OneTeam InSights

Software Releases & New Features

We had a software release on July 1st to give clients additional capabilities for capture and proposal functions.

New Feature

Auto-Numbering of Capture Strategies

Capture data under the Strategy tab including Concerns, Features & Benefits, and Win Themes will now be auto-numbered by OneTeam for easy referencing. Since Concerns and Features & Benefits are linked, if you wish to delete a Concern, you must first delete or edit the Feature & Benefits linked to it. If you delete a Concern that is linked to a Feature & Benefit, and do not delete or reassign to another concern first, you will receive a warning notice, as shown here.

Help!

♦ Does your team need training on implement new features? Email Donna Hamby

♦ Did you run into a problem working in OneTeam?

Support

♦ First try the **Support** button, search for your issue and see if there is a tutorial or answer to your issue.

♦ Next try the **Support Chat** button. If chat does not find a solution, OneTeam will open and ticket and notify our service team.

♦ Are you a GovCon and need a demo to see if OneTeam is right for your company?

Request a Demo

Q: How do I integrate with GovWin?

A: A step-by-step guide for setting up GovWin is located in OneTeam Support— Support (oneteam.net)

Type GovWin in the Support search and select either Manual or Automatic imports.

For the Automatic Imports follow the steps here:

Automate Opportunity Imports from GovWin (oneteam.net)

Manual imports here:

Manual Opportunity Imports from GovWin (oneteam.net)

If your company uses GovWin subscription service and have not set up automatic imports and updates—contact us and we will show you how much time you can save and have less errors in your opportunity data! We can add the automatic GovWin updates for a small fee to any existing subscription.
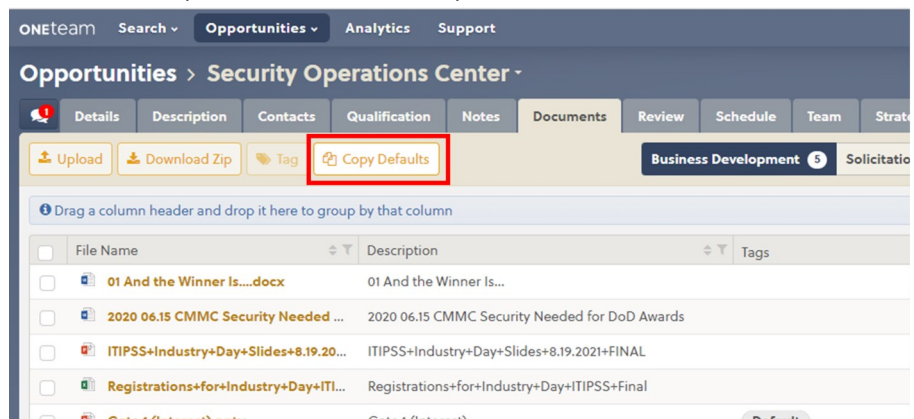
New Feature
Selecting Default Documents

OneTeam previously had the ability to **'Copy Defaults'** documents in any of the document libraries.

But now, when users select **'Copy Defaults'** they will see a pull-down list of the documents they have uploaded in their Company Setting, under Default Documents. All Default Documents (except Templates for Writer Package Templates) are uploaded here:
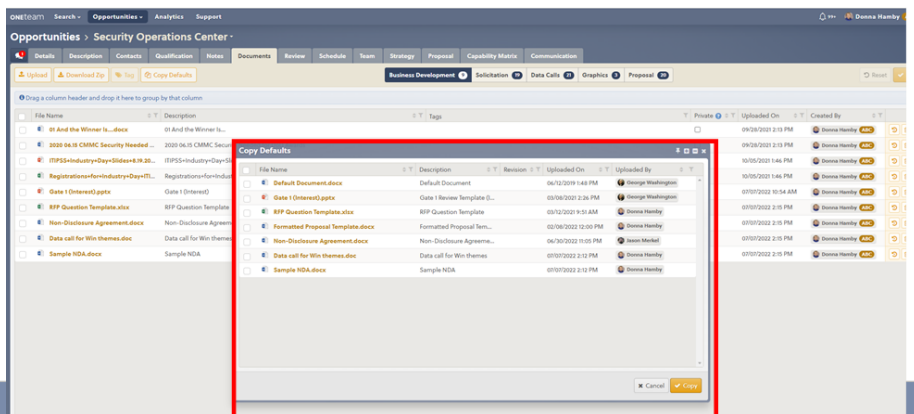
Company Settings>Capture>Documents>Defaults

After uploading templates, such as NDAs, Teaming Agreements, Graphics, or narrative content, these documents will be quickly accessible from any opportunity. Select the **Copy Defaults** button under these Documents sub-tabs— Business Development, Data Calls, or Graphics.
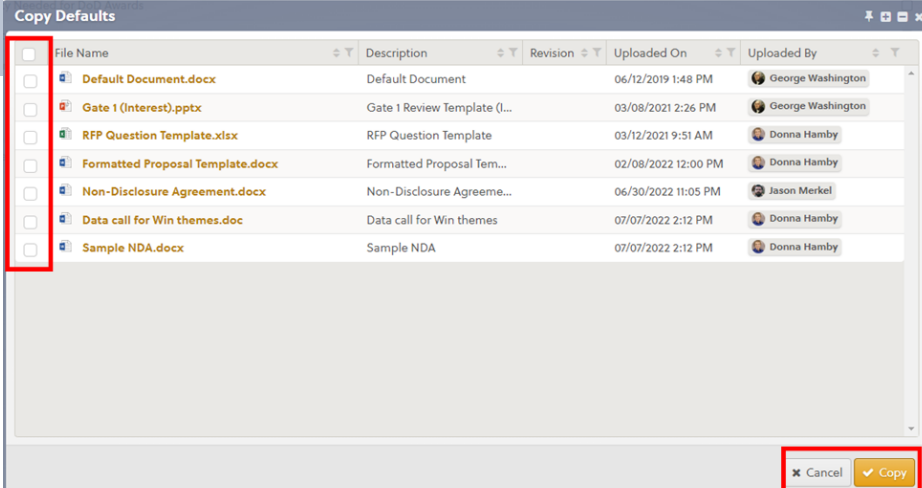

A window will pop-up with a listing of all documents loaded into the Default documents in Company Settings.

Select the documents to add to this opportunity by selecting the Checkbox. Select **Save**.

Send all questions to Donna Hamby and we will email you an answer—and maybe include it here for other users!
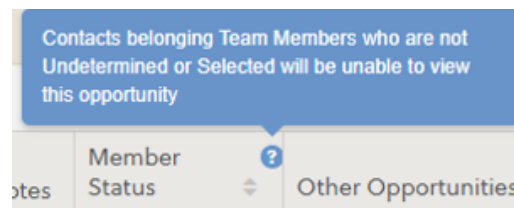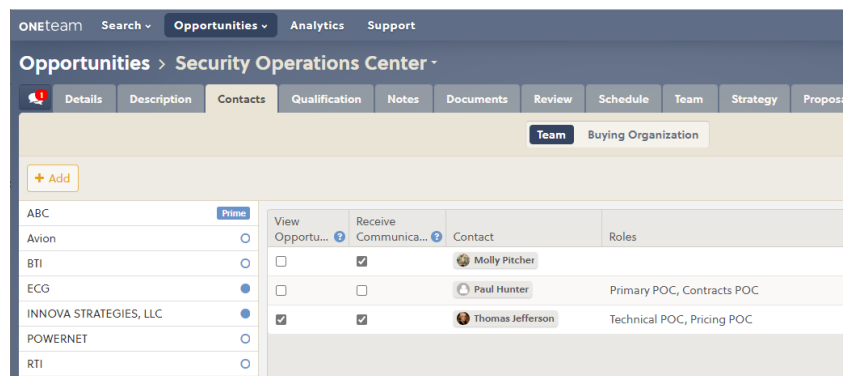
This brings so much more flexibility to the Capture and Proposal Process. Here are some ideas on how selecting individual default documents can save you time!

♦ Upload standard graphics that are used for many proposals, organization chart, recruiting and retention graphic, risk matrix, and others. Go to *Documents>Graphics* and then select which graphic templates to add to a particular bid. Then customize the graphic for the opportunity.

♦ Upload boilerplate info on Security, Safety, HR, Recruiting & Retention, Accounting, to Default Documents, with each topic in a separate document and label accordingly. Go to *Documents>Proposals* and copy selected default documents for reuse of content.

♦ Upload Capture templates such as a customer call list, Capture Manager Checklist, etc. and upload to *Documents>Business Development.*

Updated Feature
Permissions

OneTeam has updated subcontractor permissions to make it easier to see who has access to view opportunities. For a subcontractor to be able to view opportunity data, they must be in the Contacts tab of an opportunity AND they must have the View Opportunity box selected. If a subcontractor does not have a Member Status of Undetermined (pre-teaming decision) or Selected - the View Opportunity column in Contacts may be checked but will be grayed out.

All Opportunity Manager permission-level users for the prime contractor (or the company that has the OneTeam subscription) can view all opportunities, even if they are not on each specific opportunity Contact list. This permission can be controlled by using permissions at the Division level to restrict access.

This simplifies some of the permission process of subcontractors, so you will notice that the Invitation Status on the Team tab has been removed. There is a new tool tip under Member Status on the Team tab as shown below.

Proposal Managers easily manage Color Team Reviews

Collaborate in Microsoft 365 ①

Select Section Score ②

Validate L, M, C, and 'Other' Compliance from Word Add-In Panel ③

Comment, Track Changes, @Mention ④

Validate Required Terms ⑤

ONEteam®

Leverage Microsoft 365 Collaborative Co-Authoring with OneTeam's Word Add-In

Manages Permissions at Opportunity Level

Invitation Process to further Secure Data

Limits Teaming Partner Data Access Automatically

Writers Only Access their Assigned Sections

Can Require Working in Word Online – no Downloads

Upcoming OneTeam Events

Space & Missile Defense Symposium Aug 9-11, 2022

Visit the OneTeam booth at the SMD Symposium—Booth 1102 South Hall

OneTeam Online Webinars

Pipeline

WEBINAR
Business Development Pipeline Automation with OneTeam
Jul 13, 2022 12:00-1:00 pm CT

Capture

WEBINAR
Capture Management with OneTeam
Aug 16, 2022 11:00 am - 12:00 pm CT

Proposal

WEBINAR
Proposal Management & Automation with OneTeam
Sept 14, 2022 1:00-2:00 pm CT