July 2022 Volume 1, Issue 3

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.

This entry is referenced in another location and cannot be deleted.



Inside this issue

Q&A 2
New Feature 2
Upcoming Webinars
Color Team Reviews4
Proposal Features 4

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 & A

Real questions from real clients with only minor edits for clarification.

- 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.

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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.

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Send all questions to <u>Donna Hamby</u> and we will email you an answer—and maybe include it here for other users!

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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 (preteaming 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.

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Contacts belonging Team Members who are not Undetermined or Selected will be unable to view this opportunity

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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



ONEteam[®]

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



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

