

# User Guide

## Content



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## About This User Guide

There are screen shots throughout this guide. Due to customer-specific modifications to field names, field tabs, and locations these screen shots may not match those used within your instance.

### TIPS

- Where displayed, this section offers a best practice.

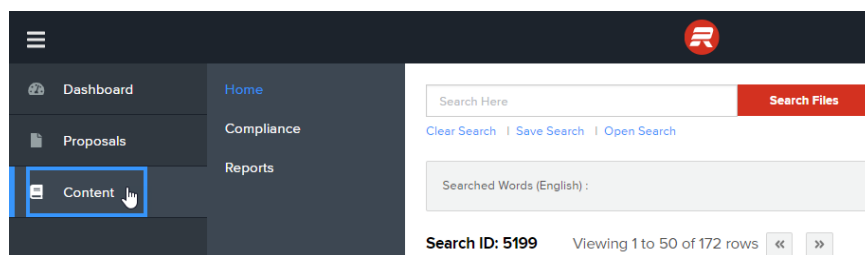
## Content Home

### Set User Default Options

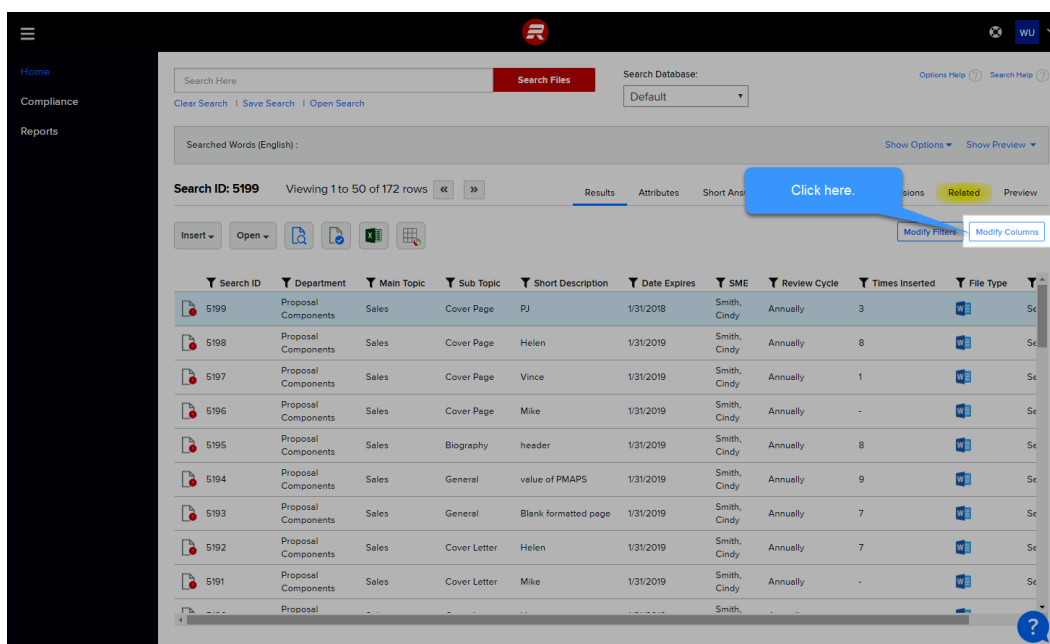
#### Modify Columns

Each user can customize the visible columns, which can be used for filtering and sorting results.

1. From the main menu, click [Content](#).



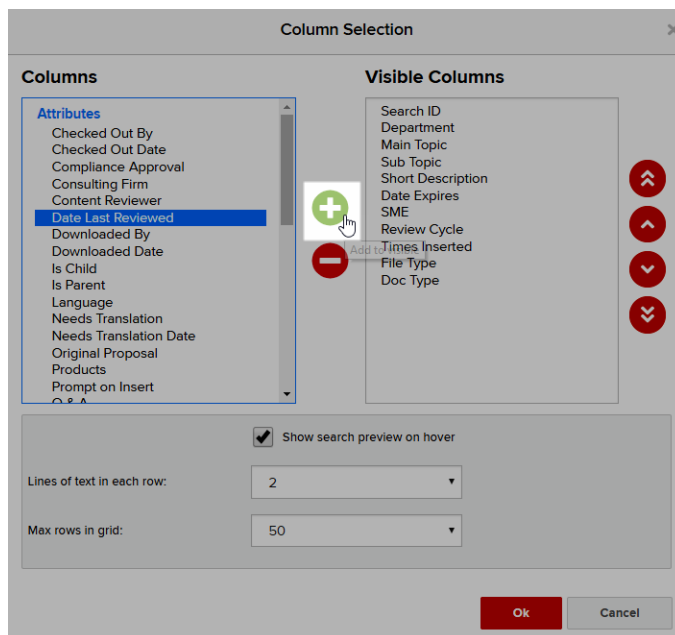
2. Click the [Modify Columns](#) icon.





## Add Columns

1. From the [Columns](#) list, select an attribute to add.
2. Click the plus icon to move the attribute to the [Visible Columns](#).
3. Confirm the new value is in the [Visible Columns](#) and click [OK](#) to save your changes.

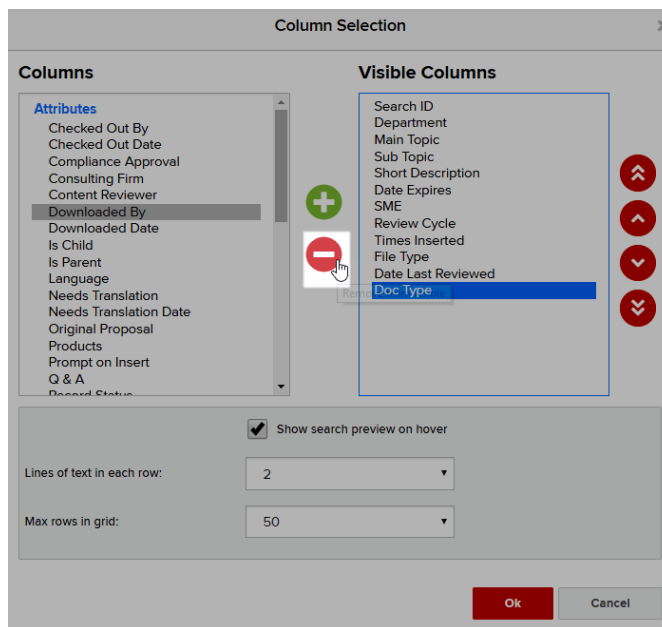


## Remove Columns

1. From the [Visible Columns](#) list, select an attribute to remove.

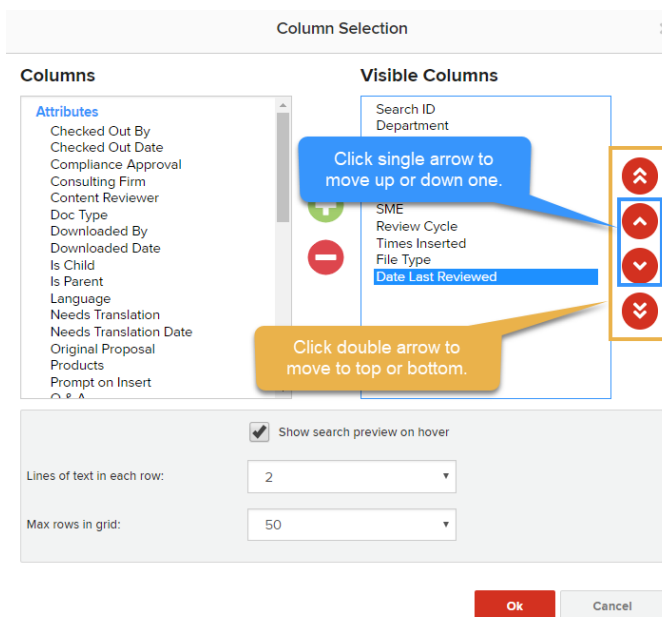


2. Click the minus icon and click **OK** to save your changes.



## Order Columns

1. Select the attribute to move and use the up and down arrows to move attributes to the desired order, and then click **OK**.

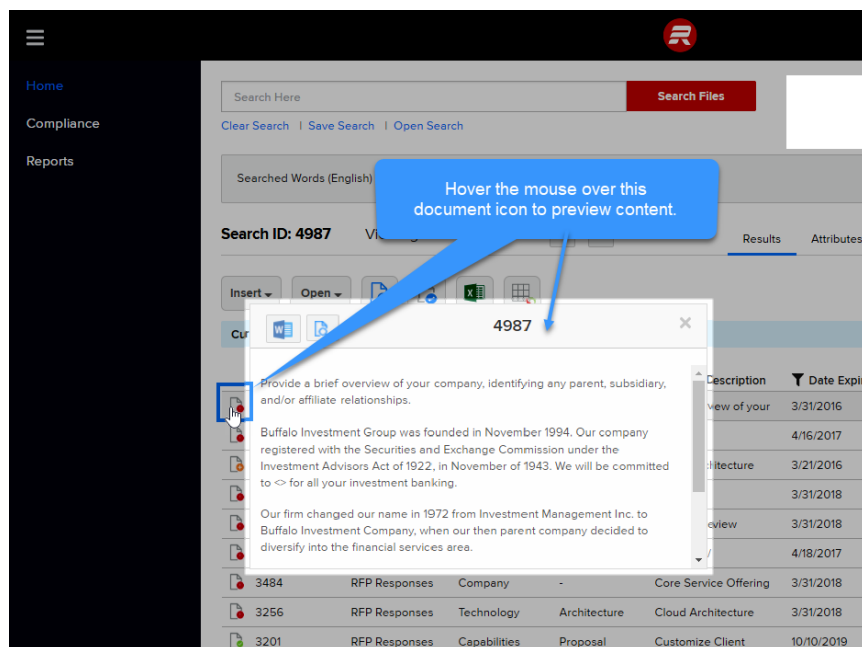
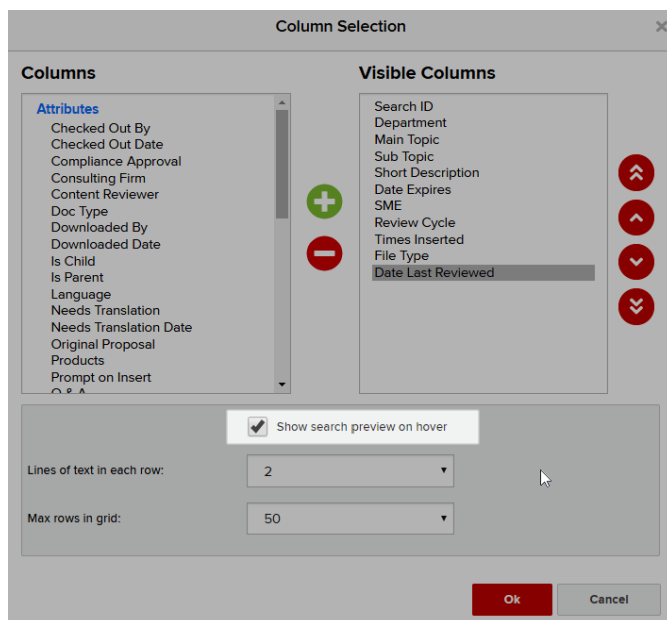






## Default Options

1. To enable the hover preview, check the "Show search preview on hover" box.





2. Choose how many rows of text to show in search results grid.

Column Selection

Columns

Attributes

- Checked Out By
- Checked Out Date
- Compliance Approval
- Consulting Firm
- Content Reviewer
- Doc Type
- Downloaded By
- Downloaded Date
- Is Child
- Is Parent
- Language
- Needs Translation
- Needs Translation Date
- Original Proposal
- Products
- Prompt on Insert
- Q & A

Visible Columns

- Search ID
- Department
- Main Topic
- Sub Topic
- Short Description
- Date Expires
- SME
- Review Cycle
- Times Inserted
- File Type
- Date Last Reviewed

☒ Show search preview on hover

Lines of text in each row: 2

Max rows in grid: 2

Ok Cancel

Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	Review Cycle	Times Inserted	File Type	Date
4987	RFP Responses	Company	-	brief overview of your	3/31/2016	Doe, Beth	Historical	19	W	5/13/2016
4986	RFP Responses	General	-	-	4/16/2017	-	-	3	W	1/16/2017
4861	RFP Responses	Technology	Security	Cloud Architecture	3/21/2016	Strong, Cecilia	Per Bid	4	W	1/16/2017
4859	RFP Responses	Company	-	-	3/31/2018	Doe, Beth	Annually	9	W	3/21/2018
4821	RFP Responses	Customer Service	Support	Account review frequency	3/31/2018	Strong, Cecilia	Annually	3	W	3/21/2018
3614	RFP Responses	Capabilities	Content Management	Segment / Segmentation	4/18/2017	Doe, Tina	Annually	11	W	4/18/2017
3484	RFP Responses	Company Information	-	Core Service Offering	3/31/2018	Doe, Beth	Historical	9	W	3/21/2018
3256	RFP Responses	Technology	Architecture	Cloud Architecture	3/31/2018	Strong, Cecilia	Annually	30	W	3/21/2018
3201	RFP Responses	Capabilities	Proposal Creation	Customize Client Information	10/10/2019	Smith, Peter	Annually	12	W	10/10/2019
3099	RFP Responses	Capabilities	-	RFP Templates	10/10/2019	Smith, Peter	Annually	16	W	10/10/2019

Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	Review Cycle	Times Inserted	File Type	Date
4987	RFP Responses	Company Information	-	brief overview of your company, identifying	3/31/2016	Doe, Beth	Historical	19	W	5/13/2016
4986	RFP Responses	General	-	-	4/16/2017	-	-	3	W	1/16/2017
4861	RFP Responses	Technology	Security	Cloud Architecture	3/21/2016	Strong, Cecilia	Per Bid	4	W	1/16/2017
4859	RFP Responses	Company Information	-	-	3/31/2018	Doe, Beth	Annually	9	W	3/21/2018
4821	RFP Responses	Customer Service	Support	Account review frequency	3/31/2018	Strong, Cecilia	Annually	3	W	3/21/2018
3614	RFP Responses	Capabilities	Content Management	Segment / Segmentation	4/18/2017	Doe, Tina	Annually	11	W	4/18/2017
3484	RFP Responses	Company Information	-	Core Service Offering	3/31/2018	Doe, Beth	Historical	9	W	3/21/2018
3256	RFP Responses	Technology	Architecture	Cloud Architecture	3/31/2018	Strong, Cecilia	Annually	30	W	3/21/2018
3201	RFP Responses	Capabilities	Proposal Creation	Customize Client Information	10/10/2019	Smith, Peter	Annually	12	W	10/10/2019



3. Choose the maximum number of rows to display in search results grid.

**Column Selection**

**Columns**

Attributes

- Checked Out By
- Checked Out Date
- Compliance Approval
- Consulting Firm
- Content Reviewer
- Doc Type
- Downloaded By
- Downloaded Date
- Is Child
- Is Parent
- Language
- Needs Translation
- Needs Translation Date
- Original Proposal
- Products
- Prompt on Insert

**Visible Columns**

- Search ID
- Department
- Main Topic
- Sub Topic
- Short Description
- Date Expires
- SME
- Review Cycle
- Times Inserted
- File Type
- Date Last Reviewed

☒ Show search preview on hover

Lines of text in each row: 2

Max rows in grid:

- 50
- 10
- 25
- 50
- 100
- 200

Ok Cancel

Search ID: 4987 Viewing 1 to 10 of 107 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open

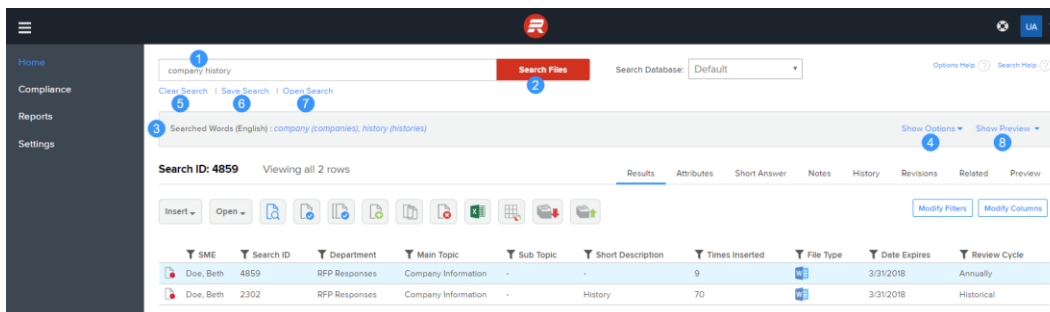
Current Filters: Department: RFP Responses

Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	Review Cycle	Times Inserted	File Type	Date
4987	RFP Responses	Company	-	brief overview of your	3/31/2016	Doe, Beth	Historical	19	W	5/13/2
4986	RFP Responses	General	-	-	4/16/2017	Smith,	Quarterly	3	W	1/16/20
4861	RFP Responses	Technology	Security	Cloud Architecture	3/21/2016	Strong,	Per Bid	4	W	1/16/20
4859	RFP Responses	Company	-	-	3/31/2018	Doe, Beth	Annually	9	W	3/21/2
4821	RFP Responses	Customer	Support	Account review	3/31/2018	Strong,	Annually	3	W	3/21/2
3614	RFP Responses	Capabilities	Content	Segment /	4/18/2017	Doe, Tina	Annually	11	W	4/18/2
3484	RFP Responses	Company	-	Core Service Offering	3/31/2018	Doe, Beth	Historical	9	W	3/21/2
3256	RFP Responses	Technology	Architecture	Cloud Architecture	3/31/2018	Strong,	Annually	30	W	3/21/2
3201	RFP Responses	Capabilities	Proposal	Customize Client	10/10/2019	Smith,	Annually	12	W	10/10/2
3099	RFP Responses	Capabilities	-	RFP Templates	10/10/2019	Smith,	Annually	16	W	10/10/2

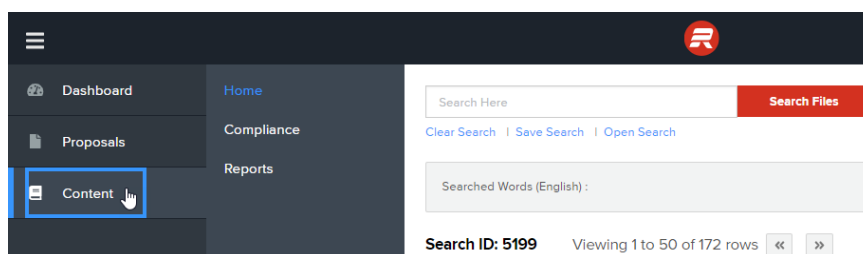


## Content Home Options

To search for content, follow the steps below, referencing the circled numbers.



If you are not on the [Content](#) page, go to the main menu and click [Content](#).



1. Type the words to search within [Search Here](#) window:
  - To perform an exact match search, put quotation marks around the text that should be an exact match
  - To perform a single word search and remove the automatic alternate word search put quotation marks around the word that should be an exact match
  - To search for a record by number, enter "id:" followed by the Search ID number.
2. Click the [Search Files](#) button.
3. [Search Words](#) display the words and language searched.
4. Click [Show Options](#) to expand the window that shows all search options.
5. Click [Clear Search](#) to remove all search text.
6. Click [Save Search](#) to add the saved result options as a new favorite search.
7. Click [Open Search](#) to use a previously saved favorite search.
8. Click [Show Preview](#) to expand the preview window.



# Search Options

To modify your search options, follow the steps below, referencing the circled numbers. Click [Show Options](#) to expand the options window.

Search ID: 4859 Viewing all 2 rows

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Beth	4859	RFP Responses	Company Information	-	-	9	Word	3/31/2018	Annually
Doe, Beth	2302	RFP Responses	Company Information	-	History	70	Word	3/31/2018	Historical

1. Choose your preferred option for what content to search:

- [All Content](#) searches all text that is in all content record documents (includes Indexed content)
- [Q & A Only](#) searches all text but only in records where the "Q & A" attribute is checked (excludes Indexed content)
- [Question Only](#) searches only the question text but only in records where the "Q & A" attribute is checked (excludes Indexed content)
- [Short Description](#) searches only the text within the [Summary](#) attribute field (note that your label may be different)

2. Choose your preferred default option for what words to include in the search:

- [All Words](#) returns records that include all words in search field
- [Any Word](#) returns records that include any of the words in the search field



3. Choose your preferred option to search for records based on compliance status (this is based on the expiration date field):
  - [All](#) returns all records
  - [Compliant](#) returns records that have not yet expired
  - [Non-Compliant](#) returns records that have expired or where the expiration date is empty
4. Choose whether to include customer configured synonyms in the search.
5. Choose your preferred option to search for content expiring in the future (this is based on the expiration date field):
  - [Next Week](#) returns records expiring within the next 7 days
  - [Next Month](#) returns records expiring within the next 30 days
  - [Next Quarter](#) returns records expiring within in the next 90 days
  - [Next Year](#) returns records expiring within in the next 365 days
6. To save your default options, click the [Save Options](#). **Important Note:** This will include text in the search text field, filters, sorting, and all options in the Show Options window. Click [Clear Search](#) before clicking [Save Options](#).
7. Click [Hide Options](#) to collapse the search options.

Searched Words (English):

☒ All Content ☒ All Words ☒ All ☐ Use Synonyms

☐ Q & A Only ☐ Any Word ☐ Compliant ☐ Non-Compliant

☐ Question Only ☐ Short Description

Expires:

[Save Options](#) [Hide Options](#) [Show Preview](#)

8. Click [Show Preview](#) to show the preview text window.

Searched Words (English):

Do you have Cloud topology, architecture, connectivity diagrams and corresponding ACLs available for client inspection?

Please refer to the Cloud Environment diagram below. Also, please refer to the following link for additional information:  
PMPAS WebPro Workflow and Network Diagrams

[Show Options](#) [Hide Preview](#) [Preview window](#)

Search ID: 4861 Viewing 1 to 10 of 108 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [PDF](#) [Word](#) [Excel](#) [PowerPoint](#) [Image](#) [Video](#) [Audio](#) [Link](#) [Print](#) [Share](#) [Modify Filters](#) [Modify Columns](#)

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent.	19	Word	3/31/2016	Historical
Smith,	4986	RFP Responses	General	-	-	3	Word	4/16/2017	Quarterly
Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4	Word	3/21/2016	Per Bid



## Sort Options

To modify sort options, follow the steps below, referencing the circled numbers:

Search ID: 3614 Viewing 1 to 10 of 108 rows << >>

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [Icons] Modify Filters **Reset Sort** Modify Columns

1

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Tina	3614	RFP Responses	Capabilities	Content Management	Segment / Segmentation	11	Word	4/18/2017	Annually
Smith, Peter	3201	RFP Responses	Capabilities	Proposal Creation	Customize Client Information	12	Word	10/10/2019	Annually
Smith, Peter	3099	RFP Responses	Capabilities	-	RFP Templates	16	Word	10/10/2019	Annually
Smith, Peter	3094	RFP Responses	Capabilities	Proposal Creation	Dashboard Overview	22	Word	10/10/2019	Annually
Doe, Beth	2593	RFP Responses	Capabilities	Searching and Inserting	Filters / Attributes	22	Word	3/31/2018	Annually
Doe, Tina	2592	RFP Responses	Capabilities	Content Management	Content Repository	17	Word	3/31/2018	Annually
Smith, Peter	2567	RFP Responses	Capabilities	Proposal Creation	File Types Supported	18	Word	10/10/2019	Annually
Doe, Tina	2493	RFP Responses	Capabilities	Content Management	Expiration Dates	11	Word	3/31/2018	Annually
Smith, Peter	2484	RFP Responses	Capabilities	Proposal Creation	Store Multiple Versions	10	Word	10/10/2019	Annually
Doe, Beth	2477	RFP Responses	Capabilities	Searching and Inserting	Single Click Insertion	17	Word	3/31/2018	Annually

1. Click on the attribute name for the column to sort, which will sort ascending. Click the same attribute name again to sort descending.
2. To remove sorting, click [Reset Sort](#).
9. Click [Reset Sort](#) to remove all sorting. This button only shows when the sort is on for a column.

## Filters

To filter your results, follow the steps below, referencing the circled numbers:

Search ID: 4861 Viewing 1 to 10 of 108 rows << >>

Results Attributes **Short Answer** Notes History Revisions Related Preview

Insert Open [Icons] **Modify Filters** Modify Columns

1

2

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent,	19	Word	3/31/2016	Historical
Smith,	4986	RFP Responses	General	-	-	3	Word	4/16/2017	Quarterly
Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4	Word	3/21/2016	Per Bid
Smith,	4860	Sales and	Sales	-	FundFire A Financial Times Services Review	-	Word	3/31/2016	Historical
Doe, Beth	4859	RFP Responses	Company	-	-	9	Word	3/31/2018	Annually
Strong,	4821	RFP Responses	Customer	Support	Account review frequency	3	Word	3/31/2018	Annually
Doe, Tina	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	11	Word	4/18/2017	Annually
Doe, Beth	3484	RFP Responses	Company	-	Core Service Offering	9	Word	3/31/2018	Historical
Strong,	3256	RFP Responses	Technology	Architecture	Cloud Architecture	30	Word	3/31/2018	Annually
Smith,	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	12	Word	10/10/2019	Annually



1. Click [Modify Filters](#), and under [Add new filter](#), select the attribute to use as a filter. Then, click [Apply](#).
2. To filter on a visible column's values, click the funnel icon next to that column name. Make selections and then click [Apply](#).

Search ID: 3614 Viewing 1 to 10 of 108 rows

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent.	19	W	3/31/2016	Historical
Smith,	4986	RFP Responses	General	-	-	3	W	4/16/2017	Quarterly
Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4	W	3/21/2016	Per Bid
Smith,	4860	Sales and	Sales	-	FundFire A Financial Times Services Review	-	W	3/31/2016	Historical
Doe, Beth	4859	RFP Responses	Company	-	-	9	W	3/31/2018	Annually
Strong,	4821	RFP Responses	Customer	Support	Account review frequency	3	W	3/31/2018	Annually
Doe, Tina	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	11	W	4/18/2017	Annually
Doe, Beth	3484	RFP Responses	Company	-	Core Service Offering	9	W	3/31/2018	Historical
Strong,	3256	RFP Responses	Technology	Architecture	Cloud Architecture	30	W	3/31/2018	Annually
Smith,	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	12	W	10/10/2019	Annually

WebPro Filters

Add new filter:

Department

Main Topic

Uncheck All Check All Show All Options Remove This Filter

Name	Count
<input checked="" type="checkbox"/> Capabilities	40
<input type="checkbox"/> Company Information	17
<input type="checkbox"/> Customer Service	8
<input type="checkbox"/> General	1
<input type="checkbox"/> Implementation & Training	14
<input type="checkbox"/> Sales	1
<input type="checkbox"/> Technology	26

Apply Cancel





3. To apply a quick filter, look for the value to filter on and right-click on that value.

Search ID: 3614 Viewing 1 to 10 of 108 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [Icons]

Modify Filters Modify Columns

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent,	19	W	3/31/2016	Historical
Smith,	4986	RFP Responses	General	-	-	3	W	4/6/2017	Quarterly
Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4	W	3/21/2016	Per Bid
Smith,	4860	Sales and	Sales	-	FundFire A Financial Times Services Review	-	W	3/31/2016	Historical
Doe, Beth	4859	RFP Responses	Company	-	-	9	W	3/31/2018	Annually
Strong,	4821	RFP Responses	Customer	Support	Account review frequency	3	W	3/31/2018	Annually
Doe, Tina	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	11	W	4/18/2017	Annually
Doe, Beth	3484	RFP Responses	Company	-	Core Service Offering	9	W	3/31/2018	Historical
Strong,	3256	RFP Responses	Technology	Architecture	Cloud Architecture	30	W	3/31/2018	Annually
Smith,	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	12	W	10/10/2019	Annually

Search ID: 3614 Viewing 1 to 10 of 107 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [Icons]

Clear Filters Modify Filters Modify Columns

Current Filters: Department: RFP Responses

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent,	19	W	3/31/2016	Historical
Smith,	4986	RFP Responses	General	-	-	3	W	4/6/2017	Quarterly
Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4	W	3/21/2016	Per Bid
Doe, Beth	4859	RFP Responses	Company	-	-	9	W	3/31/2018	Annually
Strong,	4821	RFP Responses	Customer	Support	Account review frequency	3	W	3/31/2018	Annually
Doe, Tina	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	11	W	4/18/2017	Annually
Doe, Beth	3484	RFP Responses	Company	-	Core Service Offering	9	W	3/31/2018	Historical
Strong,	3256	RFP Responses	Technology	Architecture	Cloud Architecture	30	W	3/31/2018	Annually
Smith,	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	12	W	10/10/2019	Annually
Smith,	3099	RFP Responses	Capabilities	-	RFP Templates	16	W	10/10/2019	Annually

When filters are in place, the **Current Filters** section displays within the results grid.

Search ID: 3614 Viewing 1 to 10 of 40 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [Icons]

Clear Filters Modify Filters Modify Columns

Current Filters: Department: RFP Responses, Main Topic: Capabilities

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
Doe, Tina	3614	RFP Responses	Capabilities	Content Management	Segment / Segmentation	11	W	4/18/2017	Annually
Smith, Peter	3201	RFP Responses	Capabilities	Proposal Creation	Customize Client Information	12	W	10/10/2019	Annually
Smith, Peter	3099	RFP Responses	Capabilities	-	RFP Templates	16	W	10/10/2019	Annually
Smith, Peter	3094	RFP Responses	Capabilities	Proposal Creation	Dashboard Overview	22	W	10/10/2019	Annually
Doe, Beth	2593	RFP Responses	Capabilities	Searching and Inserting	Filters / Attributes	22	W	3/31/2018	Annually
Doe, Tina	2592	RFP Responses	Capabilities	Content Management	Content Repository	17	W	3/31/2018	Annually
Smith, Peter	2567	RFP Responses	Capabilities	Proposal Creation	File Types Supported	18	W	10/10/2019	Annually
Doe, Tina	2493	RFP Responses	Capabilities	Content Management	Expiration Dates	11	W	3/31/2018	Annually
Smith, Peter	2484	RFP Responses	Capabilities	Proposal Creation	Store Multiple Versions	10	W	10/10/2019	Annually



## Search Results Grid

In the results grid, RocketDocs automatically displays important information on screen.

Search Here Search Files Search Database: Default Options Help ? Search Help ?

[Clear Search](#) | [Save Search](#) | [Open Search](#)

Searched Words (English): Show Options ▾ Show Preview ▾

Search ID: 4987 Viewing 1 to 10 of 108 rows « » Results Attributes Short Answer Notes History Revisions Related Preview

Insert ▾ Open ▾ Modify Filters Modify Columns

	SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
	Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent,	19		3/31/2016	Historical
	Smith,	4986	RFP Responses	General	-	-	3		4/16/2017	Quarterly
	Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4		3/21/2016	Per Bid
	Smith,	4860	Sales and	Sales	-	FundFire A Financial Times Services Review	-		3/31/2016	Historical
	Doe, Beth	4859	RFP Responses	Company	-	-	9		3/31/2018	Annually
	Strong,	4821	RFP Responses	Customer	Support	Account review frequency	3		3/31/2018	Annually
	Doe, Tina	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	11		4/18/2017	Annually
	Doe, Beth	3484	RFP Responses	Company	-	Core Service Offering	9		3/31/2018	Historical
	Strong,	3256	RFP Responses	Technology	Architecture	Cloud Architecture	30		3/31/2018	Annually
	Smith,	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	12		10/10/2019	Annually

1. The selected record has a light blue background.
2. The selected record displays the record's [Search ID](#).
3. The record status displays in the first column:
  - indicates the expiration date is in the future
  - indicates the expiration date has passed or is empty
  - indicates review frequency is "Per Bid"


































## Additional Tabs

The tabs to the right of Results provide details about a record. Label names may vary.

Search ID: 4987 Viewing 1 to 10 of 108 rows « »

Results 1 2 Short Answer 3 Notes 4 History 5 Revisions 6 Related 7 Preview

Insert Open            [Modify Filters](#) [Modify Columns](#)

SME	Search ID	Department	Main Topic	Sub Topic	Short Description	Times Inserted	File Type	Date Expires	Review Cycle
 Doe, Beth	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent,	19		3/31/2016	Historical
 Smith,	4986	RFP Responses	General	-	-	3		4/16/2017	Quarterly
 Strong,	4861	RFP Responses	Technology	Security	Cloud Architecture	4		3/21/2016	Per Bid
 Smith,	4860	Sales and	Sales	-	FundFire A Financial Times Services Review	-		3/31/2016	Historical
 Doe, Beth	4859	RFP Responses	Company	-	-	9		3/31/2018	Annually
 Strong,	4821	RFP Responses	Customer	Support	Account review frequency	3		3/31/2018	Annually
 Doe, Tina	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	11		4/18/2017	Annually
 Doe, Beth	3484	RFP Responses	Company	-	Core Service Offering	9		3/31/2018	Historical
 Strong,	3256	RFP Responses	Technology	Architecture	Cloud Architecture	30		3/31/2018	Annually
 Smith,	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	12		10/10/2019	Annually



1. [Attributes](#) displays all attributes for the selected record.

Save

Cancel

Search Attributes Help ?

**Contacts**

SME: Doe, Seth

Who Answered:

Compliance Approval:

Content Reviewer:

**Record Review**

Review Cycle: Historical

Date Expires: 03/31/2016

Date Last Reviewed: 06/15/2016

**Record Category**

Record Status: Active

Department: RFP Responses

Main Topic: Company Information

Sub Topic:

Short Description: brief overview of your company, identifying any parent, subsidiary, and/or affiliate relationships

Language:

Source:

Region:

Prompt on Insert:

**Other Details**

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

Version:

Sales Contact:

Consulting Firm:

Original Proposal:

Downloaded Date:

Downloaded By:

Needs Translation

Needs Translation Date:

Is Child

Is Parent

**Internal Attributes**

File Type: Word

Doc Type: Search

Checked Out By: adminuser

Checked Out Date: 03/22/2017

Q & A

Save as Attribute Group



2. **Short Answer** displays the text-only version of the selected record.

SaveCancelSearch Attributes Help ?

Short Answer for Text Only

Short Answer:

Buffalo Investment Group was founded in November 1994. Our company registered with the Securities and Exchange Commission under the Investment Advisors Act of 1922, in November of 1943. Our firm changed our name in 1972 from Investment Management Inc. to Buffalo Investment Company, when our then parent company decided to diversify into the financial services area. We are managed independently of Financial Investment Management Company and have our headquarters in Buffalo, New York.

Short Answer Notes:

This response will fit in character limited forms 500 characters or less.

3. **Notes** displays text-only notes related to the selected record.

SaveCancelSearch Attributes Help ?

Record Notes

Internal Record Notes:

Indexed File Name:



4. **History** displays the usage history of the selected record.

**History**

Date Last Inserted:

01/18/2019

Times Inserted:

19

Compliance Status:

Sent

Date	Time	Who	Proposal Name	Method
1/18/2019	8:58:38 PM	adminuser	Sample RFP Request	Relink
1/18/2019	8:53:22 PM	adminuser	Sample RFP Request	Full document from web page
5/18/2016	2:07:52 PM	adminuser	Acme RFP Response	Full document from web page
5/18/2016	2:07:27 PM	adminuser	Acme RFP Response	Full document from web page
5/4/2016	5:17:51 PM	adminuser	PMAPS Proposal Questionnaire	Full document from web page
5/4/2016	5:17:28 PM	adminuser	PMAPS Proposal Questionnaire	Full document from web page
4/26/2016	10:29:28 AM	adminuser		Response from forms tab
4/20/2016	12:34:18 PM	adminuser		Response from forms tab
4/20/2016	12:11:22 PM	adminuser		Full document from web page
4/20/2016	11:35:26 AM	adminuser		Full document from web page
4/20/2016	11:31:31 AM	adminuser	Acme RFP Response	Selected text from web page
4/18/2016	6:34:38 PM	adminuser		Response from forms tab
4/15/2016	12:31:10 PM	adminuser		Response from forms tab
4/14/2016	12:36:08 PM	adminuser		Response from forms tab
4/12/2016	2:30:15 PM	adminuser		Response from forms tab
4/8/2016	5:55:25 PM	adminuser		Full copied to clipboard
4/8/2016	5:54:35 PM	adminuser		Full copied to clipboard
4/8/2016	5:54:18 PM	adminuser	PMAPS Proposal RFP	Full document from web page
4/8/2016	5:51:10 PM	adminuser		Full copied to clipboard



5. **Revisions** displays the revision history of the selected record. This includes all prior saved versions of the record document.

Search ID: 2312    Viewing all rows

Results   Attributes   Short Answer   Notes   History   Revisions   Related

[Save](#)   [Cancel](#)   [Search Attributes Help](#) ?

### Revisions

Last Revised:

# Revisions:

Date Edited:

Added By:

Date Added:

### Revision History

Date	Who	Field	Before	After
4/27/2016 7:26:06 PM	adminuser	Short Answer	Short Answer 4923	placeholder
4/18/2016 8:34:36 PM	adminuser	Review Cycle	Historical	Annually
4/18/2016 6:32:52 PM	adminuser	Review Cycle	Archive	Historical
4/18/2016 6:32:52 PM	adminuser	Sub Topic	Users	
4/14/2016 8:58:52 PM	adminuser	Review Cycle	Annually	Archive
3/21/2016 6:31:47 PM	adminuser	Short Answer		Short Answer 4923
3/21/2016 6:31:47 PM	adminuser	Date Last Reviewed	11/24/2015 12:00:00 AM	3/21/2016 6:31:47 PM
3/21/2016 6:31:47 PM	adminuser			File Saved <a href="#">compare</a> <a href="#">revert</a>
12/8/2015 6:16:42 PM	administrator	Date Expires	11/24/2016 12:00:00 AM	3/31/2016 12:00:00 AM
12/4/2015 11:42:52 AM				File Saved <a href="#">compare</a> <a href="#">revert</a>



6. **Related** displays the following details for the selected record:

- General, parent, or child records
- Sales docs or reponse forms in which the record is included
- Assemblies in which the record is included
- Proposals in which the record is inserted
- Internal document info



**Linked Document**

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

Relational Type: **Normal Document**

Search ID:

[Add Related Document](#) [Add Child Document](#) [Add Parent Document](#)

Document	Short Description	Language	Relation
 3256	Cloud Architecture		Unspecified 

**Sales Doc linked to this document**

None

**Assemblies linked to this document**

None

**Proposals linked to this document**

None

**Internal Document Info**

Search ID: 4861

Internal ID: 7eb1b993-d7cd-4d68-ae86-9ac09894f24c





7. Preview displays the full text-only content of the selected record, and includes the ability to:

- Download the record document in its native format
- Download the record document as a PDF
- Download the record document as an image

[Download File](#) [Download as PDF](#) [Download as Image Preview](#)

Do you have Cloud topology, architecture, connectivity diagrams and corresponding ACLs available for client inspection?

Proposal Software incorporates a hybrid VM/physical environment, all hosted within NaviSite's NaviCloud Sphere. VM web servers are used in conjunction with physical SQL servers and NAS for storage. Each client is assigned a domain account via Windows AD, where each app pool, website, NAS storage, and SQL database are specific to that client. Only designated Proposal Software administrators have access to create these domain accounts. A single-tenant SQL database is secured with each client's domain account. Direct access to NaviSite servers is not available to clients.

Security is controlled using NaviSite's NaviCloud control panel, including firewalls, ports, etc.

Please click on the following link to download additional information:

[PMAPS WebPro Workflow and Network Diagrams](#)

## Filter and Sort Results

Apply filters to search results using any column that displays the funnel button.

### Filter Results

#### Auto Filter

To quickly filter results on a single value, follow the steps below:

1. Choose a column to filter.
2. View a value in that column and right-mouse click on it.

**Search ID: 5353** Viewing 1 to 25 of 107 rows << >>

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [Clear Filters](#) [Modify Filters](#) [Modify Columns](#)

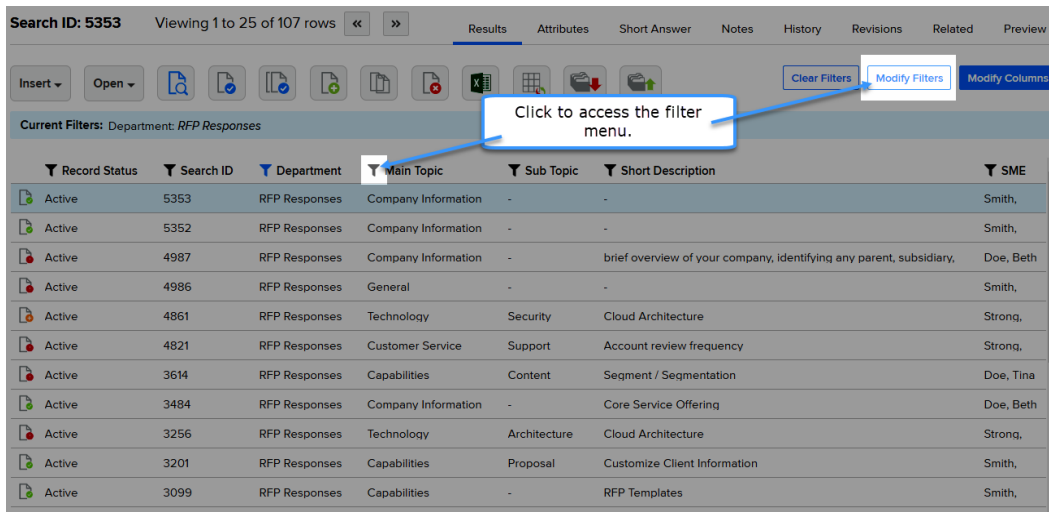
Current Filters: Department: RFP Responses

Record Status	Search ID	Department	Main Topic	Sub Topic	SME	
Active	5353	RFP Responses	Company Information	-	Smith,	
Active	5352	RFP Responses	Company Information	-	Smith,	
Active	4987	RFP Responses	Company Information	brief overview of your company, identifying any parent, subsidiary,	Doe, Beth	
Active	4986	RFP Responses	General	-	Smith,	
Active	4861	RFP Responses	Technology	Security	Cloud Architecture	Strong,
Active	4821	RFP Responses	Customer Service	Support	Account review frequency	Strong,
Active	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	Doe, Tina
Active	3484	RFP Responses	Company Information	-	Core Service Offering	Doe, Beth
Active	3256	RFP Responses	Technology	Architecture	Cloud Architecture	Strong,
Active	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	Smith,
Active	3099	RFP Responses	Capabilities	-	RFP Templates	Smith,



## Manual Filter

To apply one or more filters, click the [Modify Filters](#) button, or click on the funnel  next to the column heading you'd like to use to filter.



Search ID: 5353 Viewing 1 to 25 of 107 rows

Results Attributes Short Answer Notes History Revisions Related Preview

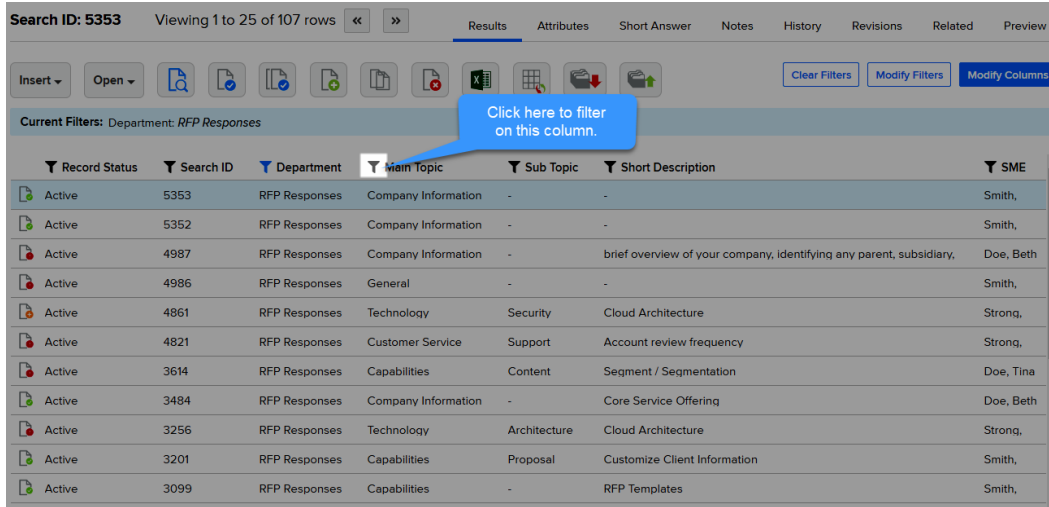
Insert Open [Icons] Clear Filters Modify Filters Modify Columns

Current Filters: Department: RFP Responses

Click to access the filter menu.

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME
Active	5353	RFP Responses	Company Information	-	-	Smith,
Active	5352	RFP Responses	Company Information	-	-	Smith,
Active	4987	RFP Responses	Company Information	-	brief overview of your company, identifying any parent, subsidiary,	Doe, Beth
Active	4986	RFP Responses	General	-	-	Smith,
Active	4861	RFP Responses	Technology	Security	Cloud Architecture	Strong,
Active	4821	RFP Responses	Customer Service	Support	Account review frequency	Strong,
Active	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	Doe, Tina
Active	3484	RFP Responses	Company Information	-	Core Service Offering	Doe, Beth
Active	3256	RFP Responses	Technology	Architecture	Cloud Architecture	Strong,
Active	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	Smith,
Active	3099	RFP Responses	Capabilities	-	RFP Templates	Smith,

1. Choose a column to filter.
2. Click on the funnel in that column header.



Search ID: 5353 Viewing 1 to 25 of 107 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open [Icons] Clear Filters Modify Filters Modify Columns

Current Filters: Department: RFP Responses

Click here to filter on this column.

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME
Active	5353	RFP Responses	Company Information	-	-	Smith,
Active	5352	RFP Responses	Company Information	-	-	Smith,
Active	4987	RFP Responses	Company Information	-	brief overview of your company, identifying any parent, subsidiary,	Doe, Beth
Active	4986	RFP Responses	General	-	-	Smith,
Active	4861	RFP Responses	Technology	Security	Cloud Architecture	Strong,
Active	4821	RFP Responses	Customer Service	Support	Account review frequency	Strong,
Active	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	Doe, Tina
Active	3484	RFP Responses	Company Information	-	Core Service Offering	Doe, Beth
Active	3256	RFP Responses	Technology	Architecture	Cloud Architecture	Strong,
Active	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	Smith,
Active	3099	RFP Responses	Capabilities	-	RFP Templates	Smith,



3. Select one or more values by checking the appropriate boxes then click [Apply](#).

The WebPro Filters dialog box has a title bar with a close button. Below the title bar is a section labeled "Add new filter:" with a dropdown menu. The main area is divided into two panes. The left pane has a tree view with "Department" and "Main Topic" selected. The right pane has a table with filter options. At the top of the right pane are links: "Uncheck All", "Check All", "Show All Options", and "Remove This Filter". The table has two columns: "Name" and "Count".

Name	Count
<input type="checkbox"/> Capabilities	40
<input checked="" type="checkbox"/> Company Information	18
<input type="checkbox"/> Customer Service	8
<input checked="" type="checkbox"/> General	1
<input type="checkbox"/> Implementation & Training	14
<input type="checkbox"/> Technology	26

At the bottom right of the dialog are "Apply" and "Cancel" buttons. A mouse cursor is pointing at the "Apply" button.

#### TIPS

- To add another field filter, select another field from the [Add new filter](#) dropdown.

## Multiple Fields

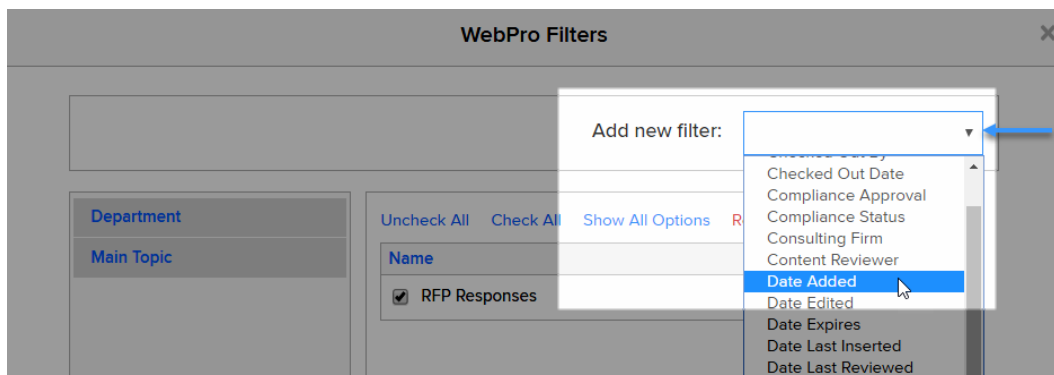
1. Click on the [Modify Filters](#) button.

The screenshot shows the application interface with a search bar at the top left displaying "Search ID: 5353" and "Viewing 1 to 25 of 107 rows". Below the search bar is a toolbar with various icons. A blue callout bubble points to the "Modify Filters" button in the toolbar, with the text "Click here to access the filter menu." The main area displays a table of RFP Responses. The table has columns: Record Status, Search ID, Department, Main Topic, Sub Topic, Short Description, and SME. The current filter is "Department: RFP Responses".

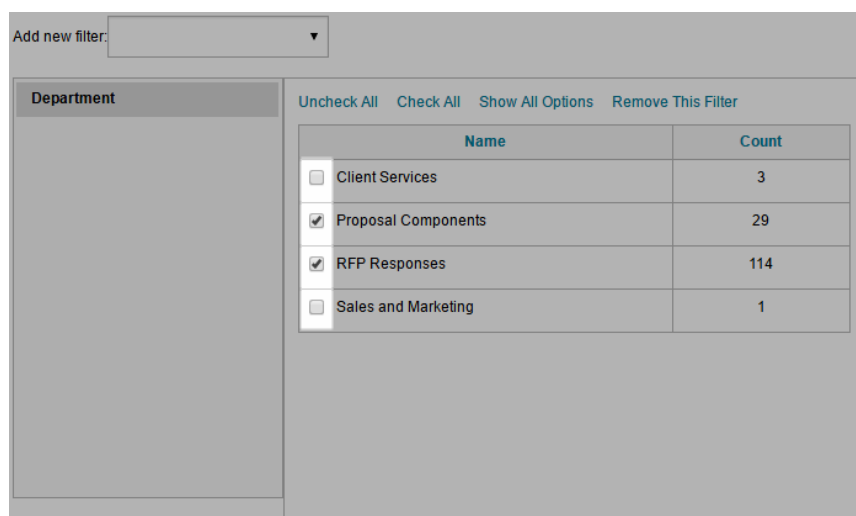
Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME
Active	5353	RFP Responses	Company Information	-	-	Smith,
Active	5352	RFP Responses	Company Information	-	-	Smith,
Active	4987	RFP Responses	Company Information	-	brief overview of your company, identifying any parent, subsidiary,	Doe, Beth
Active	4986	RFP Responses	General	-	-	Smith,
Active	4861	RFP Responses	Technology	Security	Cloud Architecture	Strong,
Active	4821	RFP Responses	Customer Service	Support	Account review frequency	Strong,
Active	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	Doe, Tina
Active	3484	RFP Responses	Company Information	-	Core Service Offering	Doe, Beth
Active	3256	RFP Responses	Technology	Architecture	Cloud Architecture	Strong,
Active	3201	RFP Responses	Capabilities	Proposal	Customize Client Information	Smith,
Active	3099	RFP Responses	Capabilities	-	RFP Templates	Smith,



2. Select the field to use as a filter from the [Add new filter](#) dropdown.

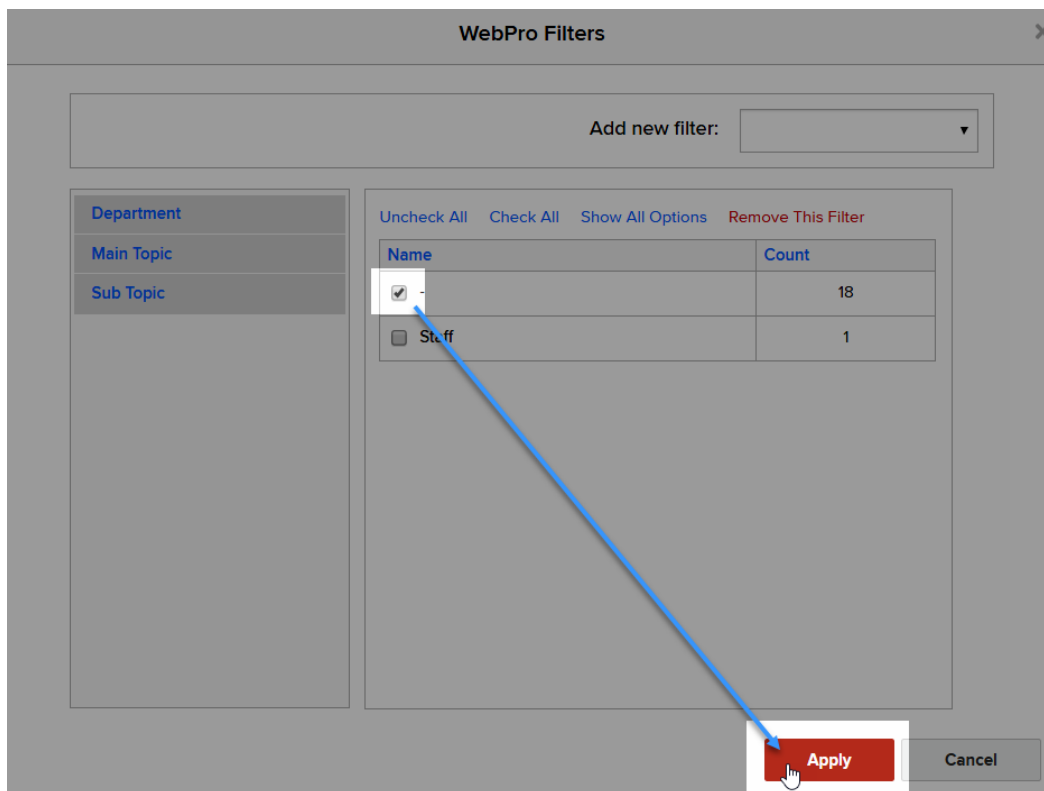


3. Check the boxes next to the values for the filter.






5. Make additional selections if desired, and then click [Apply](#).

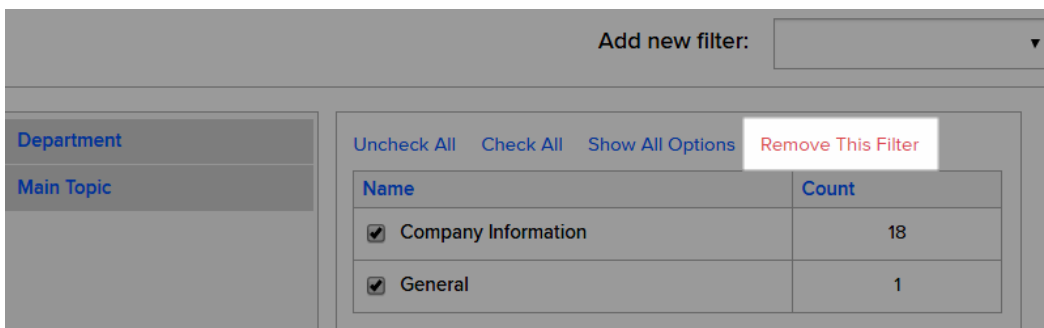


## Clear Filters

A blue funnel  button indicates a filter is in place on that column.

## Remove a Single Filter

1. Click on the filter button  and click [Remove This Filter](#).





## Remove All Filters

1. To remove all filters, click the [Clear Filters](#) button.

The screenshot shows the top of the application window. At the top left, it says 'Search ID: 5353' and 'Viewing all 19 rows'. Below this is a toolbar with various icons. A blue callout bubble points to the 'Clear Filters' button, with the text 'Click to remove all filters.' The 'Current Filters' section shows 'Department: RFP Responses, Main Topic: Company Information, General'. Below this is a table with columns: Record Status, Search ID, Department, Main Topic, Sub Topic, Short Description, and SME. The first two rows are visible, both with 'Active' status and 'RFP Responses' department.

## Sort Results

1. To sort results in ascending order, click on the column header label once.

The screenshot shows the application window with the 'Current Filters' section set to 'Department: RFP Responses, Main Topic: Capabilities'. A blue callout bubble points to the 'Sub Topic' column header, with the text 'Click here to sort.' The table below has columns: Record Status, Search ID, Department, Main Topic, Sub Topic, Short Description, and SME. The first row is highlighted, showing 'Active' status, '3099' Search ID, 'RFP Responses' Department, 'Capabilities' Main Topic, and 'RFP Templates' Short Description.

2. To sort descending, click on the column header label a second time.

The screenshot shows the application window with the 'Current Filters' section set to 'Department: RFP Responses, Main Topic: Capabilities'. A blue callout bubble points to the 'Sub Topic' column header, with the text 'Click to toggle sort order.' The table below has columns: Record Status, Search ID, Department, Main Topic, Sub Topic, Short Description, and SME. The first row is highlighted, showing 'Active' status, '2593' Search ID, 'RFP Responses' Department, 'Capabilities' Main Topic, and 'Filters / Attributes' Short Description.



## Reset Sort

1. To remove all sort orders, click the [Reset Sort](#) button.

Current Filters: Department: *RFP Responses*, Main Topic: *Capabilities*

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME
Active	2593	RFP Responses	Capabilities	Searching and Inserting	Filters / Attributes	Doe, Beth
Active	2477	RFP Responses	Capabilities	Searching and Inserting	Single Click Insertion	Doe, Beth
Active	2361	RFP Responses	Capabilities	Searching and Inserting	Search Algorithms	Doe, Beth
Active	2360	RFP Responses	Capabilities	Searching and Inserting	Search Overview	Doe, Beth
Active	400	RFP Responses	Capabilities	Searching and Inserting	Alerts, Notes, Comments	Doe, Beth
Active	337	RFP Responses	Capabilities	Searching and Inserting	Auto Populate RFP Responses	Doe, Beth
Active	90	RFP Responses	Capabilities	Searching and Inserting	Use of Keywords	Doe, Beth
Active	2340	RFP Responses	Capabilities	Reports & Tracking	Reports Overview	Doe, Tina
Active	332	RFP Responses	Capabilities	Reports & Tracking	Tracking Proposal Status	Doe, Tina
Active	3201	RFP Responses	Capabilities	Proposal Creation	Customize Client Information	Smith, Peter
Active	3094	RFP Responses	Capabilities	Proposal Creation	Dashboard Overview	Smith, Peter

## Search Options

### Save Search

[Save Search](#) allows you to create a favorite that can be repeated in the future. When you create a new saved search, it includes any text in the search text box, search options, filters, and sort order. To create a saved search, follow the steps below:

1. Click the [Save Search](#) link.

Search ID: 3099 Viewing 1 to 10 of 40 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Current Filters: Department: *RFP Responses*, Main Topic: *Capabilities*

Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	Review Cycle	Times Inserted	File Type	Date Last Revi
3099	RFP Responses	Capabilities	-	RFP Templates	10/10/2019	Smith,	Annually	16	W	10/10/2018
521	RFP Responses	Capabilities	Administrative &	Role-Based Security	3/31/2018	Doe, Beth	Annually	60	W	3/21/2016
391	RFP Responses	Capabilities	Administrative &	Chinese Wall / Restrict	3/31/2018	Doe, Beth	Annually	11	W	3/21/2016
26	RFP Responses	Capabilities	Calendar	Calendar Functionality	10/10/2019	Smith,	Annually	11	W	10/10/2018
735	RFP Responses	Capabilities	Collaboration	Collaboration Overview	10/10/2019	Smith,	Annually	34	W	10/10/2018
200	RFP Responses	Capabilities	Collaboration	Multiple Users	10/10/2019	Smith,	Annually	18	W	10/10/2018
3614	RFP Responses	Capabilities	Content	Segment /	4/18/2017	Doe, Tina	Annually	11	W	4/18/2016
2592	RFP Responses	Capabilities	Content	Content Repository	3/31/2018	Doe, Tina	Annually	17	W	3/21/2016
2493	RFP Responses	Capabilities	Content	Expiration Dates	3/31/2018	Doe, Tina	Annually	11	W	3/21/2016
2372	RFP Responses	Capabilities	Content	Revisions / Audit	3/31/2018	Doe, Tina	Annually	9	W	3/21/2016



2. Enter a name for your favorite, and then click **Ok**. Optional: share the saved search by checking **Make available to all users**.

## Open Search

**Open Search** provides quick access to your saved searches and those others made available to all users. To open a saved search, follow the steps below:

1. Click the **Open Search** link.

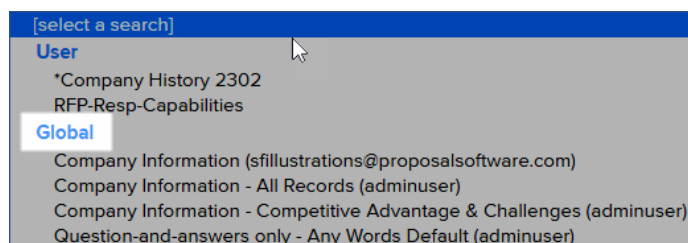
Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	Review Cycle	Times Inserted	File Type	Date Last Review
4987	RFP Responses	Company	-	brief overview of your	3/31/2016	Doe, Beth	Historical	19	Word Document	5/13/2016
4986	RFP Responses	General	-	-	4/16/2017	Smith,	Quarterly	3	Word Document	1/16/2017
4861	RFP Responses	Technology	Security	Cloud Architecture	3/21/2016	Strong,	Per Bid	4	Word Document	1/16/2017
4860	Sales and	Sales	-	FundFire A Financial	3/31/2016	Smith,	Historical	-	Word Document	-
4821	RFP Responses	Customer	Support	Account review	3/31/2018	Strong,	Annually	3	Word Document	3/21/2016
3614	RFP Responses	Capabilities	Content	Segment /	4/18/2017	Doe, Tina	Annually	11	Word Document	4/18/2016
3484	RFP Responses	Company	-	Core Service Offering	3/31/2018	Doe, Beth	Historical	9	Word Document	3/21/2016
3256	RFP Responses	Technology	Architecture	Cloud Architecture	3/31/2018	Strong,	Annually	30	Word Document	3/21/2016
3201	RFP Responses	Capabilities	Proposal	Customize Client	10/10/2019	Smith,	Annually	12	Word Document	10/10/2018
3099	RFP Responses	Capabilities	-	RFP Templates	10/10/2019	Smith,	Annually	16	Word Document	10/10/2018

Saved searches that you created will show under **User**.

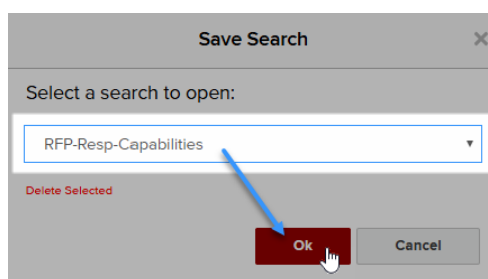




Shared searches created by others will show under [Global](#).



2. Select a saved search from the dropdown and click [Ok](#).



## Delete a Saved Search

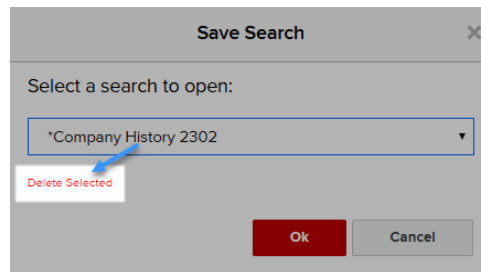
Users can only delete saved searches they created under their user account. To delete a saved search, follow the steps below:

1. Click the [Open Search](#) link.

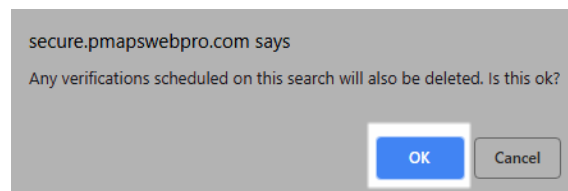
Search ID	Department	Main Topic	Sub Topic	Short Description	Date Expires	SME	Review Cycle	Times Inserted	File Type	Date Last Review
4987	RFP Responses	Company	-	brief overview of your	3/31/2016	Doe, Beth	Historical	19	Word document	5/13/2016
4986	RFP Responses	General	-	-	4/16/2017	Smith,	Quarterly	3	Word document	1/16/2017
4861	RFP Responses	Technology	Security	Cloud Architecture	3/21/2016	Strong,	Per Bid	4	Word document	1/16/2017
4860	Sales and	Sales	-	FundFire A Financial	3/31/2016	Smith,	Historical	-	Word document	-
4821	RFP Responses	Customer	Support	Account review	3/31/2018	Strong,	Annually	3	Word document	3/21/2016
3614	RFP Responses	Capabilities	Content	Segment /	4/18/2017	Doe, Tina	Annually	11	Word document	4/18/2016
3484	RFP Responses	Company	-	Core Service Offering	3/31/2018	Doe, Beth	Historical	9	Word document	3/21/2016
3256	RFP Responses	Technology	Architecture	Cloud Architecture	3/31/2018	Strong,	Annually	30	Word document	3/21/2016
3201	RFP Responses	Capabilities	Proposal	Customize Client	10/10/2019	Smith,	Annually	12	Word document	10/10/2018
3099	RFP Responses	Capabilities	-	RFP Templates	10/10/2019	Smith,	Annually	16	Word document	10/10/2018



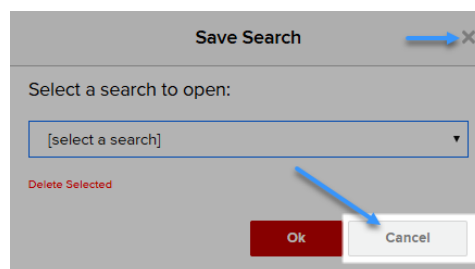
2. Select the saved search to delete from the dropdown and click [Delete Selected](#).



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



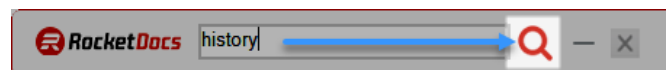
4. To close the [Save Search](#) window, click [Cancel](#) or click the close button.



## Search

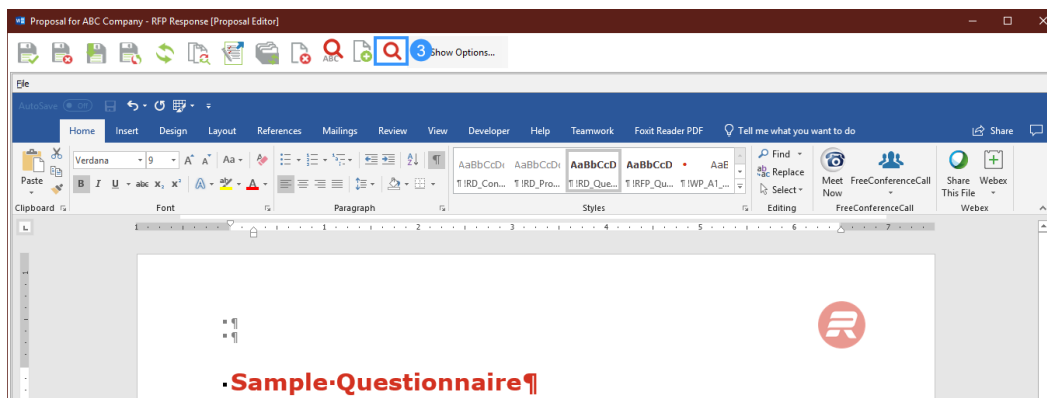
There are several ways to search for text:

- From the viewer toolbar by entering text in the box, and then click the magnifying glass

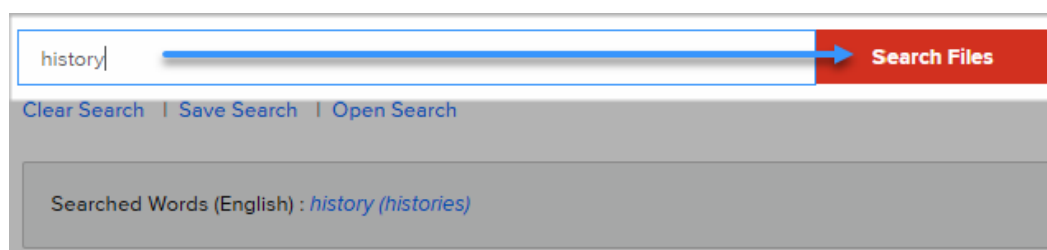




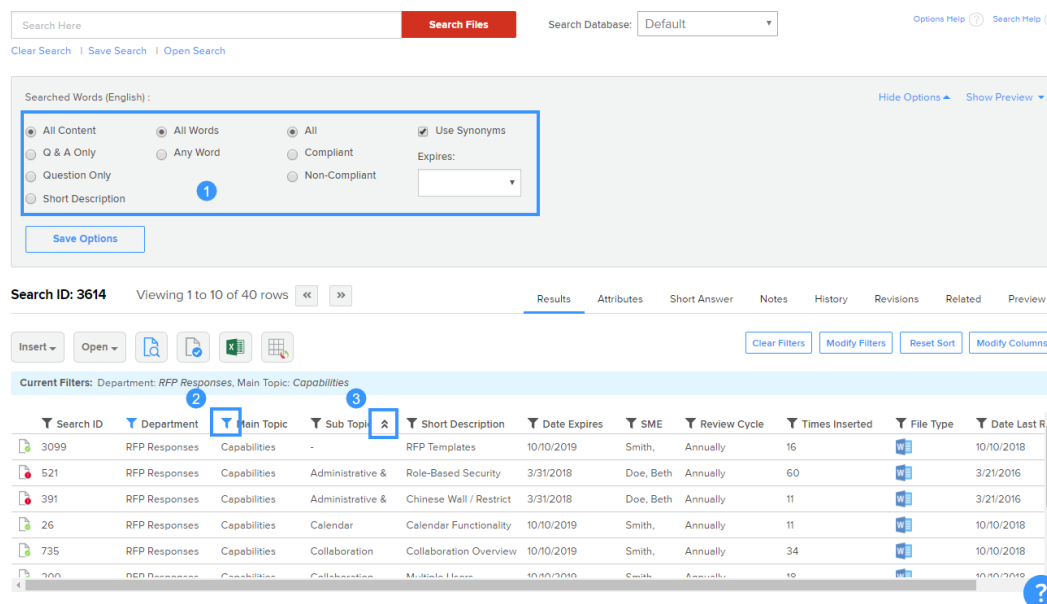
- From the [Proposal Editor](#) window by selecting text to search, and then click [Search WebPro](#) (3).



- From [Content](#) > [Home](#) enter or paste text in the search text box, and then click [Search Files](#)



- From [Content](#) > [Home](#) leave the search text box empty and apply options (1), filters (2), and sorting (3)





## Insert Content

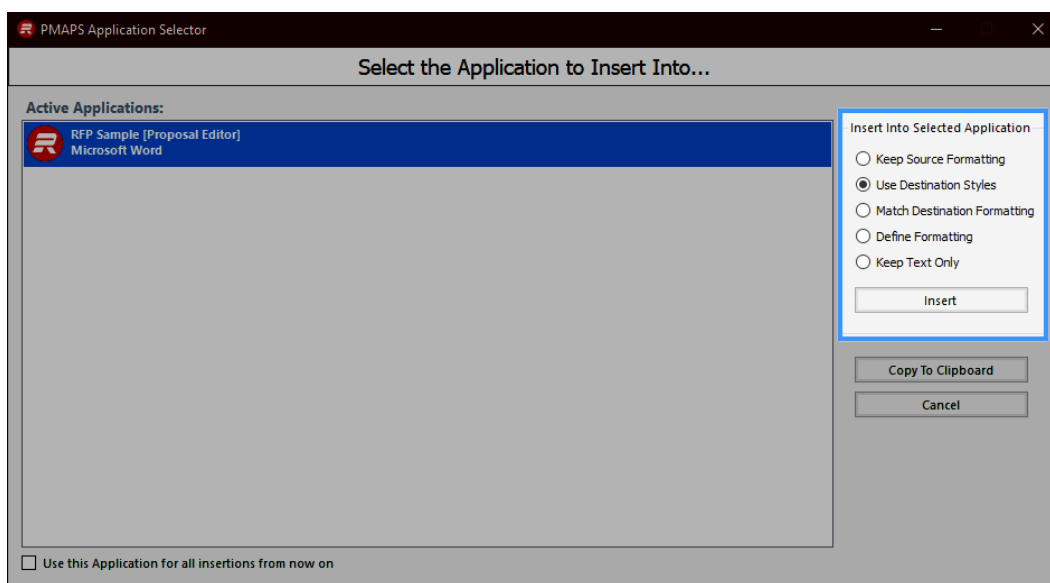
There are several ways to insert records:

- Insert Full
- Insert Selected
- Insert Short Answer

## Application Selector

The [PMAPS Application Selector](#) facilitates usage of content by allowing the user to choose formatting options, as well as insert into any saved Microsoft Office document that is open.

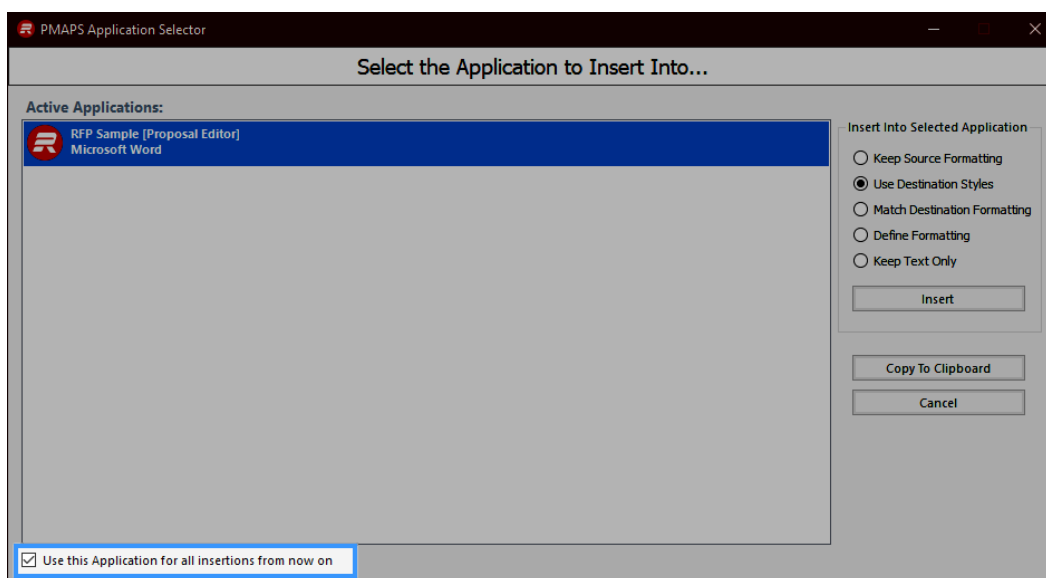
1. Under [Insert Into Selected Application](#), select a formatting option. These options use Microsoft Word paste commands. Following are definitions of each option, as defined by Microsoft®. We recommend [Use Destination Styles](#) when using custom style names or when the Microsoft default styles have been modified to the user's company branding guidelines.



- [Keep Source Formatting](#)—This option retains the look of the copied text by assigning the Normal style to the text and applying direct formatting. Direct formatting includes characteristics such as font size, italics, or other formatting to mimic the style definition of the copied text.
- [Use Destination Styles](#)—This option retains the style name that is associated with the copied text, but it uses the style definition of the document where the text is being inserted. For example, you copy Heading 1 text from one document to another. In one document, Heading 1 is defined as Arial bold, 14-point, and in the document where you are pasting the text, Heading 1 is defined as Cambria bold, 16-point. When you use the Use Destination Styles option, the pasted text uses Heading 1 style, Cambria bold, 16-point.

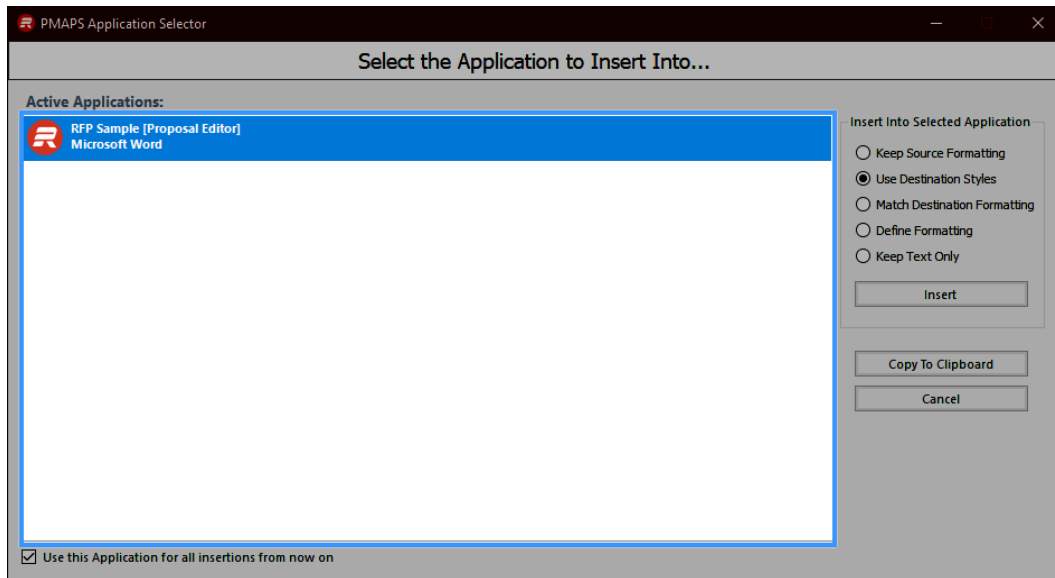


- **Match Destination Formatting**—This option discards the style definition and most formatting that was applied directly to the copied text, but it retains formatting that is considered emphasis, such as bold and italic, when it is applied to only a portion of the selection. The text takes on the style definition in the document where it is being pasted.
  - **Define Formatting**—Brings up a window that allows the user to define the font, size, color, and other formatting options including indentation. If you choose this option you will have to make selections on every insert.
  - **Kept Text Only**—This option discards all formatting and non-text elements such as pictures or tables. The text takes on the style characteristics of the paragraph where it is inserted and takes on any direct formatting or character style properties of text that immediately precedes the cursor when the text is pasted. Graphical elements are discarded, and tables are converted to a series of paragraphs.
2. If desired, check the box to remember the selected application. This option saves a huge amount of time when working on the same document for multiple answers.

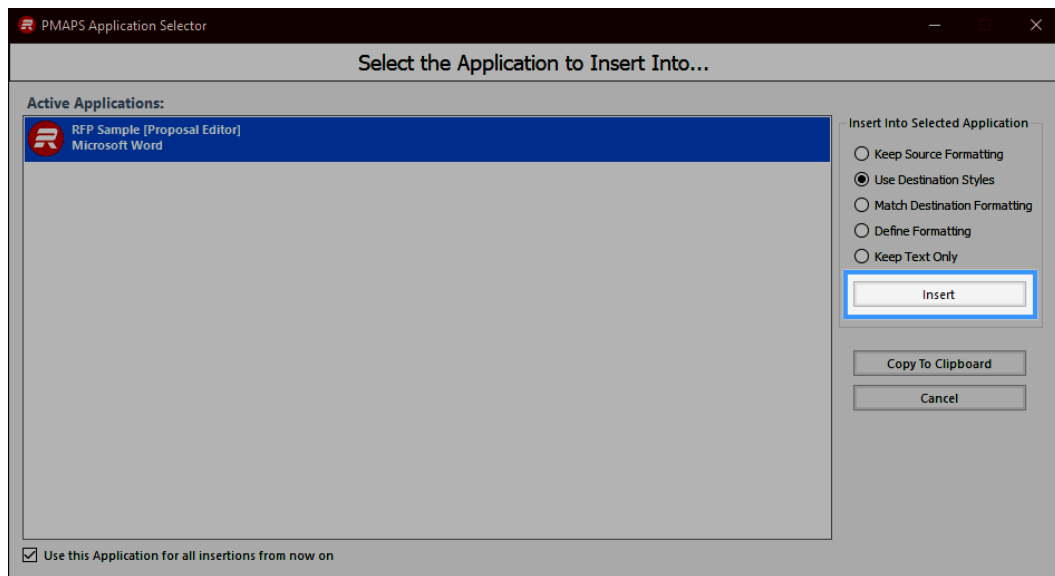




3. Choose the **Active Application** as the destination for the insert. This can be any saved Microsoft Office document that is open on the computer. To refresh the application selector because you have opened other documents, close the viewer and repeat the insert.



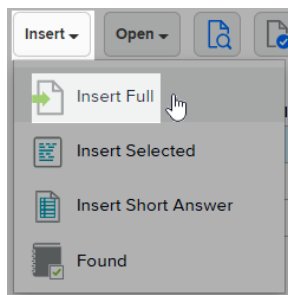
4. Ensure that the cursor is where the content should be inserted.
5. Click the **Insert** icon.





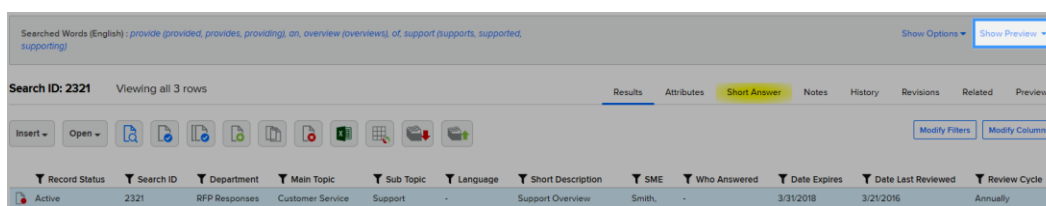
## Insert Full

1. Select the answer, click the [Insert](#) dropdown and choose [Insert Full](#).

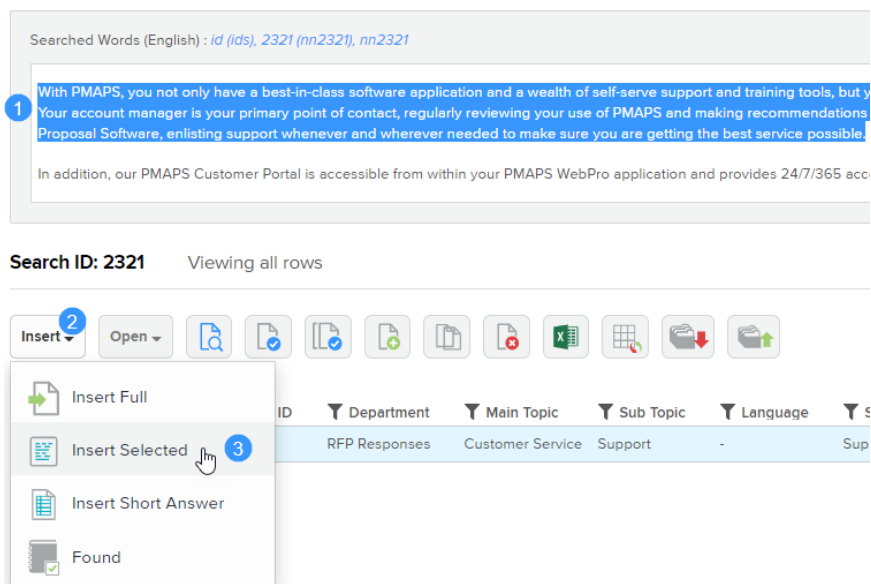


## Insert Selected Text

1. Select the answer to use.
2. Click [Show Preview](#) to expand the preview window (if not open)



3. Select the text to insert, click the [Insert](#) dropdown and choose [Insert Selected](#).

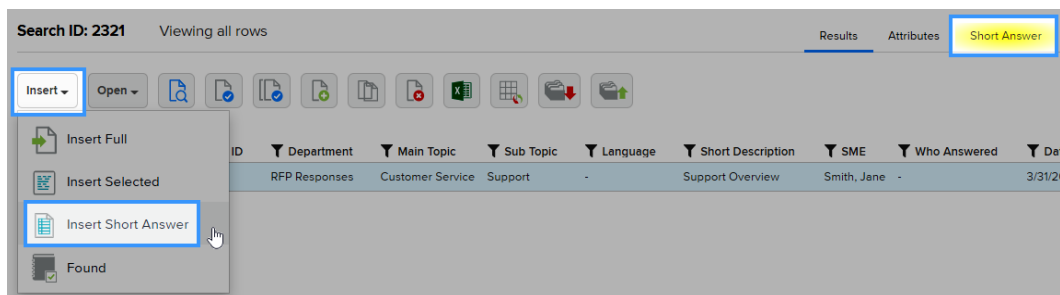




## Insert Short Answer

This option is only available if the Short Answer tab is populated for the content record selected.

1. Select the record that contains the [Short Answer](#) to use, and then click [Insert Short Answer](#).



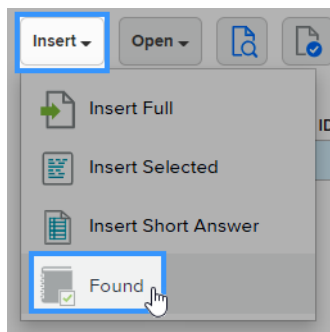
### TIPS

- Use the [Copy to Clipboard](#) option from the [Application Selector](#) to copy the short answer to your clipboard and paste it into a web form.

## Found

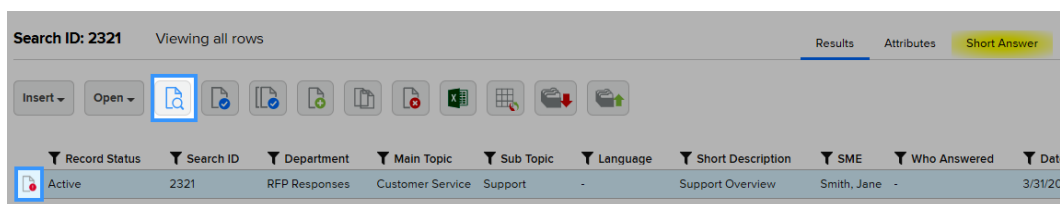
The [Found](#) option allows the user to add record usage without using any of the insert options.

1. Select the record that contains the content used, click the [Insert](#) menu and then click [Found](#).



## Insert from Document

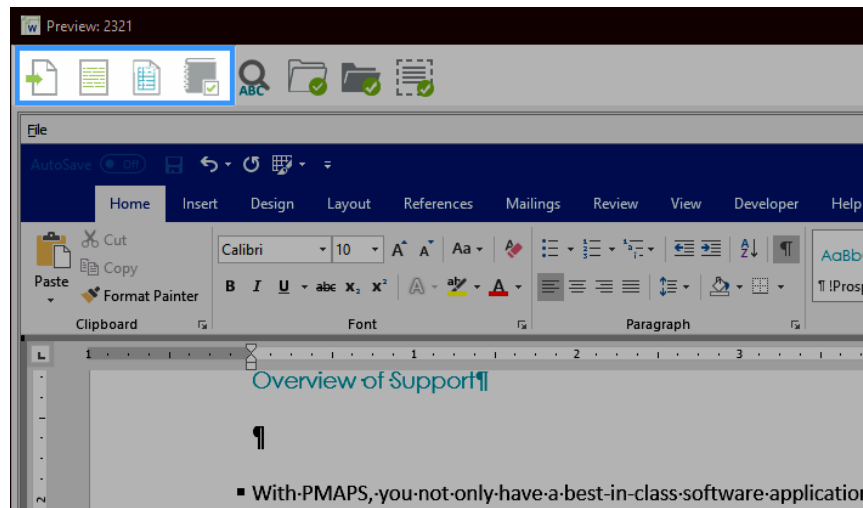
1. View the record that contains the content to use.







2. Click the icon for the insert type (Insert Full, Insert Selected, Insert Short Answer, Found).



- To insert the entire answer, click the [Insert Full](#) button.



- To insert a selected portion of the answer, click the [Insert Selected Text](#) button.



- To insert the short answer, click the [Insert Short Answer](#) button.



- To "use" the record, click the [Mark Document as 'Found'](#) button.





## Insert Word Replacements

The [Run Word Replacements](#) feature works in any document that open from the [Proposals](#) home page when using [Insert Full](#) or [Insert Selected Text](#). Codes are replaced with the corresponding field data or text upon insertion. The code replacement list is managed by the administrator.

1. Select the record from the [Results](#), click the Open menu and choose [Edit Document](#). If you do not see the [Edit Document](#) option, you do not have permission to edit content records.

Search ID: 3484 Viewing 1 to 10 of 105 rows

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open Download Document Download Document (as PDF) View Document in Browser as PDF Image Preview Send link to document.

Main Topic	Sub Topic	Short Description	SME	Date Expires	Review Cycle
Company	-	brief overview of your company.	Doe, Beth	3/31/2016	Historical
General	-	-	Smith,	4/16/2017	Quarterly
Technology	Security	Cloud Architecture	Strong,	3/21/2016	Per Bid
Customer	Support	Account review frequency	Strong,	3/31/2018	Annually
Capabilities	Content	Segment / Segmentation	Doe, Tina	4/18/2017	Annually
Company	-	Core Service Offering	Doe, Beth	3/31/2018	Historical
Technology	Architecture	Cloud Architecture	Strong,	3/31/2018	Annually

2. Delete the text to replace with a code or place your cursor where you'd like to insert the code.

Company history & founder background.  
Provide a brief history of your organization.

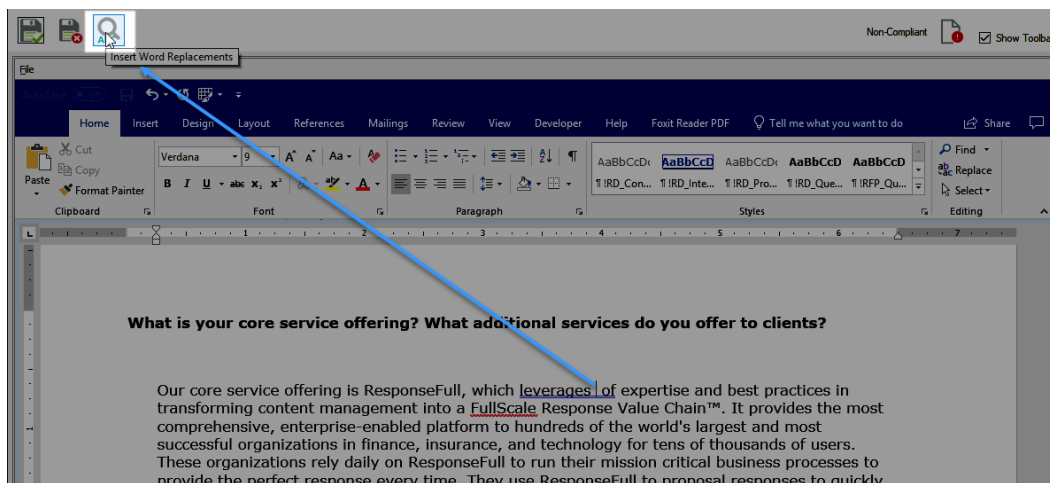
Our first solution was developed in 1994 in response to a Fortune 500 company's need to double proposal volume while holding headcount flat. Our prototype met these goals and since then, the Proposal Management and Production System (PMAPS®) has had more than 12 major upgrades largely driven by listening to, and working with the best proposal professionals who use our software every day.

In 2009, we launched PMAPS WebPro, an entirely web-based version of our successful client/server version of PMAPS. This broadens the technology platform choice and scalability options to meet any organization's proposal requirements and budget. PMAPS WebPro has spawned PMAPS Web Essentials, PMAPS WebPro Mobile and PMAPS Presentation Pro. The client/server version of PMAPS was retired on August 1, 2013, and represents the longest continuously supported proposal oriented software in history.

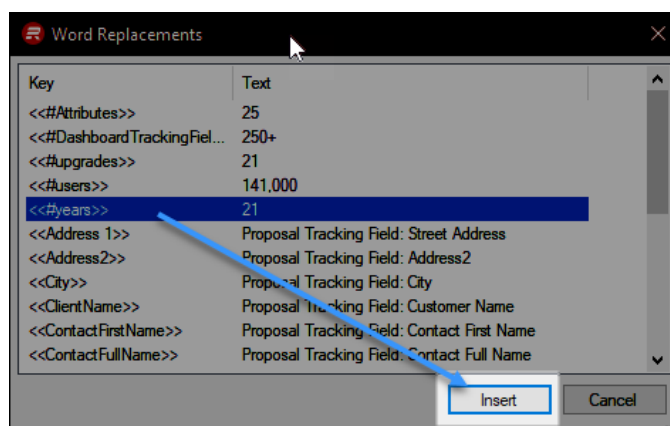
PMAPS provides a comprehensive, enterprise-enabled proposal management platform for hundreds of the world's largest and most successful financial services, asset



3. Make sure your cursor is where the code goes and then click the [Insert Word Replacements](#) icon.

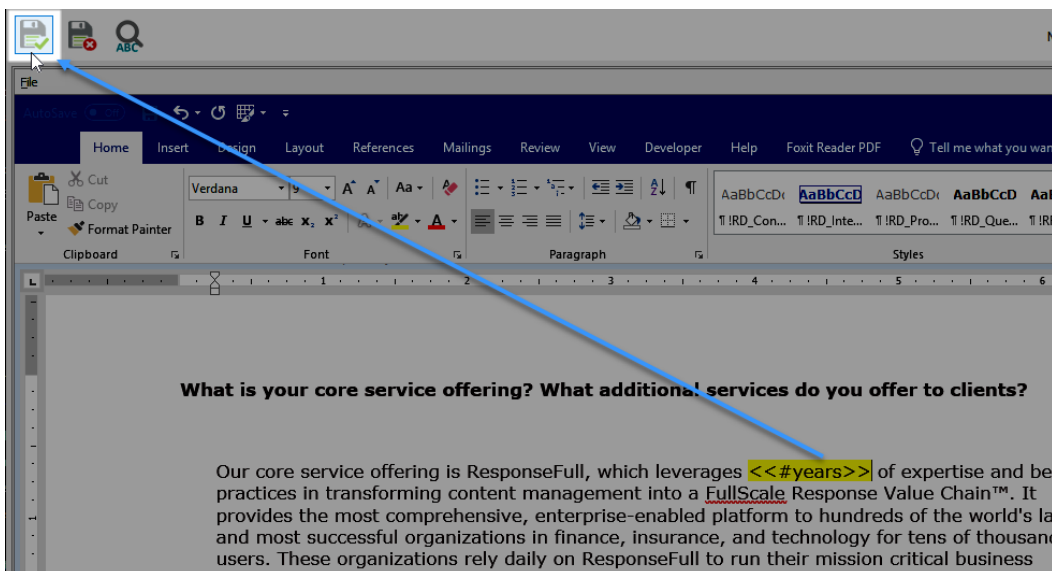


4. Select the appropriate code, and then click [Insert](#).





5. Review the text to ensure the spacing and formatting are as desired, and then click [Save](#).

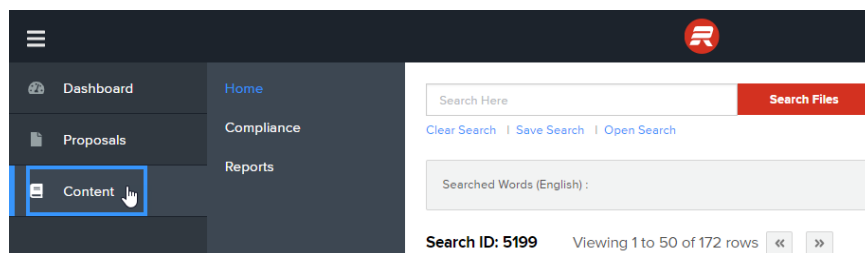


6. Close the record.



## Edit Record

1. Navigate to [Content > Home](#).





2. Select the record to edit. If you do not see the [Edit Document](#) option, you do not have permission to edit content records.
3. Click the [Open](#) menu and choose [Edit Document](#).

Search ID: 3484 Viewing 1 to 10 of 105 rows << >>

Results Attributes Short Answer Notes History Revisions Related Preview

Insert Open 2

Current Filter

- Edit Document 3
- Download Document
- Download Document (as PDF)
- View Document in Browser as PDF
- Image Preview
- Send link to document.

Main Topic	Sub Topic	Short Description	SME	Date Expires	Review Cycle
Company	-	brief overview of your company.	Doe, Beth	3/31/2016	Historical
General	-	-	Smith,	4/16/2017	Quarterly
Technology	Security	Cloud Architecture	Strong,	3/21/2016	Per Bid
Customer	Support	Account review frequency	Strong,	3/31/2018	Annually
Capabilities	Content	Segment / Segmentation	Doe, Tina	4/18/2017	Annually
Company 1	-	Core Service Offering	Doe, Beth	3/31/2018	Historical
Technology	Architecture	Cloud Architecture	Strong,	3/31/2018	Annually

#### TIPS

- If a record is checked out for compliance, do not make edits until after it's checked in because it will be overwritten when compliance is approved.
4. Make edits to the content and/or the short answer, click [Save](#), and then close the window.

WebPro: 3484

Non-Compliant 1 Show Toolbar

File

Home Insert Design Layout References Mailings Review View Developer Help Foxit Reader PDF Tell me

Paste Font Paragraph Styles Editing

Clipboard Font Paragraph Styles Editing

What is your core service offering? What additional services do you offer to clients?

1

Our core service offering is ResponseFull, which leverages decades of expertise and best practices in transforming content management into a FullScale Response Value Chain™. It provides the most comprehensive, enterprise-enabled platform to hundreds of the world's largest and most successful organizations in finance, insurance, and technology for tens of thousands of users. These organizations rely daily on ResponseFull to run their mission critical business processes to provide the perfect response every time. They use ResponseFull to proposal responses to quickly and effectively create structured and unstructured RFP responses, DDQs, security questionnaires, proposals, ad-hoc requests.

Short Answer

Our core service offering is ResponseFull, which leverages decades of expertise and best practices in transforming content management into a FullScale Response Value Chain™

2

C:\Users\Colleen Charland\AppData\Local\Temp\WebPro\TempDownloads\10768c7a-44e0-4dba-9622-ca38127c9fce\_0.docx



5. With the record still selected, click on the [Attributes](#) tab.

Search ID: 3484 Viewing 1 to 10 of 105 rows

Results **Attributes** Short Answer Notes History Revisions Related Preview

Insert Open [Icons]

Current Filters: Department: RFP Responses

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME	Date Expires	Review Cycle
Active	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent.	Doe, Beth	3/31/2016	Historical
Active	4986	RFP Responses	General	-	-	Smith,	4/16/2017	Quarterly
Active	4861	RFP Responses	Technology	Security	Cloud Architecture	Strong,	3/21/2016	Per Bid
Active	4821	RFP Responses	Customer	Support	Account review frequency	Strong,	3/31/2018	Annually
Active	3614	RFP Responses	Capabilities	Content	Segment / Segmentation	Doe, Tina	4/18/2017	Annually
Active	3484	RFP Responses	Company	-	Core Service Offering	Doe, Beth	3/31/2020	Annually
Active	3256	RFP Responses	Technology	Architecture	Cloud Architecture	Strong,	3/31/2018	Annually

6. Make appropriate attribute changes, and then click [Save](#).

Search ID: 3484 Viewing 1 to 10 of 105 rows

Results **Attributes** Short Answer Notes History Revisions Related Preview

Save Cancel Search Attributes Help Search Attributes Help

**Contacts**

SME: Doe, Beth

Who Answered:

Compliance Approval:

Content Reviewer:

**Record Review**

Review Cycle: Annually

Date Expires: 03/31/2020

Date Last Reviewed: 04/12/2019

**Record Category**

Record Status: Active

**Other Details**

Products: All Products

## Delete Document

1. Select the record to delete, and then click [Delete Document](#). If you don't see this button, you don't have permission to delete records.

Search ID: 5059 Viewing 1 to 100 of 147 rows

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

[Icons]

Times Inserted	Department	Main Topic	Sub Topic	Short Description	File Type	Doc Type	Date Expires	SME	Review Cycle
-	RFP Responses	General	-	Video provides a powerful way to help you prove your point.	W	Search	3/31/2017	Smith, Peter	Annually
-	RFP Responses	General	-	Video provides a powerful way to help you prove your point.	W	Search	5/13/2017	Smith, Peter	Annually
2	RFP Responses	General	-	Video provides a powerful way to help you prove your point.	W	Search	3/31/2017	Smith, Peter	Annually

2. Only one prompt will pop up to confirm the deletion and the delete cannot be undone. Click [OK](#) to proceed.

secure.pmapswebpro.com says:

Are you sure you want to delete this document?

OK Cancel



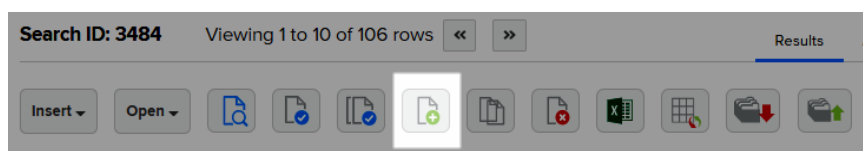
### TIPS

- Delete cannot be undone and a deleted document cannot be recovered. Exercise caution when deleting records. Use the Download Document option to download a copy before permanently deleting. Alternatively, mark a record as archived and then add a restriction to hide these records from users.

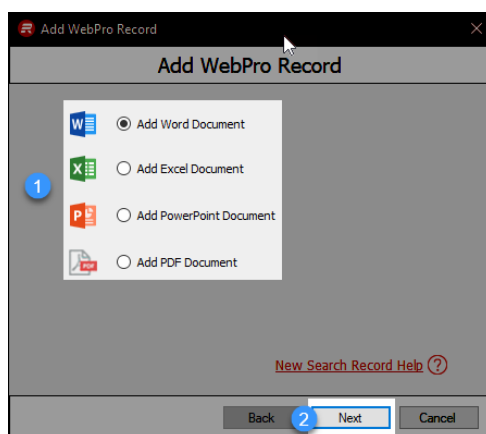
## Add Record

### Add Record from Search

1. Click [Add Record](#). If you don't see this button, you don't have permission to add content records.



2. Select the document type you would like to add, and then click [Next](#).

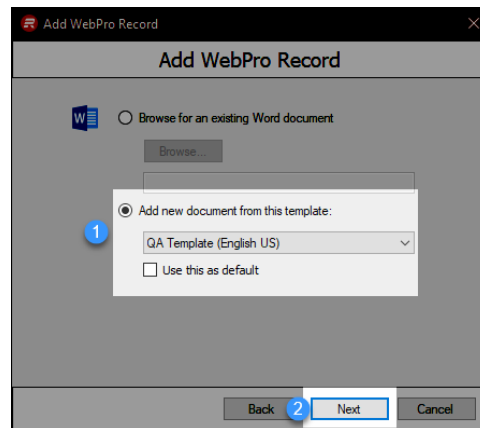


### TIPS

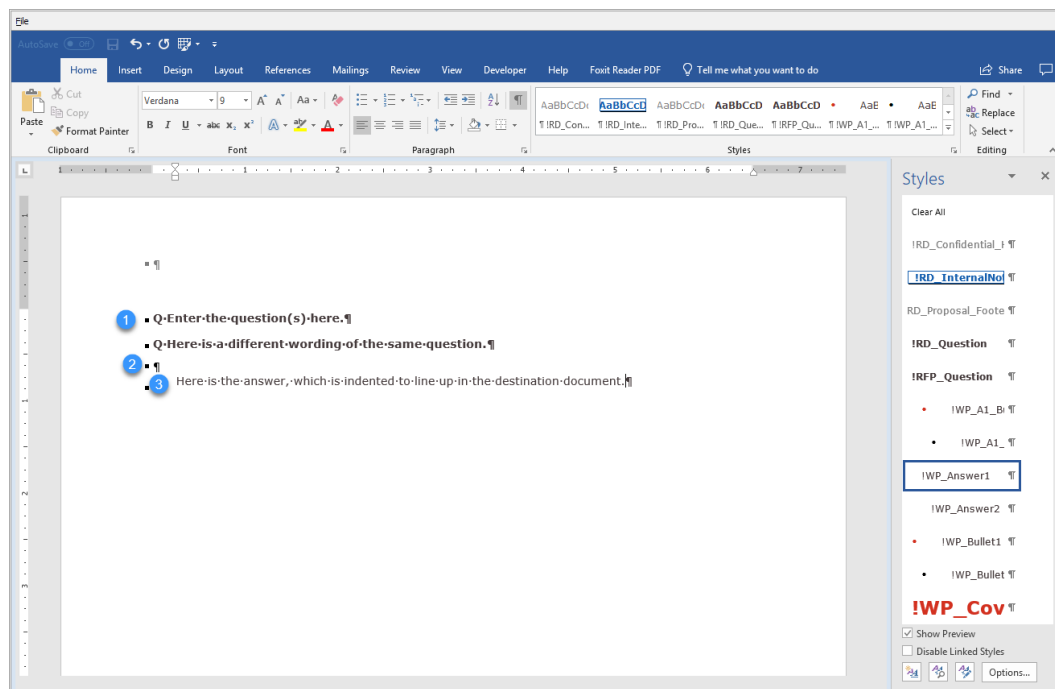
- When adding Word documents that are question-and-answer pairs, be sure there is one blank empty line (hard return) between the question and answer.
- When adding Word documents, the option is provided to use a style template. Use the template as instructed by the administrator to ensure consistency with brand guidelines as appropriate. If no template is selected, the document will be based off the local user's Normal.dotm Word instance.
- When adding Word documents that are question-and-answer pairs, be sure to check the [Q & A](#) checkbox on the [Attributes](#) tab.
- When adding documents that are not question-and-answer pairs, use the Browse option to quickly create the new record from an existing document.



3. If presented, choose a template, and then click [Next](#).



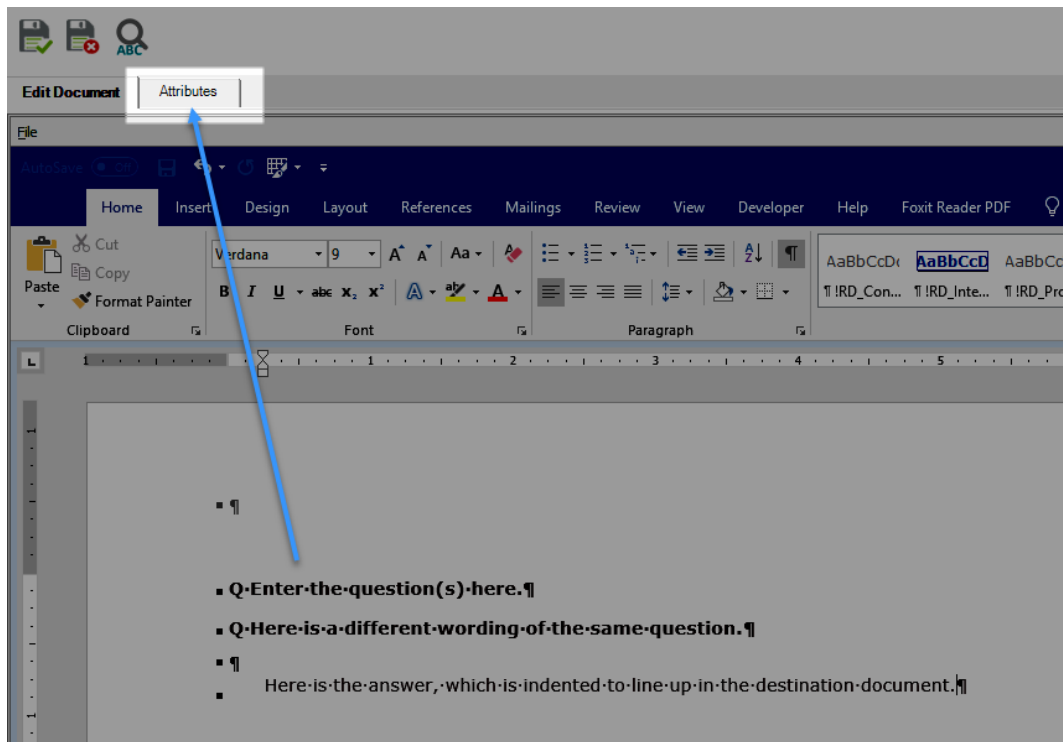
4. Input the content for the new record. Enter two hard returns after the question(s) and then input the response.







5. Go to the [Attributes](#) tab.



6. Select an [Attribute Group](#) to quickly prefill multiple fields, or manually make selections, and then click [Save](#).

1 Attribute Group: Company Information

2 Contacts

SME: Smith, Cindy

Who Answered:

Compliance Approval:

Content Reviewer:

3 Record Review

Review Cycle: Annually

Date Expires: 12/31/2019

Date Last Reviewed: 4/12/2019

4 Record Category

Record Status: Active

Department: RFP Responses

Main Topic: Company Information

Sub Topic:

Short Description:

Language:

Source:

Region:

Prompt on Insert:

5 Other Details

Products:

- ☐ All Products
- ☐ PMAPS Presentation Pro
- ☒ PMAPS Web Essentials
- ☒ PMAPS WebPro

Version:

Sales Contact:

Consulting Firm:

Original Proposal:

6 Internal Attributes

Q & A: ☒



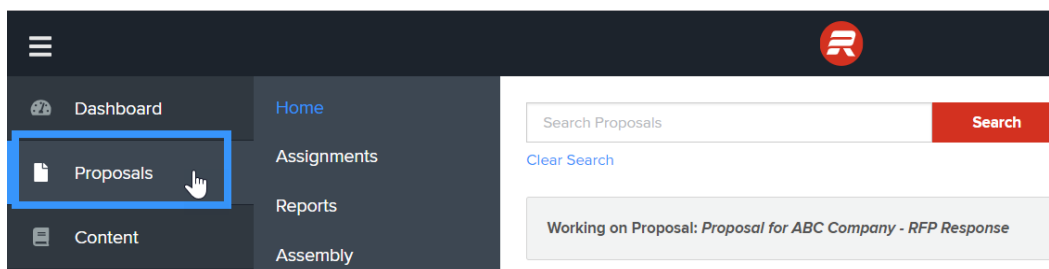
7. To save the record without requesting compliance, click [Save](#) at the prompt. To request compliance, refer to the [Compliance](#) user guide.

The image shows a 'Save Options' dialog box from RocketDocs. It has a title bar with the RocketDocs logo and a close button. The main area contains three radio buttons for saving options: 'Save Without Requesting Compliance' (selected), 'Save To Compliance Central', and 'Save To Compliance Central and Request Compliance Immediately (SME will be notified)'. Below these are checkboxes for 'Overwrite existing Q & A' (checked), 'Create Child Relationships', and 'Save an iCalendar Event'. There is also a 'Due Date' field with a calendar icon. At the bottom, there is a 'Notes' text area and two buttons: 'Save' and 'Cancel'. A blue arrow points from the top-left corner of the dialog box to the 'Save' button.

## Add Q&A (Smart Add)

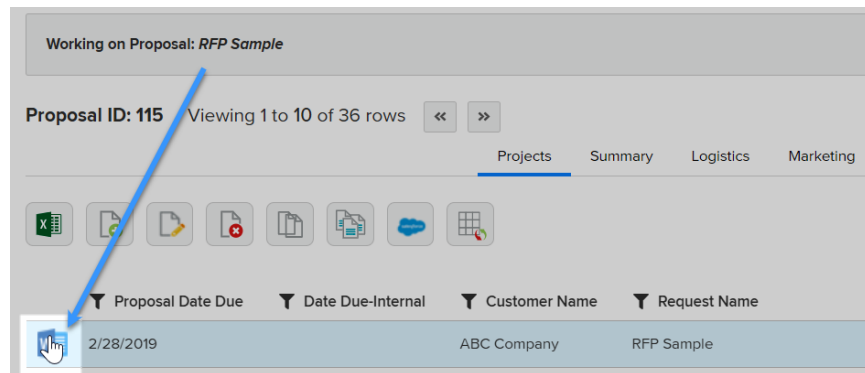
When working on an RFP document from the dashboard, users quickly add a new search record using the Add Q&A option.

1. From the main menu, click [Proposals](#).

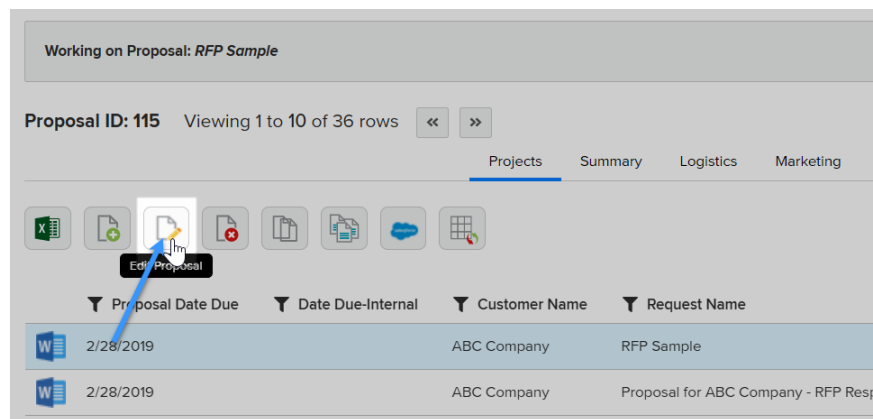




2. Click the file type button for the proposal record.

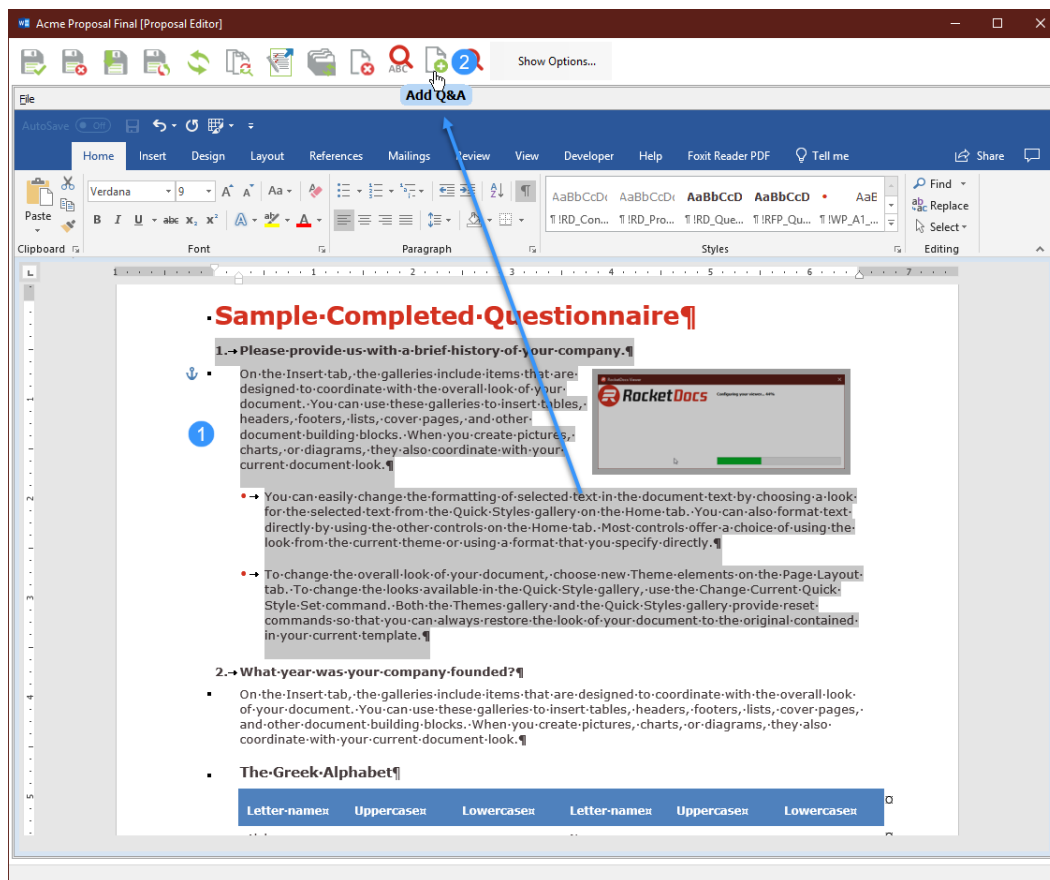


Or, select the proposal (row will have a light blue background), and click [Edit Proposal](#).



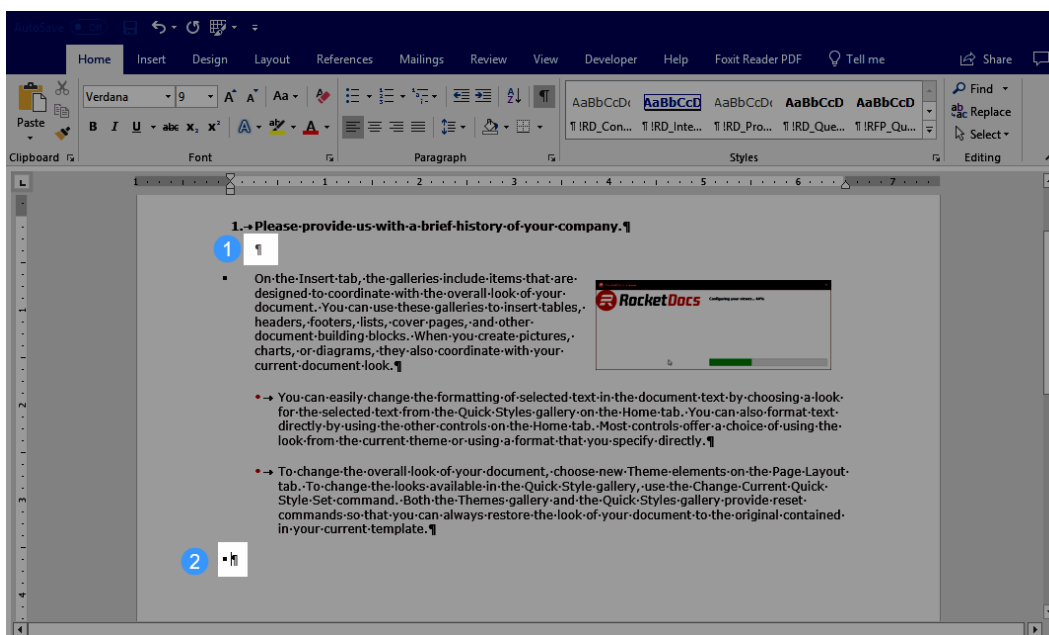


3. In the **Proposal Editor** window, select (highlight with the cursor) the content to add, and then click the **Add Q&A** button.

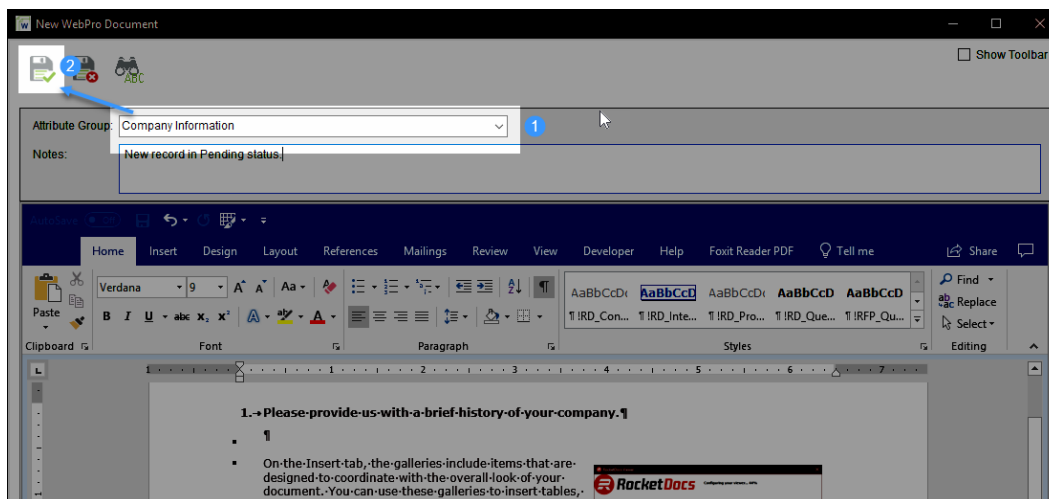




4. If the record is a question-and-answer pair, ensure there is a blank hard return (empty line) between the question and answer, and remove the blank line at the end of the answer.



5. Select an [Attribute Group](#) from the picklist. If no attribute group is selected, the record will be added without any attributes. The record can't be added without selecting an attribute group.



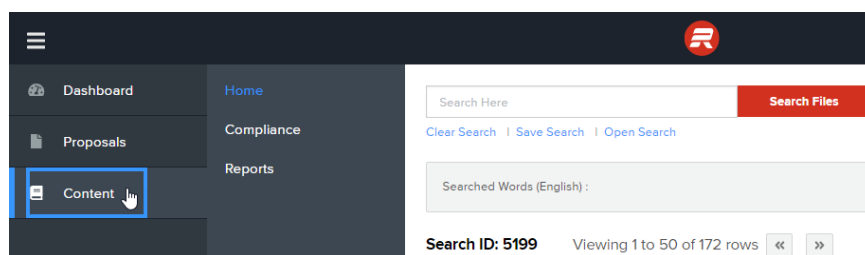


# Download/Checkout and Upload Docs

## Download/Checkout

Another option for updating content records is to check them out using the Download option and check them in using the Upload option. This option downloads a copy of each record as a separate document. This option is ideal if you want to entirely replace a document with another one (e.g., a PDF file that has a new version or a content record that has new branding). The downloaded document's file name is the [Search ID](#) number followed by the text in the [Summary](#) field (if any). To check in these documents, simply ensure you name the file the same file name as the original download.

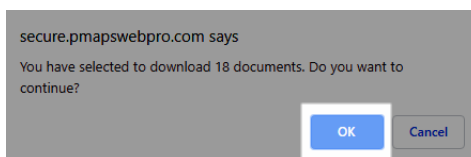
1. Navigate to [Content > Home](#).



2. Filter and/or search for the records to download, and then click the [Download/Checkout](#) button.

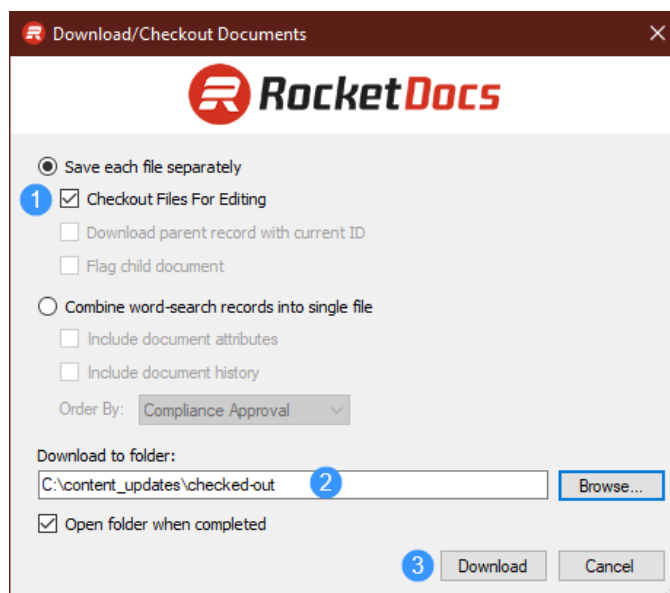
Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME	Date Expires	Review Cycle
Active	5353	RFP Responses	Company	-	-	Smith,	6/30/2019	Annually
Active	5352	RFP Responses	Company	-	-	Smith,	12/31/2019	Annually
Active	4987	RFP Responses	Company	-	brief overview of your company,	Doe, Beth	3/31/2016	Historical
Active	3484	RFP Responses	Company	-	Core Service Offering	Doe, Beth	3/31/2020	Annually
Active	2319	RFP Responses	Company	-	Competitive Advantage	Doe, Beth	3/31/2018	Historical
Active	2306	RFP Responses	Company	-	Financial Condition / Statements	Doe, Beth	3/31/2018	Historical
Active	2302	RFP Responses	Company	-	History	Doe, Beth	3/31/2018	Historical
Active	2300	RFP Responses	Company	-	Ownership	Doe, Beth	3/31/2018	Historical
Active	2299	RFP Responses	Company	-	Office Locations	Doe, Beth	3/31/2018	Historical
Active	1701	RFP Responses	Company	-	Organizational Chart	Doe, Beth	3/31/2018	Historical

3. At the prompt, click [OK](#) to proceed.



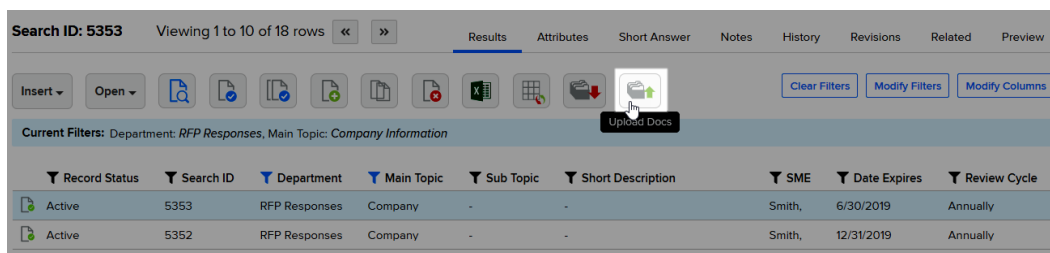


4. Check the option [Checkout Files For Editing](#), choose a folder to download the documents to, and then, click [Download](#).



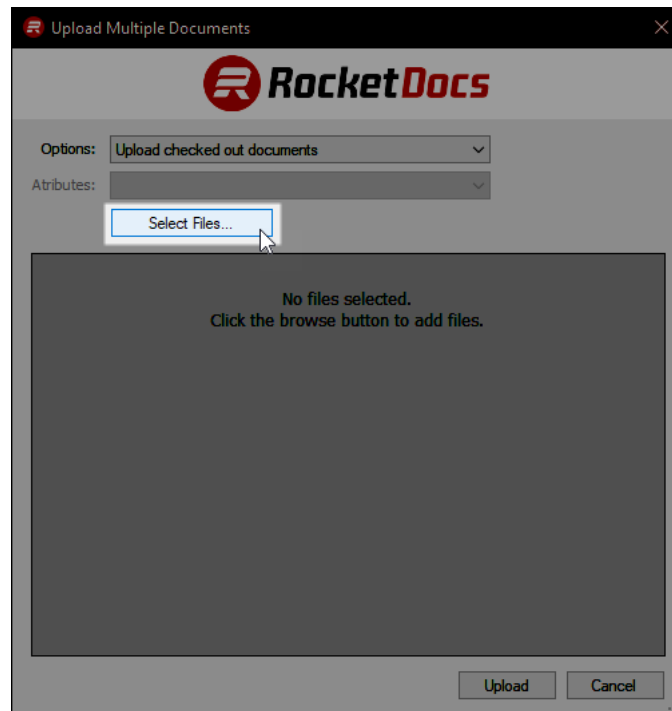
## Upload Docs

1. Click the [Upload Docs](#) button.

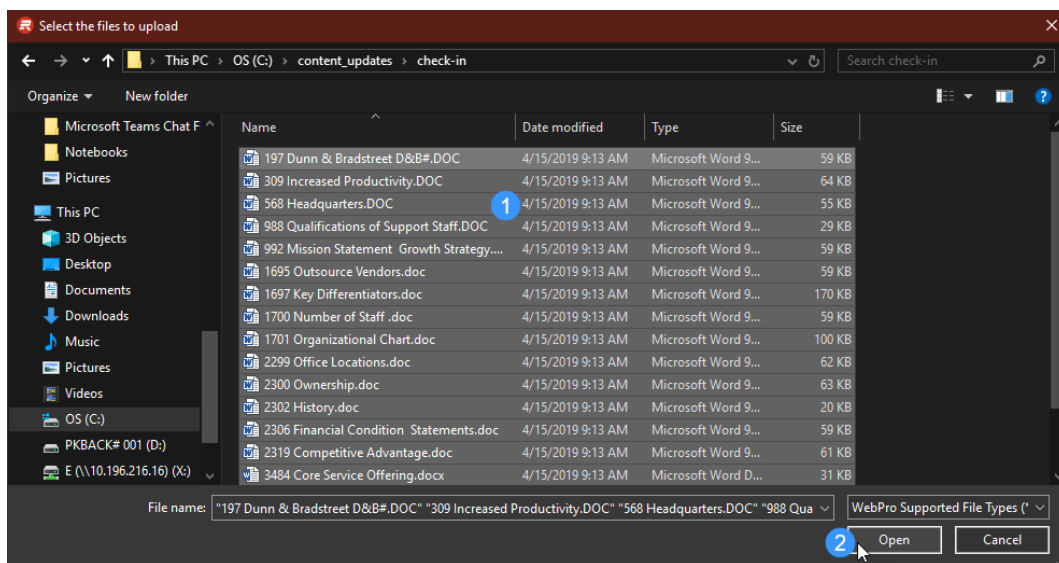




3. Click [Select Files...](#).



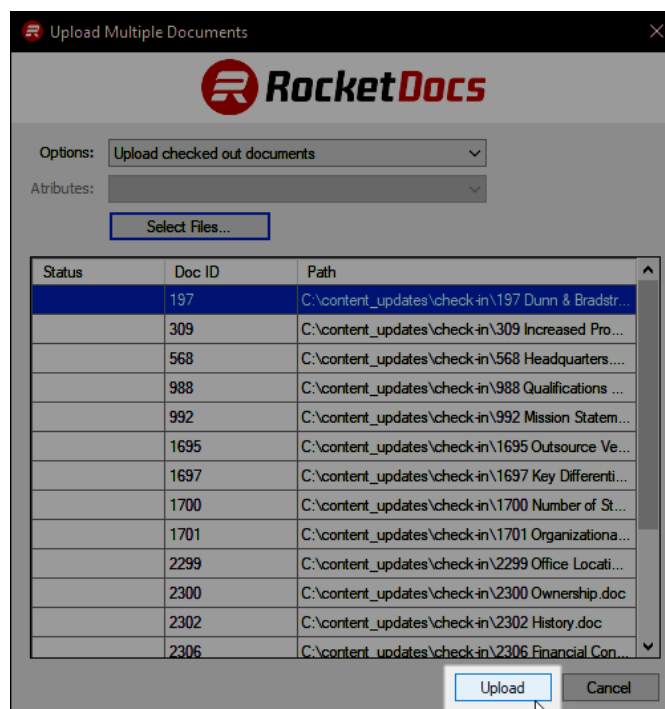
4. Select the records to check in (use the CTRL or SHIFT to choose multiple files at once), and then click [Open](#).







5. Wait for the files to load in the window, and then click the [Upload](#) button. The window will simply close when the process is complete.



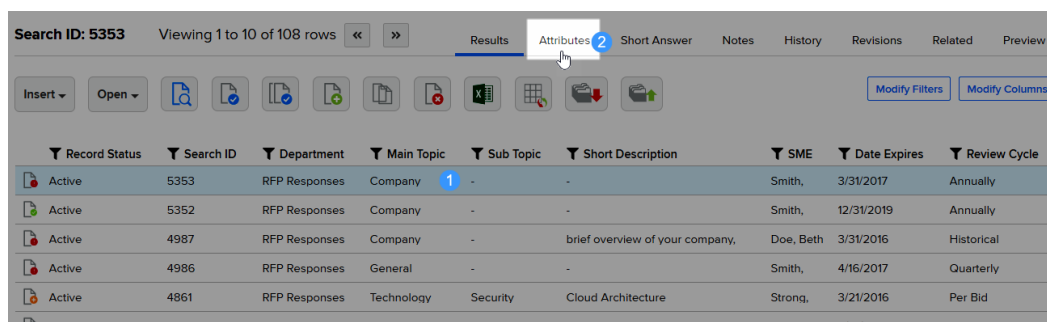
#### TIPS

- When using this feature to update branding, open the checked-out document, select all contents and copy into the new branding document. Then, apply any formatting changes. Close the original checked-out document and save the new file as the same name as the new version.
- Before checking in updated records, filter for those records so that it's simple to update the expiration date for all records at once, if needed.

## Create an Attribute Group

Users with permission can add new attribute groups. An attribute group is a template of attribute values. To add an attribute group:

1. Locate the record that has t set of attributes to save, and then click on the [Attributes](#) tab.





2. Review the attributes to confirm the values that will be in the template, and then click [Save as Attribute Group](#).

**Contacts** 1

SME:

Who Answered:

Compliance Approval:

Content Reviewer:

**Record Review** 2

Review Cycle:

Date Expires:

Date Last Reviewed:

**Record Category** 3

Record Status:

Department:

Main Topic:

Sub Topic:

Short Description:

Language:

**Other Details** 4

Products: ☐ All Products   
☐ AnswerFull  
☐ InsightFull  
☒ N/A  
☐ ReactFull  
☐ ResponseFull  
☐ WinFull

Version:

Sales Contact:

Consulting Firm:

Original Proposal:

Language:

Source:

Region:

Prompt on Insert:

Downloaded Date:

Downloaded By:

☐ Needs Translation

Needs Translation Date:

☐ Is Child

☐ Is Parent

**Internal Attributes**

File Type:

Doc Type:

Checked Out By:

Checked Out Date:

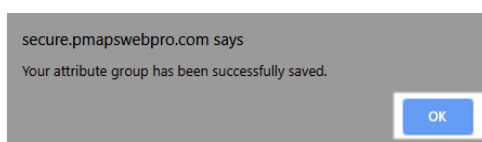
☒ Q & A

5 [Save as Attribute Group](#)



3. Enter the name for the attribute group, and then click [Ok](#).

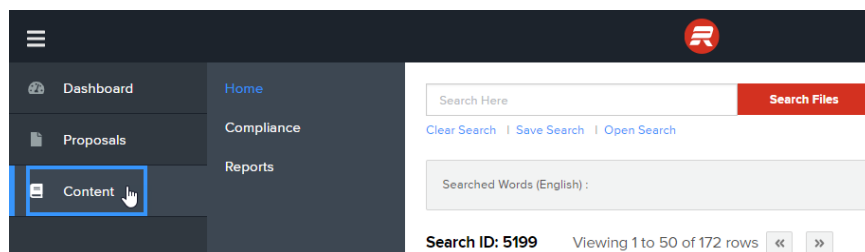
4. At the confirmation prompt, click [OK](#).



## Global Attribute Changes

The [Global Attribute Changes](#) features allows users to apply mass changes to one or more content records at once. To make global changes to [Search](#) records, follow the steps below.

1. From the main menu, navigate to [Content](#) > [Home](#).





2. Narrow the results to records that need global changes and the click [Global Attribute Changes](#) button.

Search ID: 5392 Viewing all 9 rows

Results Attributes Short Answer Notes History Revisions **Related** Preview

Insert Open [Icons] [Global Attribute Changes]

Current Filters: Sub Topic: [blank], Department: RFP Responses, Main Topic: Company Information, Short Description: [blank]

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	SME	Date Expires
Active	5392	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5391	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5390	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5389	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5388	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5387	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5386	RFP Responses	Company Information	-	-	Smith, Cindy	4/18/2020
Active	5353	RFP Responses	Company Information	-	-	Smith, Cindy	6/30/2019
Active	5352	RFP Responses	Company Information	-	-	Smith, Cindy	12/31/2019

3. Make desired changes to the field values and when ready, click [Apply](#).

Attributes

**Contacts**

SME: [dropdown]  
Who Answered: [dropdown]  
Compliance Approval: [dropdown]  
Content Reviewer: [dropdown]

**Record Category**

Record Status: [dropdown]  
Department: [dropdown]  
Main Topic: [dropdown]  
Sub Topic: **History** 1  
Short Description: **company history** 2  
Language: [dropdown]  
Source: [dropdown]  
Region: [dropdown]  
Prompt on Insert: [text]

**Record Review**

Review Cycle: [dropdown]  
Date Expires: **01/01/2020** 3  
Date Last Reviewed: **04/19/2019** 4

**Other Details**

Modify Products: [text]  
Modify Version: [text]  
Sales Contact: [dropdown]  
Consulting Firm: [dropdown]  
Original Proposal: [text]  
Downloaded Date: [text]  
Downloaded By: [text]  
Needs Translation: [dropdown]  
Needs Translation Date: [text]  
Is Child: [dropdown]

5 Apply Cancel

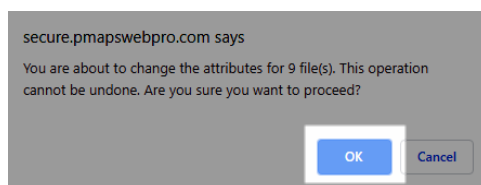
#### TIPS

- 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).

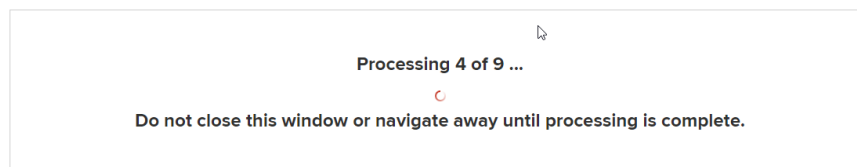


- Scroll up and down to reveal fields in other tabs.

4. Validate the number of files that will change, and then click **OK**. Click **Cancel** if you would like to revise the filters or changes.



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



## TIPS

- It may be necessary to remove or modify filters/sorting to reveal the changes.

## Building Parent Child Records

The parent/child relationship feature facilitates managing content where there is a parent record in one language and child record(s) in one or more different languages.

We recommend following the best practices workflow below when managing parent/child record relationships.



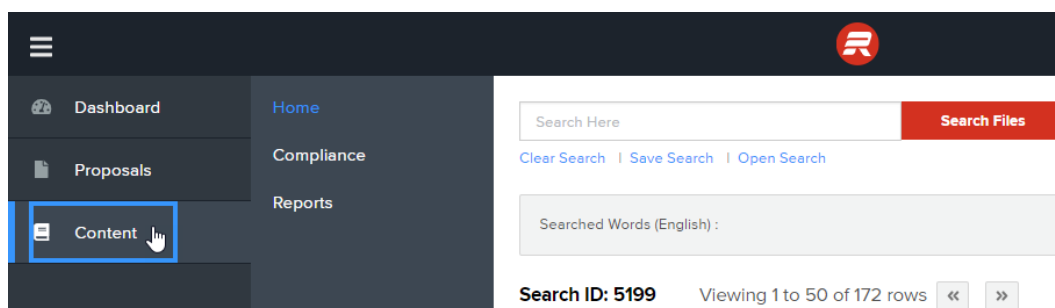
1. Use [Compliance](#) to send all or single parent records to content experts. Compliance allows you to combine multiple records into a single document, which makes it easier for the content expert to update.
2. Review and validate updated documents provided by content experts, and then use [Compliance](#) to import updated records.
3. Approve all records in [Compliance](#). This will trigger the "Needs Translation" process for all associated child records of approved parent records where the record content changed.
4. Use the [Needs Translation](#) field to filter the records that need translation and then use the [Download All](#) feature to download the child records. Each record will be downloaded as an individual Word document. Send the documents to your translation services for updating.
6. Use the [Upload Records](#) feature to import the translated child records. This action removes all "Needs Translation" triggers for the imported records.

There are three permissions required to use all parent/child record features: [Multiple Doc Download](#), [Multiple Doc Upload](#), and [Run Verify Process](#).

Permissions																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
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## Add Languages

1. If you are not on the [Content](#) page, go to the main menu and click [Content](#).





2. Click on the [Attributes](#) tab.

Search Here Search Files Search Database: Default

[Clear Search](#) | [Save Search](#) | [Open Search](#)

Searched Words (English):

**Search ID: 5353** Viewing 1 to 25 of 108 rows << >>

Results **Attributes** Short Answer Notes His

Insert Open

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description
Active	5353	RFP Responses	Company	-	-
Active	5352	RFP Responses	Company	-	-
Active	4987	RFP Responses	Company	-	brief overview of your company, identifying any parent, subsidiary,

3. Click the [Edit](#) button next to the Language field.

Record Status: Active

Department: RFP Responses

Main Topic: Company Information

Sub Topic:

Short Description:

Language:

Source:

Region:

Prompt on Insert:

Products:

- ☐ All Products
- ☐ AnswerFull
- ☐ InsightFull
- ☒ N/A
- ☐ ReactFull
- ☐ ResponseFull
- ☐ WinFull

Version:

Sales Contact:

Consulting Firm:

Original Proposal:

Downloaded Date:

Downloaded By:

☐ Needs Translation

Needs Translation Date:

☐ Is Child

☐ Is Parent



4. Click the [Edit Values](#) button.

**Label Definition for: Language**

Label for Screen:  Description:

☐ User must complete field before saving  
☐ User must complete field after Ship Date  
☐ Only administrators can edit  
☐ Only administrators can edit Pick-Lists  
☐ Update Calendar  
☐ Default Value "Yes"  
☐ Disable Field

**Must keep the same meaning of field!**

[More Info](#) [Edit Values](#) [Save](#) [Cancel](#)

5. Click the + icon to add a new value to the list.

**Edit Options for: Language**

Arabic  
Chinese  
English UK  
English US  
French  
Japanese  
Spanish

[+](#)  
[↺](#)  
[✕](#)  
[✎](#)  
[✕](#)

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





6. Add the language in the space provided and click [Save](#).

**Edit Options for: Language**

1 Item text:

German

2 **Save** Cancel

**Save** Cancel

7. Repeat steps 5 and 6 until all languages are in the list and click [Save](#).

**Edit Options for: Language**

Arabic  
Chinese  
English UK  
English US  
French  
Japanese  
Spanish  
German

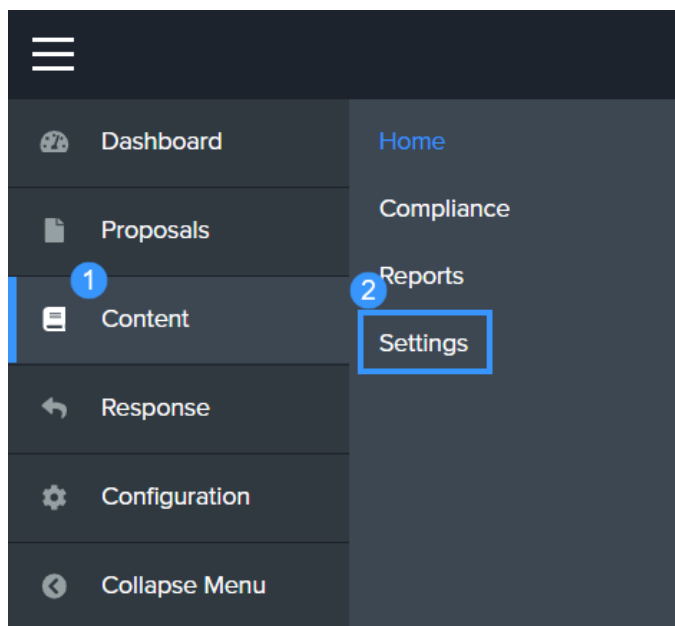
+  
↺  
✕  
✎  
📄

**Save** Cancel

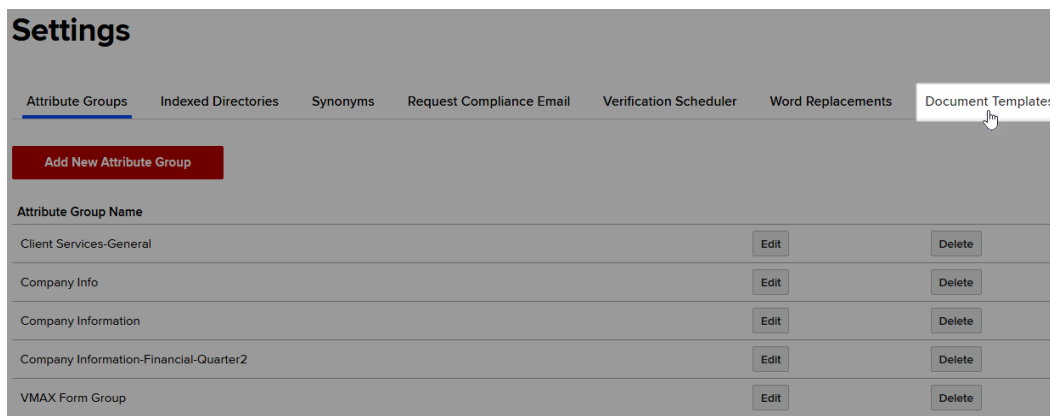


## Upload Templates

1. Go to the main menu, choose [Content](#), and then choose [Settings](#).



2. Click on [Document Templates](#).





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

Microsoft Word Templates		
Description	Language	Edit
Arabic	Arabic	<a href="#">✎</a>
Chinese	Chinese	<a href="#">✎</a>
English UK	English UK	<a href="#">✎</a>
French	French	<a href="#">✎</a>
Japanese	Japanese	<a href="#">✎</a>
QA Template	English US	<a href="#">✎</a>
Spanish	Spanish	<a href="#">✎</a>
<a href="#">Add New Word Template</a>		

- Enter a name for the template.


### Edit Word Doc Template

Name or Description:

German Template

Language:

Download File:



Upload File:

Choose File

No file chosen

Save

Cancel

- Choose the language for the template.

### Edit Word Doc Template


Name or Description:

German Template

Language:

German

Download File:



Upload File:

Choose File

No file chosen

Save

Cancel



6. Click [Choose File...](#).

**Edit Word Doc Template**

Name or Description: German Template

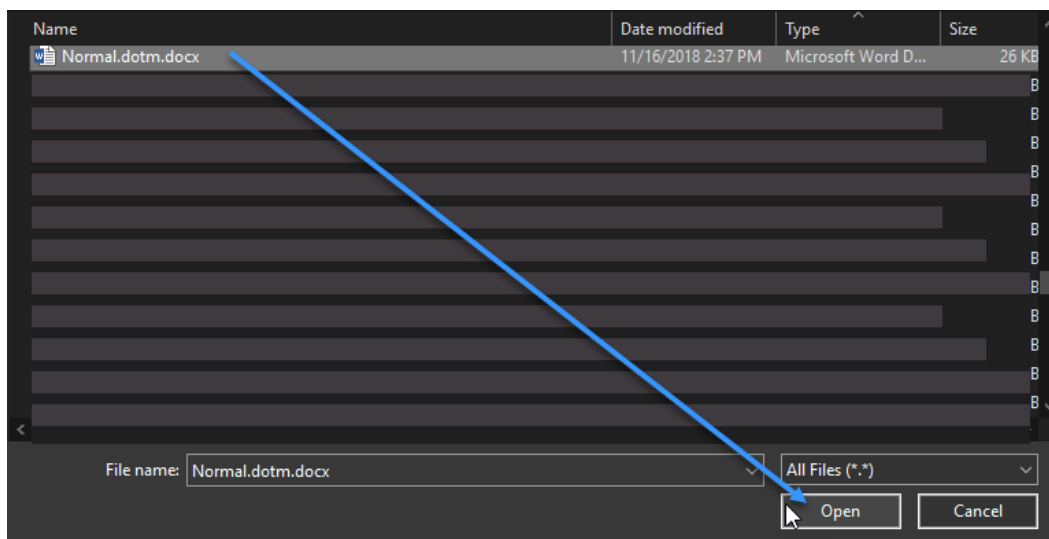
Language: German ▼

Download File:

Upload File: **Choose File** No file chosen

**Save** **Cancel**

7. Select the template to upload and click [Open](#).



8. Click [Save](#).

**Edit Word Doc Template**

Name or Description: German Template

Language: German ▼

Download File:

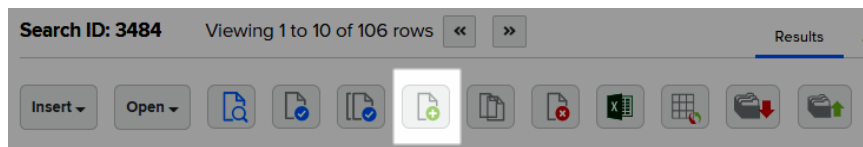
Upload File: **Choose File** Normal.dotm.docx

**Save** **Cancel**

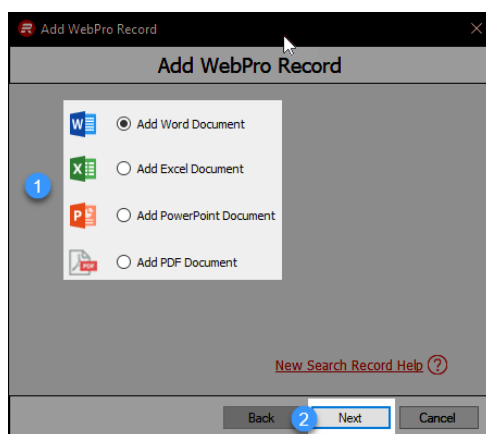


## Add Parent Record

1. Click [Add Record](#). If you don't see this button, you don't have permission to add content records.



2. Select the document type you would like to add, and then click [Next](#).

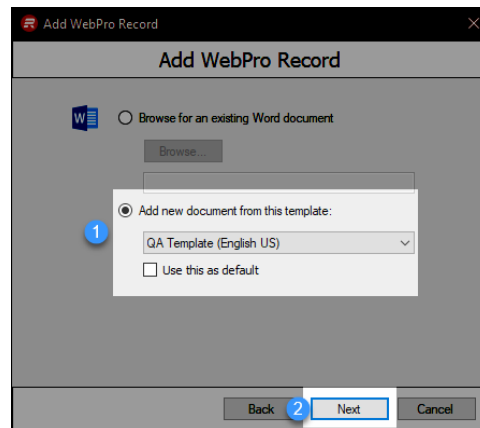


### TIPS

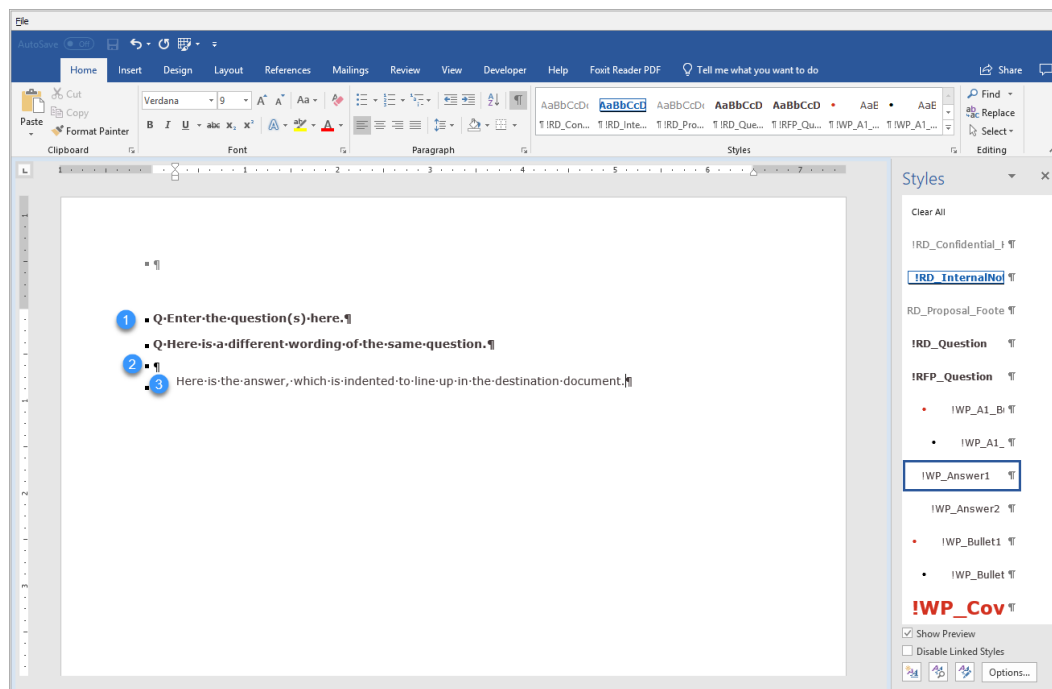
- When adding Word documents that are question-and-answer pairs, be sure there is one blank empty line (hard return) between the question and answer.
- When adding Word documents, the option is provided to use a style template. Use the template as instructed by the administrator to ensure consistency with brand guidelines as appropriate. If no template is selected, the document will be based off the local user's Normal.dotm Word instance.
- When adding Word documents that are question-and-answer pairs, be sure to check the [Q & A](#) checkbox on the [Attributes](#) tab.
- When adding documents that are not question-and-answer pairs, use the Browse option to quickly create the new record from an existing document.



3. If presented, choose a template, and then click [Next](#).

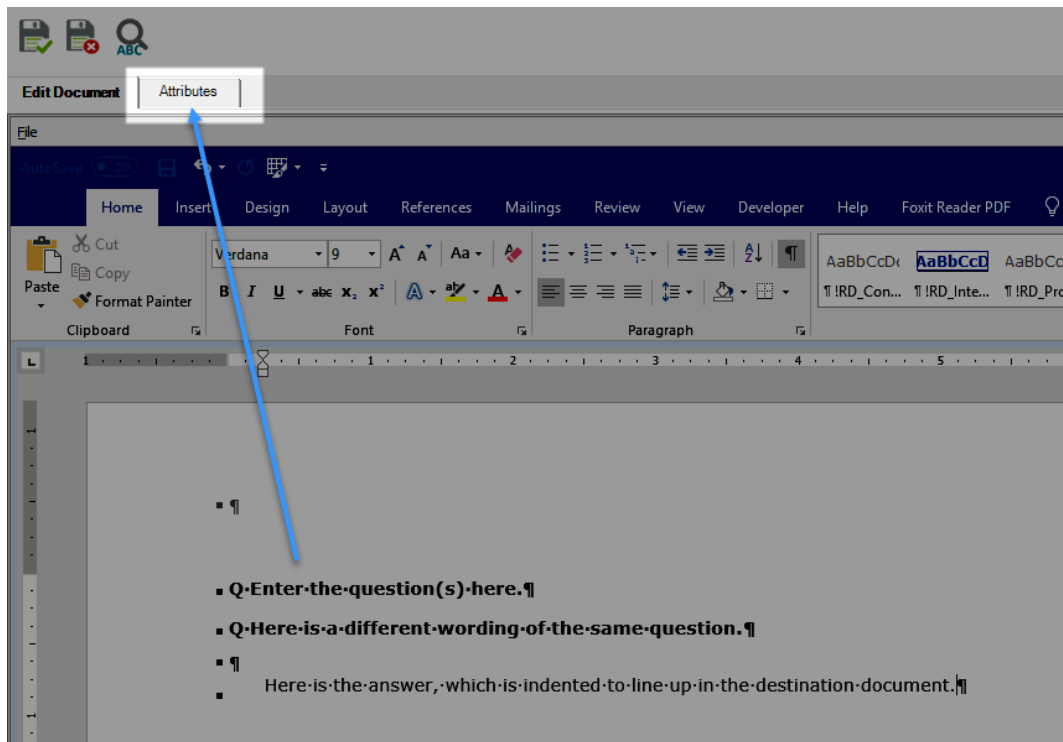


4. Input the content for the new record. Enter two hard returns after the question(s) and then input the response.





5. Go to the [Attributes](#) tab.



6. Select an [Attribute Group](#) to quickly prefill multiple fields, or manually make selections, and then click [Save](#).



7. Check the box next to [Create Child Relationships](#) and uncheck any languages to exclude.

8. Choose an option for [Compliance](#).

- a. Click [Save to Compliance Central](#) to place the record in the [Not Sent](#) tab, and then click [Save](#).





- b. Click [Save to Compliance Central and Request Compliance Immediately \(SME will be notified\)](#) to immediately email the record to the designated [SME](#). Enter a Due Date and then click [Save](#).

The 'Save Options' dialog box in RocketDocs. It features the RocketDocs logo at the top. Below the logo are three radio button options: 'Save Without Requesting Compliance', 'Save to Compliance Central' (marked with a blue '1'), and 'Save To Compliance Central and Request Compliance Immediately (SME will be notified)' (selected). Under the 'Options' section, there are checkboxes for 'Overwrite existing Q & A' (checked, marked with a blue '2'), 'Create Child Relationships' (checked), 'Save an iCalendar Event' (unchecked), and a 'Due Date' field set to '5/3/2019'. To the right of these options is a list of languages: Arabic (Arabic), Chinese (Chinese), English UK (English UK) (checked), and French (French) (checked). At the bottom, there is a 'Notes' text area and two buttons: 'Save' (marked with a blue '3') and 'Cancel'.

9. Click [Clear Search](#) to refresh the page.

A search bar interface. It has a text input field labeled 'Search Here' and a red 'Search Files' button. Below the input field are three buttons: 'Clear Search' (highlighted with a blue box), 'Save Search', and 'Open Search'.

10. The newly added parent and child records will be at the top unless there is other sorting in place.

A screenshot of a search results table in RocketDocs. The table has columns for Record Status, Search ID, Department, Main Topic, Sub Topic, Short Description, Is Parent, Is Child, SME, and Date Expires. The first row is highlighted. The table shows several records for 'RFP Responses' under the 'Company' department, with 'Is Parent' and 'Is Child' columns indicating their relationship.

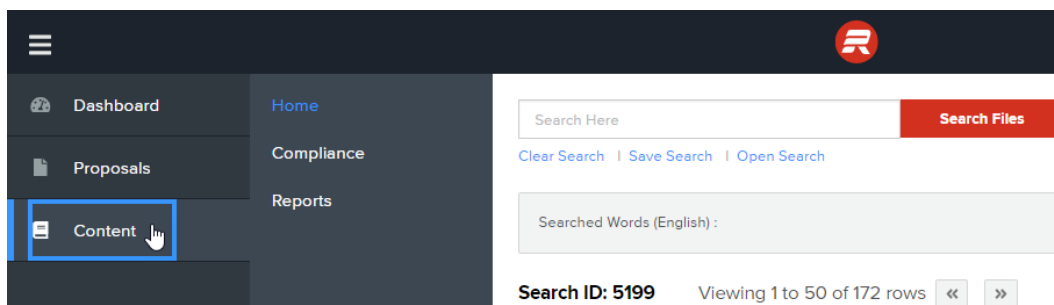
Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	Is Parent	Is Child	SME	Date Expires
Active	5392	RFP Responses	Company	-	-	-	true	Smith,	6/30/2019
Active	5391	RFP Responses	Company	-	-	-	true	Smith,	6/30/2019
Active	5390	RFP Responses	Company	-	-	-	true	Smith,	6/30/2019
Active	5389	RFP Responses	Company	-	-	-	true	Smith,	6/30/2019
Active	5388	RFP Responses	Company	-	-	-	true	Smith,	6/30/2019
Active	5387	RFP Responses	Company	-	-	-	true	Smith,	6/30/2019
Active	5386	RFP Responses	Company	-	-	true	-	Smith,	6/30/2019



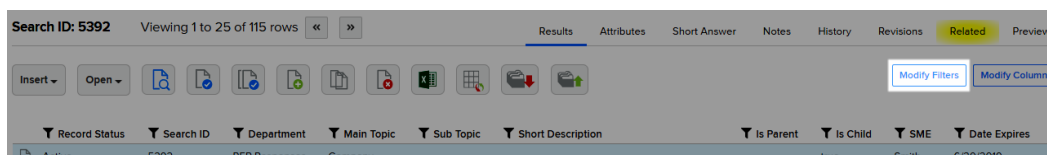
## Send Parent Record

If the option to save to compliance central was not used, follow the steps below to send the parent record to the designated SME. If the option to send immediately was used, skip to the next section.

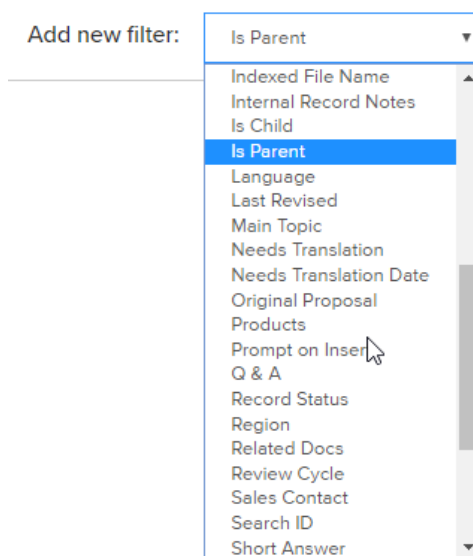
1. If you are not on the [Content](#) page, go to the main menu and click [Content](#).



2. Click [Modify Filters](#).



3. From the [Add new filter](#) picklist, choose [Is Parent](#).





4. Check the box next to **True**, and then click **Apply**.

The 'WebPro Filters' dialog box is shown. It has a title bar with 'WebPro Filters' and a close button. Below the title bar is a section for 'Add new filter:' with a dropdown menu. The main area is divided into two panes. The left pane is titled 'Is Parent' and is currently empty. The right pane contains a table with two columns: 'Name' and 'Count'. The table has two rows: 'False' with a count of 114, and 'True' with a count of 1. The 'True' row is selected, indicated by a checkmark in the 'Name' column. Above the table are four buttons: 'Uncheck All', 'Check All', 'Show All Options', and 'Remove This Filter'. At the bottom right of the dialog are two buttons: 'Apply' (highlighted with a red box and a hand icon) and 'Cancel'.

Name	Count
<input type="checkbox"/> False	114
<input checked="" type="checkbox"/> True	1

5. Click the **Send All Records to Compliance** button.

The screenshot shows the main application window. At the top, it says 'Search ID: 5386' and 'Viewing all rows'. Below this is a toolbar with various icons. One icon, which looks like a document with a checkmark, is highlighted with a tooltip that says 'Send All Records to Compliance'. Below the toolbar, there is a section for 'Current Filters: Is Parent: true'. At the bottom, there is a table with columns: 'Record Status', 'Search ID', 'Department', 'Main Topic', 'Sub Topic', 'Short Description', 'Is Parent', 'Is Child', 'SME', and 'Date E'. The first row of data shows: 'Active', '5386', 'RFP Responses', 'Company Information', '-', '-', 'true', '-', 'Smith, Cindy', and '6/30/2019'.

Record Status	Search ID	Department	Main Topic	Sub Topic	Short Description	Is Parent	Is Child	SME	Date E
Active	5386	RFP Responses	Company Information	-	-	true	-	Smith, Cindy	6/30/2019



6. Select [Add to Compliance Central](#), choose [Order By](#) to group records together, adjust what to include with the content, and then click [Submit](#).

Multiple Documents

### Verify Multiple Documents - Options

SME	# of Documents
Doe, Beth	8
Doe, Jane	2
Doe, Tina	13

☐ Show All Documents ☒ Show Totals Per SME

☐ Internal Review Only - Create document(s), but do not email or track in Compliance Central  
☒ Open Documents Using Word ☐ (put all documents in one file)  
☐ Save Documents In Folder

1 ☒ Add to Compliance Central - Sends document to SME and adds to Compliance Central  
☐ Add to Compliance Central

2 Show History ☐  
Include Attributes Table ☒  
Order By: Main Topic

3 [Submit](#) [Cancel](#)

## Approve Parent Record

To upload revised parent record record(s), use the [Import](#) feature.

1. From the main menu, click on [Content](#), then [Compliance](#).

1

Dashboard

Proposals

Content 2

Response

Configuration

Collapse Menu

Home

Compliance 3

Reports

Settings

Not Sent - 8 Sent To SME - 23 Returned From SME

View 15 Items per Page [Reset Sort](#) [Clear Filter](#)

☐ Department Main Topic Sub Topic

☐ RFP Responses Customer Service Support

☐ RFP Responses Customer Feedback

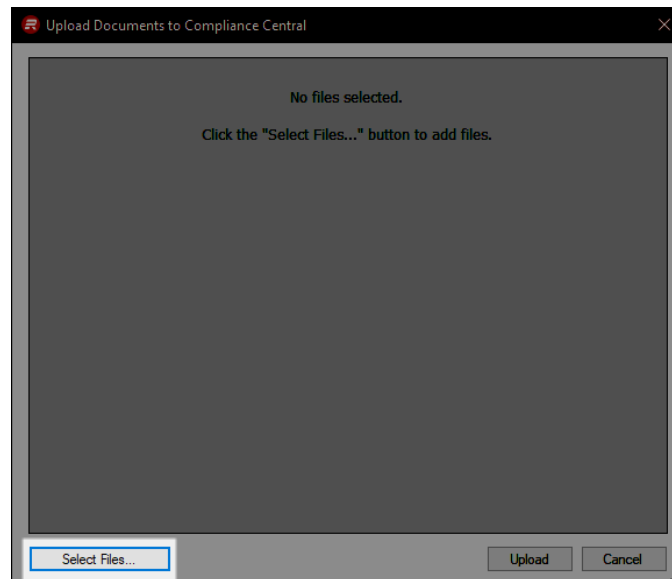
2. Click the [Import](#) button.

Not Sent - 0 Sent To SME - 30 Returned From SME - 0

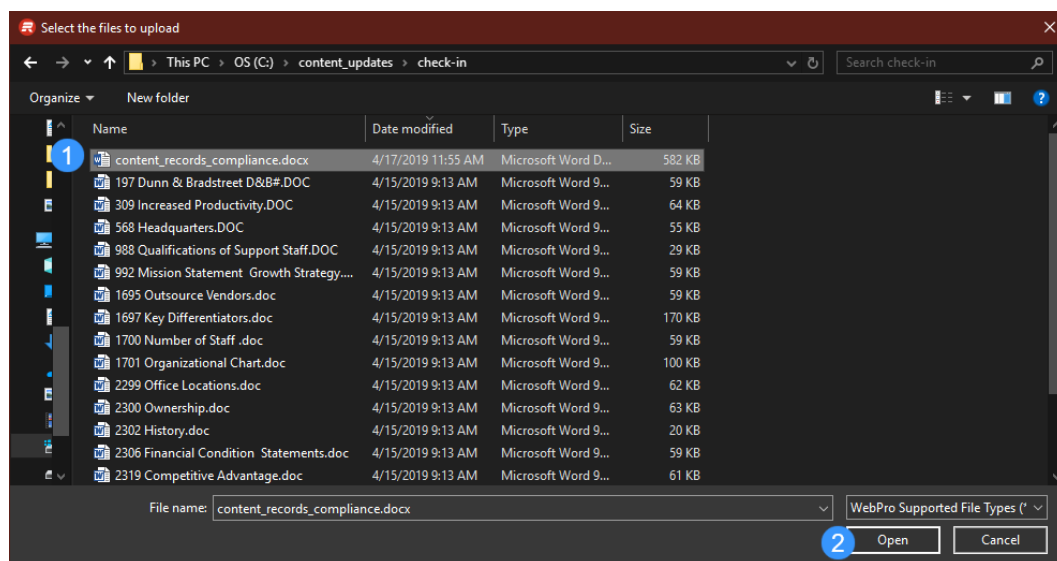
Import



3. Click the [Select Files...](#) button.

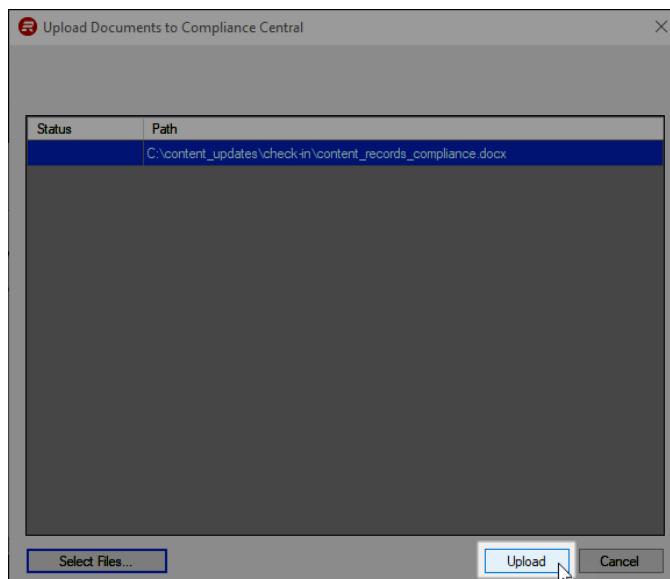


5. Navigate to file location, select the updated document(s), and then click [Open](#). You can select more than one document at once. You can also continue to click [Select Files...](#) to select additional documents.

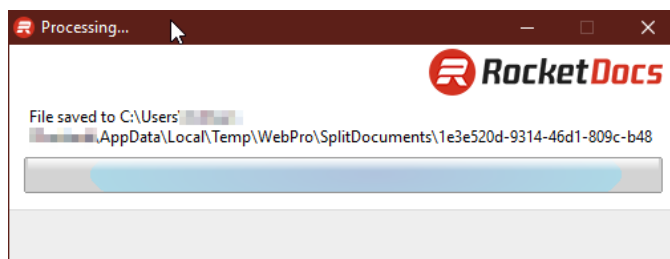




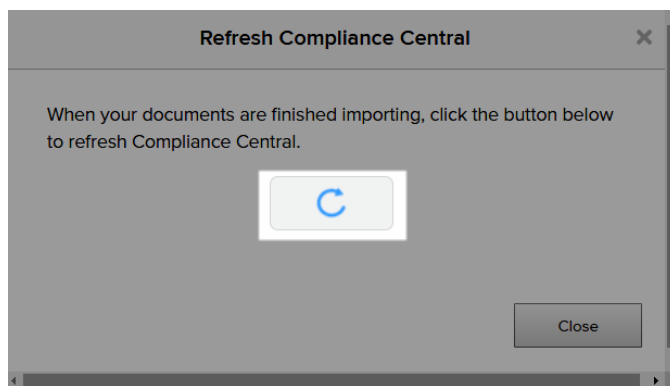
6. To import the updated documents, click the [Upload](#) button.



7. [ResponseFull](#) will be closing and opening Word during this process, so wait for the processing window to complete and close before doing any other work.

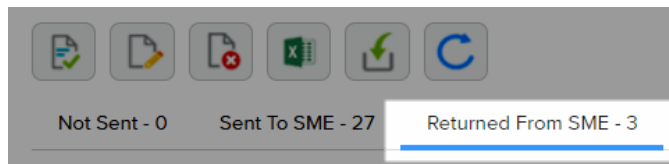


8. Click [Refresh](#) button to refresh the [Compliance](#) page (this will also close the window).

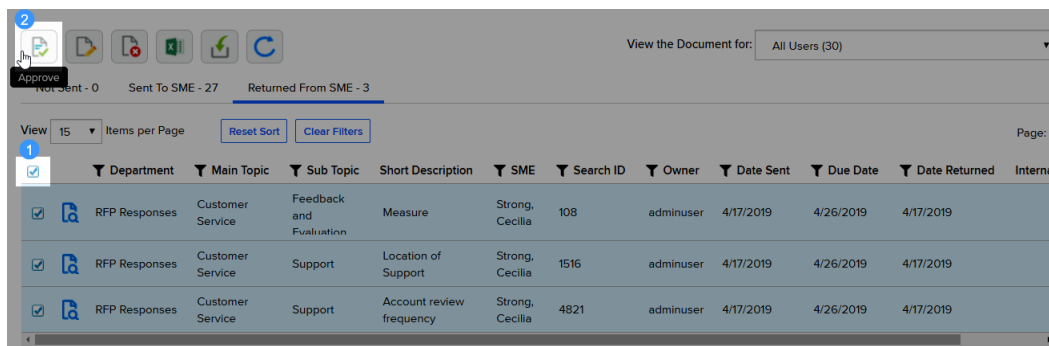




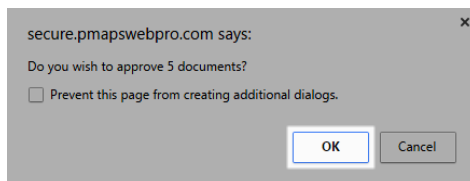
- Click on the [Returned From SME](#) tab.



- Check the box next to the records to approve (or check the box in the header row to select all), and then click the [Approve](#) button.



- Confirm the number of records to approve, and then click [OK](#).

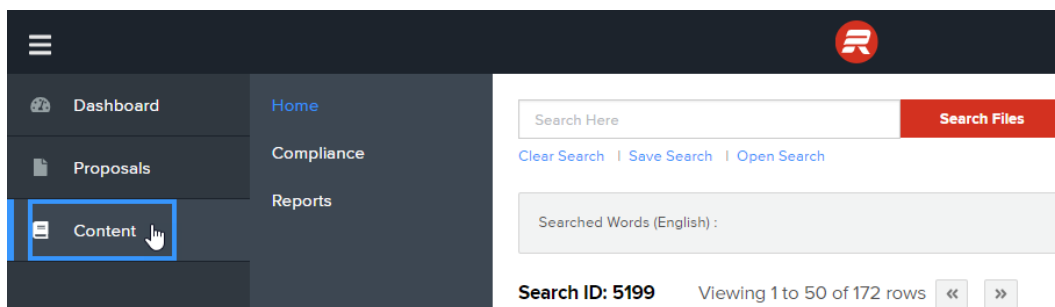


- Click the Refresh button to refresh [Compliance](#).

## Send Child Record

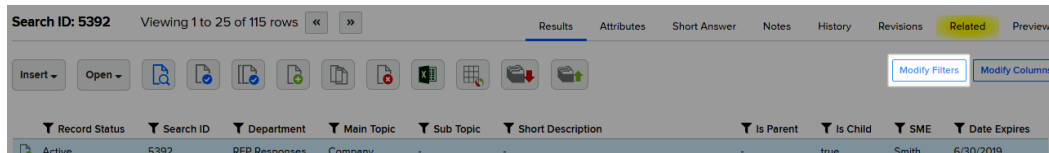
If you have followed the steps above to review and approve parent record(s), all associated child records are triggered for the "Needs Translation" process.

- Create a local folder for the child records.
- If you are not on the [Content](#) page, go to the main menu and click [Content](#).

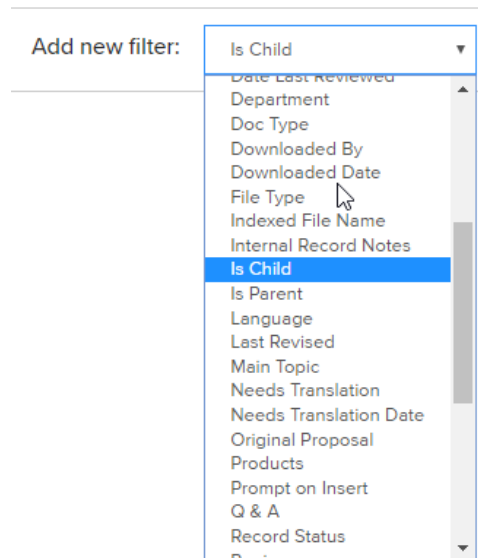




2. Click [Modify Filters](#).



3. From the [Add new filter](#) picklist, choose [Is Child](#).







4. Check the box next to **True**.

The 'WebPro Filters' dialog box is shown. At the top, there is a section labeled 'Add new filter:' with a dropdown arrow. Below this, on the left, is a tab labeled 'Is Child'. On the right, there are buttons: 'Uncheck All', 'Check All', 'Show All Options', and 'Remove This Filter'. Below these buttons is a table with two columns: 'Name' and 'Count'.

Name	Count
<input type="checkbox"/> False	109
<input checked="" type="checkbox"/> True	6

At the bottom right of the dialog are 'Apply' and 'Cancel' buttons.

5. From the **Add new filter** picklist, choose **Needs Translation**.

The 'WebPro Filters' dialog box is shown with the 'Add new filter:' dropdown menu open. The menu lists various filter options, and 'Needs Translation' is highlighted. The background shows the 'Is Child' filter with 'True' selected.

Uncheck All   Check All   Show All Options   Remove This Filter

**Name**

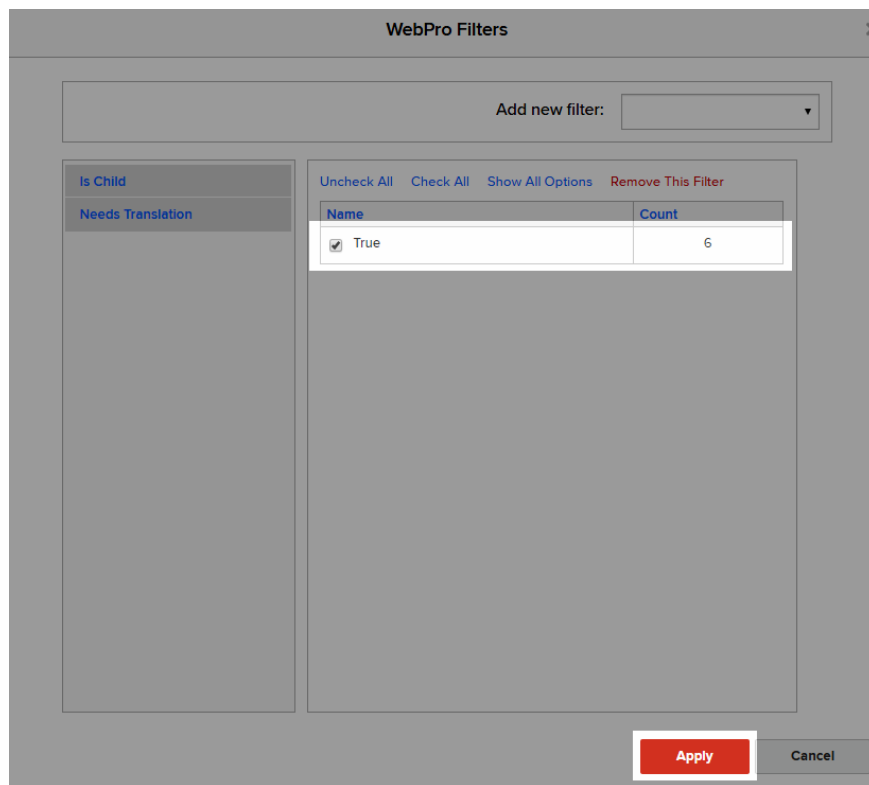
☐ True

**Add new filter:**

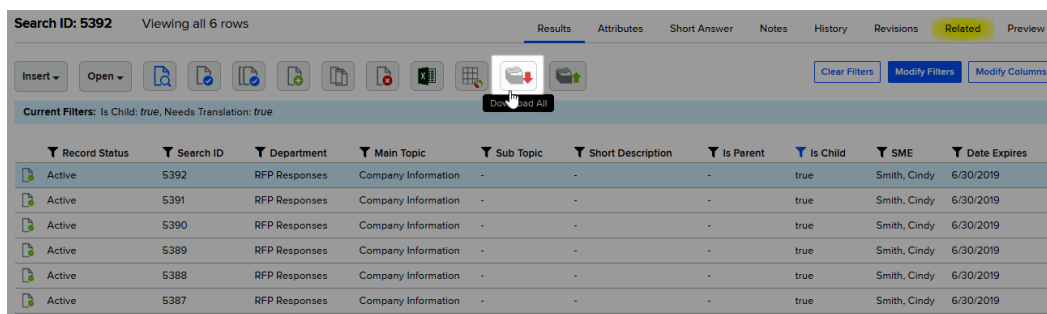
- Needs Translation
- Doc Type
- Downloaded By
- Downloaded Date
- File Type
- Indexed File Name
- Internal Record Notes
- Is Parent
- Language
- Last Revised
- Main Topic
- Needs Translation**
- Needs Translation Date
- Original Proposal
- Products
- Prompt on Insert
- Q & A
- Record Status
- Region
- Related Docs
- Review Cycle



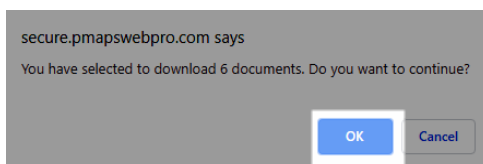
6. Check the box next to **True**, and then click **Apply**.



7. Click the **Download All** icon.

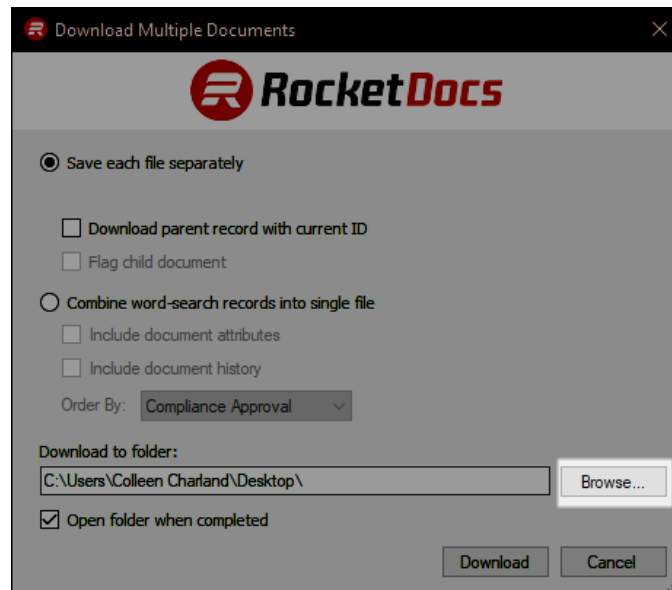


8. Click **OK** to proceed.

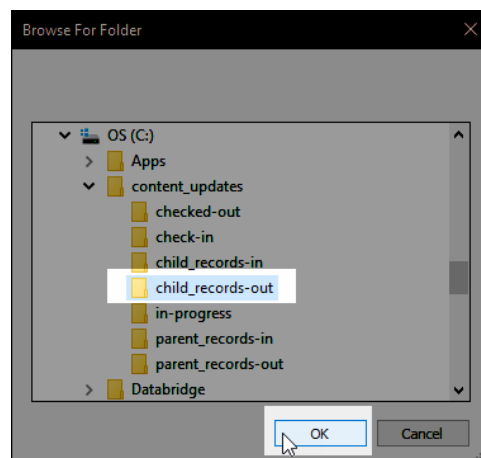




9. Click the [Browse...](#) icon.



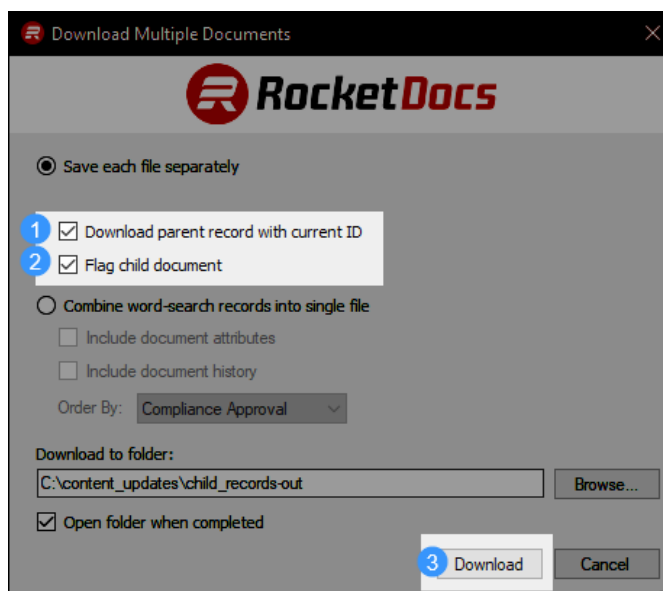
10. Choose the local folder and click [OK](#).





11. Save the files:

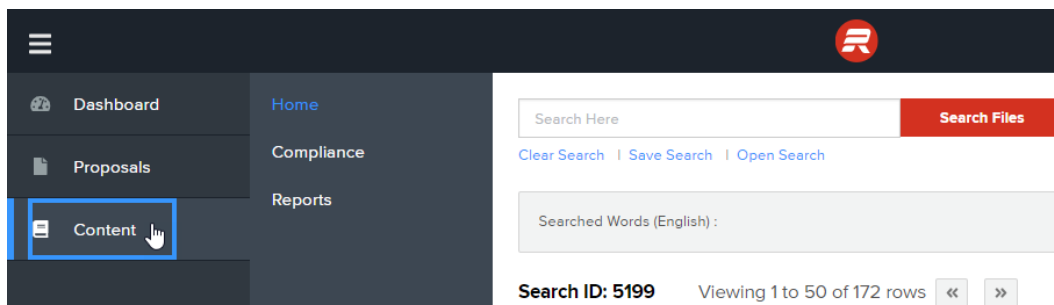
- 1) Check the [Download parent record with current ID](#) to send the parent version of the record for each associated child record.
- 2) Check the [Flag child record](#) box to capture the [Date Downloaded](#) and [Downloaded By](#) attribute details.
- 3) Click [Download](#).



## Upload Child Record(s)

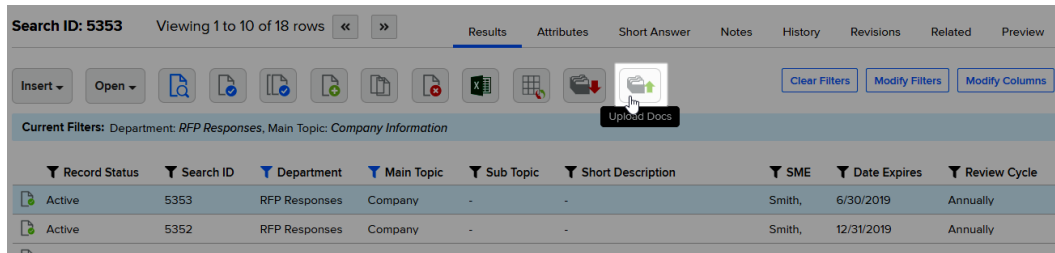
To update the translated child records:

1. If you are not on the [Content](#) page, go to the main menu and click [Content](#).

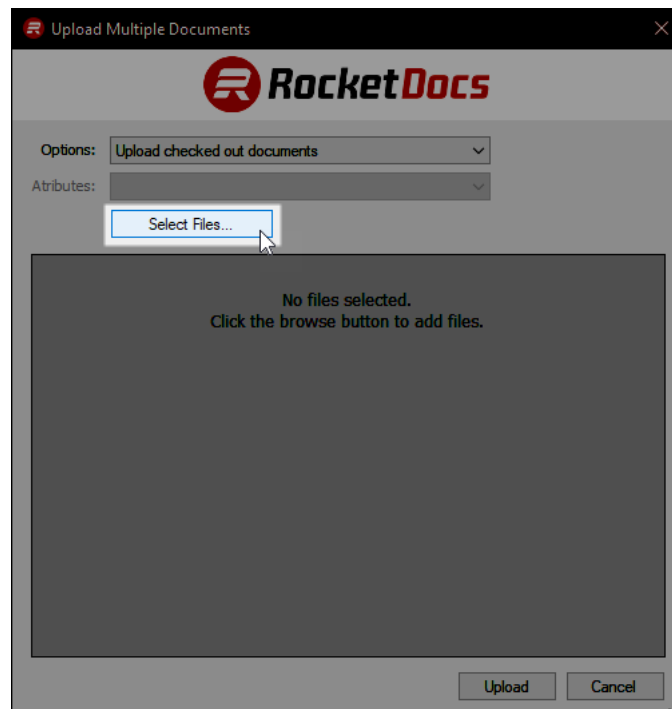




2. Click the [Upload Docs](#) button.

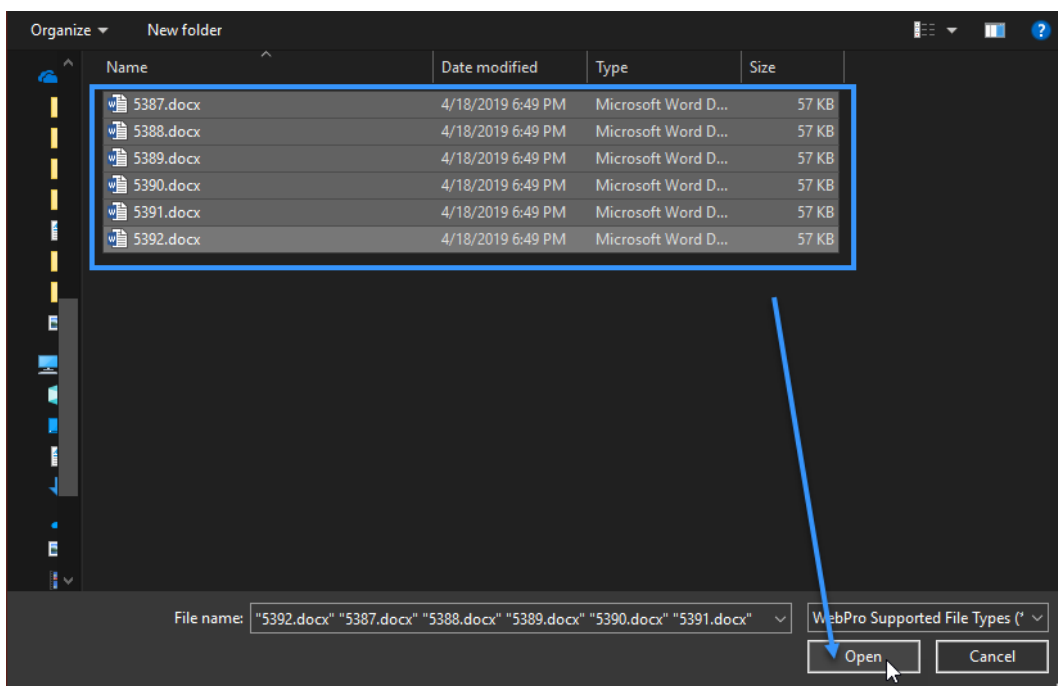


3. Click [Select Files...](#)





4. Select the child records to import (use the CTRL or SHIFT to choose multiple files at once), and then click [Open](#).



Once the window closes, the process is complete.

## Update Records Using Compliance

[Compliance](#) stores all content records that have not been sent, have been sent, and have been returned (but not yet approved).

### Automated Review Frequency

[Compliance](#) is programmed to automatically apply a new expiration date based on the using an exact value as the review frequency. The automated extension applied is set from the date the records are approved in [Compliance](#).

Review Frequency Value	Automated Extension Applied
Annually	1 year from date approved
Yearly	1 year from date approved
Semi-Annually	6 months from date approved
Quarterly	3 months from date approved
Monthly	1 Month from date approved
1st Quarter	The next January 1 after date approved

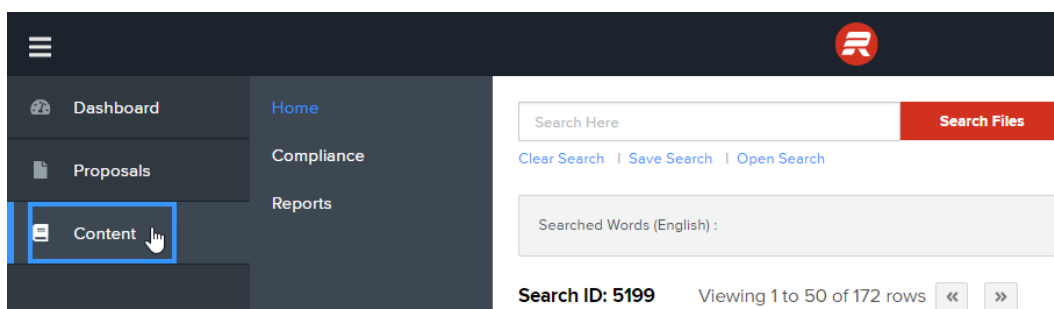


2nd Quarter	The next April 1 after date approved
3rd Quarter	The next July 1 after date approved
4th Quarter	The next October 1 after date approved
X Days	X number of days after date approved (valid integer only) – for example, if the review frequency value is “45 Days” the expiration date is updated to 45 days after the date approved
X Weeks	X number of weeks after date approved (valid integer only) – for example, if the review frequency value is “6 Weeks” the expiration date is updated to 6 weeks after the date approved
X Months	X number of months after date approved (valid integer only) – for example, if the review frequency value is “18 Months” the expiration date is updated to 18 months after the date approved

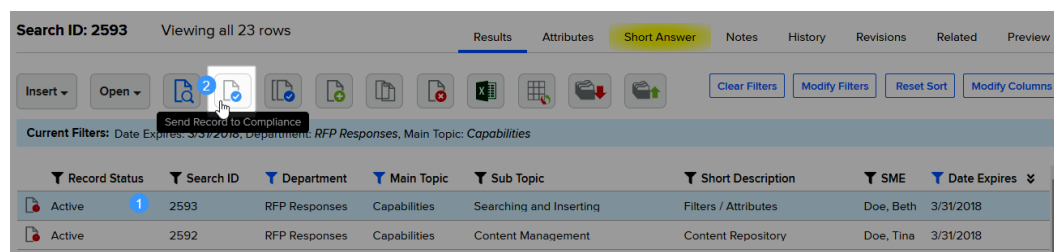
## Request Compliance

### Send Single Record

1. If you are not on the [Content](#) page, go to the main menu and click [Content](#).

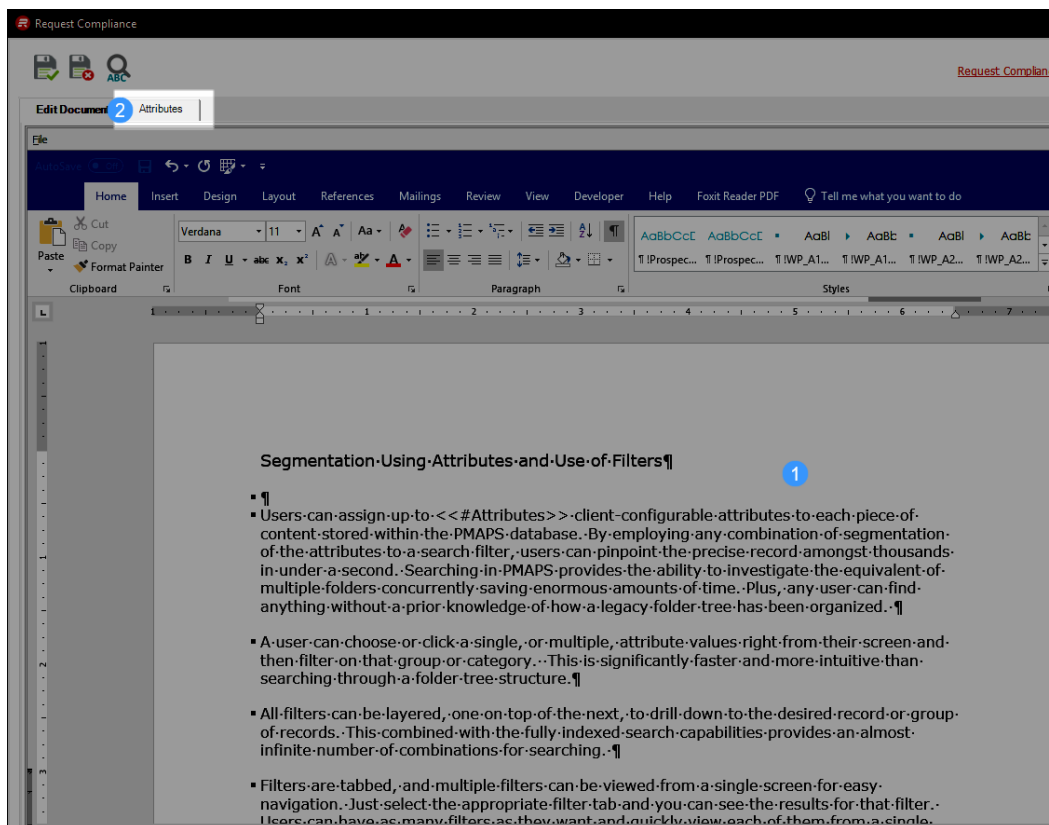


2. Select the record and click the [Send Record to Compliance](#) button.

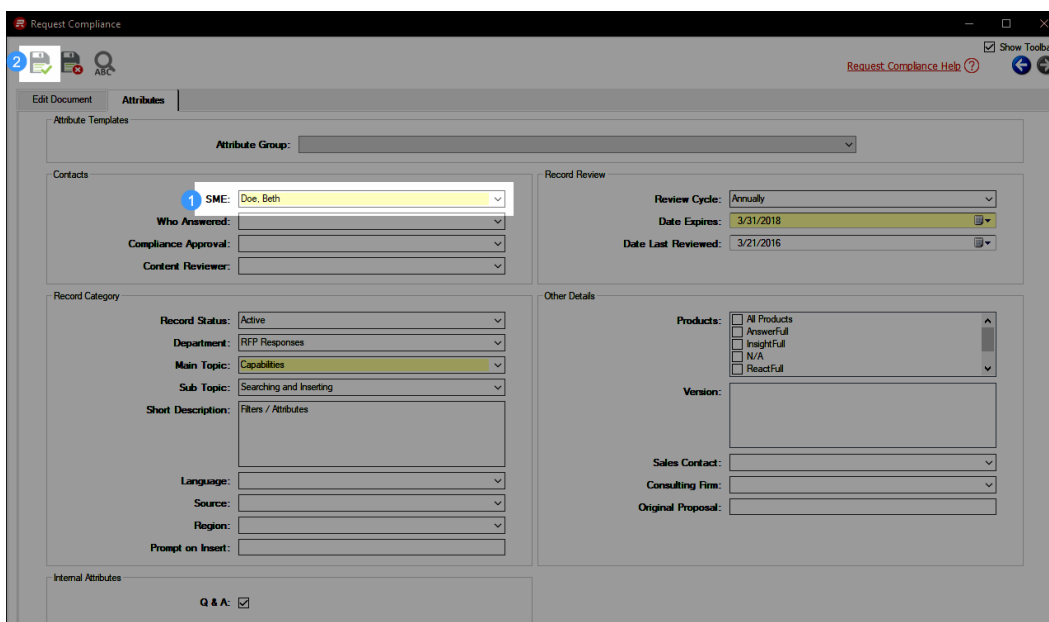




3. Make changes to the content (if necessary), and then go the [Attributes](#) tab.



4. Make changes to the attributes (if necessary) and click the [Save](#) button. An [SME](#) must be selected to proceed.







5. Choose one of two options: a) save to pending area (default); or b) send immediately.

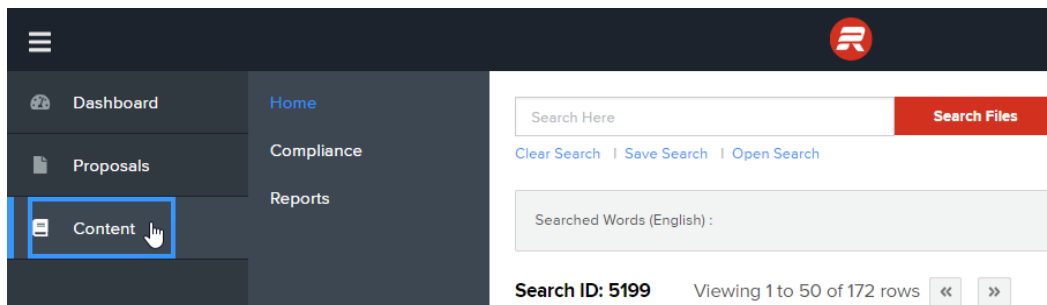
a) Click [Save to Compliance Central](#) to place the record in the [Not Sent](#) tab, and then click [Save](#).

b) Click [Save to Compliance Central and Request Compliance Immediately \(SME will be notified\)](#) to immediately email the record to the designated [SME](#), and then click [Save](#).

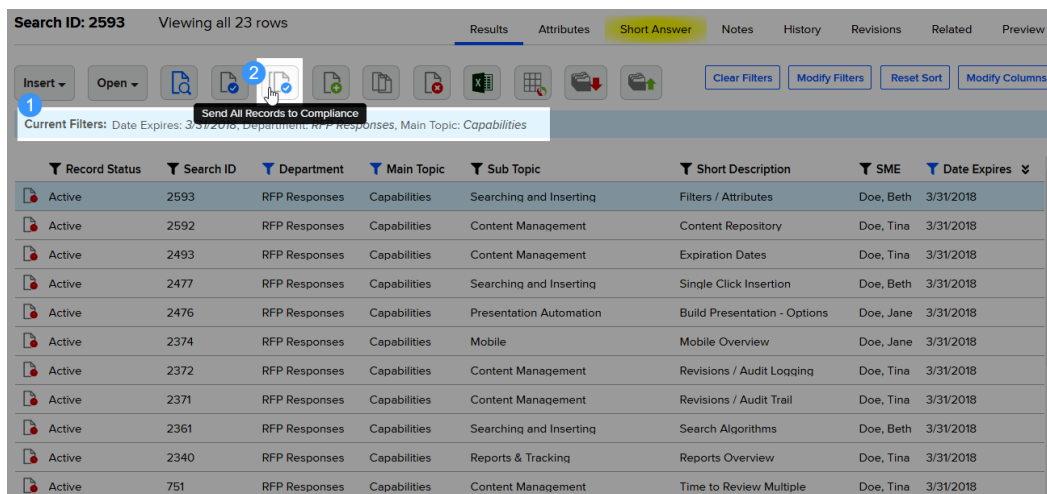


## Send All Records

1. If you are not on the [Content](#) page, go to the main menu and click [Content](#).



2. To send one or more records through Compliance, apply filters to display all the records you'd like to update, and then click the [Send All Records to Compliance](#) button. A single record can be processed this way.





5. Choose one of the two options: a) save to pending area (default); or b) send immediately. Do not use [Internal Review Only](#) if you plan to import updated records back into [Compliance](#).

a) Select [Add to Compliance Central](#) and then click [Submit](#).

Multiple Documents

### Verify Multiple Documents - Options

SME	# of Documents
Doe, Beth	8
Doe, Jane	2
Doe, Tina	13

☐ Show All Documents ☒ Show Totals Per SME

☐ Internal Review Only - Create document(s), but do not email or track in Compliance Central

☒ Open Documents Using Word ☐ (put all documents in one file)

☐ Save Documents In Folder

☐ Add to Compliance Central - Sends document to SME and adds to Compliance Central

☒ Add to Compliance Central

Show History ☐

Include Attributes Table ☒

Order By:

**1** **2**

b) Select [Add to Compliance Central](#), choose [Order By](#) to group records together, adjust what to include with the content, and then click [Submit](#).

Multiple Documents

### Verify Multiple Documents - Options

SME	# of Documents
Doe, Beth	8
Doe, Jane	2
Doe, Tina	13

☐ Show All Documents ☒ Show Totals Per SME

☐ Internal Review Only - Create document(s), but do not email or track in Compliance Central

☒ Open Documents Using Word ☐ (put all documents in one file)

☐ Save Documents In Folder

☐ Add to Compliance Central - Sends document to SME and adds to Compliance Central

☒ Add to Compliance Central

**2** Show History ☐

Include Attributes Table ☒

Order By:

**1** **3**



## Internal Review Only

[Internal Review Only](#) allows records to be exported for informational purposes only. The exported document(s) cannot be used to automatically update records through Compliance.

### TIPS

- If you'd like to sort by more than one attribute, choose the option to [Add to Compliance Central](#). These items will quickly be placed into the pending ([Not Sent](#) tab) area in [Compliance](#) where they can be downloaded using two sort options.

## Manage Compliance Items

### Send to SME

1. From the main menu, click on [Content](#), then [Compliance](#).

The screenshot shows the Compliance Central interface. On the left, a dark sidebar contains a main menu with items: Dashboard, Proposals, Content (highlighted with a blue bar and a '2' badge), Response, Configuration, and Collapse Menu. A secondary menu on the right of the sidebar lists: Home, Compliance (highlighted with a blue bar and a '3' badge), Reports, and Settings. The main content area has a top bar with the 'R' logo and a row of icons for document actions. Below this, there are three tabs: 'Not Sent - 8' (active), 'Sent To SME - 23', and 'Returned From SME'. A 'View' dropdown is set to '15' with 'Items per Page' text, and buttons for 'Reset Sort' and 'Clear Filter'. A table follows with columns for checkboxes, Department, Main Topic, and Sub Topic. The first row shows 'RFP Responses', 'Customer Service', and 'Support'. The second row shows 'RFP Responses', 'Customer', and 'Feedback'.



2. From the **Not Sent** tab, click the checkbox next to each record to send (or click the checkbox in the header row to select all), and then click the **Send to SME** button.

	Department	Main Topic	Sub Topic	Short Description	SME	Search ID	Owner	Date Added	Internal Record Notes
<input checked="" type="checkbox"/>	RFP Responses	Customer Service	Support	Ongoing Communications	Smith, Jane	102	adminuser	4/17/2019	
<input type="checkbox"/>	RFP Responses	Customer Service	Feedback and Evaluation	Measure	Strong, Cecilia	108	adminuser	4/17/2019	
<input checked="" type="checkbox"/>	RFP Responses	Customer Service	Support	Standard SLAs	Smith, Jane	892	adminuser	4/17/2019	
<input checked="" type="checkbox"/>	RFP Responses	Customer Service	Users	User Group	Smith, Jane	990	adminuser	4/17/2019	
<input type="checkbox"/>	RFP Responses	Customer Service	Support	Location of Support	Strong, Cecilia	1516	adminuser	4/17/2019	
<input type="checkbox"/>	RFP Responses	Customer Service		# of Clients	Smith, Fred	2312	adminuser	4/17/2019	
<input checked="" type="checkbox"/>	RFP Responses	Customer Service	Support	Support Overview	Smith, Jane	2321	adminuser	4/17/2019	
<input type="checkbox"/>	RFP Responses	Customer Service	Support	Account review frequency	Strong, Cecilia	4821	adminuser	4/17/2019	

3. Check the **Include Attributes** box, enter a **Due Date**, and then click **OK**.

**Request Compliance from SME**

☐ Include Notes

☒ Include Attributes

Due Date: 04/26/2019

☐ Download an ICAL Reminder.

☐ Attach an ICAL Reminder.

☐ Change the SME or Compliance Approval ☐ Add CCs to email

☐ Add notes to the items

4 Documents Selected

**OK** Cancel

## Additional Options

1. To include notes already applied to a record, check the **Include Notes** box.
2. To add a note to the selected records, click the **Include Notes** box, then click **Add notes to the items** and enter the desired notes.
3. To change the SME, check the **Change the SME or Compliance Approval** box. This will change the SME permanently.
4. To carbon copy someone, check the **Add CCs to email** and enter the email addresses separated by a semi-colon.
5. To open a calendar reminder, check the **Download an ICAL Reminder** box.



6. To send a calendar to the recipient, check the [Attach an ICAL Reminder](#) box.

**Request Compliance from SME**

1

☒ Include Notes  
☒ Include Attributes

3

☒ Change the SME or Compliance Approval

5

☒ Download an ICAL Reminder.

6

☒ Attach an ICAL Reminder.

Due Date: 04/26/2019

4

☒ Add CCs to email

Choose a SME  
Please Select a SME ▼  
Choose a Compliance Approval  
Please Select a Compliance Approval ▼

People to CC:  
separate email addresses with semicolons ";"  
example: john@web.com;jane@web.com

☒ Add notes to the items

2 Notes:

4 Documents Selected

OK

Cancel

7. Click the [Refresh](#) button to refresh Compliance and close the window.

**Refresh Compliance Central**

When your documents are finished importing, click the button below to refresh Compliance Central.

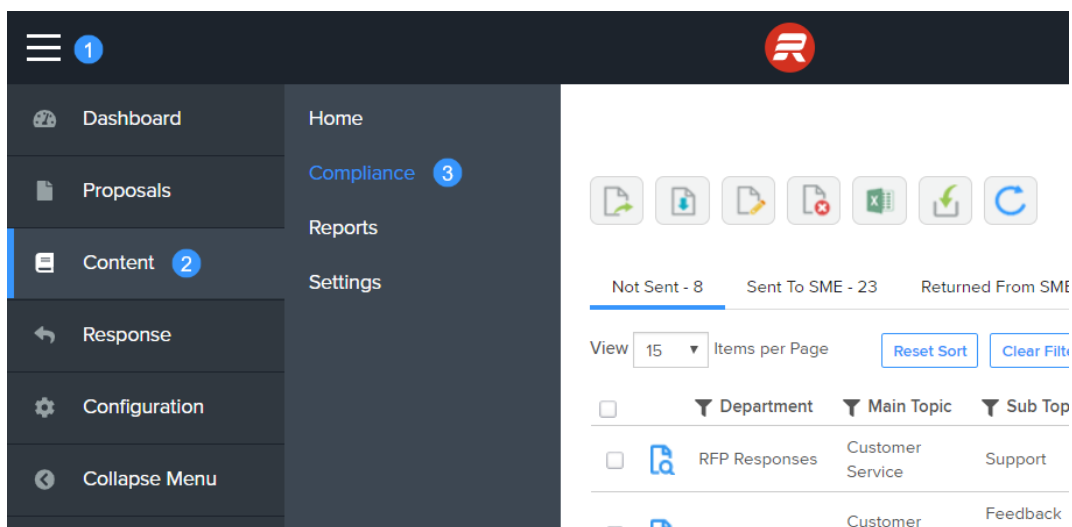
Close



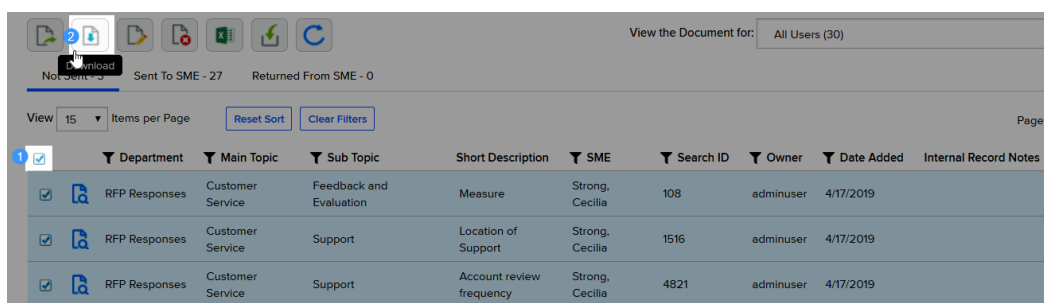
## Download

Use the [Download](#) option to create a Word document you can attach to a custom email.

1. From the main menu, click on [Content](#), then [Compliance](#).



2. Click the checkbox next to each record to send, and then click the [Download](#) button.





2. Check the option [Mark downloaded items as sent](#). This is required to import the updated record back into [Compliance](#).

**Download Documents**

☐ Mark downloaded items as sent.

☐ Include Notes

☐ Include Attributes

Sort By:

SME ▼

Then By:

▼

☐ Add notes to the items

**3 Documents Selected** **OK** Cancel

3. Check the [Include Attributes](#) box, enter a [Due Date](#), update the [Sort By](#), and then click [OK](#).

**Download Documents**

☒ Mark downloaded items as sent.

☐ Include Notes

☒ Include Attributes

Due Date: 04/26/2019

☐ Download an ICAL Reminder.

Sort By:

SME ▼

Then By:

▼

☐ Add notes to the items

**3 Documents Selected** **OK** Cancel





## Additional Options

1. To open a calendar reminder, check the [Download an ICAL Reminder](#) box.
2. To sort the records by an attribute, choose an option under [Sort By](#).
3. To sort the records by an additional attribute, choose an option under [Then By](#).
4. To add a note to all records, click the [Include Notes](#) box, then click [Add notes to the items](#) and enter the desired notes.

**Download Documents**

☒ Mark downloaded items as sent.

☐ Include Notes  
☒ Include Attributes

Due Date: 04/26/2019  
**1** ☒ Download an ICAL Reminder.

**2** Sort By:  
Main Topic ▼

**3** Then By:  
Sub Topic ▼

**4** ☒ Add notes to the items

Notes:  

Sample notes.

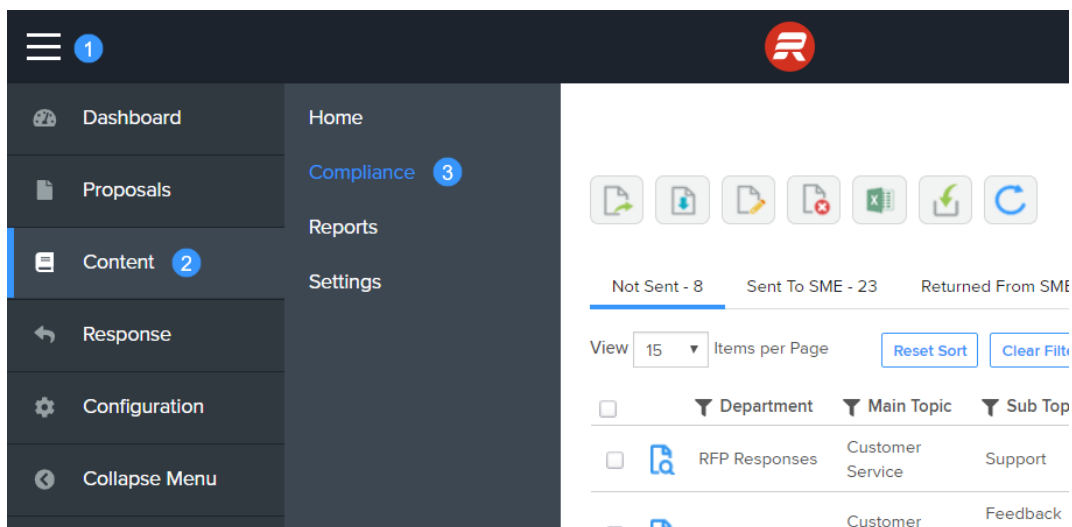
**3 Documents Selected** **OK** Cancel



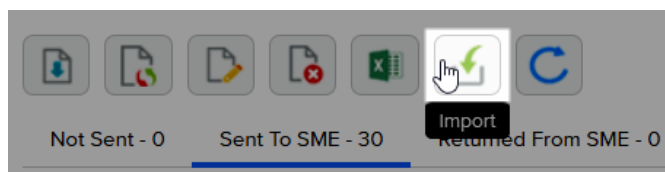
## Import

To upload update content record documents, use the [Import](#) feature. Make sure the document(s) is(are) closed and in a location where they are easy to find.

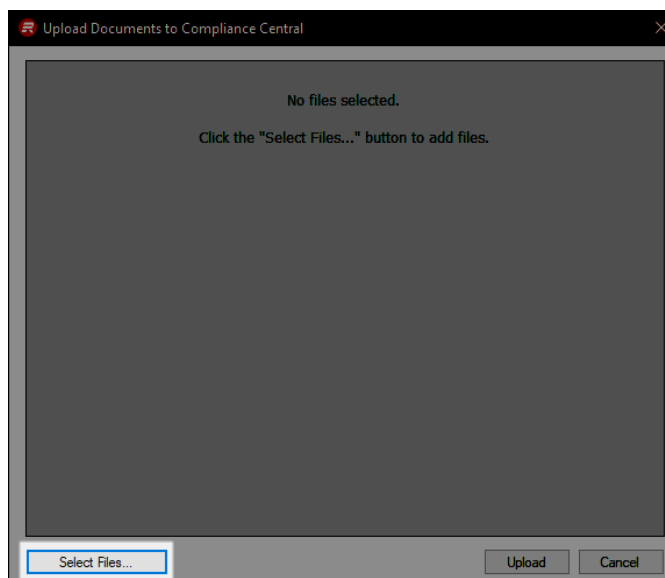
1. From the main menu, click on [Content](#), then [Compliance](#).



2. Click the [Import](#) button.

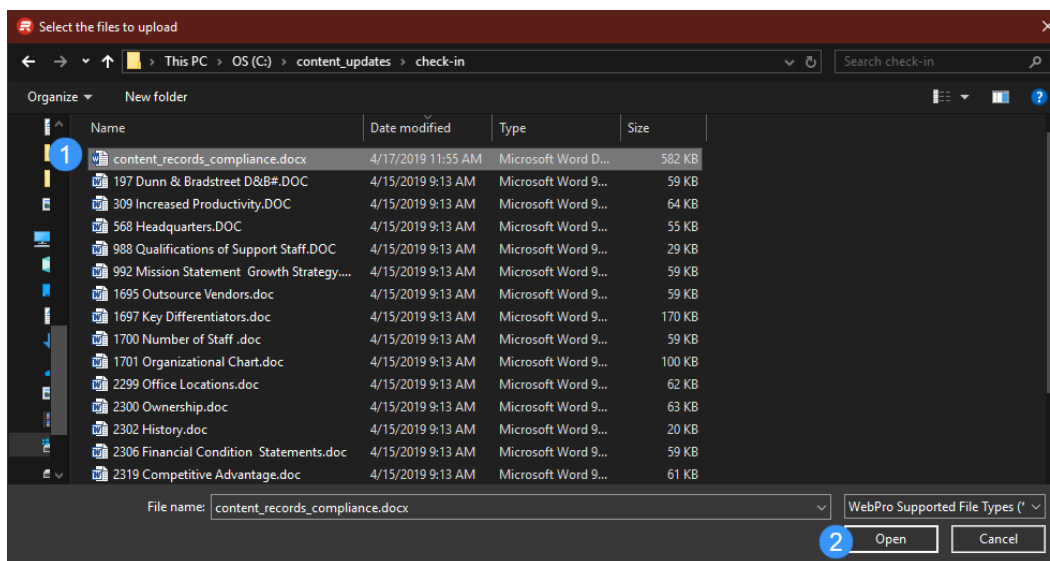


3. Click the [Select Files...](#) button.

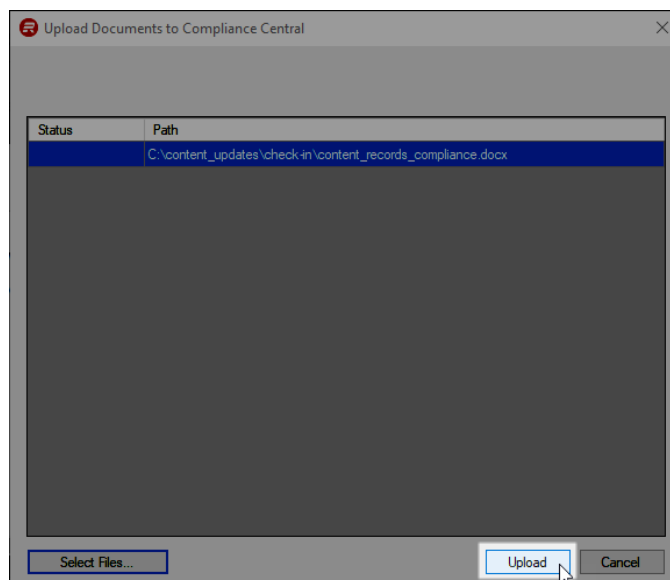




5. Navigate to file location, select the updated document(s), and then click [Open](#). You can select more than one document at once. You can also continue to click Select Files... to select additional documents.

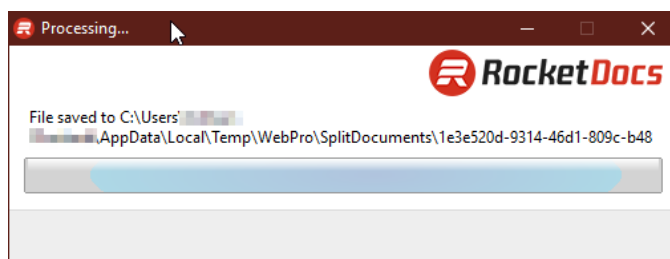


6. To import the updated documents, click the [Upload](#) button.

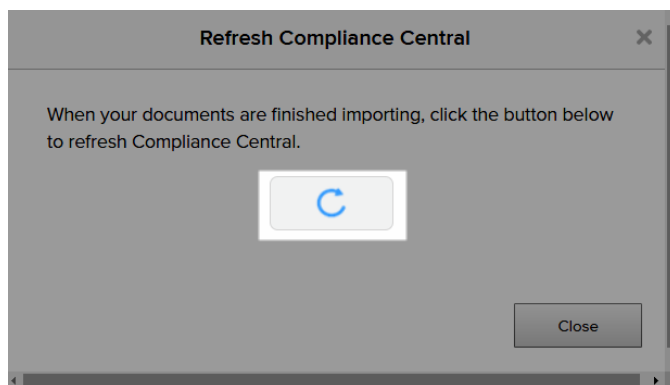




7. [ResponseFull](#) will be closing and opening Word during this process, so wait for the processing window to complete and close before doing any other work.

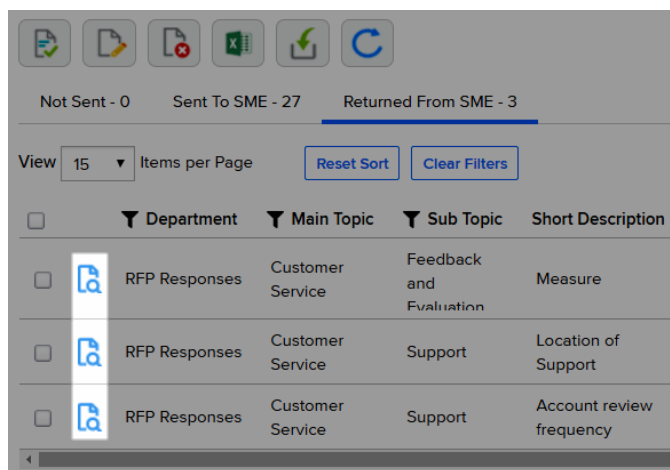


8. Click [Refresh](#) button to refresh the [Compliance](#) page (this will also close the window).



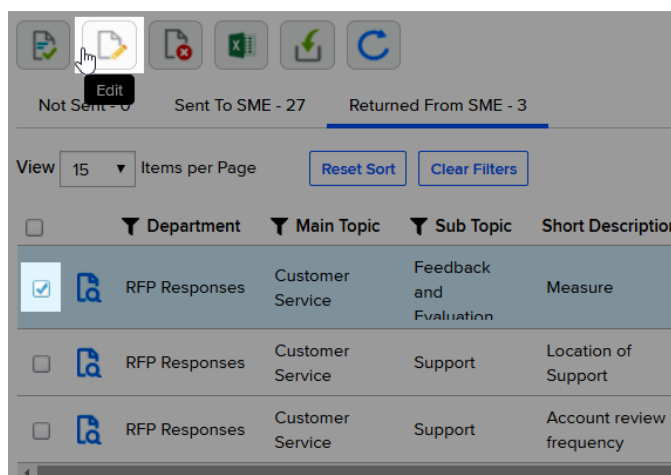
## Review

1. To view an individual content record before approval, click the [View Document](#) button next to the record.





2. To manually edit an individual content record before approval, check the box next to the record and click the [Edit](#) button. Save changes and close the record before approving.



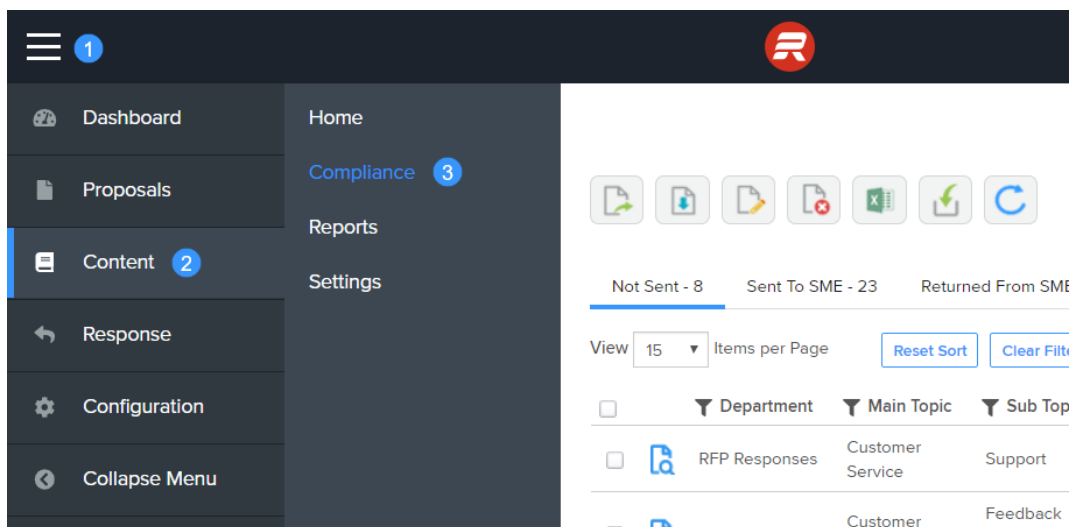
### TIPS

- Check the review frequency of content records before approving the updates back to the content records. This helps you ensure you are updating the expiration date appropriately (or not updating at all depending on preference) on approval.
- Review the updated documents before importing them into Compliance. It's faster to review these in a single document where all that's required is to Approve the records in just three clicks.

## Approve

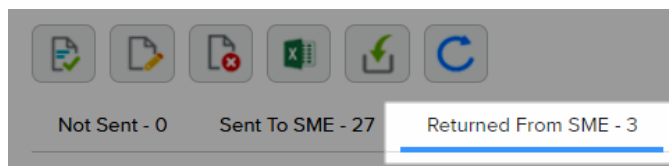
Whenever there are records that have been imported into [Compliance](#), the final step in the process is to approve them.

1. From the main menu, click on [Content](#), then [Compliance](#).

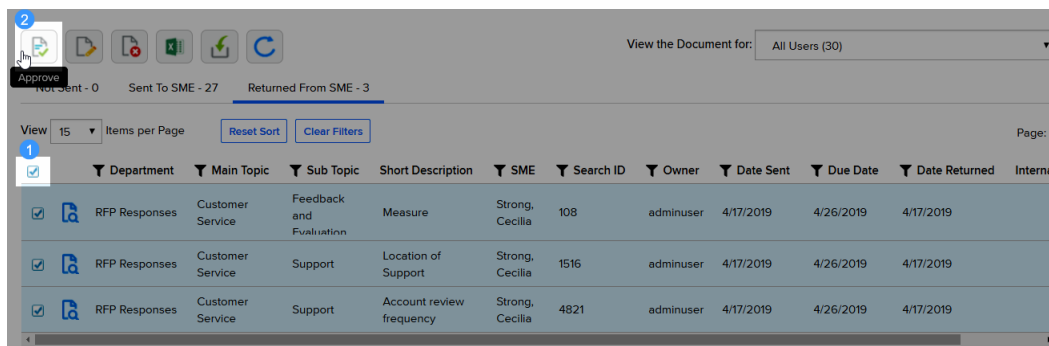




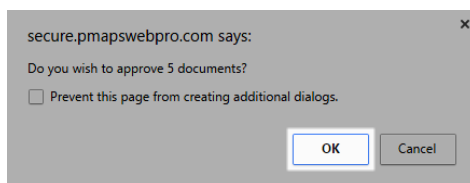
- Click on the [Returned From SME](#) tab.



- Check the box next to the records to approve (or check the box in the header row to select all), and then click the [Approve](#) button.



- Confirm the number of records to approve, and then click [OK](#).

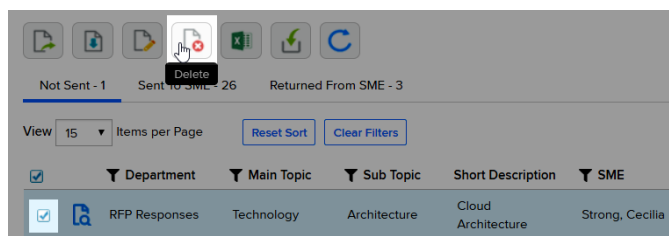


## Delete

You can remove content record(s) from [Compliance](#). This will *not* delete a record from [ResponseFull](#). It is not advisable to remove content records from the [Returned From SME](#) tab because you will lose any updates to that(those) content record(s).

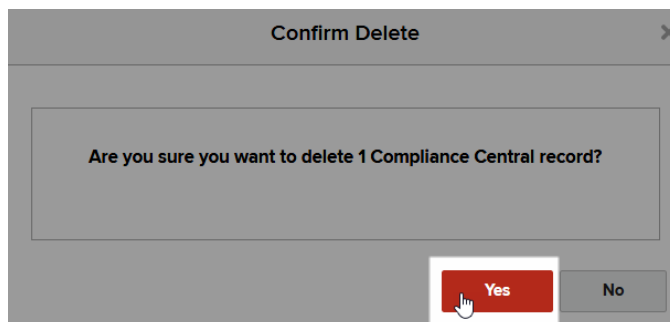
## Not Sent Records

- Check the box(es) next to the record(s) to remove, and then click the [Delete](#) button.



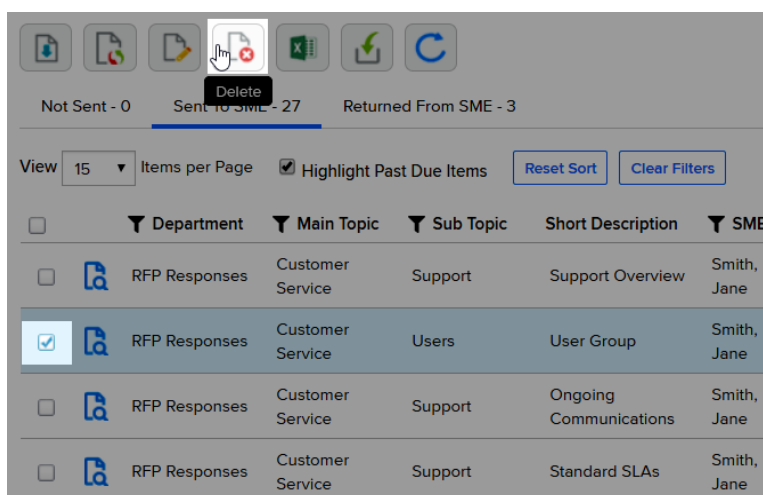


2. Click [Yes](#) to proceed or [No](#) to cancel. The page will automatically refresh.

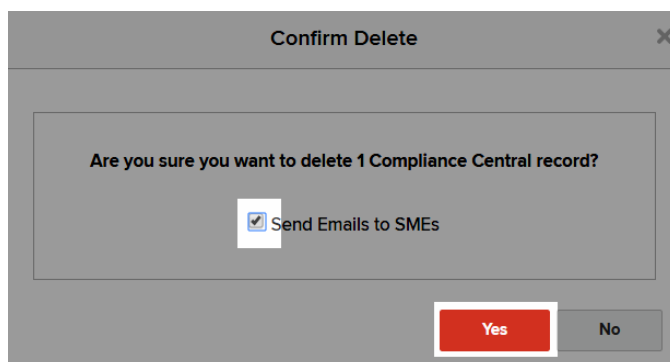


## Sent Records

1. Check the box(es) next to the record(s) to remove, and then click the [Delete](#) button.



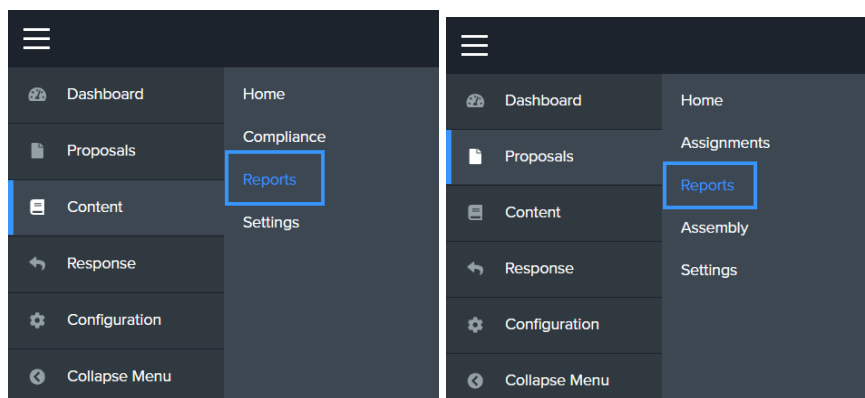
2. Choose whether to notify the SME, and then click [Yes](#) to proceed or [No](#) to cancel. The page will automatically refresh.









# Reports
















Access to Reports is available from both the Proposals and Content modules. All users may can view and edit reports they create. Administrators have access to all reports and may also designate other users with admin access to all reports.



## Select

Users can view and edit all reports to which they have access on the [Select](#) tab. By default, the user will see only reports they have created. To see all reports, check the box next to [View all reports](#).

1. The [Scope](#) column indicates whether a report is Private  or Public .
2. The [Type](#) column indicates whether a report is a Content  or Proposal  report.
3. The [Created](#) report indicates the date and time the report was created.
4. The [Creator](#) column indicates the user name of the person who created the report.
5. The [Last Edited](#) column indicates the date and time the report was last edited.
6. The [Edited By](#) column indicates the user name of the person last edited the report.
7. The [Name](#) column is the name given to the report.

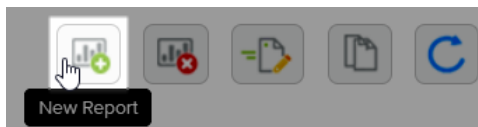
Select							Build	View
<div></div> <div><input type="checkbox"/> View all reports</div>								
1 Scope	2 Type	3 Created	4 Creator	5 Last Edited	6 Edited By	7 Name		
		5/9/2016 2:05 PM	adminuser	1/13/2017 8:41 PM	adminuser	Archived Records		
		11/1/2017 11:39 AM	adminuser	11/1/2017 12:12 PM	adminuser	Content added and updated by user		
		5/9/2016 2:04 PM	adminuser	5/9/2016 2:19 PM	adminuser	Proposal Status		
		11/7/2017 11:49 AM	adminuser	11/7/2017 11:49 AM	adminuser	Proposal Team KPI Report by YOUR NAME.		
		1/9/2017 3:08 PM	adminuser	1/9/2017 7:55 PM	adminuser	Sample Proposal Report		





## New Report

To create a new report, click the [New Report](#) button.



Refer to the numbered items related to the screen shot below for report options.

Report Options

1

Select a type of report:

Proposals

2

Type a name for the report:

Weekly Proposal Status

3

☒ Save as Public Report (everyone can see)

4

Sort results by:

Proposal Date Due

5

☒ Invert Sort

6

Visible fields:

Check All

Un-Check All

Customer Name

Customer Type

Date Received

Estimated Revenue (MM)

7

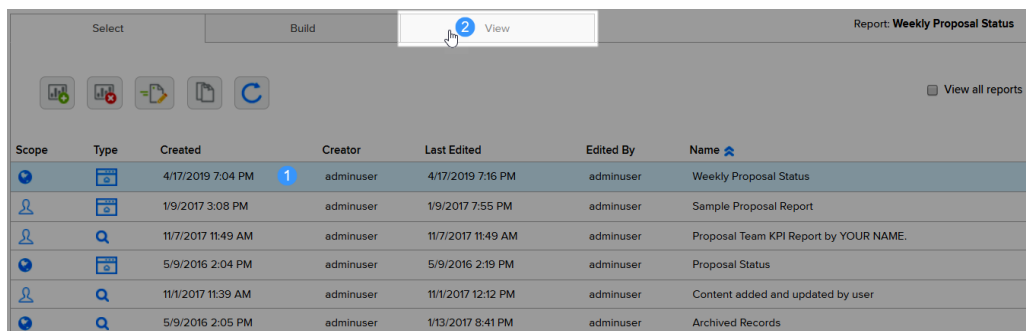
OK

Cancel

1. Select the type of report from the dropdown, either for [Proposals](#) (proposal record attributes) or [Q+A Documents](#) (content record attributes).
2. [Type a name for the report](#).
3. To make this report available to all users, check [Save as Public Report \(everyone can see\)](#).
4. To set a default ascending sort order, choose from the [Sort results by](#) dropdown. Check [Invert Sort](#) to sort in descending order. This attribute does not have to be a visible field in the report.
5. Select the [Visible fields](#) to include in the report by checking the box next to each. Arrange the order by using the up/down and top/bottom arrows.
6. Click [OK](#) to save the report.



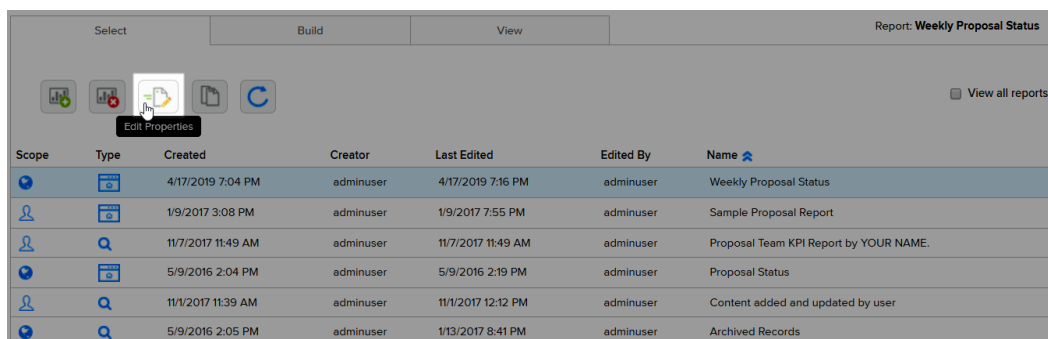
To view the report, select it from the list and click the [View](#) tab (or double-click on the report).



Scope	Type	Created	Creator	Last Edited	Edited By	Name
📌	📄	4/17/2019 7:04 PM	adminuser	4/17/2019 7:16 PM	adminuser	Weekly Proposal Status
👤	📄	1/9/2017 3:08 PM	adminuser	1/9/2017 7:55 PM	adminuser	Sample Proposal Report
👤	🔍	11/7/2017 11:49 AM	adminuser	11/7/2017 11:49 AM	adminuser	Proposal Team KPI Report by YOUR NAME.
📌	📄	5/9/2016 2:04 PM	adminuser	5/9/2016 2:19 PM	adminuser	Proposal Status
👤	🔍	11/1/2017 11:39 AM	adminuser	11/1/2017 12:12 PM	adminuser	Content added and updated by user
📌	🔍	5/9/2016 2:05 PM	adminuser	1/13/2017 8:41 PM	adminuser	Archived Records

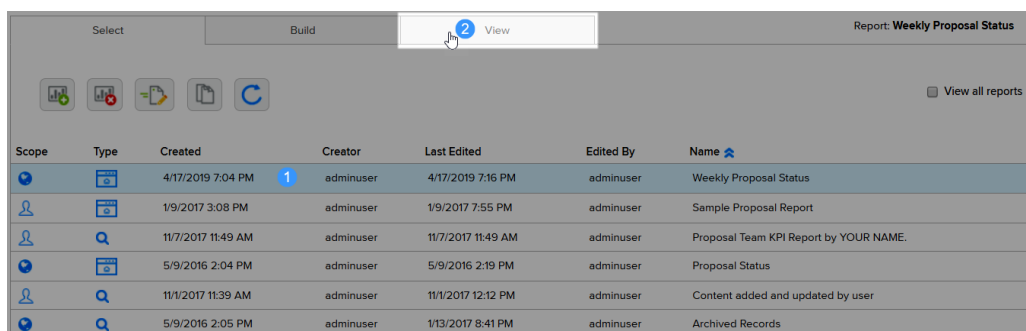
## Edit Properties

1. Select the report to edit (single click) and click the [Edit Properties](#) button.



Scope	Type	Created	Creator	Last Edited	Edited By	Name
📌	📄	4/17/2019 7:04 PM	adminuser	4/17/2019 7:16 PM	adminuser	Weekly Proposal Status
👤	📄	1/9/2017 3:08 PM	adminuser	1/9/2017 7:55 PM	adminuser	Sample Proposal Report
👤	🔍	11/7/2017 11:49 AM	adminuser	11/7/2017 11:49 AM	adminuser	Proposal Team KPI Report by YOUR NAME.
📌	📄	5/9/2016 2:04 PM	adminuser	5/9/2016 2:19 PM	adminuser	Proposal Status
👤	🔍	11/1/2017 11:39 AM	adminuser	11/1/2017 12:12 PM	adminuser	Content added and updated by user
📌	🔍	5/9/2016 2:05 PM	adminuser	1/13/2017 8:41 PM	adminuser	Archived Records

2. Make changes and click [OK](#) to save.
3. To view the report, select it from the list and click the [View](#) tab (or double-click on the report).

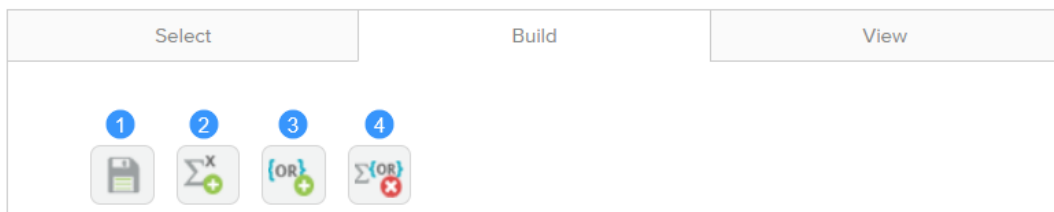


Scope	Type	Created	Creator	Last Edited	Edited By	Name
📌	📄	4/17/2019 7:04 PM	adminuser	4/17/2019 7:16 PM	adminuser	Weekly Proposal Status
👤	📄	1/9/2017 3:08 PM	adminuser	1/9/2017 7:55 PM	adminuser	Sample Proposal Report
👤	🔍	11/7/2017 11:49 AM	adminuser	11/7/2017 11:49 AM	adminuser	Proposal Team KPI Report by YOUR NAME.
📌	📄	5/9/2016 2:04 PM	adminuser	5/9/2016 2:19 PM	adminuser	Proposal Status
👤	🔍	11/1/2017 11:39 AM	adminuser	11/1/2017 12:12 PM	adminuser	Content added and updated by user
📌	🔍	5/9/2016 2:05 PM	adminuser	1/13/2017 8:41 PM	adminuser	Archived Records



## Build Tab

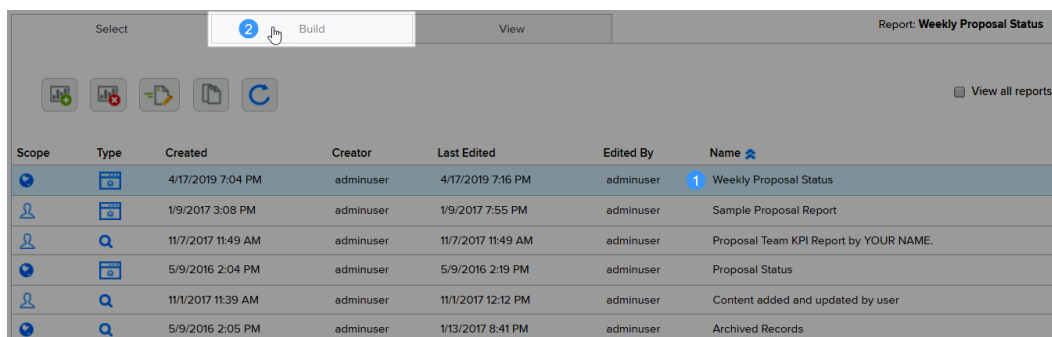
Go to the [Build](#) tab to apply conditions for the report.




1. Click [Save Changes](#) after making any changes to conditions before viewing the report.
2. Click [Add Term](#) to add a condition.
3. Click [Add Group](#) to add a group.
4. Click [Clear All](#) to remove all conditions and groups.

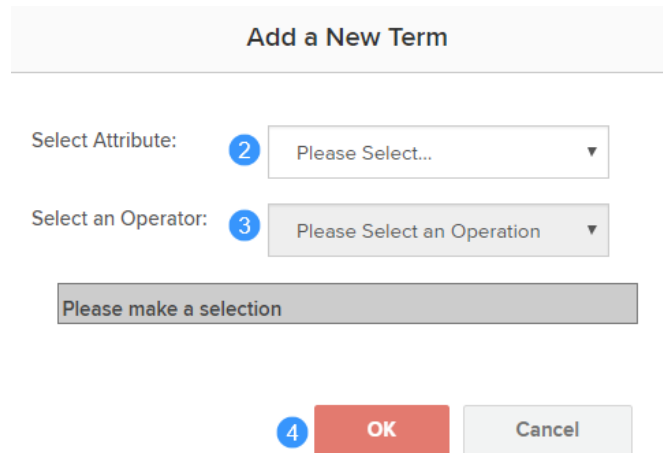
## Add a Condition

To apply a condition, select the report and then on the [Build](#) tab.

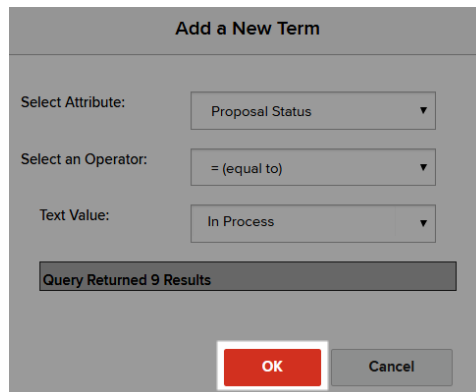




1. To add a condition, click the [Add Term](#) button  and refer to the numbered items related to the screen shot below.



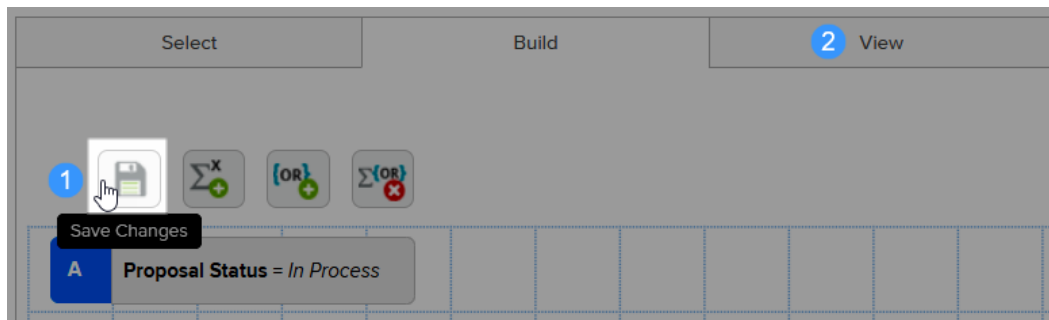
2. In the [Select Attribute](#) dropdown, select attribute to filter.
3. In the [Select an Operator](#) dropdown, select an operator appropriate to the selected attribute.
4. In the value field, choose the desired value. Note the results indicated by the query.
5. Click [OK](#).



Repeat steps 1 through 5 to add multiple conditions. Learn about groups in the [next section](#).

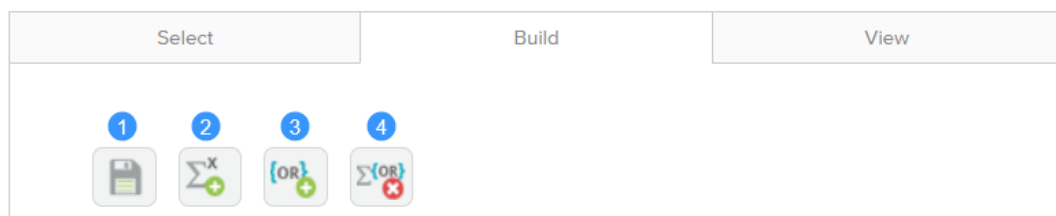


- Click [Save Changes](#) and click the [View](#) tab to view the modified report.

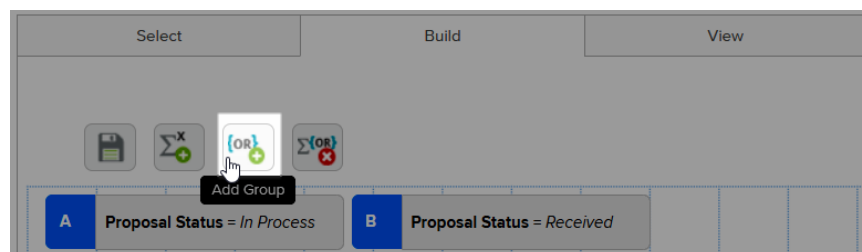


## Add a Group

Go to the [Build](#) tab to apply conditions for the report.



- To add a grouping, click the [Add Group](#) button.

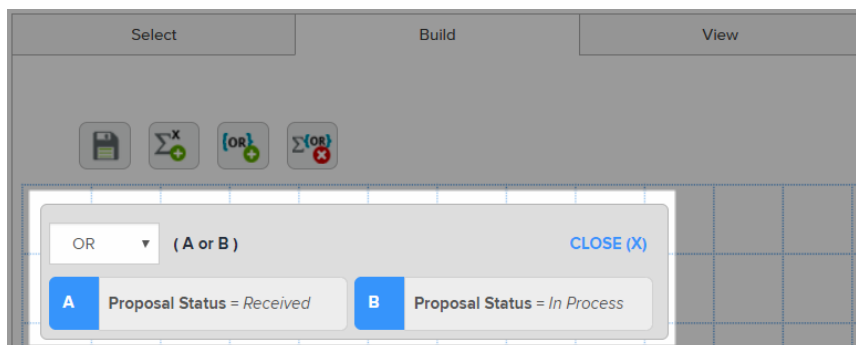


- Drag-and-drop the condition into the group window. The grey grouping box will turn blue when the condition is in the window.

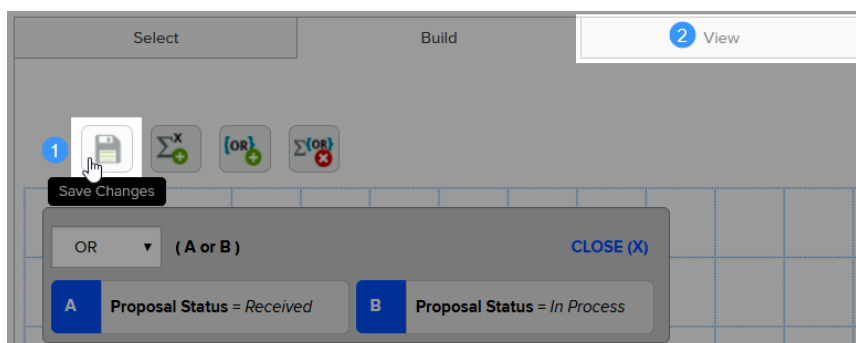




3. Drag-and-drop until all conditions are in the group window.



4. Choose the type of group.
  - a. Choose **OR** to include results where any of the conditions are met.
  - b. Choose **AND** to include results where all conditions are met.
5. Click **Save Changes** and click the **View** tab to view the modified report.



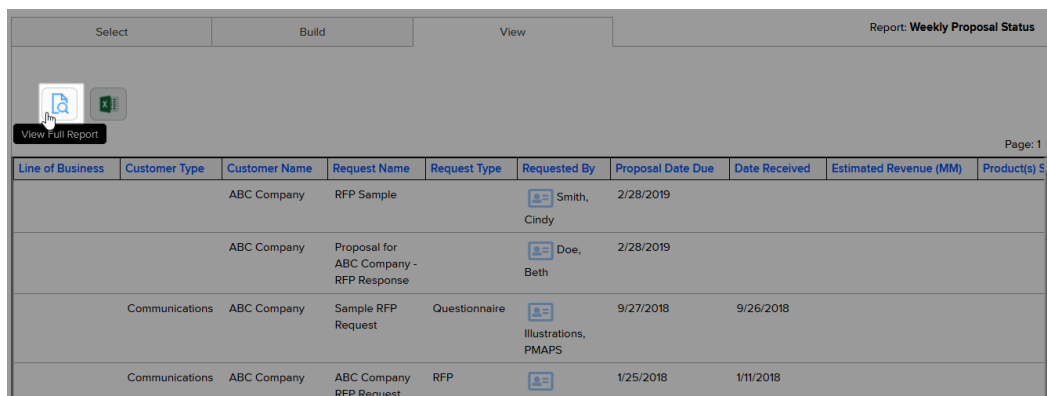
## View Tab

1. To view a report, select it from the list and click the **View** tab (or double-click on the report).

Scope	Type	Created	Creator	Last Edited	Edited By	Name
📌	📄	4/17/2019 7:04 PM	adminuser	4/17/2019 7:16 PM	adminuser	Weekly Proposal Status
👤	📄	1/9/2017 3:08 PM	adminuser	1/9/2017 7:55 PM	adminuser	Sample Proposal Report
👤	🔍	11/7/2017 11:49 AM	adminuser	11/7/2017 11:49 AM	adminuser	Proposal Team KPI Report by YOUR NAME.
📌	📄	5/9/2016 2:04 PM	adminuser	5/9/2016 2:19 PM	adminuser	Proposal Status
👤	🔍	11/1/2017 11:39 AM	adminuser	11/1/2017 12:12 PM	adminuser	Content added and updated by user
📌	🔍	5/9/2016 2:05 PM	adminuser	1/13/2017 8:41 PM	adminuser	Archived Records



2. To view the full report in a separate web page, click the [View Full Report](#) button.

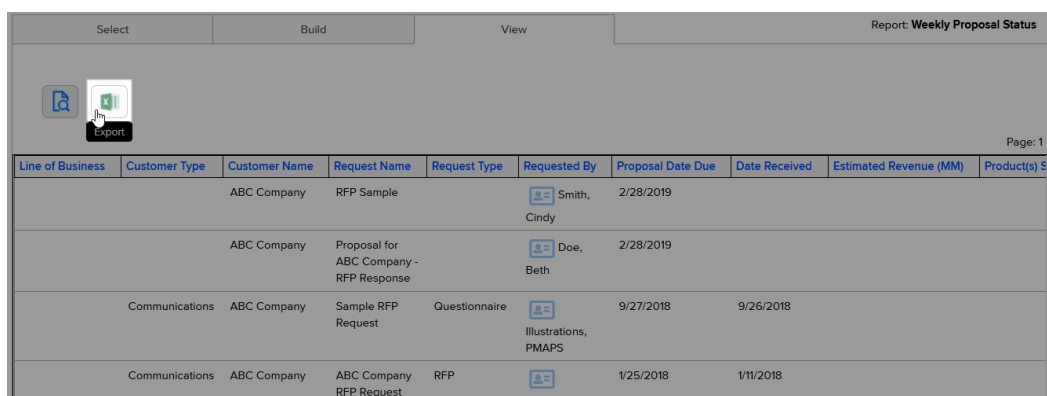


Report: Weekly Proposal Status

Page: 1

Line of Business	Customer Type	Customer Name	Request Name	Request Type	Requested By	Proposal Date Due	Date Received	Estimated Revenue (MM)	Product(s)
		ABC Company	RFP Sample		Smith, Cindy	2/28/2019			
		ABC Company	Proposal for ABC Company - RFP Response		Doe, Beth	2/28/2019			
Communications	ABC Company	Sample RFP Request	Questionnaire		Illustrations, PMAPS	9/27/2018	9/26/2018		
Communications	ABC Company	ABC Company RFP Request	RFP		Illustrations	1/25/2018	1/11/2018		

3. To export the report data, click the [Export](#) button.

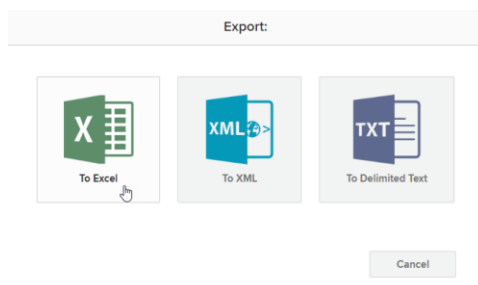


Report: Weekly Proposal Status

Page: 1

Line of Business	Customer Type	Customer Name	Request Name	Request Type	Requested By	Proposal Date Due	Date Received	Estimated Revenue (MM)	Product(s)
		ABC Company	RFP Sample		Smith, Cindy	2/28/2019			
		ABC Company	Proposal for ABC Company - RFP Response		Doe, Beth	2/28/2019			
Communications	ABC Company	Sample RFP Request	Questionnaire		Illustrations, PMAPS	9/27/2018	9/26/2018		
Communications	ABC Company	ABC Company RFP Request	RFP		Illustrations	1/25/2018	1/11/2018		

4. Click on the export type to export the report data.



## Content Settings

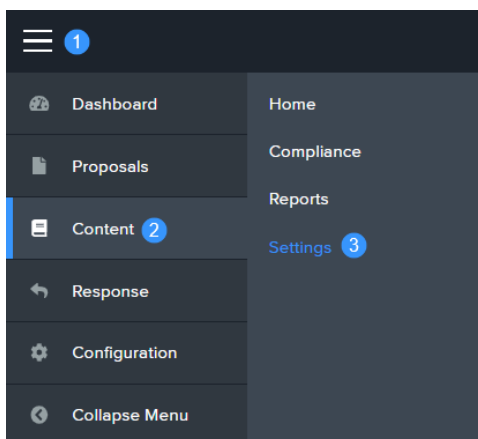
### Attribute Groups

[Attribute Groups](#) are templates that auto-fill a set of attribute values for content records and are not linked to the records. Attribute groups are managed in Content > Settings, which requires Administrator permission.

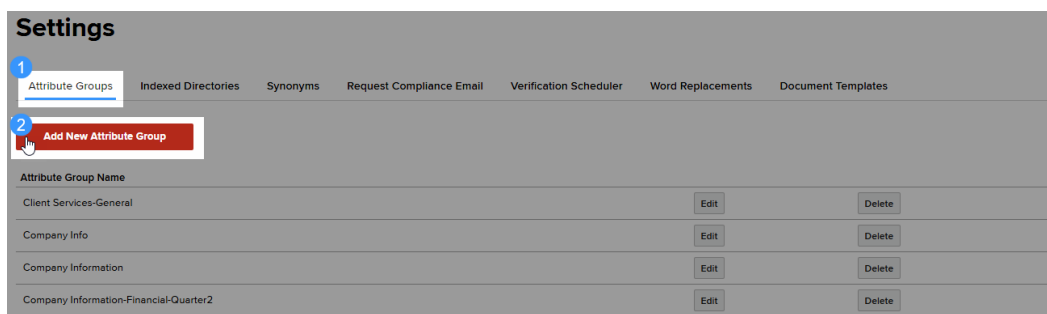


## Add an Attribute Group

1. From the main menu, choose [Content](#) then [Settings](#).



2. Choose [Attribute Groups](#) and click [Add New Attribute Group](#).










3. Select the values that should be auto-fill when using the attribute group.

**Add Attribute Group**

Group Name:

<b>Contacts</b>	<b>Record Review</b>
SME: 	Review Cycle: <input type="text"/>
Who Answered: <input type="text"/>	Date Expires: 
Compliance Approval: <input type="text"/>	Date Last Reviewed: <input type="text"/>
Content Reviewer: <input type="text"/>	<b>Other Details</b>
<b>Record Category</b>	<input type="checkbox"/> All Products
Record Status: <input type="text"/>	<input type="checkbox"/> AnswerFull
Department: <input type="text"/>	<input type="checkbox"/> InsightFull
Main Topic: <input type="text"/>	<input type="checkbox"/> N/A
Sub Topic: <input type="text"/>	<input type="checkbox"/> ReactFull
Short Description: <input type="text"/>	<input type="checkbox"/> ResponseFull
Language: <input type="text"/>	<input type="checkbox"/> WinFull
Source: <input type="text"/>	Products: <input type="text"/>
Region: <input type="text"/>	Version: <input type="text"/>
Prompt on Insert: <input type="text"/>	Sales Contact: <input type="text"/>
<b>Internal Attributes</b>	Consulting Firm: <input type="text"/>
Q & A: 	Original Proposal: <input type="text"/>

☐

**Save** **Cancel**

**TIPS**

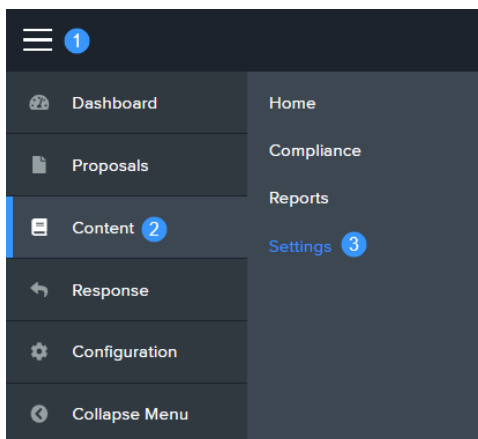
- Always choose a [SME](#), even if it's only a placeholder. This will ensure you can use all the [Content](#) and [Compliance](#) tools to manage your content.
- Use thoughtful consideration when entering expiration dates, knowing that it will be necessary to update these when those expiration dates pass.
- If the record is a question-and-answer pair, check the [Q & A](#) checkbox so that the insert feature will work properly and only insert the response.
- Use a [Group Name](#) that will be easy to understand.



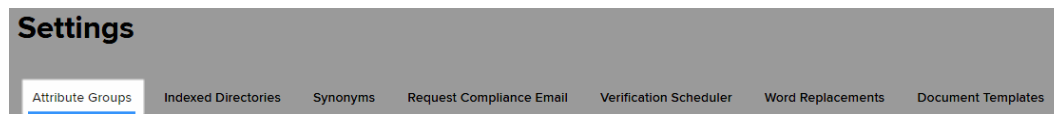
4. Enter a meaningful **Group Name** for the set of values, and then click Save.

## Edit an Attribute Group

1. From the main menu, choose **Content** then **Settings**.



2. Choose **Attribute Groups**.





3. Click the [Edit](#) button next to the [Attribute Group](#) to change.

Attribute Group Name		
Client Services-General	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Info	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Info-History	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Information	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Information-Financial-Quarter	<a href="#">Edit</a>	<a href="#">Delete</a>

4. Make appropriate changes and click [Save](#). Note: this will not update any existing records. There is no link between attribute groups and records.

Group Name:

**Contacts**

SME:

Who Answered:

Compliance Approval:

Content Reviewer:

**Record Category**

Record Status:

Department:

Main Topic:

Sub Topic:

Short Description:

Language:

Source:

Region:

Prompt on Insert:

**Internal Attributes**

Q & A: ☒

**Record Review**

Review Cycle:

Date Expires:

Date Last Reviewed:

**Other Details**

☐ All Products

☐ AnswerFull

☐ InsightFull

☐ N/A

☐ ReactFull

☐ ResponseFull

☐ WinFull

Products:

Version:

Sales Contact:

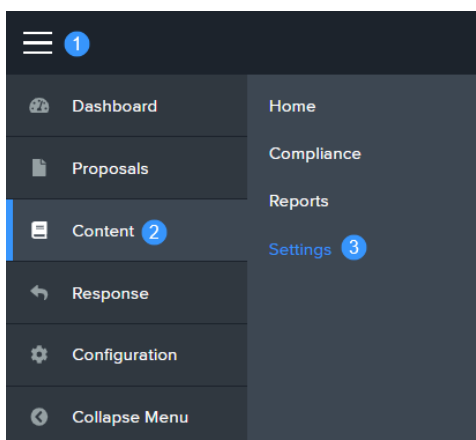
Consulting Firm:

Original Proposal:

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

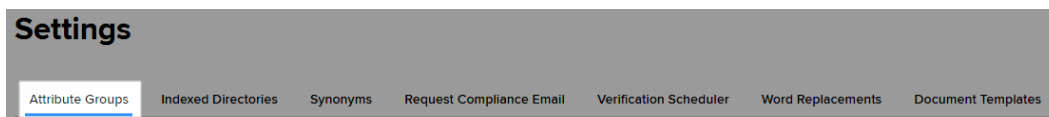
## Delete an Attribute Group

1. From the main menu, choose [Content](#) then [Settings](#).





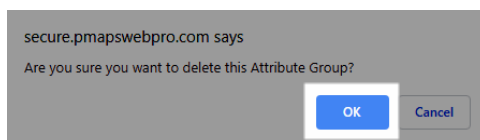
2. Choose [Attribute Groups](#).



3. Click the [Delete](#) button next to the [Attribute Group](#) to remove.

Attribute Group Name		
Client Services-General	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Info	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Info-History	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Information	<a href="#">Edit</a>	<a href="#">Delete</a>
Company Information-Financial-Quarter	<a href="#">Edit</a>	<a href="#">Delete</a>

4. Click [OK](#) to proceed.



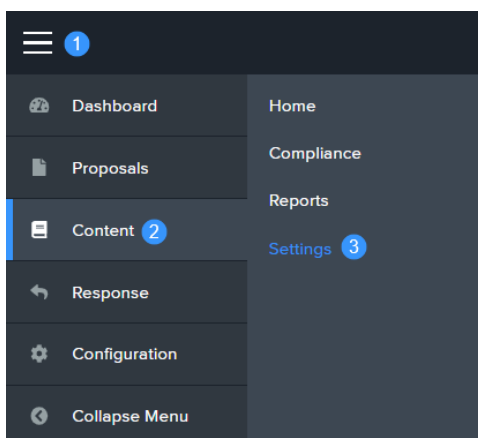
## Indexed Directories

### Server Files

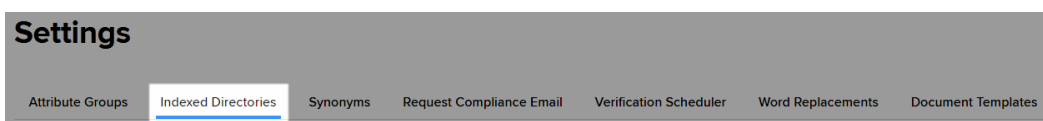
Indexed Directories are folder shares on your server that contain documents you'd like to store and search using [ResponseFull](#). It enables one-way synchronization of documents from a folder share into a ResponseFull web application and continuously scans for permitted file types (.doc .docx .xls .xlsx .ppt .pptx .pdf). Indexed documents are read only and exempt from editing, deleting, and using compliance, meaning these activities must take place in the folder share. This requires that the Indexer application be installed, configured, and running on a local server. If you are interested in using this functionality, please contact your customer success manager or [submit a ticket](#).

### Add a Directory

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Indexed Directories](#).



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

Is SharePoint	UNC Path / SharePoint Url
<input type="checkbox"/>	\\servername\public\marketing\resumes\

4. click the radio button [UNC/Web](#).

### Add Directory

Directory Type: ☒ UNC / Web ☐ Microsoft SharePoint

UNC Directory:

☒ Enabled

Options: ☐ Scan Sub Directories

Store Files on Web Server (Highly Recommended)

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



5. Enter the [UNC Directory](#) for the location of the files. Do not use mapped network drives unless you'll be installing and running the indexer from that same computer. Leave the [Enabled](#) box checked. **Note: once you have saved a new directory, the UNC Directory cannot be altered, and you'll have to delete and start over to make corrections.**

**Add Directory**

Directory Type: ☒ UNC / Web ☐ Microsoft SharePoint

UNC Directory:

☒ Enabled

Options: ☐ Scan Sub Directories

Store Files on Web Server (Highly Recommended) ▼

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

6. To include sub-folders under the [UNC Directory](#), check the [Scan Sub Directories](#) box.

**Add Directory**

Directory Type: ☒ UNC / Web ☐ Microsoft SharePoint

UNC Directory:

☒ Enabled

Options: ☒ Scan Sub Directories

Store Files on Web Server (Highly Recommended) ▼

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

7. Leave the option set to [Store Files on Web Server \(Highly Recommended\)](#). **Note: if you elect to [Keep file in existing location](#), any user that tries to view or download these files must also have access to that folder and it may take much longer to view/download these files.**

**Add Directory**

Directory Type: ☒ UNC / Web ☐ Microsoft SharePoint

UNC Directory:

☒ Enabled

Options: ☒ Scan Sub Directories

Store Files on Web Server (Highly Recommended) ▼

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



8. Uncheck file type extensions to exclude those from indexing.

**Add Directory**

Directory Type: ☒ UNC / Web ☐ Microsoft SharePoint

UNC Directory:

☒ Enabled

Options: ☒ Scan Sub Directories

Store Files on Web Server (Highly Recommended) ▼

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

10. Select an [Indexer](#). This is mandatory before you can save the new directory.

**Add Directory**

Directory Type: ☒ UNC / Web ☐ Microsoft SharePoint

UNC Directory:

☐ Enabled

Options: ☒ Scan Sub Directories

Store Files on Web Server (Highly Recommended) ▼

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

Indexer:  ▼



11. Select the attributes that will be applied to all files indexed from this directory, and then click [Save](#).

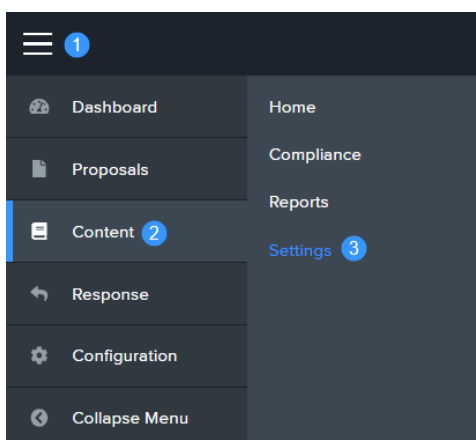
The final step is to go to the [Configuration](#) settings and edit the directory so that user(s) and/or group(s) have access. These instructions are in the Configuration userguide.

## Synonyms

Use Synonyms to help users locate records when searching for content responses, especially for unique words to your organization or industry. Attribute groups are managed in [Content](#) > [Settings](#), which requires Administrator permission.

### Add a Synonym

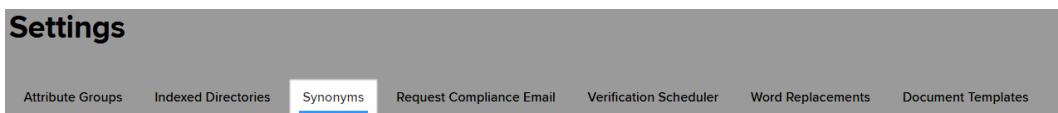
1. From the main menu, choose [Content](#) then [Settings](#).



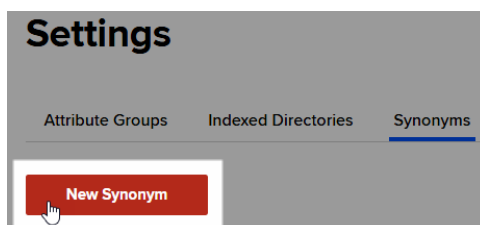




2. Click on [Synonyms](#).



3. Click [New Synonym](#).



4. Enter the word.

A screenshot of a dialog box for adding a new synonym. It has two input fields: 'Word' and 'Synonym'. The 'Word' field contains the text 'bio'. Below the fields are two buttons: 'Save' (red) and 'Cancel' (gray).

5. Enter a synonym for the word, and then click [Save](#).

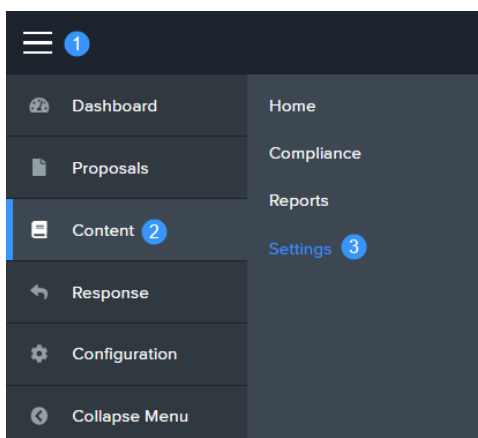
A screenshot of the same dialog box. The 'Synonym' field now contains the text 'resume'. The 'Save' button is highlighted with a red border and a mouse cursor, and it is labeled with a blue number '2'. The 'Word' field still contains 'bio' and is labeled with a blue number '1'.

#### TIPS

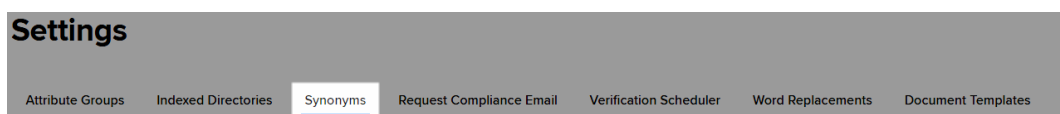
- There is no need to enter the word as both a word and synonym because the entries are reciprocal, meaning if a user has the option to search synonyms enabled, and searches for either the word or the synonym, it will find the synonym or the word in the results.

## Edit a Synonym

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Synonyms](#).



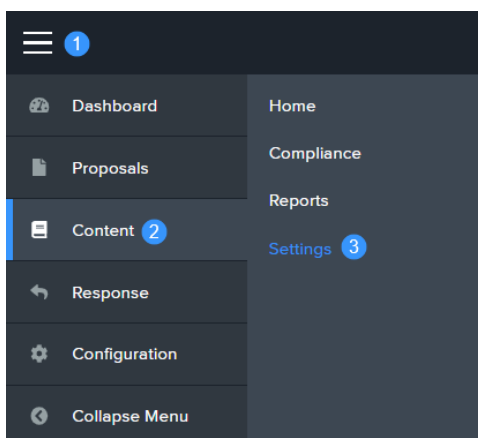
3. Click the [Edit](#) next to the synonym.

Word	Synonym		
bio	biography	<a href="#">Edit</a>	<a href="#">Delete</a>
bio	resumes	<a href="#">Edit</a>	<a href="#">Delete</a>
client	customer	<a href="#">Edit</a>	<a href="#">Delete</a>
company	corporation	<a href="#">Edit</a>	<a href="#">Delete</a>

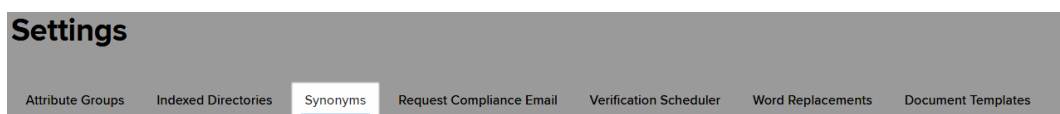
2. Make the changes and click [Save](#).

## Delete a Synonym

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Synonyms](#).



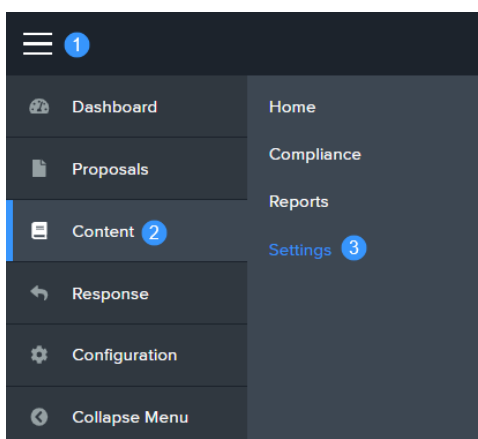
3. Click the [Delete](#) next to the synonym.

Word	Synonym		
bio	biography	<a href="#">Edit</a>	<a href="#">Delete</a>
bio	resume	<a href="#">Edit</a>	<a href="#">Delete</a>
client	customer	<a href="#">Edit</a>	<a href="#">Delete</a>

## Request Compliance Email

Use this page to customize the outgoing email used for compliance requests.

From the main menu, choose [Content](#) then [Settings](#).





Click on [Request Compliance Email](#) to customize the email. This applies to all requests sent automatically by the system.

**Settings**

Attribute Groups   Indexed Directories   Synonyms   Request Compliance Email   Verification Scheduler   Word Replacements   Document Templates

1. Edit the [Subject](#) text.
2. Edit the [Body](#) text.
3. Use the codes where the system will automatically replace important information in the email.
4. The email displays using HTML formatting, so at any time during the update process, click the [Preview](#) icon to review the look of the changes, and then click [Save](#) to complete.

**Subject:** 1

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

**Body:** 2

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

- Do not turn off track changes.<br>
- Make content revisions in between the Start and End flags.<br>
- Only add internal notes/comments in the table cell under the SME Comments and Confirmation column.<br>
- If there are no content revisions, enter your initials in the cell under the SME Approval column.<br>
- Return the document only once all responses have been reviewed. Partial updates cannot be accepted.<br><br>

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

Again, thank you for your continued participation and support!<br><br>

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

Requestor's Email: <<REQUESTOREMAIL>><br>

Due Date: <<DUEDATE>>

<<REQUESTOR>>: Requestor's Name 3  
<<REQUESTOREMAIL>>: Requestor's Email  
<<DUEDATE>>: Due Date

Preview 4 Save Cancel

HTML Code	Action
 	Adds a line break after the text.
<b>	Begins bold text.
</b>	Ends bold text.
<i>	Begins italicized text.



</i>

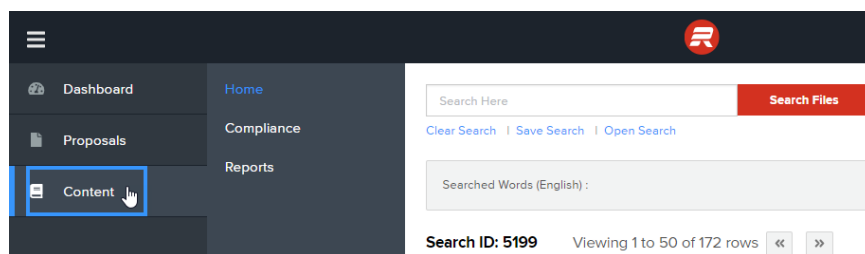
Ends italicized text.

## Verification Scheduler

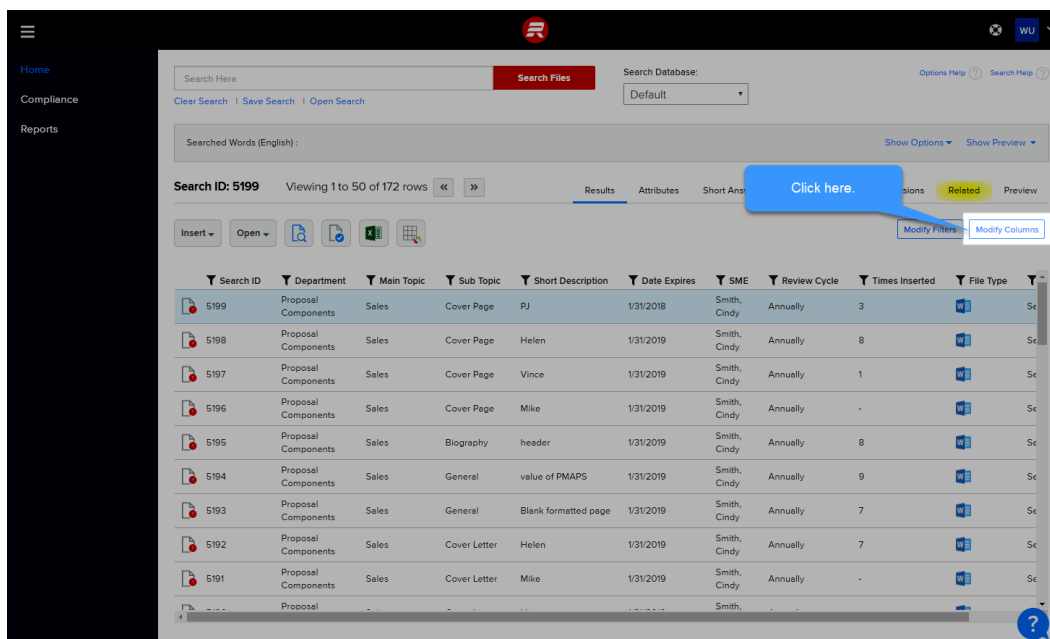
The [Verification Scheduler](#) enables automatic disbursement of content records to the assigned SME. This process is based on an automated schedule associated with a [Saved Search](#) and only records where the [Doc Type](#)=Search and [File Type](#)=Word may be sent. This option requires custom configuration to process the requests. To request more information about this functionality, please contact your customer success manager or [submit a ticket](#).

## Create a Saved Search

1. From the main menu, click [Content](#).



2. Click the [Modify Columns](#) icon.





- Under [Add new filter](#), select [Doc Type](#).

Add new filter: ▼

[Show All Options](#) R

- # Revisions
- Added By
- Checked Out By
- Checked Out Date
- Compliance Approval
- Compliance Status
- Consulting Firm
- Content Reviewer
- Date Added
- Date Edited
- Date Expires
- Date Last Inserted
- Date Last Reviewed
- Doc Type**
- Downloaded By
- Downloaded Date
- File Type
- Indexed File Name
- Internal Record Notes

- Check the box next to [Search](#).

<a href="#">Uncheck All</a> <a href="#">Check All</a> <a href="#">Show All Options</a> <a href="#">Remove This Filter</a>	
Name	Count
<input checked="" type="checkbox"/> <a href="#">Search</a>	26

- Under [Add new filter](#), select the [File Type](#) field.

Add new filter: ▼

[Show All Options](#) R

- # Revisions
- Added By
- Checked Out By
- Checked Out Date
- Compliance Approval
- Compliance Status
- Consulting Firm
- Content Reviewer
- Date Added
- Date Edited
- Date Expires
- Date Last Inserted
- Date Last Reviewed
- Downloaded By
- Downloaded Date
- File Type**
- Indexed File Name
- Internal Record Notes
- Is Child



6. Check the box next to [Word](#).

Uncheck All   Check All   Show All Options   Remove This Filter	
Name	Count
<input checked="" type="checkbox"/> Word	26

7. Apply any other filters and search options, and then click [Apply](#).

WebPro Filters

Add new filter:

Department

Doc Type

File Type

Main Topic

Uncheck All   Check All   Show All Options   Remove This Filter

Name	Count
<input checked="" type="checkbox"/> Technology	26

Apply

Cancel

8. Click the [Save Search](#) link.

Search Here

Search Files

Search Database: Default

Search Help   Search Help

Clear Search   Save Search   Open Search

Options Help   Options Help

Searched Words (English):

Show Options   Show Preview

Search ID: 4861   Viewing 1 to 25 of 26 rows

Results   Attributes   Short Answer   Notes   History   Revisions   Related   Preview

Insert   Open

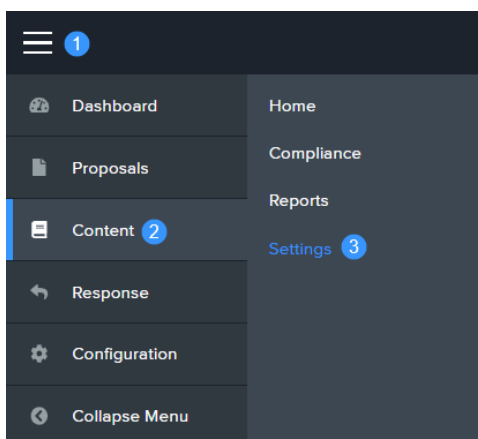


2. Enter a name for the saved search, and then click [Ok](#).

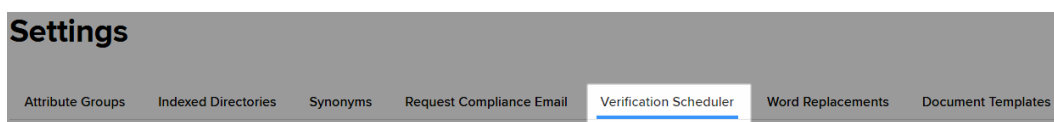
A dialog box titled "Save Search" with a close button (X) in the top right corner. It contains a text input field with the text "RFP Resp-Technology". Below the input field is a checkbox labeled "Make available to all users". At the bottom right, there are two buttons: a red "Ok" button and a grey "Cancel" button. A mouse cursor is pointing at the "Ok" button.

## Create a Schedule

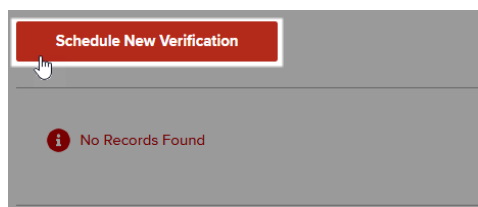
1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Verification Scheduler](#).



3. Click [Schedule New Verification](#).







4. Enter a [Process Name](#).

**Verify Process Schedule**

Process Name:

Search Criteria:

Schedule:

Next Scheduled Date:

**Save** **Cancel**

5. Select the saved search from the [Search Criteria](#) dropdown. Items display by the user's name, last name first, and then the name of the saved search.

**Verify Process Schedule**

Process Name:

Search Criteria:

Schedule:

Next Scheduled Date:

**Save** **Cancel**



6. Select the desired frequency from the [Schedule](#) options, and then click [Save](#).
  - a. When using [Single Date](#), specify the next scheduled date the process should run. The [Next Scheduled Date](#) will populate automatically based on the calendar.

The screenshot shows a dialog box titled "Verify Process Schedule". It contains four input fields: "Process Name" with the value "Tech Responses-Annual", "Search Criteria" with a dropdown menu showing "Admin, User - RFP Resp-Technology", "Schedule" with a dropdown menu showing "Beginning of Each Month", and "Next Scheduled Date" which is currently empty. At the bottom, there are two buttons: a red "Save" button and a grey "Cancel" button. A mouse cursor is pointing at the "Save" button.

- b. When using [Single Date](#), specify the next scheduled date the process should run. The [Next Scheduled Date](#) will populate automatically based on the calendar.

The screenshot shows the same "Verify Process Schedule" dialog box, but with the "Schedule" dropdown menu set to "End of Each Month". The "Next Scheduled Date" field remains empty. The "Save" and "Cancel" buttons are at the bottom, with a mouse cursor pointing at the "Save" button.



- c. When using [Single Date](#), specify the next scheduled date the process should run.

The screenshot shows the 'Verify Process Schedule' dialog box. It has a title bar 'Verify Process Schedule'. Below it, there are four fields: 'Process Name' with the value 'Tech Responses-Annual', 'Search Criteria' with a dropdown menu showing 'Admin, User - RFP Resp-Technology', 'Schedule' with a dropdown menu showing 'Single Date', and 'Next Scheduled Date' with a text input field containing '6/1/2019'. At the bottom, there are two buttons: a red 'Save' button with a hand cursor icon and a grey 'Cancel' button.

- d. When using [Days of Month](#), select the appropriate days or week. The [Next Scheduled Date](#) will populate automatically based on the calendar.

The screenshot shows the 'Verify Process Schedule' dialog box. It has a title bar 'Verify Process Schedule'. Below it, there are four fields: 'Process Name' with the value 'Tech Responses-Annual', 'Search Criteria' with a dropdown menu showing 'Admin, User - RFP Resp-Technology', 'Schedule' with a dropdown menu showing 'Days of Month', and 'Next Scheduled Date' with an empty text input field. Below the 'Next Scheduled Date' field, there is a list of checkboxes for days of the week and weeks of the month. The days are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The weeks are: First Week (checked), Second Week, Third Week, and Fourth Week. At the bottom, there are two buttons: a red 'Save' button with a hand cursor icon and a grey 'Cancel' button.



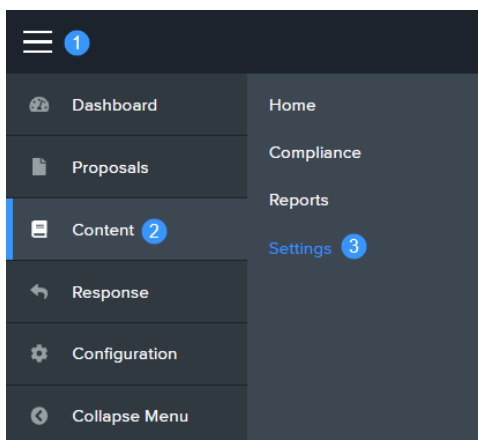
## Word Replacements

Word Replacements are text word codes that are automatically found and replaced when using specific ResponseFull functions:

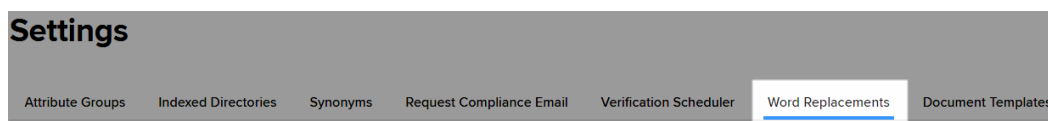
- [Insert Full](#) or [Insert Selected Text](#)
  - Codes in records that are inserted using this feature are automatically replaced
  - Microsoft Word only (in Excel and PowerPoint the Run Word Replacements must be run)
  - Run Word Replacement can be run at any time in Word, Excel and PowerPoint
- 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/WinFull
  - Codes in any documents created using sales docs forms are automatically replaced

## Add a Code

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Word Replacements](#).





3. Click [Add New](#).

Add New			
Keyword	Replacement		
<<#Attributes>>	25	Edit	Delete
<<#DashboardTrackingFields>>	250+	Edit	Delete
<<#upgrades>>	21	Edit	Delete
<<#users>>	141,000	Edit	Delete
<<#years>>	21	Edit	Delete
<<Address 1>>	Proposal Tracking Field: Street Address	Edit	Delete
<<Address2>>	Proposal Tracking Field: Address2	Edit	Delete
<<City>>	Proposal Tracking Field: City	Edit	Delete
<<ClientName>>	Proposal Tracking Field: Customer Name	Edit	Delete

4. Enter the [Replacement Keyword](#) surrounded by non-alphanumeric characters (e.g., { }, [ ], < >). This allows the word replacement code to be easily distinguishable from other text. The [Replacement Keyword](#) is not case sensitive, meaning that you can enter the code in any case and it will always be replaced.

**Add A New Word Replacement**

Replacement Keyword:

☒ Use Exact Text ☐ Use Mapped Field

Replacement Text:

5. Select the replacement type option [Use Exact Text](#).
  - a. Select [Use Exact Text](#) to replace the keyword with the value populated in here.

**Add A New Word Replacement**

Replacement Keyword:

☒ Use Exact Text ☐ Use Mapped Field

Replacement Text:



- b. Enter the [Replacement Text](#) for the keyword.

**Add A New Word Replacement**

Replacement Keyword:

☒ Use Exact Text ☐ Use Mapped Field

Replacement Text:

6. Select the replacement type option [Use Mapped Field](#).

- a. Select [Use Mapped Field](#) to replace keyword with the value from the related proposal's attribute field when the document is edited using the viewer.

**Add A New Word Replacement**

Replacement Keyword:

☐ Use Exact Text ☒ Use Mapped Field

Q&A or Proposal:

Field:

- b. Choose [Proposal](#) from the [Q&A or Proposal](#) dropdown.

**Add A New Word Replacement**

Replacement Keyword:

☐ Use Exact Text ☒ Use Mapped Field

Q&A or Proposal:

Field:



- c. Choose the field the value should pull from in the Field dropdown.

**Add A New Word Replacement**

Replacement Keyword:

☐ Use Exact Text ☒ Use Mapped Field

Q&A or Proposal:

Field:

7. Click **OK**.

**Add A New Word Replacement**

Replacement Keyword:

☐ Use Exact Text ☒ Use Mapped Field

Q&A or Proposal:

Field:

## Edit a Code Value

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

Add New			
Keyword	Replacement		
<<#Attributes>>	25	Edit	Delete
<<#DashboardTrackingFields>>	250+	Edit	Delete
<<#upgrades>>	21	Edit	Delete
<<#users>>	141,000	Edit	Delete
<<#years>>	21	Edit	Delete



2. Make changes and click [OK](#).

**Add A New Word Replacement**

Replacement Keyword: <<#users>>

☒ Use Exact Text ☐ Use Mapped Field

Replacement Text: 153,000

**OK** Cancel

## Delete a Code

1. Click the [Delete](#) next to the keyword.

Keyword	Replacement	Edit	Delete
<<#Attributes>>	25	Edit	Delete
<<#DashboardTrackingFields>>	250+	Edit	Delete
<<#upgrades>>	21	Edit	Delete

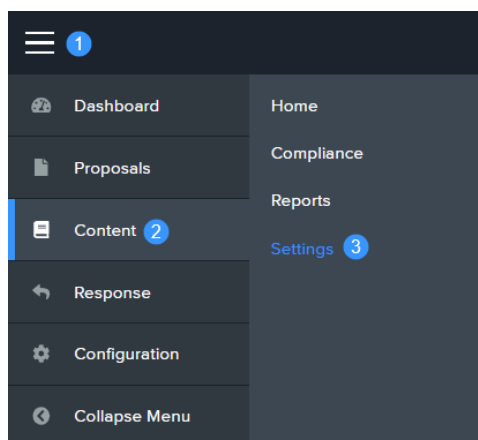
## Document Templates

Store Microsoft Word and PowerPoint templates to use for adding new content records. Templates can be associated with a language if using the custom language download feature.

### Microsoft Word

#### Add New Word Template

1. From the main menu, choose [Content](#) then [Settings](#).







2. Click on [Document Templates](#).

The screenshot shows the 'Settings' page with a horizontal navigation bar. The tabs are: Attribute Groups, Indexed Directories, Synonyms, Request Compliance Email, Verification Scheduler, Word Replacements, and Document Templates. The 'Document Templates' tab is currently selected and highlighted with a blue underline.

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

The screenshot shows a table titled 'Microsoft Word Templates'. The table has three columns: Description, Language, and Edit. The rows are: Arabic, Chinese, English UK, French, Japanese, QA Template, and Spanish. Below the table is a red button labeled 'Add New Word Template' which is highlighted with a red box and a mouse cursor pointing at it.

Description	Language	Edit
Arabic	Arabic	<a href="#">Edit</a>
Chinese	Chinese	<a href="#">Edit</a>
English UK	English UK	<a href="#">Edit</a>
French	French	<a href="#">Edit</a>
Japanese	Japanese	<a href="#">Edit</a>
QA Template	English US	<a href="#">Edit</a>
Spanish	Spanish	<a href="#">Edit</a>

4. Enter a name for the template.

The screenshot shows the 'Edit Word Doc Template' form. The 'Name or Description' field contains the text 'German Template'. The 'Language' field is a dropdown menu. The 'Download File' field has a download icon. The 'Upload File' field has a 'Choose File' button and the text 'No file chosen'. At the bottom are 'Save' and 'Cancel' buttons.

5. Choose a language for the template, if appropriate. Leave this empty if you are not using the custom language download feature.

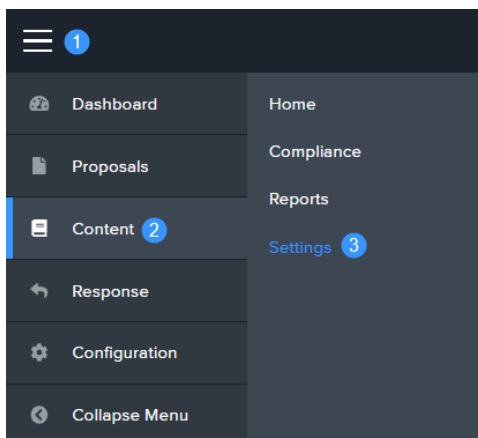
The screenshot shows the 'Edit Word Doc Template' form. The 'Name or Description' field contains the text 'QA Template'. The 'Language' field is a dropdown menu that is highlighted with a white border. The 'Download File' field has a download icon. The 'Upload File' field has a 'Choose File' button and the text 'No file chosen'. At the bottom are 'Save' and 'Cancel' buttons.



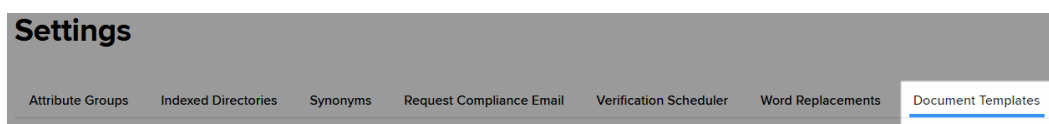


## Edit a Template

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Document Templates](#).



3. Under Microsoft Word Templates click the edit icon for the template to modify.

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



4. To replace the document, follow the steps below.

a. Click [Choose File...](#)

**Edit Word Doc Template**

Name or Description: QA Template

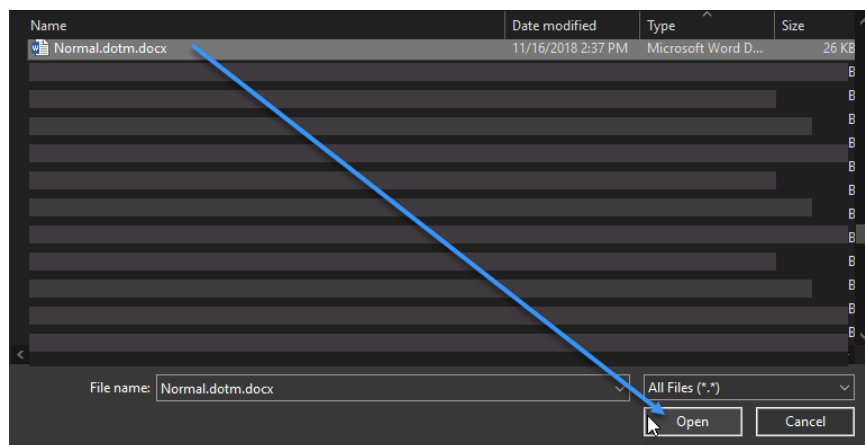
Language: ▼

Download File:

Upload File: Choose File No file chosen

Save Cancel

b. Select the template to upload and click [Open](#).



c. Click [Save](#).

**Edit Word Doc Template**

Name or Description: QA Template

Language: ▼

Download File:

Upload File: Choose File Normal.dotm.docx

Save Cancel



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

**Edit Word Doc Template**

Name or Description:

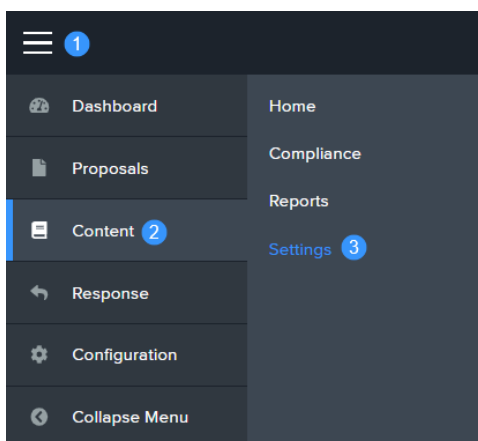
Language:

Download File:

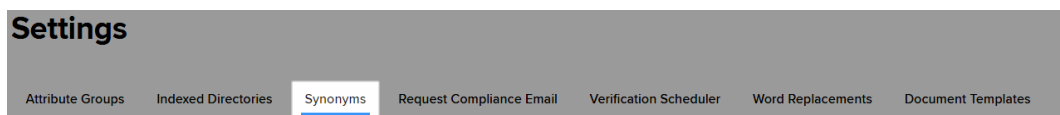
Upload File:  No file chosen

## Delete a Template

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Document Templates](#).



3. Click the edit icon next to the template to remove.

Microsoft Word Templates		
Description	Language	Edit
Arabic	Arabic	
Chinese	Chinese	
English UK	English UK	
French	French	
Japanese	Japanese	
Q-A Template		
Spanish	Spanish	



4. Click the [Delete](#) button.

**Edit Word Doc Template**

Name or Description:

Language:

Download File:

Upload File:  No file chosen

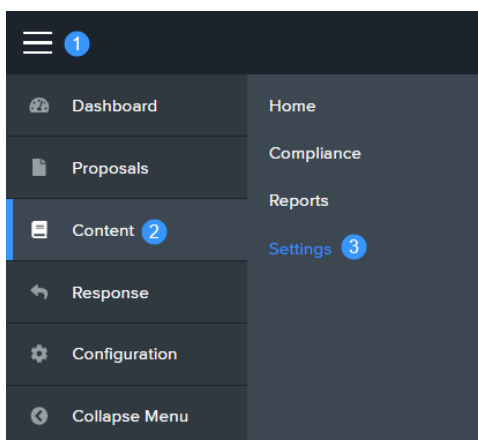
5. Click [OK](#) to proceed.

secure.pmapswebpro.com says  
Are you sure you want to delete this template?

## Microsoft PowerPoint

### Add a Template

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Document Templates](#).

**Settings**

Attribute Groups Indexed Directories Synonyms Request Compliance Email Verification Scheduler Word Replacements Document Templates



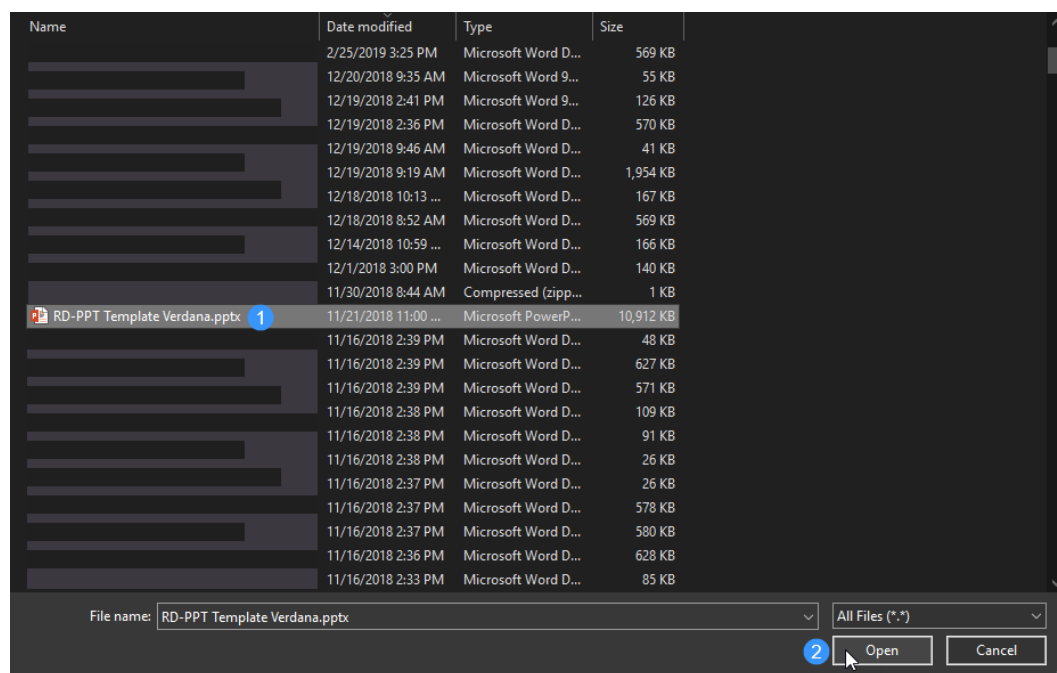
- Under **To add a new PowerPoint** section, click **Choose File**.

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

File:  No file chosen

Description:

- Select the template file and click **Open**.



- Enter a description for the template, and then click **Upload PowerPoint...**

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

File:  RD-PPT Template Verdana.pptx

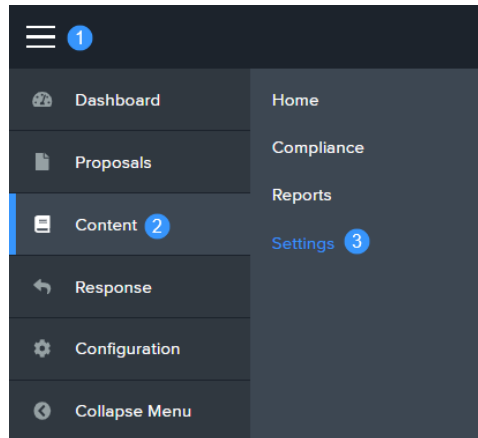
Description:  1

2

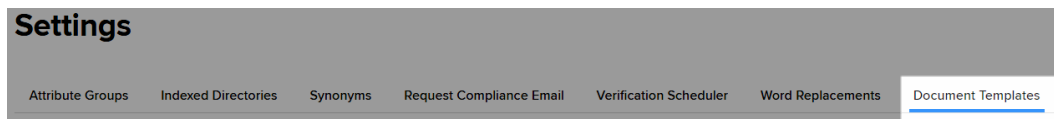


## Delete a Template

1. From the main menu, choose [Content](#) then [Settings](#).



2. Click on [Document Templates](#).



3. Click the delete button next to the template to remove.



4. Click [OK](#) to proceed.

