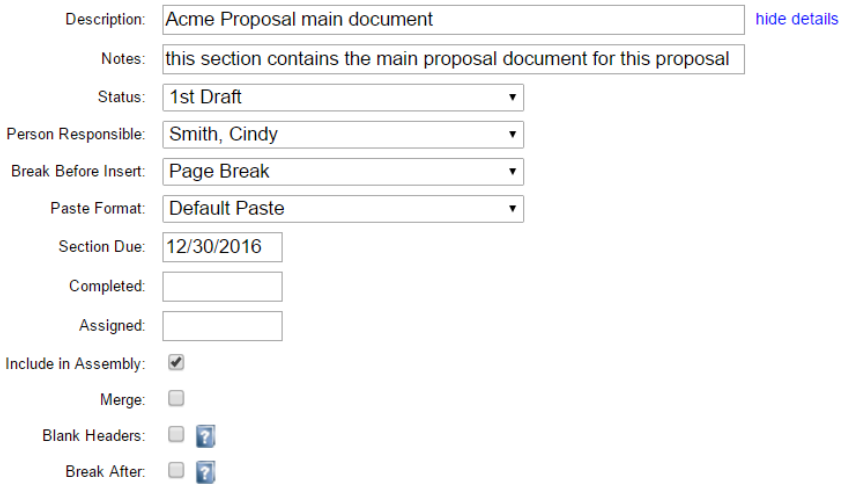
- Default Paste: uses the setting from your Microsoft Word Normal.dotm for Pasting between documents when style definitions conflict.
- Keep Source Formatting: This option retains the look of the text by assigning the "Normal" style and includes characteristics such as font size, italics, or other formatting 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.



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	Show All Details	Expands the view of all sections to display the available options.
Hide Details	Hide All 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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