Free Trial Reference and Training Guide

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Free Trial Reference and Training Guide

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Second Edition

Welcome to your OneTeam Free Trial!

Congratulations on starting your 30-day free trial of OneTeam – this is the first step in streamlining and automating your company's BD process! OneTeam fully integrates the entire Business Development Lifecycle including Pipeline Management, Capture Management, and Proposal Development. Are you ready to get started?

Our BD experts at OneTeam created this guide to lead you through your trial period and help you master the power of OneTeam. You do not need to complete every task shown here, but this guide provides a roadmap for a few high-level BD functions that OneTeam supports. This document is meant to lead you through your free trial – not to provide an exhaustive reference for all OneTeam features. If at any point during your trial you need more resources or support, please do not hesitate to reach out to us.

You have most likely had one or two demos, but now you are ready to see firsthand how to use OneTeam. If you want a quick refresher on OneTeam Navigation and Features – feel free to set up a meeting with a member of our Customer Satisfaction Team – Free Trial Overview Meeting. We want this to be a successful exercise for you and your team and are always happy to assist you!

Your Company's Trial Site has been loaded with 20 Demo opportunities. Feel free to practice on these opportunities or add an opportunity that is of interest to you! This guide is full of practice opportunities, but you do not have to complete them all in one day.

You will learn more in the free Training that OneTeam provides for your Team when you purchase a subscription – including Company Administrator Training, Capture and Pipeline Training, and Proposal Training. Additional training is always available as an add-on. Free Training is provided per the following schedule:

Essentials Plan	5 hours of personalized training
Pro Plan	10 hours of personalized training
Premium Plan	15 hours of personalized training

OneTeam is here to help you every step of the way. If you have questions, just reach out to OneTeam at Free Trial Assistance! We look forward to talking with you again soon!

Donna T. Hamby,
OneTeam Product Manager

Guide Contents

Sample Exercises

Take a look through these sample exercises to perform in OneTeam. When you have completed one – check it off the list! Remember to check the support site to help with questions, talk with your team members if you are unsure of exercise, or email us if you need assistance before our Q&A session.

NOTE: If a task contains either Company Administrator, Proposal Manager, Capture Manager, Writer, or Reviewer at the end of the sentence in ( ), it indicates which role would typically perform that action.

DEFINITIONS

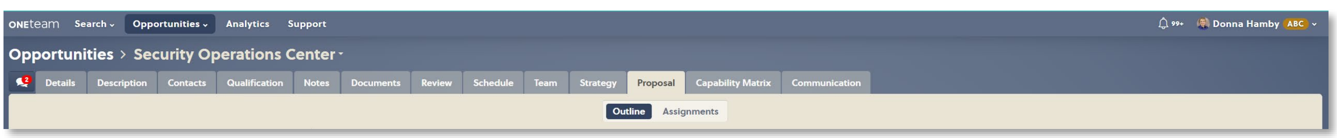
Pipeline: A listing of Opportunities that are evaluated and moved through a process to various stages until award (Select Opportunities Menu, then Opportunities in the drop-down list). Also called Opportunities List or Opportunities View. This is the home page when logging into the OneTeam application.

Opportunity: One specific bid or contract that your company is tracking in the Pipeline.

Tab: The structure of information in OneTeam is organized in tabs. All Opportunities have the same tabs – Detail, Description, Contacts, Qualification, Notes, Documents, Review, Schedule, Team, Strategy, Proposal, Capability Matrix, and Communication.

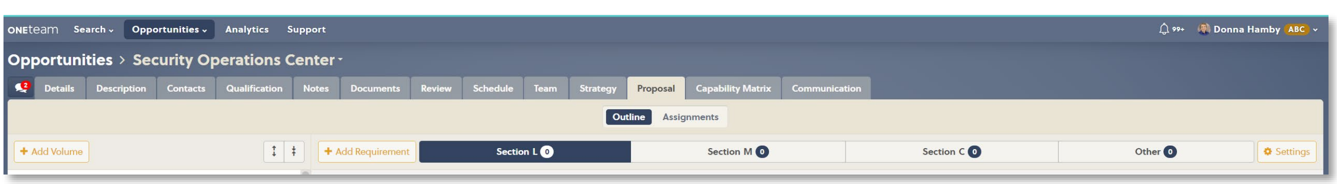
In the example below, the Opportunity name is Security Operation Center. The Tabs listed above are shown and ONLY APPLY TO THIS OPPORTUNITY.

Sub-Tab: A sub-section of a Tab. For example, the Proposal tab has an Outline sub-tab and an Assignments sub-tab. This example shows the Proposal tab selected, and the Outline sub-tab selected (dark blue).



Inside Opportunity: Select an Opportunity from the pipeline and complete tasks and functions for that specific opportunity. All 'Iof a Proposal Managers tasks are performed 'Inside an Opportunity' and most Capture Manager tasks are also performed 'Inside an Opportunity'. General Pipeline assessment and management is accomplished in the Opportunity Pipeline (not inside an Opportunity).

Button: These are selections in many tabs within OneTeam, usually shown in Gold. For example +Add Volume, +Add Requirement, and Settings are buttons in this graphic.



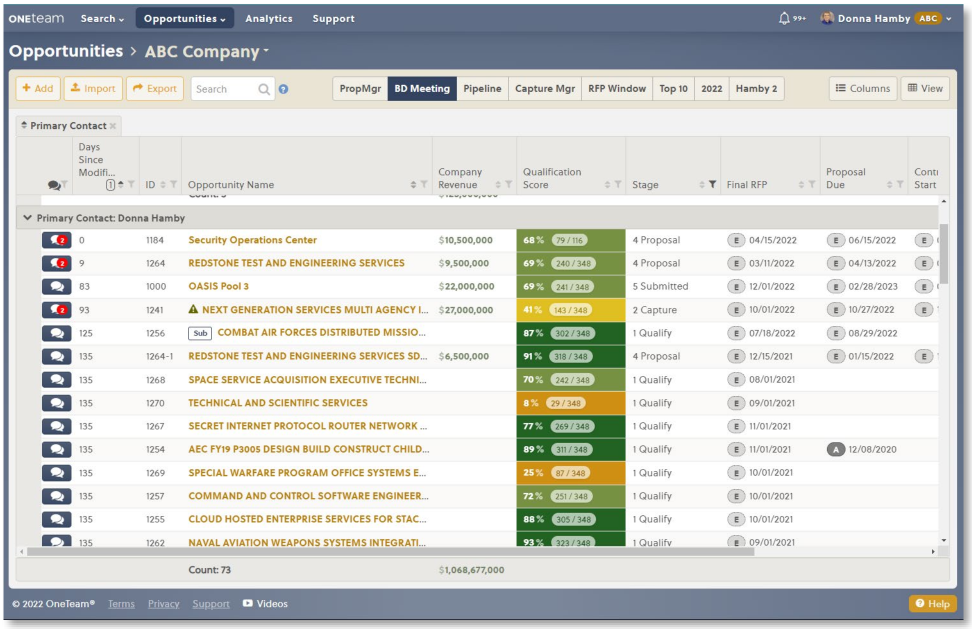
User: A person, identified by unique email address, who has access to OneTeam. Company Users require either a Standard or Limited User License. Subcontractors are given a free Limited User license by OneTeam.

View: Term in OneTeam for data to be displayed in a Pipeline list. Over 60 data fields are available to be displayed for opportunties, and custom fields may also be added. A view is the arrangement of this data, including how the data is grouped (such as by Primary Contact), how the data is filtered (such as by Stage), and how the data is sorted (such as by ascending date).

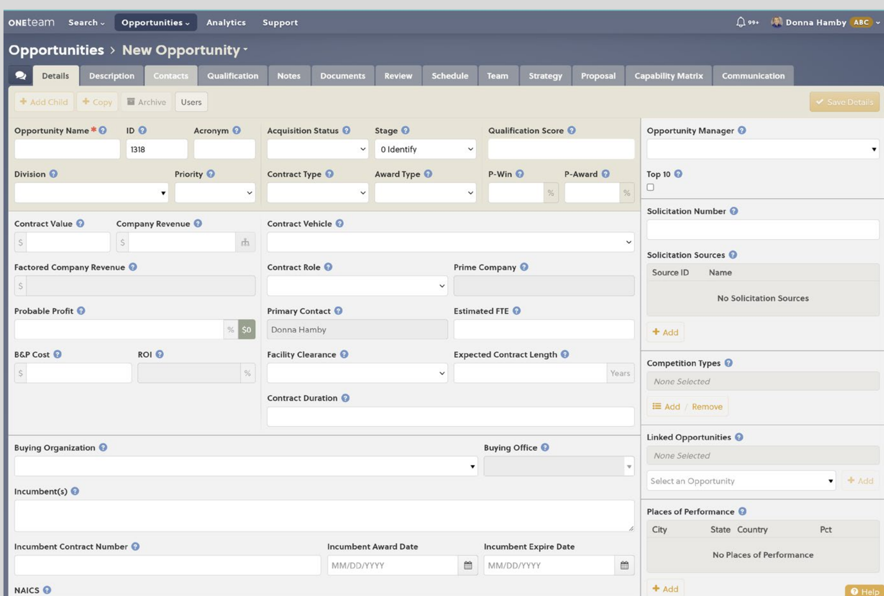
1.0 Add an Opportunity to the Pipeline — Completed ☐

1 Go to the Opportunities drop-down menu and select Opportunities.

2 Select the **+Add** button.



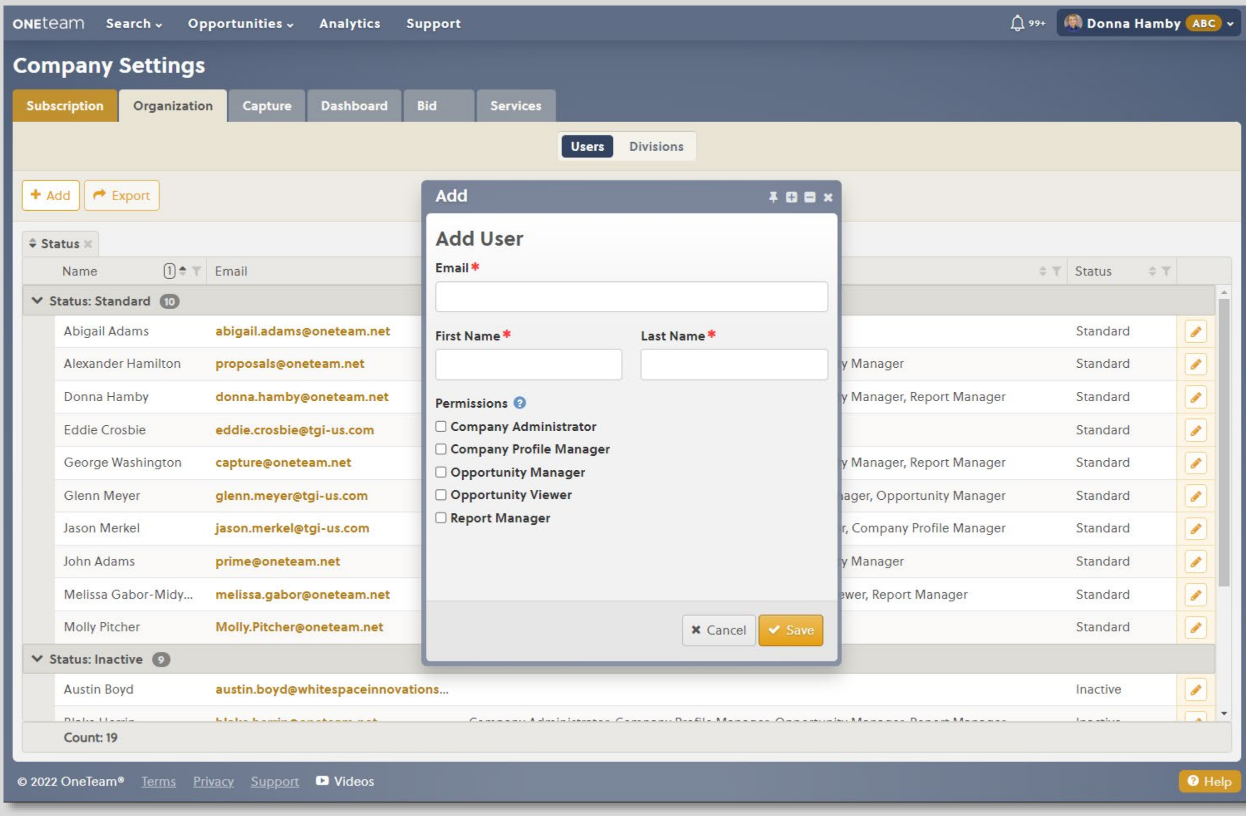
3 Add Opportunity Name and other information – hover over the blue circle **?** for more info about the various fields. Add dates for RFI, DRFP, RFP, Proposal Due, Contract Award and Contract Start.



4 Select **Save Details.**

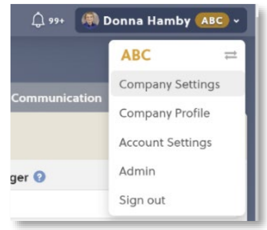
5 Go back to Opportunities List to see the opportunity has now been added to the pipeline.

2.0 Add Internal Contacts – Company Admin Only   Completed ☐

1	Go to the OneTeam drop-down menu under your name on the upper right.
2	Select **Company Settings.** OneTeam automatically opens the Company Settings to the **Organization** tab, **Users** sub-tab. (Company Administrator)
3	Select **+Add** to add a new user. (Company Administrator) 
4	Add user email, first name, last name and select Opportunity Manager permission. Note: The blue **?** displays permission descriptions. (Company Administrator)
5	Select **Save**. (Company Administrator)

3.0 Customize Stages For Your Company – Company Admin Only Completed ☐

1 Go to OneTeam drop-down menu under your name on upper right.

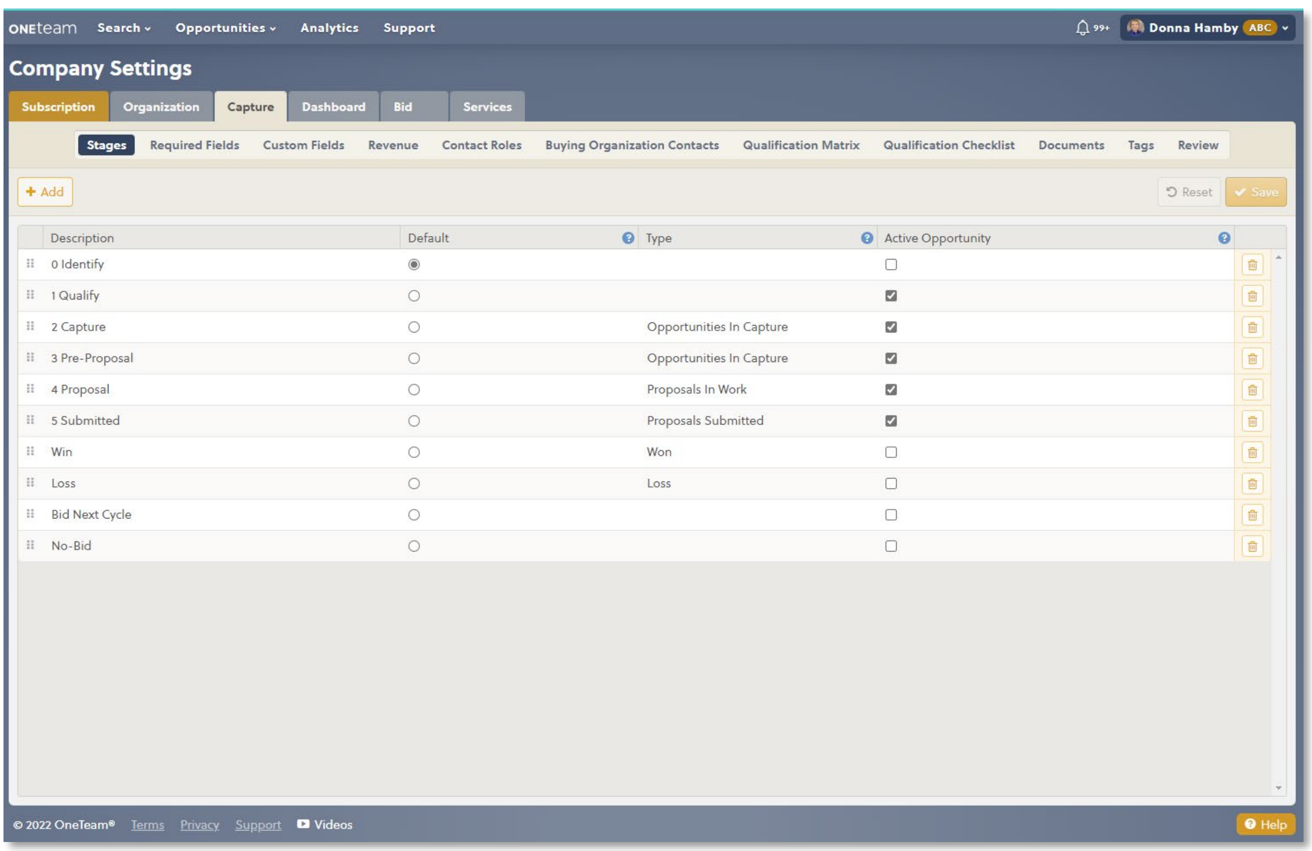


2 Select **Company Settings**. (This can only be completed by a OneTeam Company Administrator)

3 Select **Capture** Tab and then select the **Stages** sub-tab. (Company Administrator)

4 Select **+Add** button to add new stage.

Provide Description (name of stage), Type, and select checkbox if this is an active phase for an opportunity, such as pre-capture, capture, or proposal. Do not check this box for closed opportunities, won, lost phases. (Company Administrator)



5 Select **Save**. (Company Administrator)

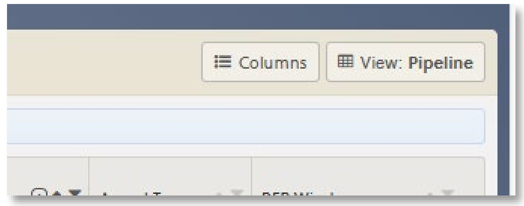
6 To edit an existing Stage, click in the Description column to edit. (Company Administrator)

7 Select **Save**. (Company Administrator)

4.0 Create A Custom Pipeline View — Completed ☐

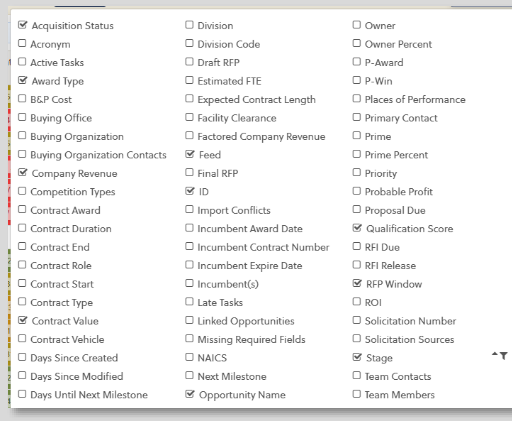
1 Start on the home page, which is the Pipeline view. By default all demo opportunities will be shown. (Opportunity Managers)

2 Select the **Columns** button in the upper right of the Opportunities List. (Opportunity Managers)



3 A window will open with a listing of all 63 default columns available, and any custom columns that have be added by the Company Administrators.

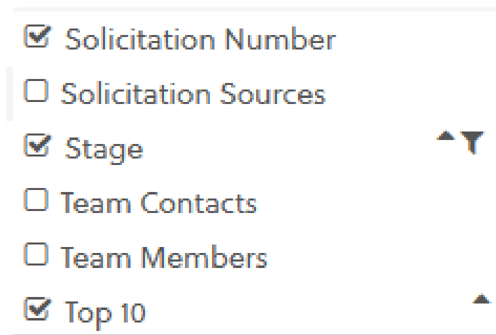
If you are having difficulty seeing all of the columns, check the zoom on the browser window. Once the zoom is over 100%, the column names may be too large to fit within the pop-up window. Reduce the zoom to easily see all column headings. (Opportunity Managers)



4 Columns that are shown in the current view, will have a check mark in the box beside the name, as shown in Solicitation Number., Stage, and Top 10.

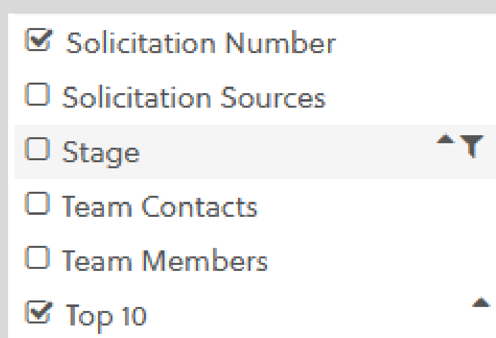
Columns that are filtered will show a filter icon, as shown here with Stage.

Sorted columns will show a sort icon, as shown in Stage and Top 10. (Opportunity Managers)



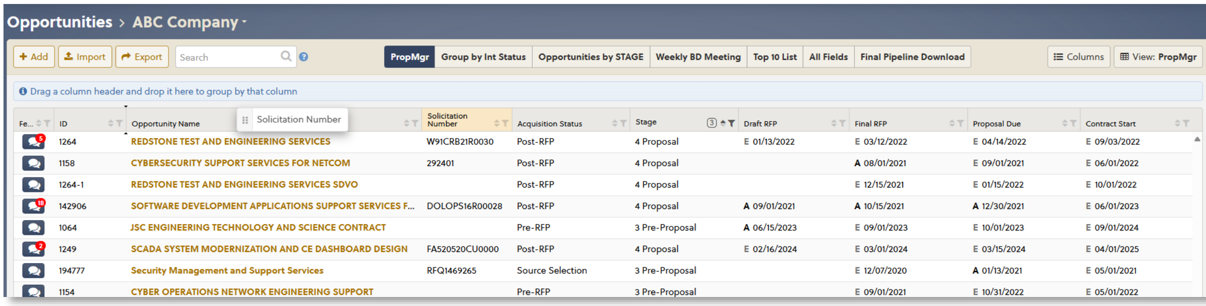
5 If you want to uncheck a column that is sorted or filtered, first remove the sort and/or filter from those column headings. Then deselect the column heading in the **Columns** window.

Notice in this example that the Stage column has a filter applied, but the column is not visible. The filter will still be applied to the resulting data in the Opportunity List. If you simply remove the column from the view, the sort and filter selections remain active.



Select or deselect the column checkboxes to add or remove columns from the new custom view you are creating. (Opportunity Managers)

6 To rearrange columns, select a column heading to move, then drag and drop it to the desired position.

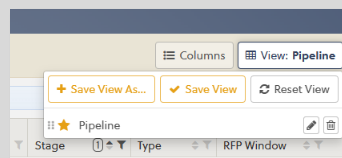


Resize the columns widths as desired by selecting the right edge of a column heading to adjust column width. (Opportunity Managers)

7 Select filter and sort options to your preferences. (Opportunity Managers)

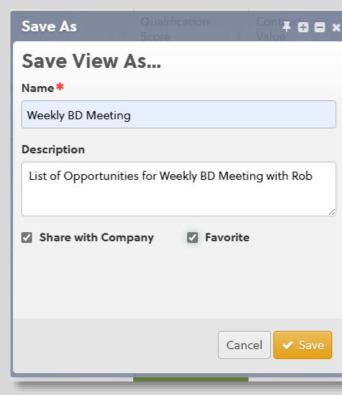
8 Select the **View** button and then select **+Save View As** button in the VIEW BOX.

Note the **Save View** button will update changes to an exiting view. The **Save View As** button creates a new custom view with all the selections you have made. (Opportunity Managers)



9 Give the newly created view a name, which is required, and a description, which is optional. (Opportunity Managers)

10 Select the **Share with Company** checkbox to share this new custom View with your company’s OneTeam users. (Opportunity Managers)



11 Check the Favorite box to create a shortcut for this view at the top of your pipeline.

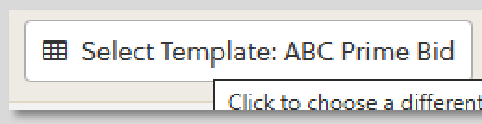
This does not designate this View as a Favorite for everyone on your team. Each person selects and manages their own favorites. (Opportunity Managers)

5.0 Complete Qualification Matrix Completed ☐

1 Select an Opportunity Name from the Pipeline or Opportunities list to open it. (Capture Manager)

2 Select **Qualification** Tab. (Capture Manager)

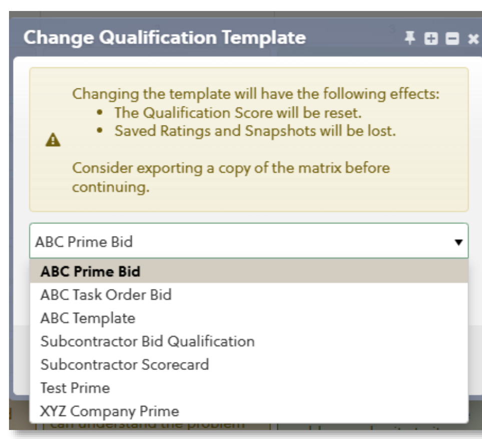
3 Select the **Select Template** button on the upper left side of the matrix to determine which Qualification Matrix Template to use for this opportunity.



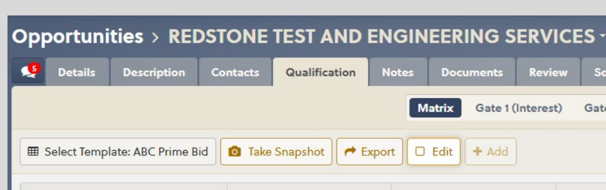
4 The 'Change Qualification Template' will open. If a Qualification Score has been given to an opportunity, the company's default template will be displayed.

If a Qualification Score has been given, changing the Qualification Matrix will lose all score on the matrix being removed.

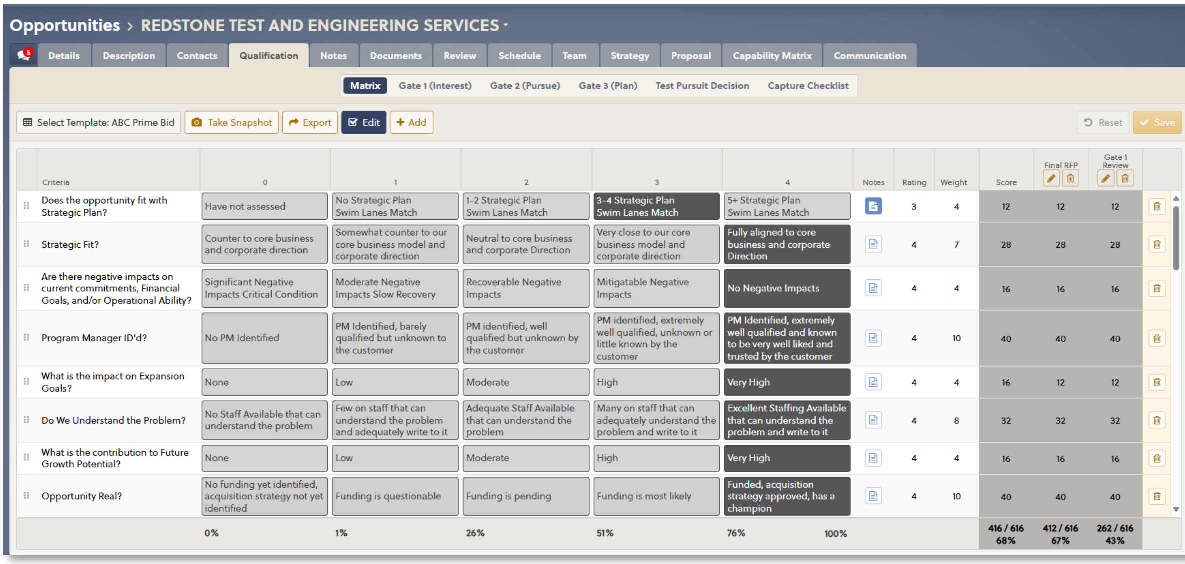
Select the Qualification Matrix template to use. Then select the ✓**Change** button to remove the current matrix and replace it with the one selected.



5 If minor changes need to be made to the Qualification Matrix FOR THIS OPPORTUNITY MATRIX ONLY – select the **Edit** button, which is located under the **Matrix** sub-tab and next to the **Export** button. (Capture Manager)



6



The entire matrix will change from the colorful one, previously shown above, to a gray and black version, which means you are in Edit mode.

7 Also notice that the Edit button has a checkmark, and is now selected and shown in dark blue rather than the previous ivory/gold color and unchecked.

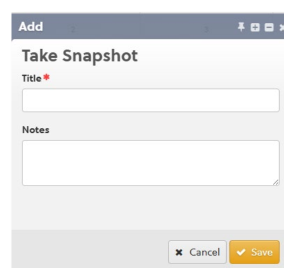
8 Make the desired changes to the Criteria, Responses under the score numbers, and the weight for each line entry.

9 When finished, select ✓**Save.**

10 Select the **Edit** button to exit Edit mode. Edits will be in effect for this matrix, but do not change the master template in Company Settings.

11 Make selections in qualification matrix and notice how the score updates. (Capture Manager)

12 Select **Take Snapshot** to create a snapshot of that date's qualification score. The 'Add' window will open for you to add a title of the snapshot and any notes.



13 Select ✓**Save** to save the snapshot.

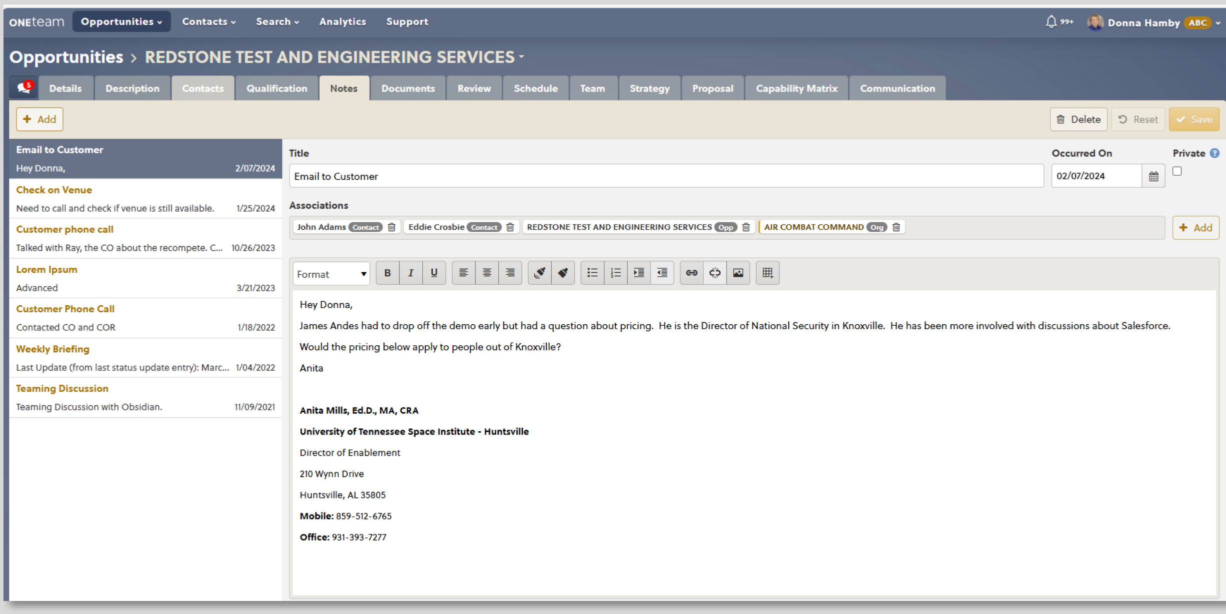
This saves the score for each row and the overall score and percentage. OneTeam automatically assigns the date to the Title of the Snapshot, which can be seen if you hover over the title of any snapshot. (Capture Manager)

6.0 Add Notes to Opportunity — Completed ☐

1 Select an Opportunity from the Pipeline or Opportunities list to open it. (Capture Manager)

2 Select **Notes** tab. (Capture Manager)

3 Select **+Add** button on upper left to add New Note. (Capture Manager)



4 Add Note Title – use specific terms and keywords such as Customer Meeting, Customer Phone Call, Teaming Discussion, Weekly Brief, etc. OneTeam automatically records the person creating the note and the date. (Capture Manager)

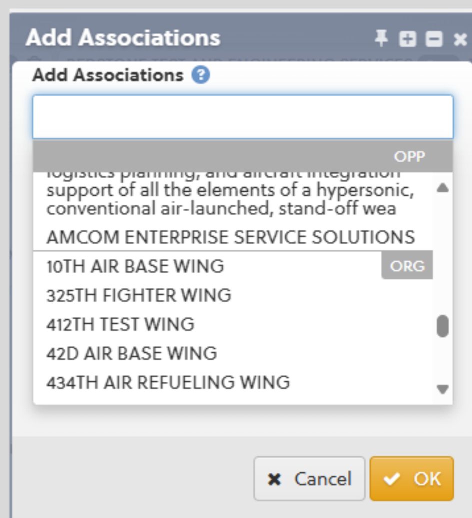
5 Add any needed Associations in the Associations field. Select the **+Add** button on the right side of the field to open the 'Add Associations' window.

This window includes Contacts, Opportunities, and Organizations from your Company's OneTeam database.

These entries are shown by the labels Con, Opp, and Org with a gray box to denote where each of those options start.

All of the options are not easily viewable due to there being hundreds of possibilities, so begin typing the name you wish to add, and OneTeam autosearches for potential matches to fill in. .

This associates or links this note to whatever associations you select. You may link the note to multiple contacts, multiple companies, and multiple opportunities.

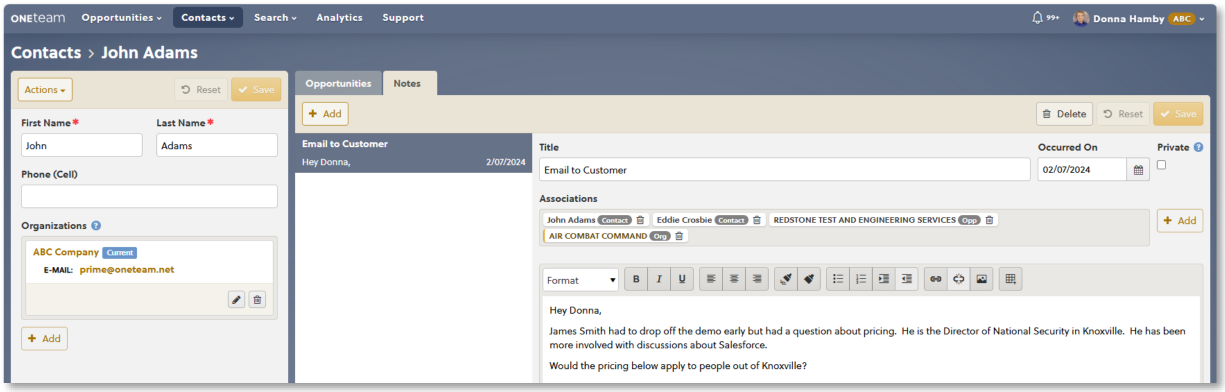


6 Add Note narrative in the content box and format as desired. (Capture Manager)

7 Select ✓**Save**. (Capture Manager)

The note is now also viewable in the Contacts drop-down menu in any Organizations or Contacts that it was associated to. The screenshot here shows the note associated to John Adams, and also shows all associations.

8

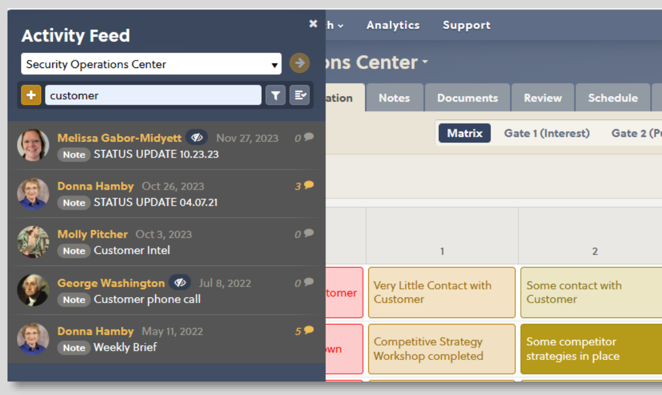


9

SHORTCUT ALERT

All Notes can be viewed and are searchable in the Activity Feed for each Opportunity.

You can also add a Note from the Activity Feed by selecting the **+** button and then selecting **+New Note**.



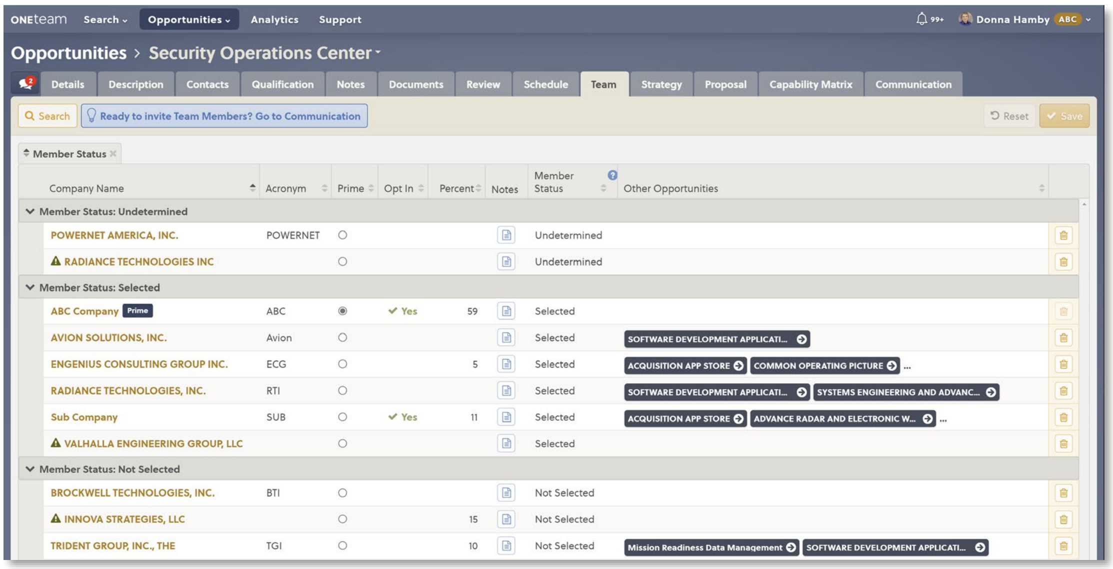
7.0 Select Teaming Partners — Completed ☐

1 Select Opportunity name from Pipeline to open it. (Capture Manager)

2 Select **Team** tab. (Capture Manager)

3 Select the **Search** button on upper left to initiate Company Search. (Capture Manager)

4 If the name of the company is known, type the company name in the Search box. Select **Search** button. (Capture Manager)



5 Select correct company name from list or review each one to find correct company.
A company will have a listing for every location with a Cage Code. (Capture Manager)

6 Select **+Add to Team** button (upper right) to add company to the Opportunity Team tab. (Capture Manager)

7 Select **<Back to [opportunity name]** button (upper left) to return to Opportunity **Team** tab. (Capture Manager)

8 If the company name is not know, you can perform an advanced search using the Search menu at the upper left of the OneTeam application. This uses filters to select a specific type of team partner – select specific location, NAICS, Socio-Economic certification, customers, and much more. (Capture Manager)

9 Review companies and select the **+Add to Team** button as detailed above. Return to Opportunity. (Capture Manager)

10 Assign team members a percent work share (not required). (Capture Manager)

11 Change Member Status to ‘Selected’ to build your team. (Capture Manager)

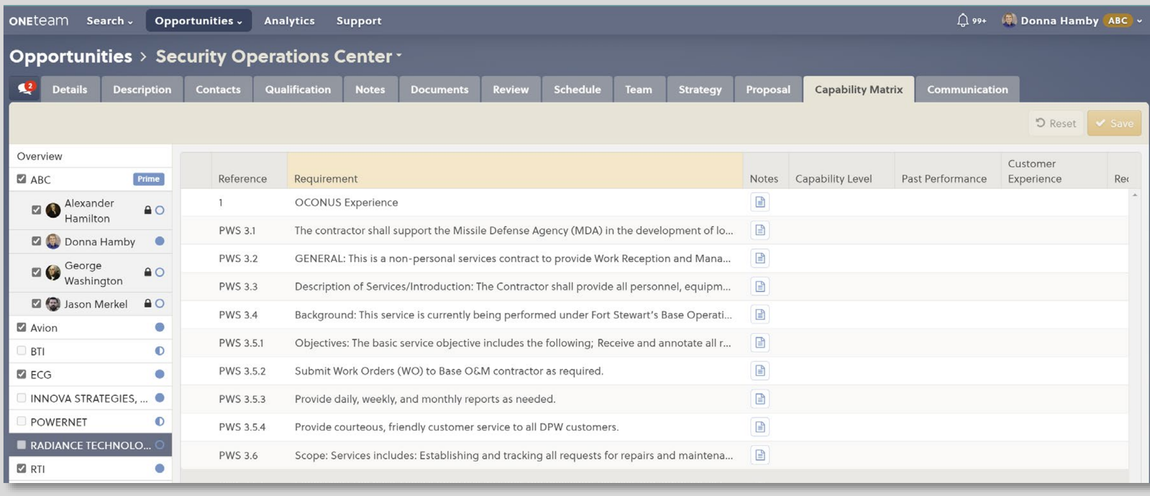
12 Select **✓Save.** (Capture Manager)

8.0 Create a Capability Matrix — Completed ☐

1 Select Opportunity name from Pipeline to open it. (Capture or Proposal Manager)

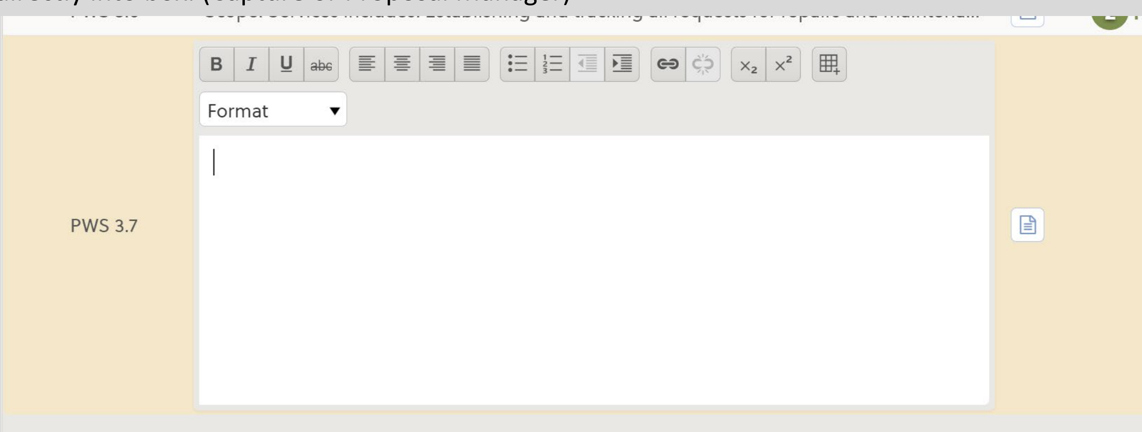
2 Select **Capability Matrix** tab. (Capture or Proposal Manager)

3 Use the **+Add Requirement** button to add Requirement rows to the matrix. (Capture or Proposal Manager)



4 Add Reference Number, usually the PWS or SOW number to the Reference field. (Capture or Proposal Manager)

5 A window opens with a text box for the Requirement. Copy and paste from an RFP or type requirement directly into box. (Capture or Proposal Manager)



6 Select ✓**Save.** (Capture or Proposal Manager)

7 Add as many requirements as desired. (Capture or Proposal Manager)

8 Use the **Select Categories** button to add Categories for responses – by default the matrix is populated with Capability Level, Past Performance, Customer Experience, and Recency. These are set in Company Settings by a Company Administrator. (Capture or Proposal Manager)

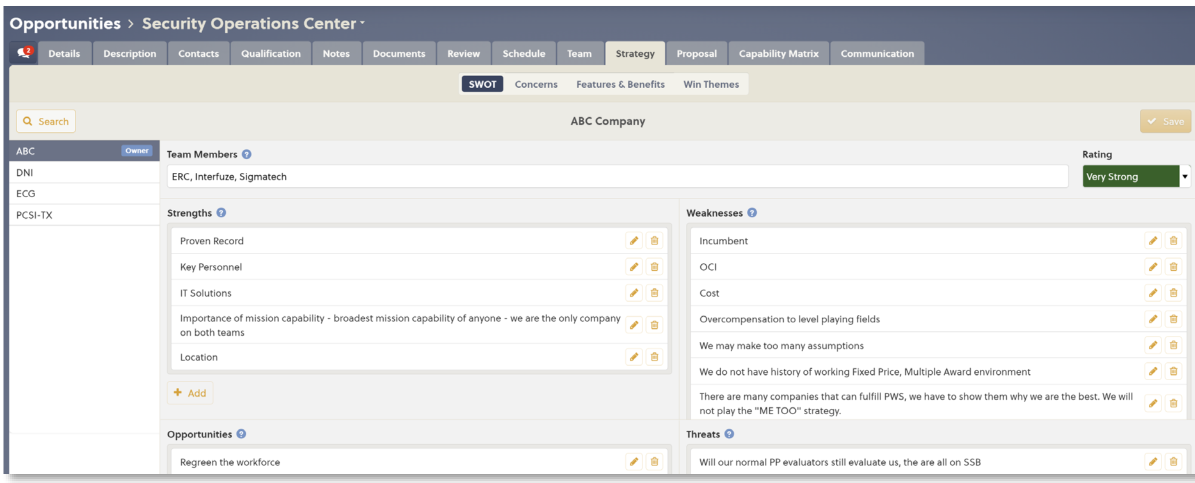
9.0 Create a SWOT Analysis — Completed ☐

1 Select Opportunity name from Pipeline to open it. (Capture or Proposal Manager)

2 Select **Strategy** tab. (Capture or Proposal Manager)

3 Complete SWOT on self by adding team members in the appropriate field. (Capture or Proposal Manager)

4 Use the +Add buttons under each section to add content. Add team Strengths, Weaknesses, Opportunities, and Threats. In the Rating drop-down menu, select an overall rating the government would likely assign to your team. (Capture or Proposal Manager)



5 Select ✓Save. (Capture or Proposal Manager)

6 Use the Search button (above your company's name on the left side) to search for competitors to evaluate. Follow instructions under 'Select Teaming Partners' for using the Search function. (Capture or Proposal Manager)

7 Select the +Add to Competition button to add the selected company to the SWOT sub-tab. (Capture or Proposal Manager)

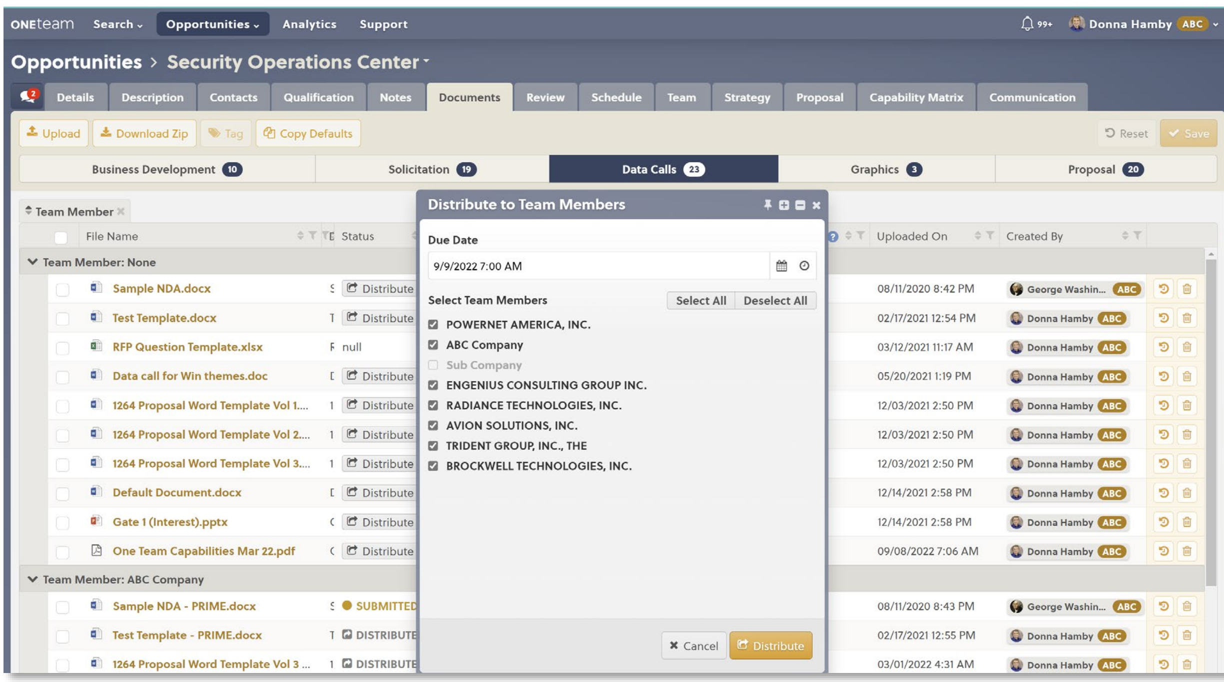
8 Select <Back to [opportunity name] button (upper left) to return to Opportunity Strategy tab. (Capture or Proposal Manager)

9 Select the Competitor's name and then add known or likely Team Members, and complete the SWOT analysis on the competitor. (Capture or Proposal Manager)

10 Complete for all known competitors, and select ✓Save. (Capture or Proposal Manager)

10.0 Create a Data Call for an Individual Opportunity — Completed ☐

1	Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)
2	Select **Documents** tab, **Data Calls** sub-tab. (Capture or Proposal Manager)
3	Select your own Word, PowerPoint, Excel, or pdf document to upload. Either use the **Upload** button and navigate to the document on the computer, or select a file and drag to the document area. (Capture or Proposal Manager)
4	DTo notify a contact to complete the Data Call, select the **Distribute** button and select the company name. Select **Distribute**. Note, the Data Call will go to the person(s) under the **Contacts** tab who have been selected to receive communications. (Capture or Proposal Manager)
5	Select ✓**Save**. (Capture or Proposal Manager)



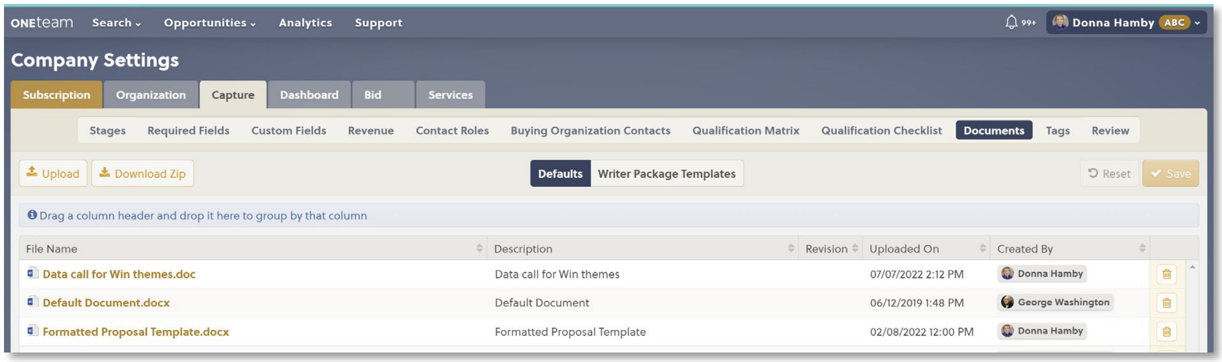
11.0 Create Data Call for all Opportunities – Company Administrator Completed ☐

1 Go to menu under your name on upper right. (Company Administrator)

2 Select Company Settings. (Company Administrator)

3 Select **Capture** tab, and then select **Documents** sub-tab. (Company Administrator)

4 Select the **Defaults** sub-tab. (Company Administrator)



5 Select Word, PowerPoint, Excel, or pdf document to upload. Either use the **Upload** button and navigate to the document on the computer, or select a file and drag to the document area. (Company Administrator)

6 Provide a Description for the document. (Company Administrator)

7 Select ✓**Save**. (Company Administrator)

8 Select the Opportunities menu, and Select **Opportunities**. (Capture or Proposal Manager)

9 Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)

10 Select **Documents** tab, **Data Calls** sub-tab. (Capture or Proposal Manager)

11 Select the **Copy Defaults** button and the 'Copy Defaults' window will open. Select desired Data Call from list by checking the box to the left of the File Name. Select ✓**Copy**. (Capture or Proposal Manager)

12 To notify a contact to complete the Data Call, select the **Distribute** button to open the 'Distribute to Team Members' window.

Check the company name(s) to receive the data call. Companies that are grayed out have already received this data call, and those in black font have not received the data call. By default all eligible companies will be checked, but you may un-select companies.

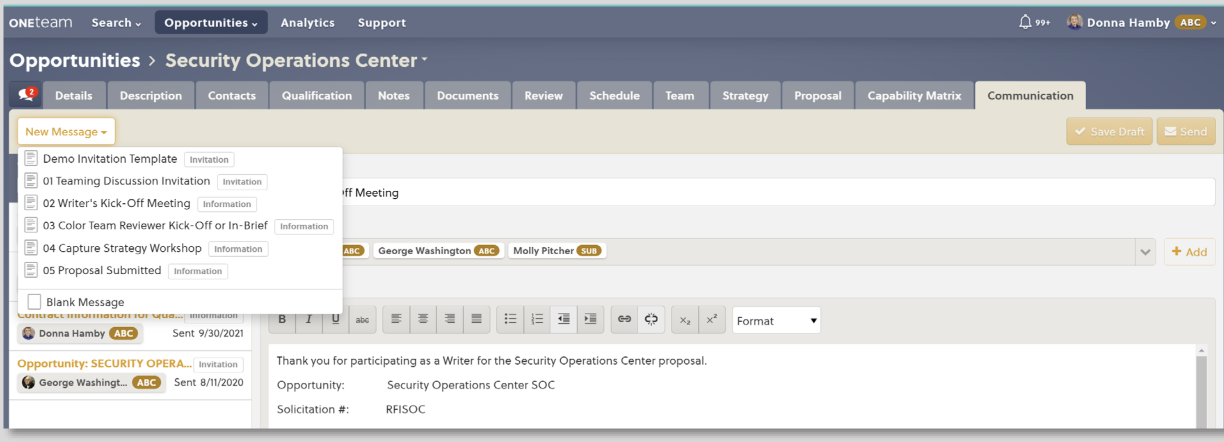
Select **Distribute**. Note, the Data Call will go to the person(s) under the Contracts (Capture or Proposal Manager)

12.0 Send a Communication Email — Completed ☐

1 Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)

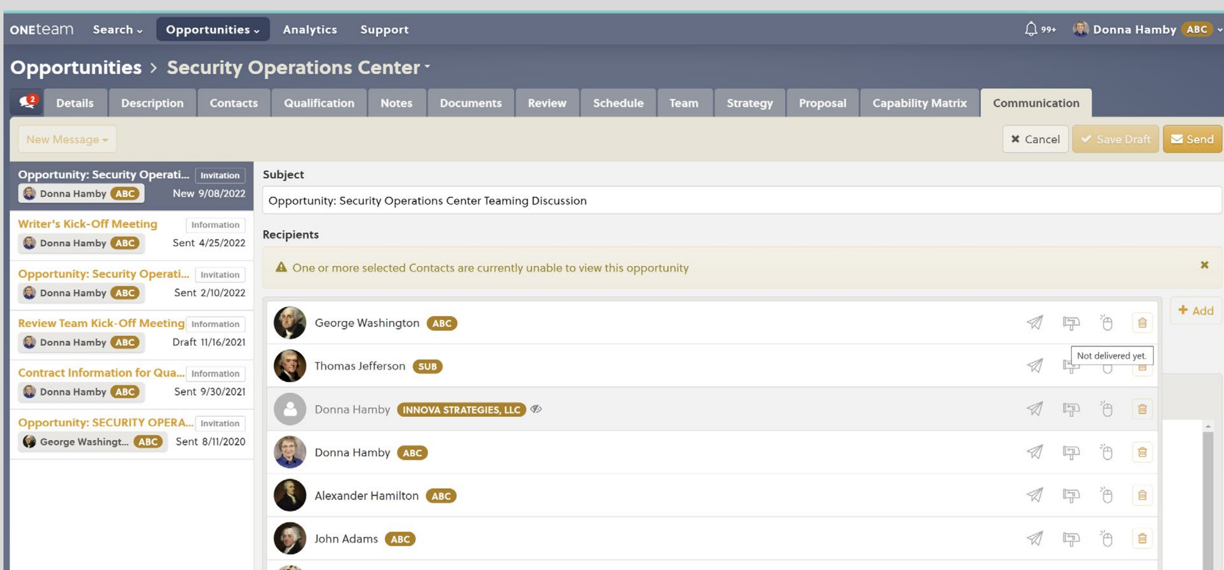
2 Select **Communication** tab. (Capture or Proposal Manager)

3 Select the **New Message ▾** button, which opens a drop-down list of options. (Capture or Proposal Manager)



4 Select one of the pre-made templates from the list. (Capture or Proposal Manager)

5 Notice that the Recipients are pre-populated with people from the Contacts tab, who are authorized to receive communications. (Capture or Proposal Manager)



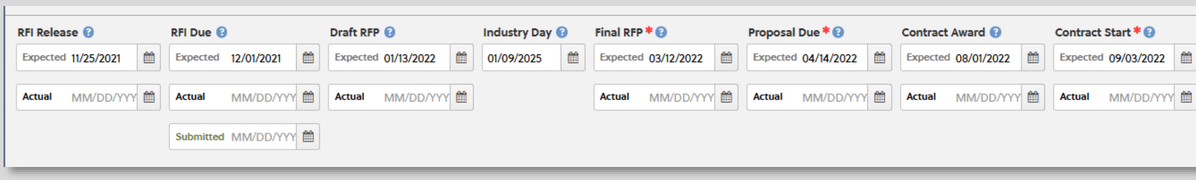
6 Add any addition data to the template, remove recipients if desired, and select ✉**Send**. (Capture or Proposal Manager)

13.0 Assign Tasks and Create Schedule — Completed ☐

1 Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)

2 Select **Schedule** tab. (Capture or Proposal Manager)

3 If the following dates are populated on the Details Tab, they will automatically show up on the Schedule: RFI Release, RFI Due, Draft RFP, Industry Day, Final RFP, Proposal Due, Contract Award, and Contract Start. (Capture or Proposal Manager)



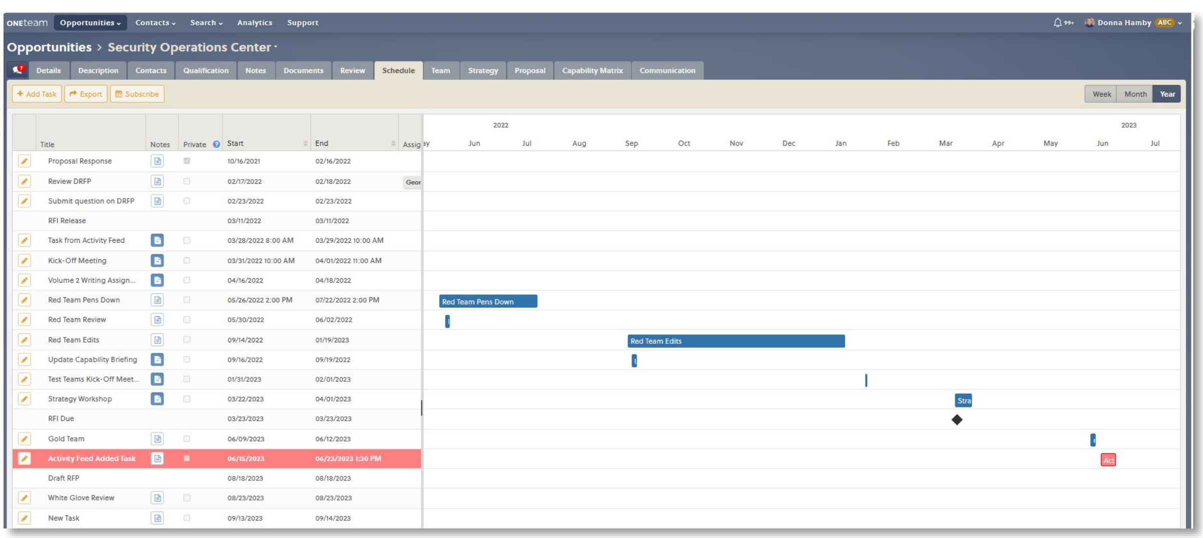
4 If these items are not shown in the Schedule tab, select the Details tab and input either E (Expected Date) or A (Actual Date) in the date fields.

5 Select the **Schedule** tab, and notice that the dates from the **Details** tab are now shown. (Capture or Proposal Manager)

6 Add more events, milestones, or tasks by selecting the **+Add Task** button.You can also add assignments to the Schedule. (Capture or Proposal Manager)

7 Add custom events such as Red Team, Kick-Off Meeting, Questions due to Government, etc. (Capture or Proposal Manager)

8 Select **✓Save** for each new task. (Capture or Proposal Manager)



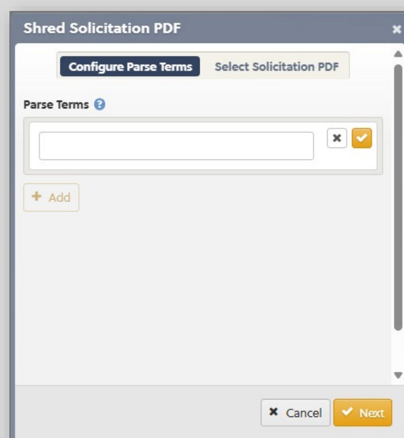
14.0 Shred an RFP — Completed ☐

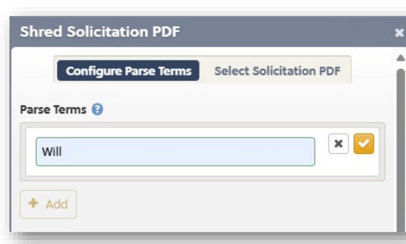
READ BEFORE UPLOADING DOCUMENT TO SHRED

For the Free Trial, Start small with the shredding process. DO NOT UPLOAD a 150 page RFP consisting of sections A-M. To learn the process, upload a short (25 pages or less) PWS or SOW, Section L and Section M.

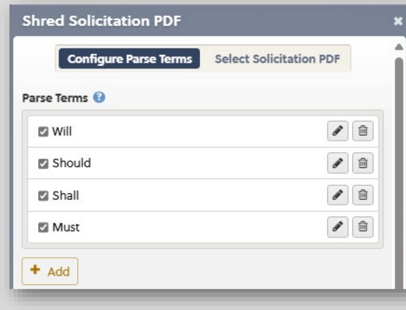
If your test RFP is all in one document, considering removing pages from the pdf to remove Section A, B, D, E, F, and J at the very least. These sections are not meant to be mapped to proposal outline headings and users will spend too much time with the inaccurate and odd numberings (contract and FAR clause numbers, and 'X' or checkmarks)

1	Select an Opportunity name from Pipeline to open it. (Proposal Manager)
2	Select **Proposal** tab. (Proposal Manager)
3	Select the **+Project** button to create a new project for the opportunity. (Proposal Manager)
4	Give the Project a Title (required), description, and Due Date.(Proposal Manager)
5	Select ✓**Save** button to save Project.
6	Select **+Shred** buttonto initiate Shred Process and select pdf document to shred and parse terms.
7	The 'Shred Solicitation PDF' window will open. Select the **+Add** button below the parse Terms field to add desired parse terms. An entry window will appear to add the first parse term. *Note: After a Project is added to an opportunity, subsequent projects will automatically show all parse terms from previous projects on that opportunity. The Proposal Manager can add or remove terms on any project as desired.*
8	Type the term in the entry window and select the **Accept** ☑ button. Terms will then appear in the list with a checkbox that can be toggled on or off.





9 Continue to add terms, until all desired parse terms have been added.



10 Select **Next or 'Select Solicitation PDF'**.

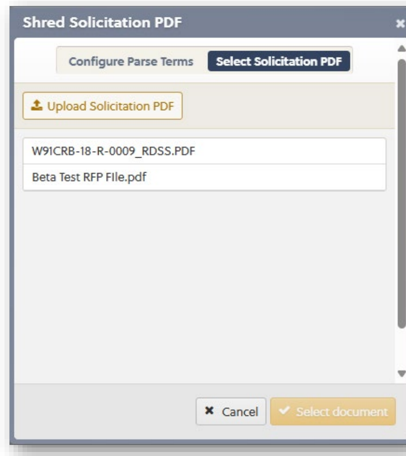
The dialog box changes the selection function from '*Configure Parse Terms*' to '*Select Solicitation PDF*', as shown by the dark blue highlight box.

If pdf files currently exist in the Solicitation Documents library for the opportunity, those files will be shown in a list in the middle of the window.

If no pdf files are in the Solicitation Documents library, the Proposal Manager must upload one or more pdf files to shred.

Select the **Upload Solicitation PDF** button to navigate to the desired pdf file for this opportunity.

The pdf will then be automatically added to the Opportunity Documents library, Solicitation section [**Documents** tab, **Solicitation** sub-tab].



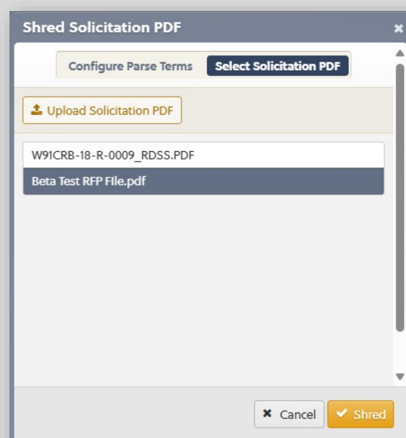
11 The selected document will also appear here in the Shred Solicitaion PDF window.

In this example, two pdfs are already loaded into the Solicitation Document library.

Select the desired file to shred.

When a pdf file is selected to be shredded, it will be highlighted in blue and the **✓Shred** button is activated.

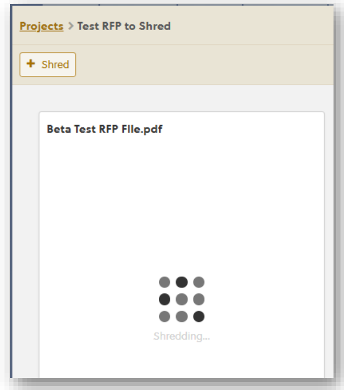
Note: Previously, the Shred button displayed 'Select document' and was not active. As soon as a pdf file is selected from the list in the middle of the window, the ***✓Shred*** *button appears.*



12 Select ✓**Shred** to start the shred process.

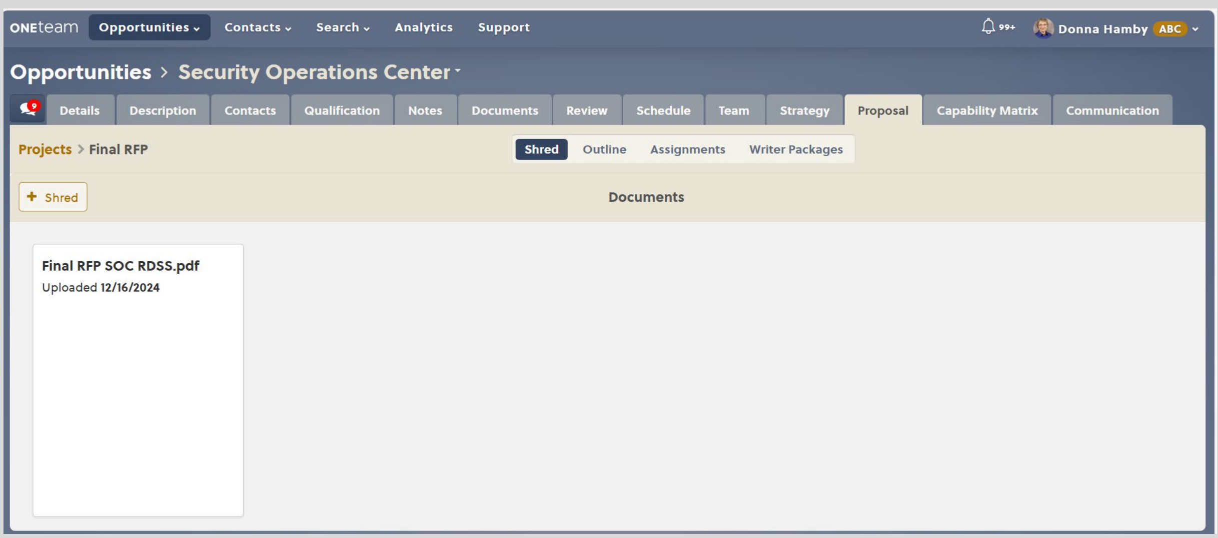
Note: Only one [1] pdf document can be shredded at a time. The Proposal Manager may shred multiple pdf documents for a specific project, but these would be added one at a time.

While the Azure AI Document Intelligence is analyzing and shredding the pdf document and identifying requirements by the designated Parse Terms, users will see an animated icon to indicate that the shred is in process.



13 When the shred is complete, the display will update to the one shown here, with the Document name shown on the Document Card. The date the document was shredded is shown below the document name.

The document has now been analyzed and shredded and is now ready for the Proposal Manager to analyze the document, resolve any shred or numbering issues, and then move to proposal outline development and requirements mapping.



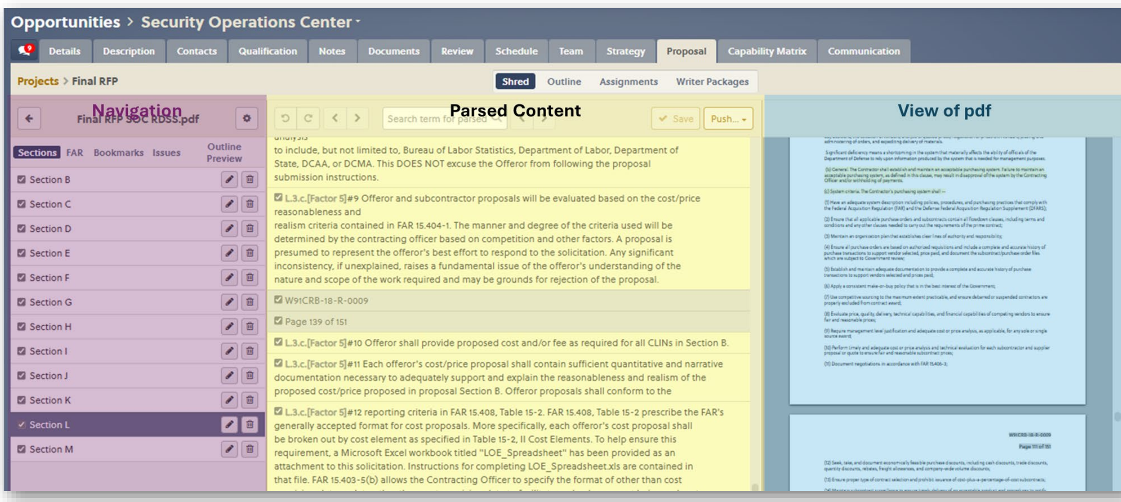
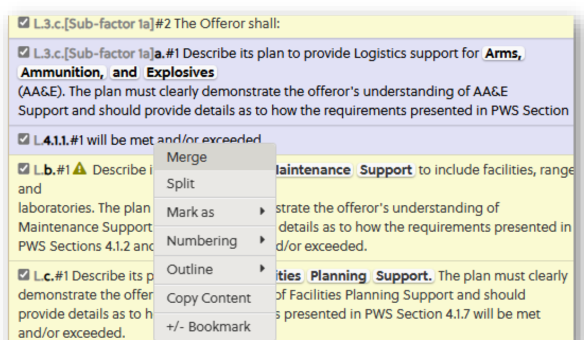
14 If the RFP is in multiple files, you must shred documents one at a time. Simply repeat the process using the **+Shred** button, navigate to or upload the desired document(s) and Shred each document.

15 When all documents are uploaded and shredded, begin the review process to continue to the Proposal Outline and Requirements mapping.

The explanation and documentation of this process for the Free Trial is abbreviated, and will not go into all the details of correcting erroneous numbering.Further More training is provided to users after subscription purchase. The Free Trial application contains the entire Shred process.

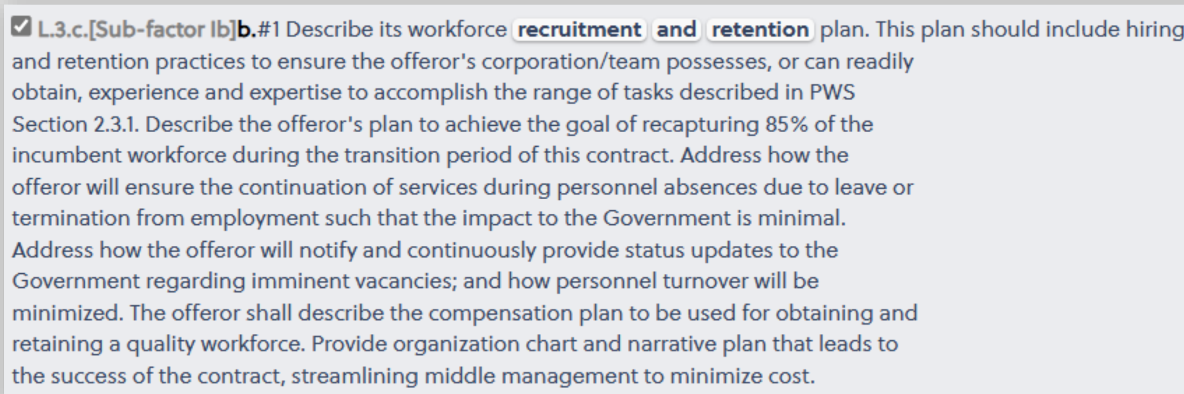
15.0 Review the RFP Shred — Completed ☐

Note: CTRL and Shift are keyboard shortcuts that allow users to select multiple cells of parsed content. CTRL selects multiple cells that are anywhere in the parsed content, not necessarily next to each other. Shift selects a group of cells that are contiguous (i.e. next to each other) by clicking one cell, and then holding Shift and clicking the last cell. All the cells in between are then selected.

1	Select the Opportunity name from the pipeline of opportunities.
2	Select the **Proposal** tab and the correct Project (if more than one project for the opportunity currently exists).
3	Select a shredded document to review.
4	The Document will now open as shown in the example below, with sub-tabs for **Shred**, **Outline**, **Assignments**, and **Writer Packages**. The document in the screenshot has many sections, your trial document should only have Sections C, L, and M, as described at the beginning of Lesson 14.0. 
5	Review Section L to see if any requirements were erroneously split into 2 requirements. This may include a requirement that spans the pdf page break or requirements that contain another Section or reference number.
6	Select the two or more row to be merged, and then access the **Context Menu**, by right clicking on any requirement row. Select Merge from the **Context Menu** and the rows will be merged into a single requirement. 

Many times, the RFP provides a lot of information and directives within a single paragraph. In that case, it would be advantageous to split a single cell requirement into smaller pieces, especially when the Proposal Manager anticipates multiple writers will be addressing those proposal headings.

7

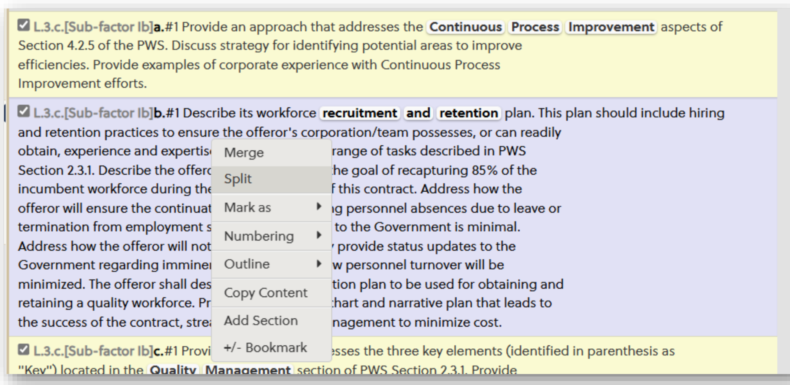


8

To split a cell in the parsed content panel, select the cell to be split.

Right click to see the **Context Menu.**

Select **Split**.

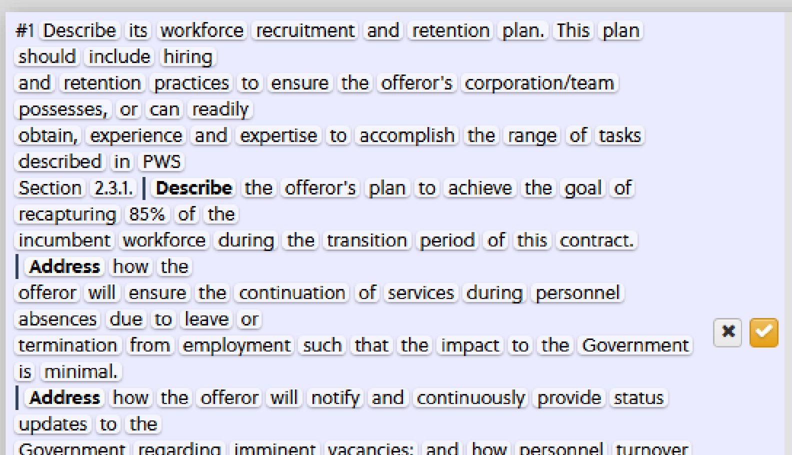


9

The selected requirement will then be displayed as individual words and is visibly more expanded than before.

Place the mouse cursor between the words where the requirement should be split, and left click.

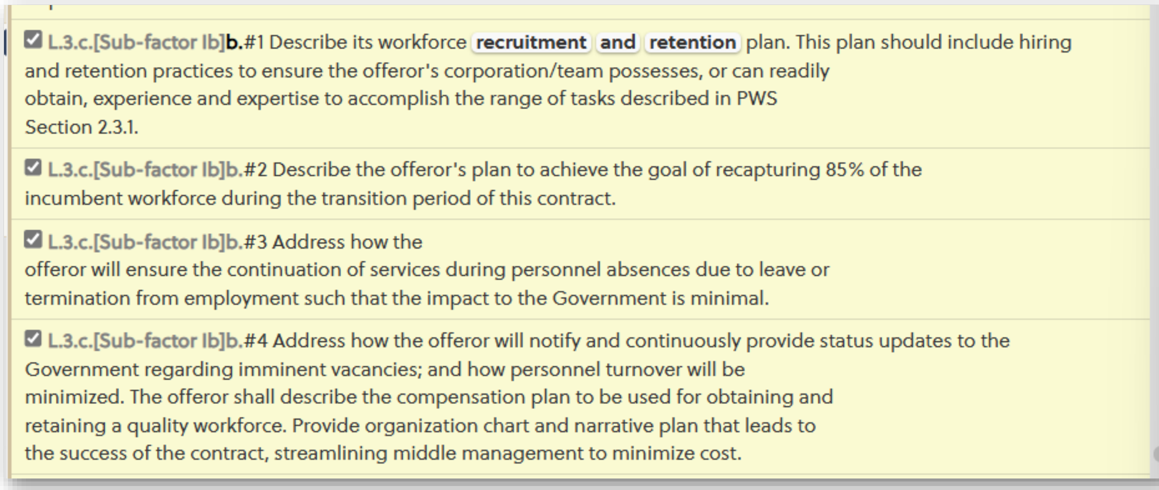
Multiple splits can be created in the same requirement cell.



10

Select the ✓ button to save split changes.

The resulting split of a single row will appear as shown in the screenshot below. Note: OneTeam keeps a unique number for each cell of parsed content When this requirement was split into 4 separate cells, the unique numbering at the end of the RFP number, are #1, #2, #3, #4.

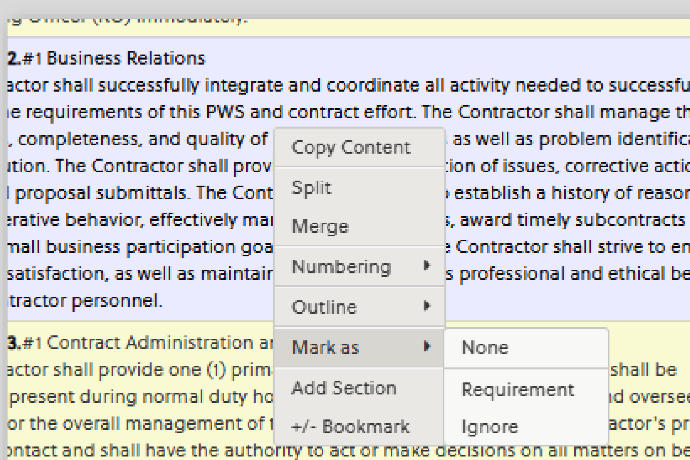


11

Designate Parsed Content Rows as Requirements

Right click in a row to bring up the **Context Menu.**

Select Mark As, then select either Requirement or Ignore



Requirement –designates the cell as a requirement to be addressed in the proposal, turns the cell shading to yellow, and will include this requirement when Pushing requirements to the **Outline Workspace**.

Ignore – which is used for informational only data in the RFP and turns the cell gray when selected. Cells marked as Ignore will not be copied to the **Outline Workspace** to be mapped.

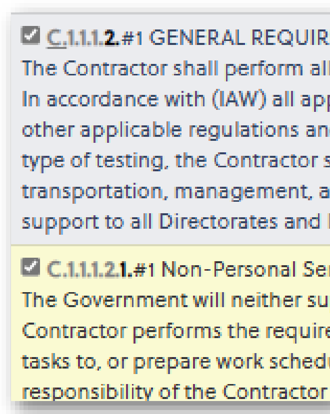
12

Validate Requirements

After Requirements rows have been distinguished from ignore rows, the Proposal Manager must validate that every cell marked as requirement is indeed a requirement to be pushed to the **Outline** workspace, mapped to an Outline Heading, and written to by writer so that it is addressed in the RFP response.

To assist with the validation process, each Parsed Content cell has a validation checkbox as shown in the screenshots to the right.

Select the **checkbox** after validating the row IS A REQUIREMENT to be mapped to a Proposal Heading.



16.0 Create a Proposal Outline Completed ☐

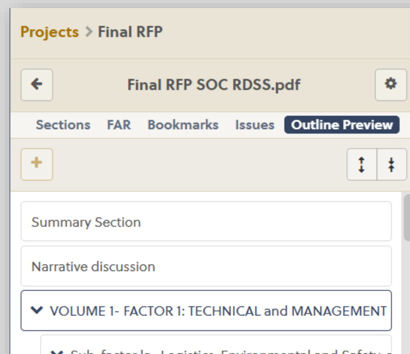
1 Select an Opportunity name from Pipeline to open it. (Proposal Manager)

2 Select **Proposal** tab, select the appropriate Project, and then select the **Shred** sub-tab. (Proposal Manager)

3 Select the shredded document and navigate to Section L or open the Section L shredded document if it is separate from the rest of the shredded documents.

4 Select the parsed content rows in the middle panel, which contain the description of the outine for the proposal volumes. Use Ctrl or Shift buttons on keyboard to multi-select rows.

5 Select the **Outline Preview** in the left navigation panel of the **Shred Workspace.**

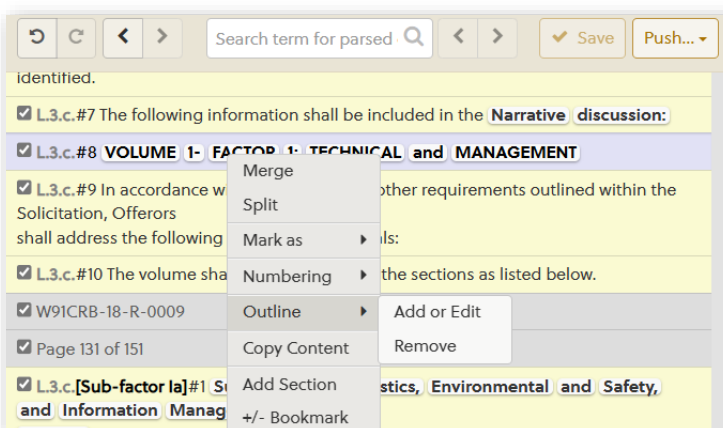


Select the **+** button between the Outline Preview heading and the outline heading that are displayed.

This will initially be blank, until Outline Headings are selected in the parsed content cells. Then a tree view will be displayed.

By default, OneTeam will auto-select the best words to use as Outline Headings, by analyzing the sentence structure and capitalization for all cells that are selected.

6 The screenshot shows 'Volume I – Factor 1: Technical and Management' highlighted.



OneTeam automatically selects all words up until 'and' for headings.

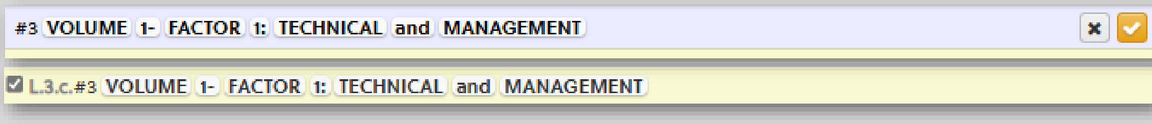
By selecting the add or edit selection, the user will be able to add the words 'and Management' to the heading.

In the example screenshot, all of the words in this cell are designated as Outline Headings.

7

Continue selecting Outline Heading terms and then use the Outline Preview in the left navigation panel to set the correct levels for each heading.

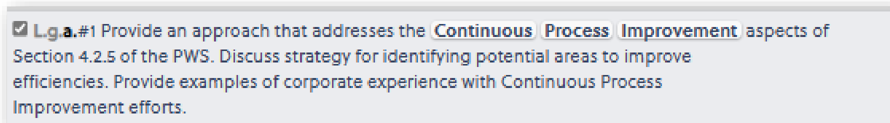
After editing or adding any words to the Outline Heading selection, select the Checkbox to confirm the outline heading.



8

This an example of only a few words that were auto-selected in L.g.a#1 – Continuous Process Improvement.

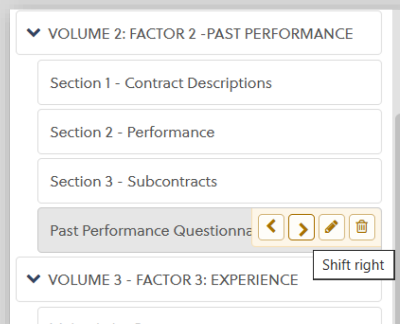
Continue to mark terms for the Outline Headings, until all outline for all volumes of the proposal are completed.



9

The Outline Preview also allows users to alter heading levels using the < and > buttons, which shift the heading to the left to move it up a level or to the right to make the heading subordinate to the one preceding it.

OneTeam will automatically set each Volume level heading as a Heading 1, and headings below that will be Heading 2 or lower.

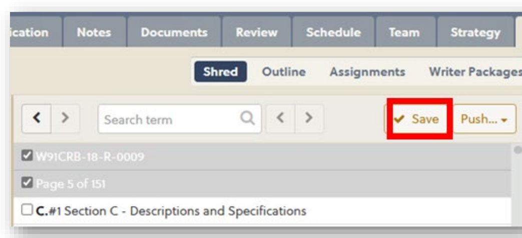


10

Push Headings from Shred Workspace to Outline Workspace

Select ✓Save to save the splits, merges, numbering corrections, and requirements marking.

This is useful if the review process needs to be paused and completed at a later time.

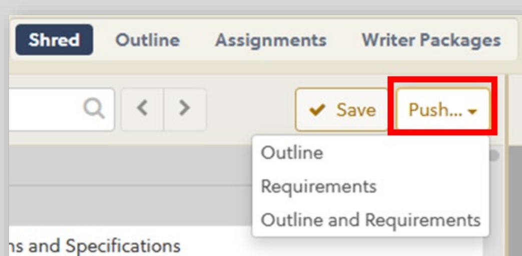


11

If Outline Heading identification is complete, select the Push button.

This will save and push content to the Outline Workspace.

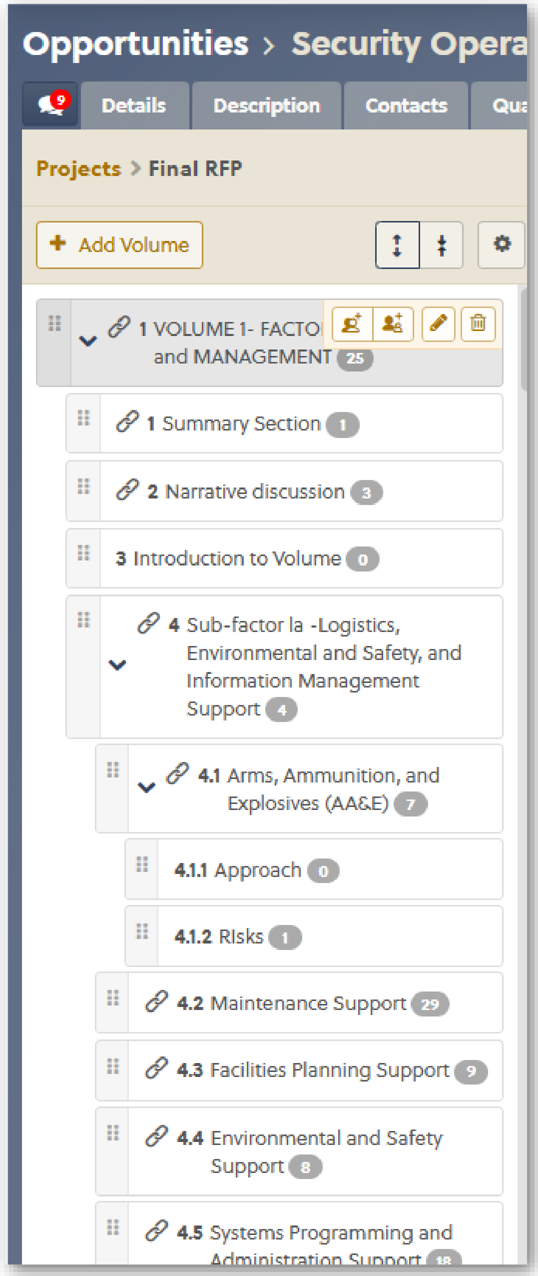
The Push button allows users to select the Outline, Requirements, or both Outline and Requirements, to be pushed to the Outline Workspace, where the entire Outline can be reviewed and edited.



After Outline Headings have been marked from the RFP text and pushed from the **Shred Workspace** to the **Outline Workspace**, it is time to review and validate the entire proposal outline.

12 Take the time to validate every line of the Outline to ensure that the Outline is correct and compliant BEFORE any writing begins, thus reducing reworks that cost valuable time.

Headings may be moved by selecting a heading and dragging it to the desired location.



13 This is also a good time to determine if additional headings are needed that were not found in the RFP.

This process is covered in the next exercise - Section 17.0.

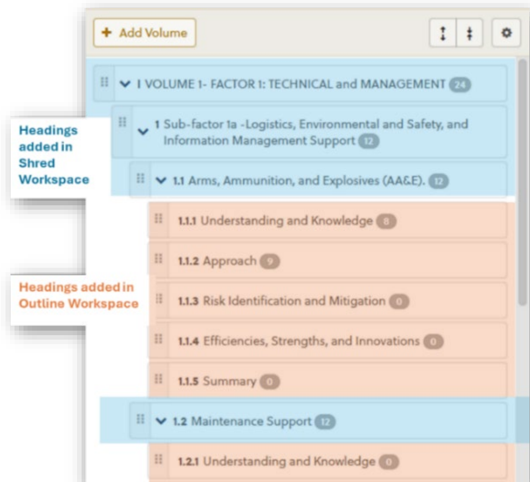
17.0 Create Manual Proposal Headings — Completed ☐

1 Review the Outline Headings to determine if additional headings are needed. For the Technical and Management sections, additional headings not found in the RFP may include items such as

- Understanding
- Approach
- Risks
- PWS Staffing Plan
- Efficiencies, Strengths, and Innovations
- Experience Examples or Proof Points
- Summary

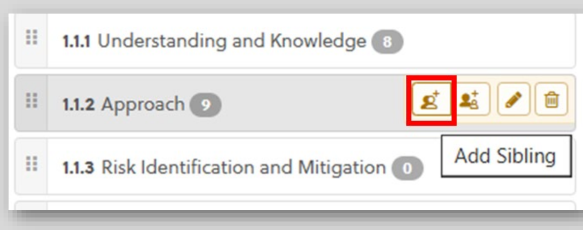
2 In the Outline example to the right, the blue shaded headings were added in the **Shred Workspace.**

The orange shaded headings were manually added in the **Outline Workspace**.

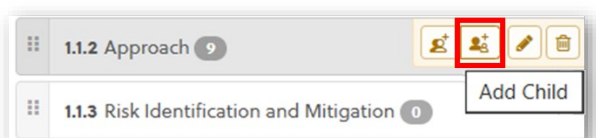


3 To add a same level heading after an existing heading, hover over the heading, which will turn gray, and select the **Add Sibling** button.

If there are multiple headings at the same level and **Add Sibling** is selected, the new heading will be added to the end of that level of headings. It will not be added just below the headed selected.

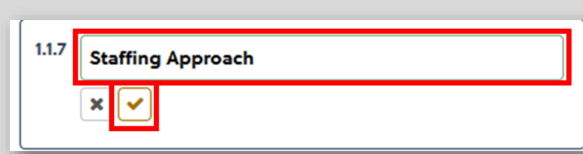


4 To add a lower-level heading (sub-heading) under any heading, hover in the Heading Name field and select the **Add Child** icon/button.



5 When manually adding a heading to the Outline in the **Outline Workspace**, by either using the **Add Sibling** or **Add Child**, a new line with an entry field will be created.

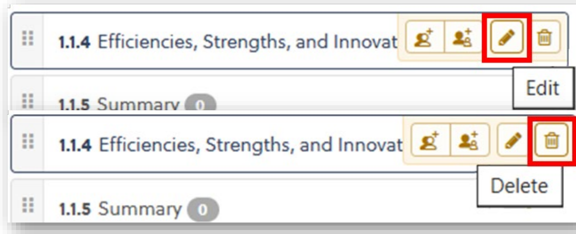
Type the name of the heading, in the appropriate case, and save by selecting the gold check mark.

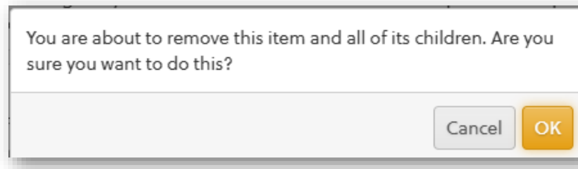


6 After saving a heading entry, if needed, use the **Edit** button to make changes to the heading text.

To delete a heading, select the **Delete** button (trash icon). A confirmation window will open to confirm deletion of that entry AND all of its children headings, if applicable.

If the child(ren) headings need to be retained, remove their relationship to the parent heading either moving headings to a different parent heading or changing the heading level to make them the same level as the one being deleted.

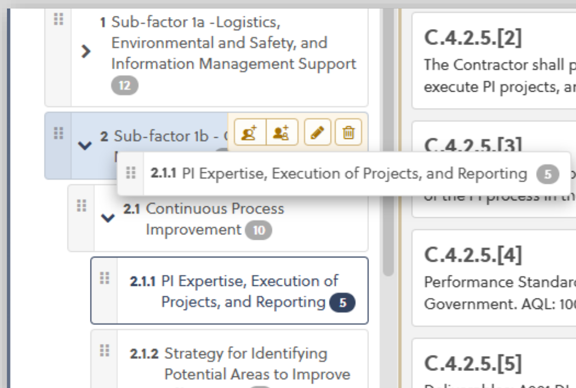




7 At any time, the Outline Headings can be expanded or collapsed using the arrows on the heading boxes.

Select the **>** button to expand that heading to show the next level sub-headings.

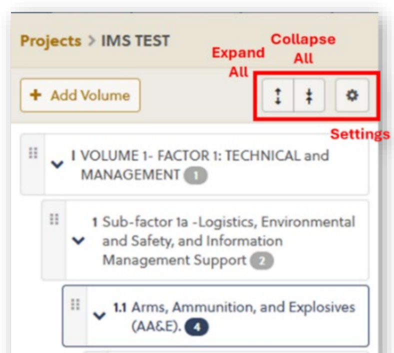
Sub-headings can also be expanded to show lower-level headings.



8 Select the **∨ button** in the outline heading to collapse the section.

When the heading and sub-heading are collapsed, the button will be shown as **>**, and can be selected to expand the selection.

Expand or collapse the entire outline by selecting the **Expand All** and **Collapse All** buttons above the headings, shown in the screenshot to the right.

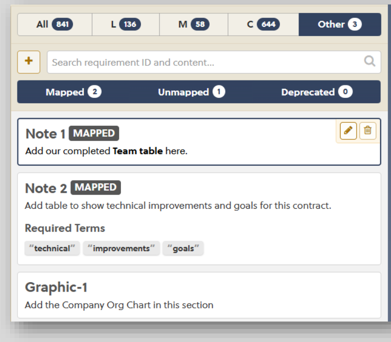


9 Make all desired Outline Heading updates and then you are ready to map the RFP Requirements.

18.0 Add Required Terms to Requirement — Completed ☐

Required Terms may be added to any manual or automatic requirement which was pushed from the parsed content in the **Shred Workspace**. Add Required Terms BEFORE mapping requirements to headings to streamline the mapping and validation process.

1 To add Required Terms that need to be included in the proposal, go to the Requirements panel of the **Outline Workspace** to see the individual requirements.

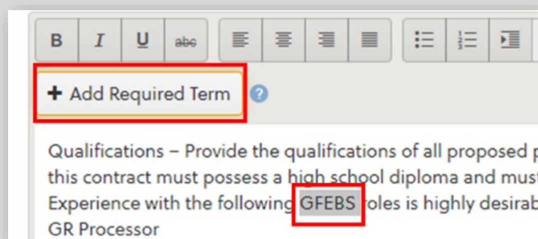


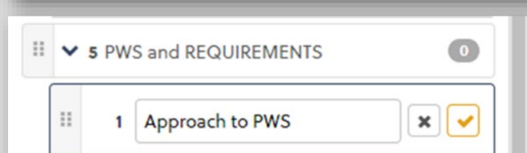
2 Select the requirement that the Required Term will be added to.

Select the **Edit** button to open the Requirement Window.

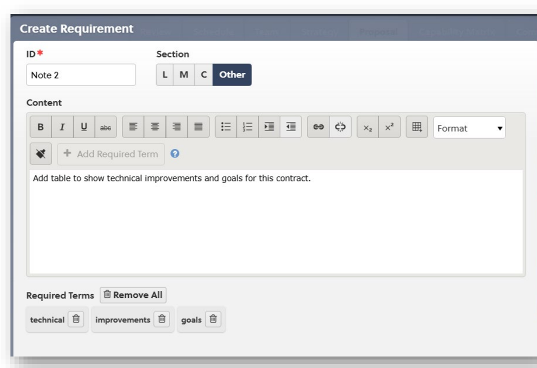
3 Highlight the desired term in the Description field and select the **+ Add Required Term** button.

The OneTeam Word Add-in will notify the assigned proposal Writer to include this term in the appropriate outline section – see [Contribute to a Proposal through a Writer Package](#).

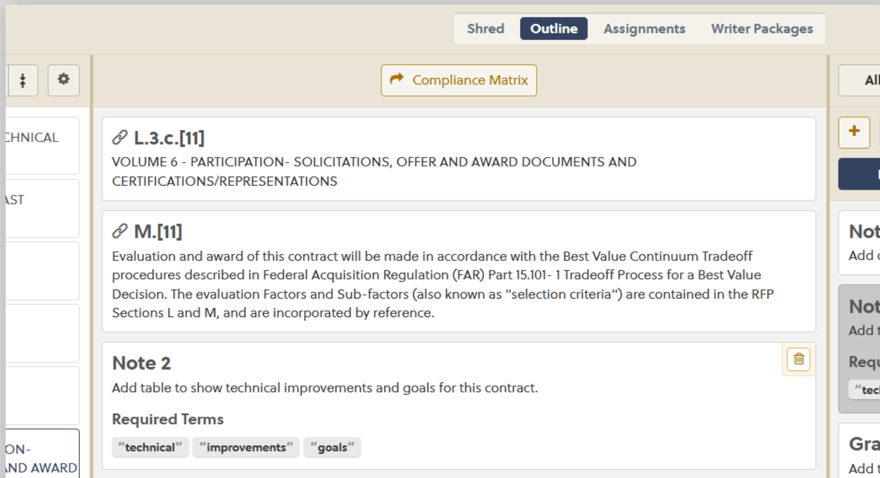




4 When creating or editing a Requirement, the Required Terms that have been set will be displayed in the Requirements box, at the bottom, as shown in the screenshot to the right.



5 This is the requirement after saving. The Required Terms are still at the bottom but appear in quote marks and gray boxes as shown in the screenshot to the right.



6 Select the **Save** button to add another requirement to the selected heading.

Save before using the **+ Add Requirement** button for another requirement.

Repeat these steps until all requirements are mapped to their respective headings in the outline.

7

Best Practice

Mapping requirements to the Outline is essential for getting to the first draft. It is also essential to ensure that every requirement in the RFP is thoroughly addressed.

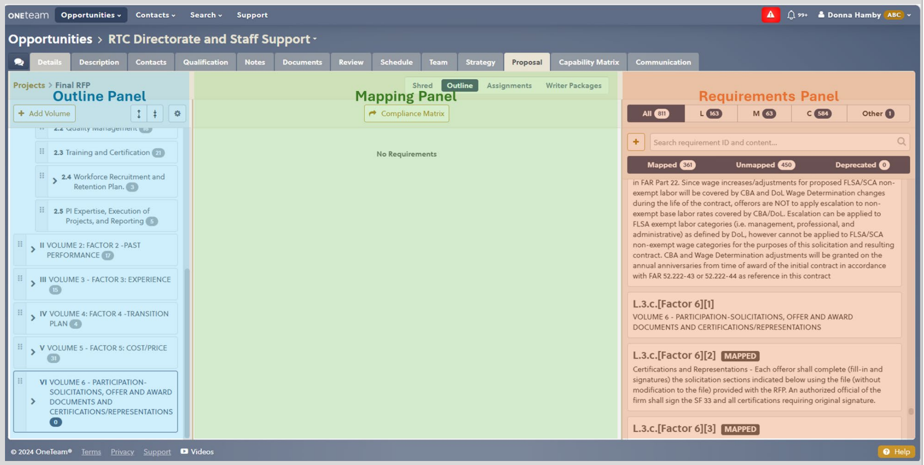
- It is not possible to copy a requirement and then change it to get 2 separate requirements. There is only one requirement allowed per ID number.
- Break down requirements into multiple sections if needed using the 'SPLIT' command from the **Context Menu** in the **Shred Workspace**.
- Map a requirement to multiple Outline Headings when it is needed – a single requirement can provide needed content for multiple Writers and sections.
- Use the Required Terms to help Writers know which terminology is preferred for their inputs and to ensure all requirements are thoroughly addressed.

19.0 Map RFP Requirements — Completed ☐

1 Select an Opportunity name from Pipeline to open it. (Proposal Manager)

2 Select **Proposal** tab, Select a Project, then select the **Outline** sub-tab.

3 The Requirements from the parsed content were pushed to the **Outline Workspace** with the Outline Headings previously. Now when **Outline Workspace** is selected, all cells that were designated as Requirements and validated by the Proposal Manager with a checkbox, will appear in the Requirements panel on the right.



The screenshot here shows the Outline Panel on the left and the Requirements Panel on the right.

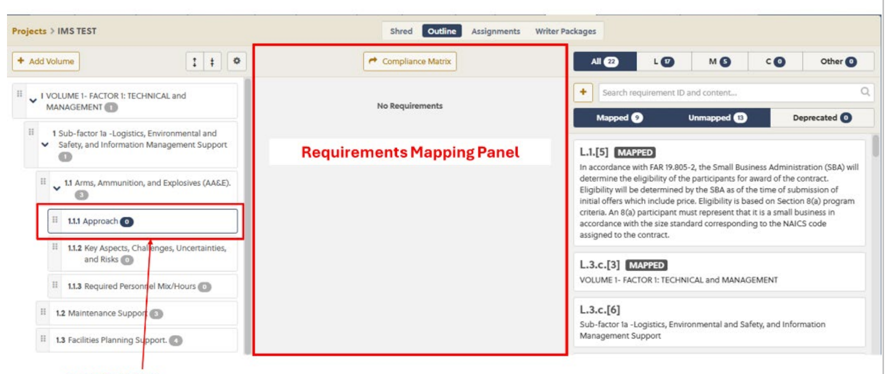
The center panel is the location to drag requirements from the right panel to visually see that it is mapped to a specific heading.

4 The words 'No Requirements' will be displayed in the center panel when no requirements have been mapped to a selected heading.

The requirement cell will be displayed in the center Requirements Mapping panel when it is mapped to a selected heading.

In this example, notice that Heading 1.1.1 Approach has a dark border around it, indicating that heading is selected or highlighted.

Note that the center Requirements Mapping panel does change based on which heading is selected. It may show no requirements mapped to heading 1.1.1 Approach, but may then show 2 requirements mapped to heading 1.1 Arms, Ammunition, and Explosives.

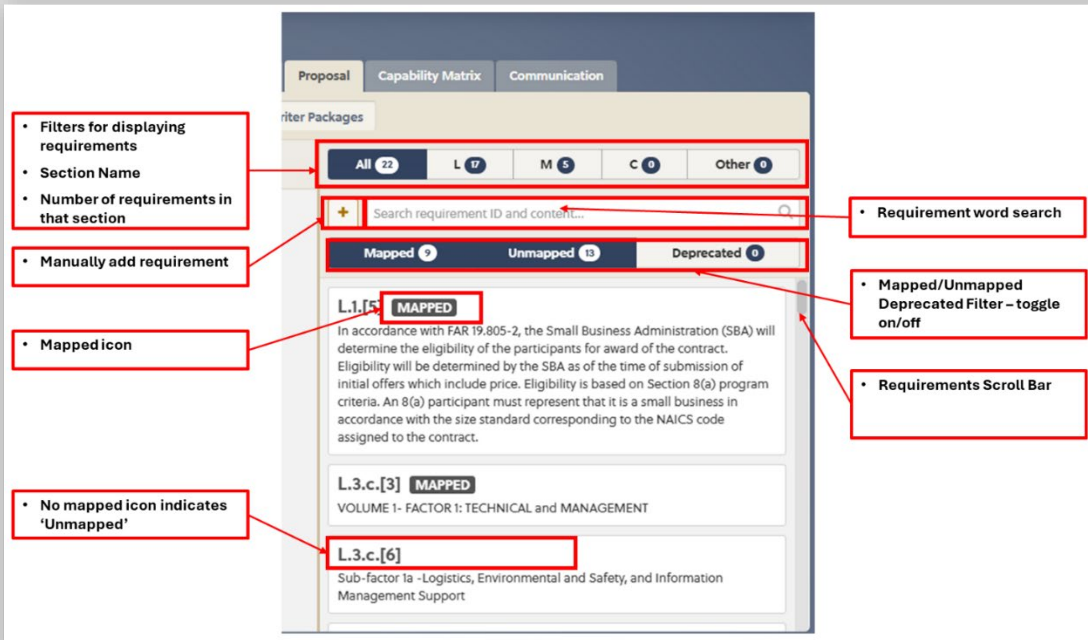


5 Here is an overview of the elements and info that is contained in the Requirements panel of the **Outline Workspace**.

At the top of the panel are the filters which all users to select which 'Sections' of requirements are displayed below. If a filter is dark blue, it is selected.

In the example the 'All' filter is selected so All Requirements from Sections L, M, C, and Other are displayed in the listed below it.

The L, M, C, and Other filters can only be displayed one at a time, unless 'All' is selected to display them all.



There is also a Search bar to search for specific words.

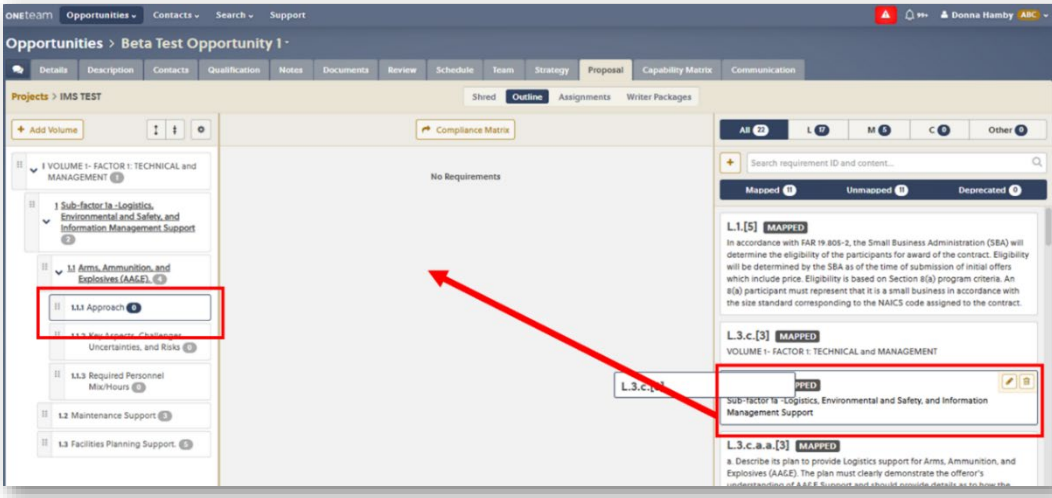
There is a + button manually add requirements, such as instructions to Writers.

There are filters to Display either Mapped, Unmapped, or Deprecated (obsolete) requirements that also shows the number of each. These filters may be selected in any combination of 1, 2, or 3 all filters.

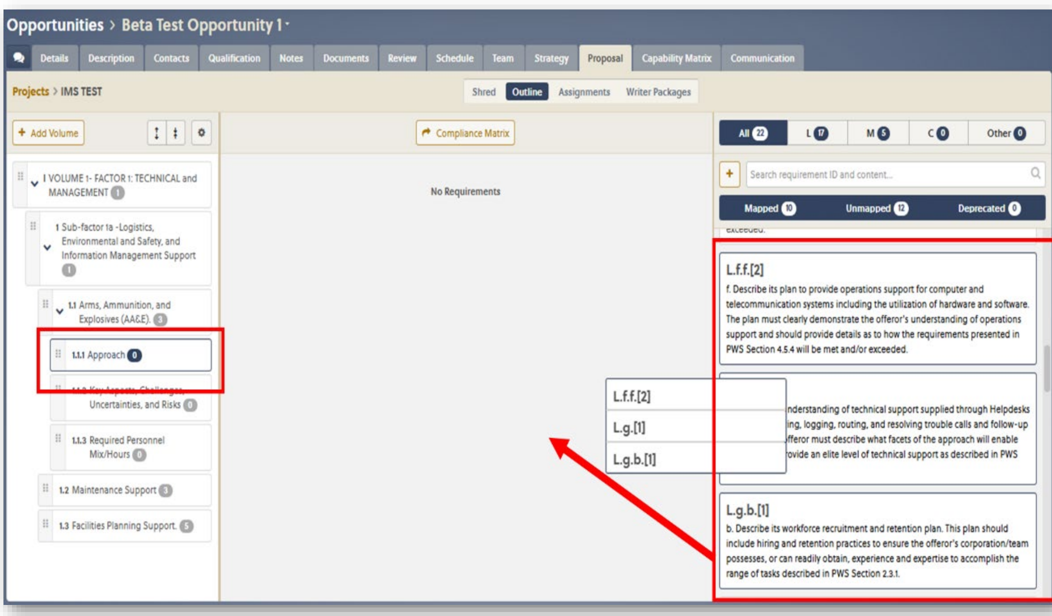
6 In the **Outline Workspace**, users can select a proposal heading, then select a requirement from the Requirements panel, and drag it to the center mapping panel. This will immediately map that requirement to the selected Proposal Outline Heading.

Continue this process until all requirements are mapped to the correct headings.

- A requirement can be mapped to headings by selecting one heading at a time, and dragging the requirement to mapping panel.

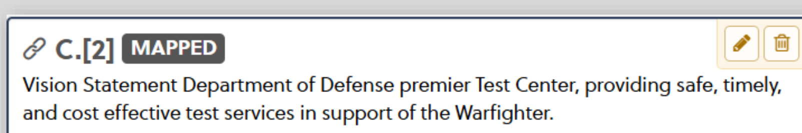


- Multiple requirements can be mapped to a single heading by using the CTRL button to multi-select requirements, then drag them all together to the mapping panel.



- You cannot multi-select headings to add the same requirement to multiple headings.

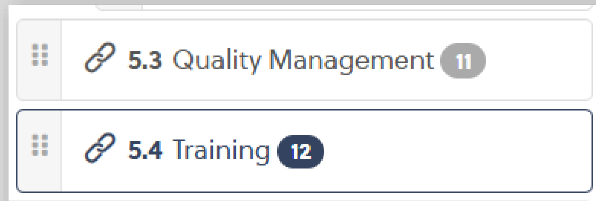
7 After a requirements is mapped, the ‘Mapped’ icon appears in the requirement.



8 In the Requirements panel on the right, select a requirement and hover over the link icon to see the shredded document name that provided the requirement.

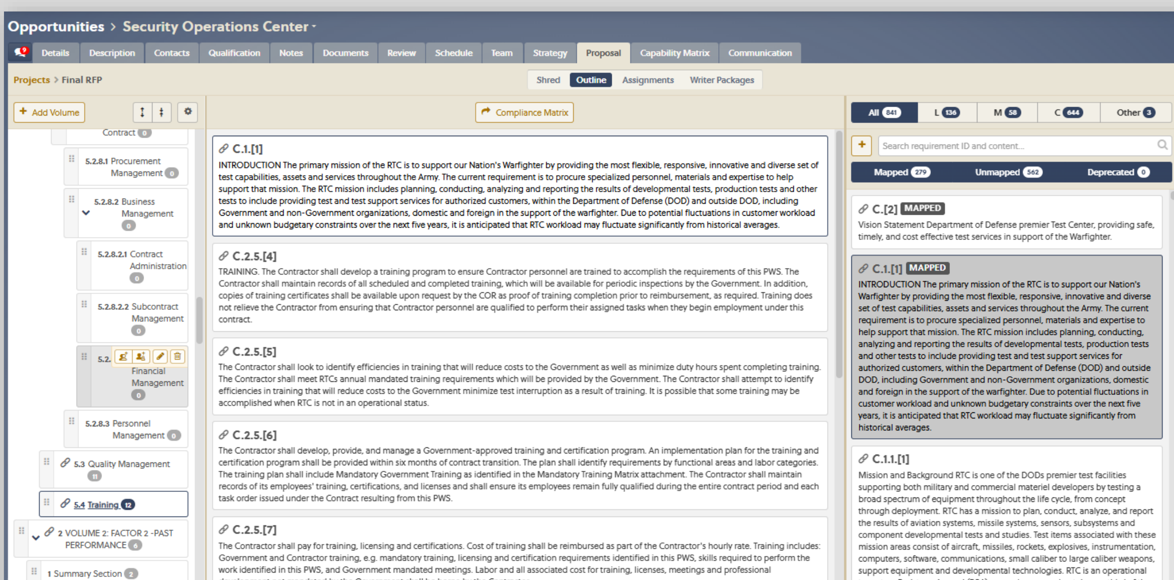
9 Every Outline Heading that was created in the **Shred Workspace** will display a link icon as shown in the example here.

Hover over this link to see the name of the shredded document where it was marked before being pushed to the **Outline Workspace.**



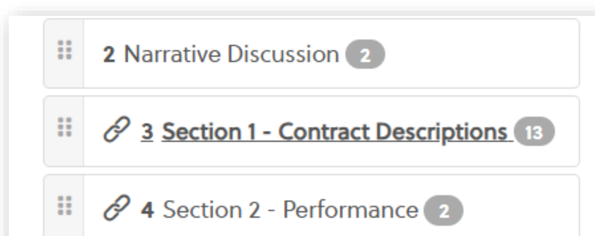
10 The Outline Headings also display a number at the end of the heading indicating the number of requirements that are currently mapped to that heading. In the example above, the Quality Management heading has 11 requirements mapped to it and Training has 12 requirements mapped.

11 To view the list of requirements for a specific heading, select the Outline Heading. In the center Mapping Panel, all requirements will be shown in alphabetic order of numbering schema. There is a scroll bar for the Mapping Panel to scroll through all 12 requirements for the *5.4 Training* Outline Heading.



12 To see which heading(s) that requirement is to mapped, make sure the Outline Heading are fully expanded in the left panel by selecting the Expand button.

Then select the requirement in the right Requirement Panel. The heading that the requirement is mapped to will appear in bold and underlined.

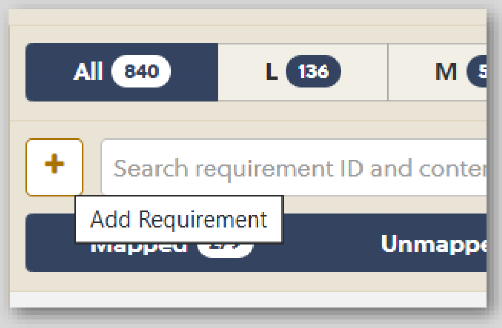
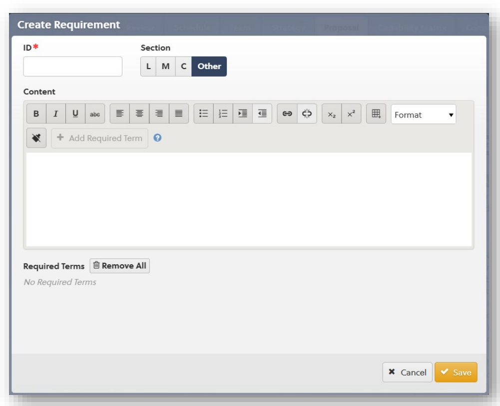


20.0 Add Manual Requirements — Completed ☐

Ocassionally, a Proposal Manager may wish to add a manual requirement, that is one that is not verbatium from the RFP.

This might be a note or instruction to a writer, such as to add a specific graphic or additional information that will assist in developing the proposal narrative for a specific section.

This might also be an overview of the customer, their mission, or important facts to remember that are not strictly requirements designated in the RFP document during the shred process.

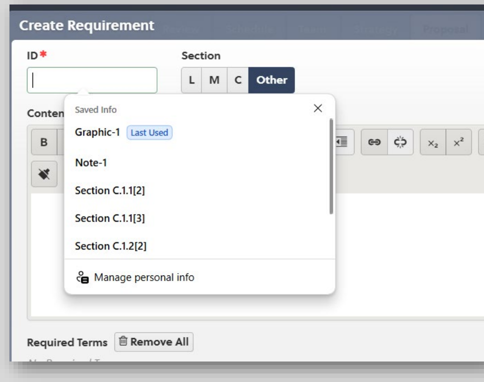
1	Select an Opportunity name from Pipeline to open it. (Proposal Manager)	
2	Select **Proposal** tab, Select a Project, then select the **Outline** sub-tab.	
3	Select the + button in the right Requirements panel. This is next to the search bar under the All, L, M, C, and Other filter buttons.	
4	The 'Create Requirement' window will open. This window contains several fields and options for the requirement – ID, Section, Description box, and Required Terms. In the example here, all fields are blank upon adding the requirement and the cursor is shown in the ID field.	

5 Assign an ID to the requirement, using letters and/or numbers.

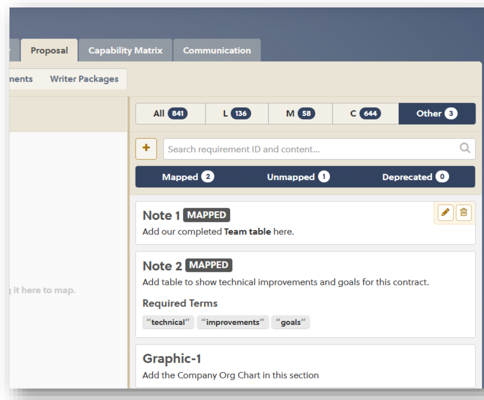
When using a manual requirement for a note to the writers, use a numbering schema that does not conflict with the numbering of the RFP or other document that was shredded.

Note-1, Note A, and Graphic 1 would all be good IDs for a manual requirement. Avoid G-1, as that might be confused with Section G of the RFP.

Select the Section as **Other**.

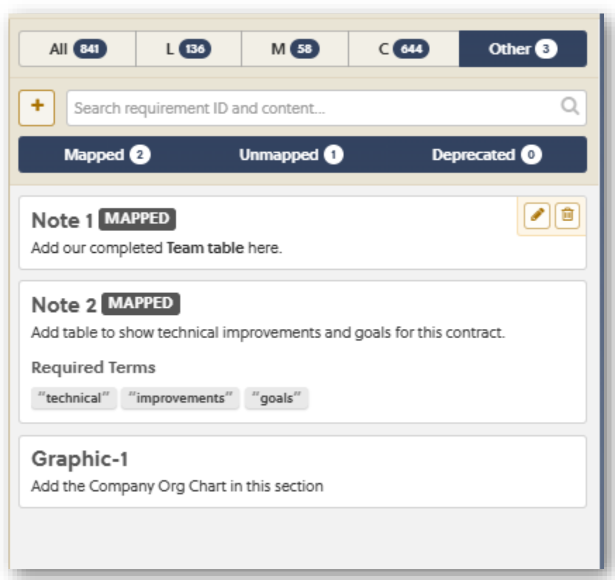


6 The example to the right shows 2 Notes, which have been mapped to a proposal outline heading, and 1 Graphic requirement, which has not been mapped to a proposal outline heading.



7 Continue adding manual requirements as desired.

8 Manually added requirements will not have a link icon since they are not created in the Shred Workspace by marking parsed requirements.

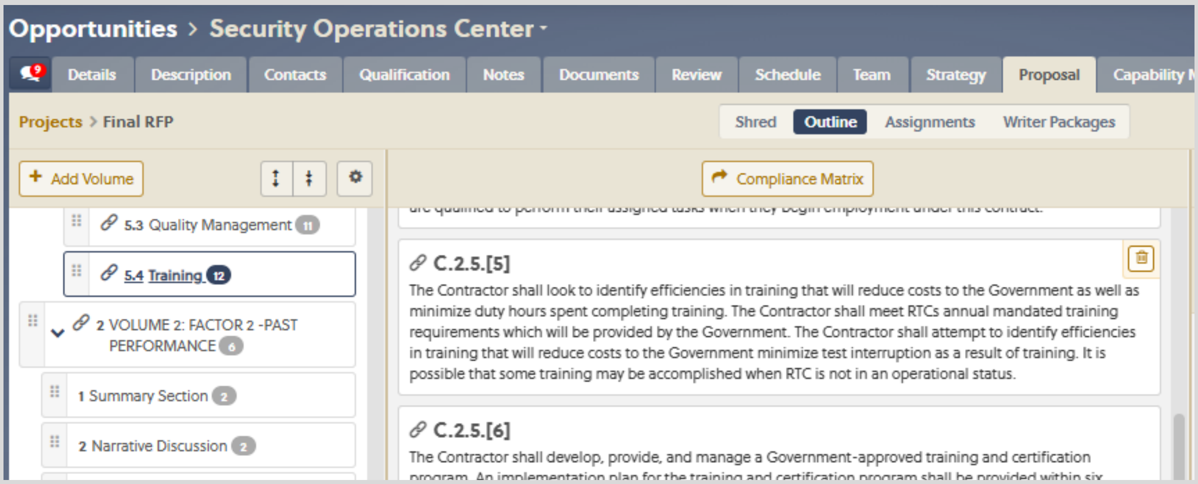


21.0 Delete Requirements

1 To delete a requirement mapping to a specific Outline Heading, select the appropriate Outline Heading in the left panel.

2 Scroll through the list of requirements that are currently mapped by looking in the center Mapping Panel.

3 Hover over the upper right corner of the requirement that you wish to delete from the outline. Select the trash icon to remove that requirement from the heading.

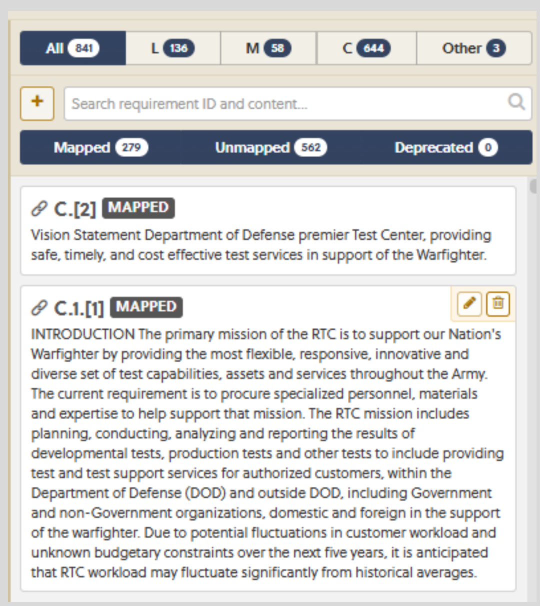


4 The requirements is still in the Requirements list in the Requirements panel on the right and can now be mapped to other Outline Headings as needed.

5 To remove a requirement completely from Requirements panel, so that it is not mapped to any Outline Heading, follow this same procedure in the right Requirement panel.

This completely removes the requirement from the list that are eligible to be mapped.

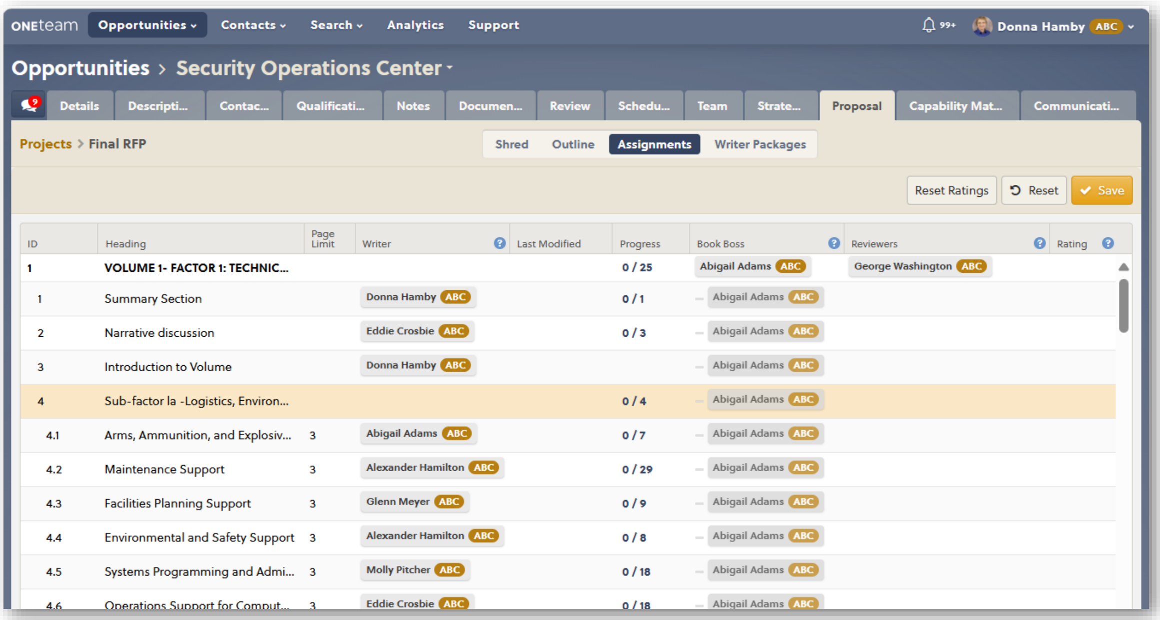
You may also edit a requirement here, including identifying Required Terms or Keywords.



22.0 Create Proposal Assignments — Completed ☐

1 Select an Opportunity name from Pipeline to open it. (Proposal Manager)

2 Select **Proposal** tab, select the Project, and select the **Assignments** sub-tab. (Proposal Manager)



3 Notice the Proposal Outline with Heading numbers in the left most columns. (Proposal Manager)

4 If desired, add page limits to each heading. This is a guide for Writers, it does not actually prevent Writers from adding more pages than they are assigned.
These are for reference only and do not roll up to the Volume level page limit. (Proposal Manager)

5 Assign Writers in the Writer column from a drop-down list of Contacts on this Opportunity.
Only one Writer may be assigned to a Proposal Heading. (Proposal Manager)

6 If additional names are needed, add them in the Contacts tab, then they will be available to select here to assign as Writers. (Proposal Manager)

7 If desired, add a Book Boss to each Volume on the Volume Name line (Volume level). (Proposal Manager)

8 Add Reviewers in the Reviewers column. Reviewers must be in the Opportunity Contacts tab. (Proposal Manager)

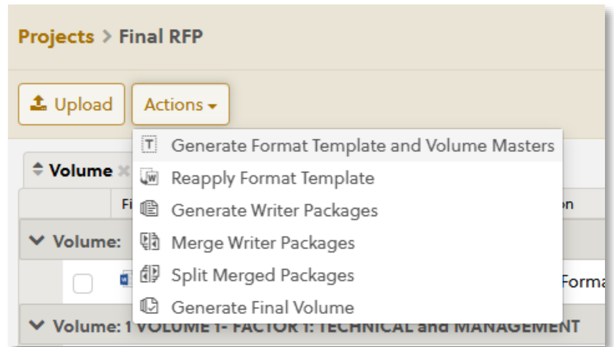
9 The Last Modified, Progress, and Rating columns will populate as Writers write and check off requirements in Writer Packages, and as Reviewers provide ratings to a review document. (Proposal Manager)

10 Select ✓**Save**. (Proposal Manager)

23.0 Create Proposal Writer Packages — Completed ☐

1 After completing Assignments, select the **Writer Packages** sub-tab. (Proposal Manager)

2 Select the **Actions** button and **Generate Format Template and Volume Masters**. (Proposal Manager)

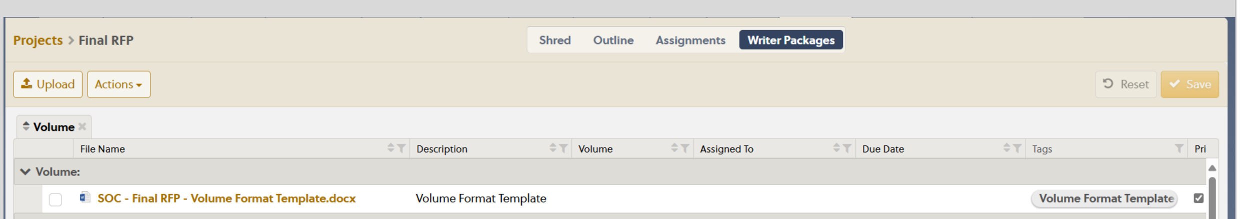


3 The ‘Generate Format Template’ window will open. Select the Proposal Template from the drop-down list.

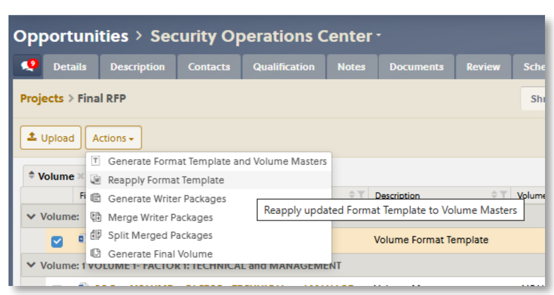
4 This generates a Format Template based on your company’s style guide template that you have previously uploaded in the OneTeam Company Settings.

Now you may customize this template for this specific bid. For example, check the margins, font sizes and other requirements per the RFP instructions and then update this template.

5 After generating the Format Template, it is located in a separate section and called ‘Volume Format Template’.



6 If the format template needs to be updated throughout the proposal process. Open the template and update as needed The ‘Reapply Format Template’ from the **Actions** button menu to flow those format changes to the Volume Masters.



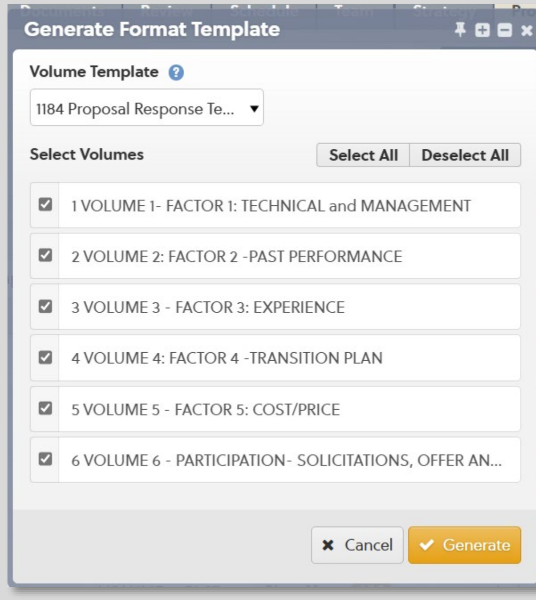
6 Next Generate Volume Masters using the Generate Format Template and Volume Masters in the **Actions** button menu.

7 Select which Volumes to Generate the Volume Template for.

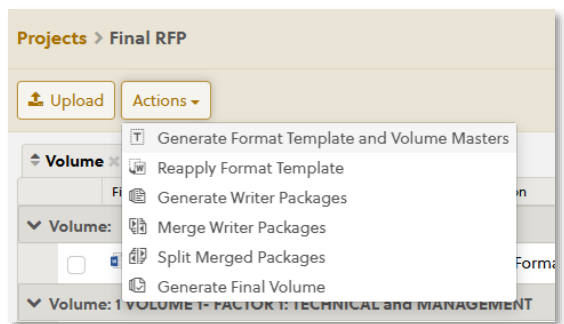
You may use the ‘Select All’ and ‘Deselect All’ filters to quickly select all at once, or use the checkboxes beside the Volume numbers/names to select or deselect individual volumes.

8 Select the ✓**Generate** button.

This creates formatted Volume template(s).



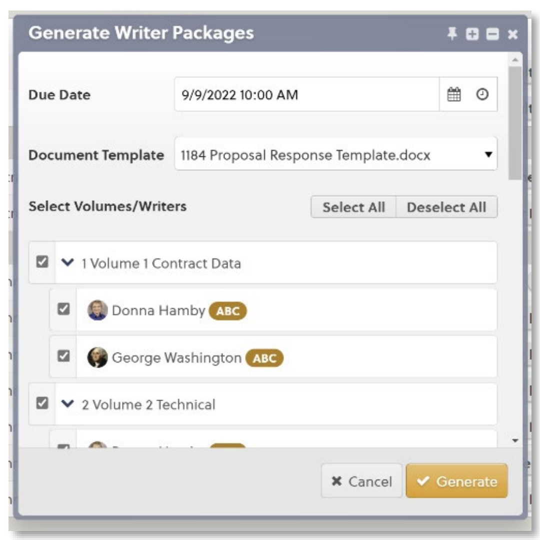
9 Select the **Actions** button and **Generate Writer Packages**. (Proposal Manager)



10 Select Due Date for Writers. (Proposal Manager)

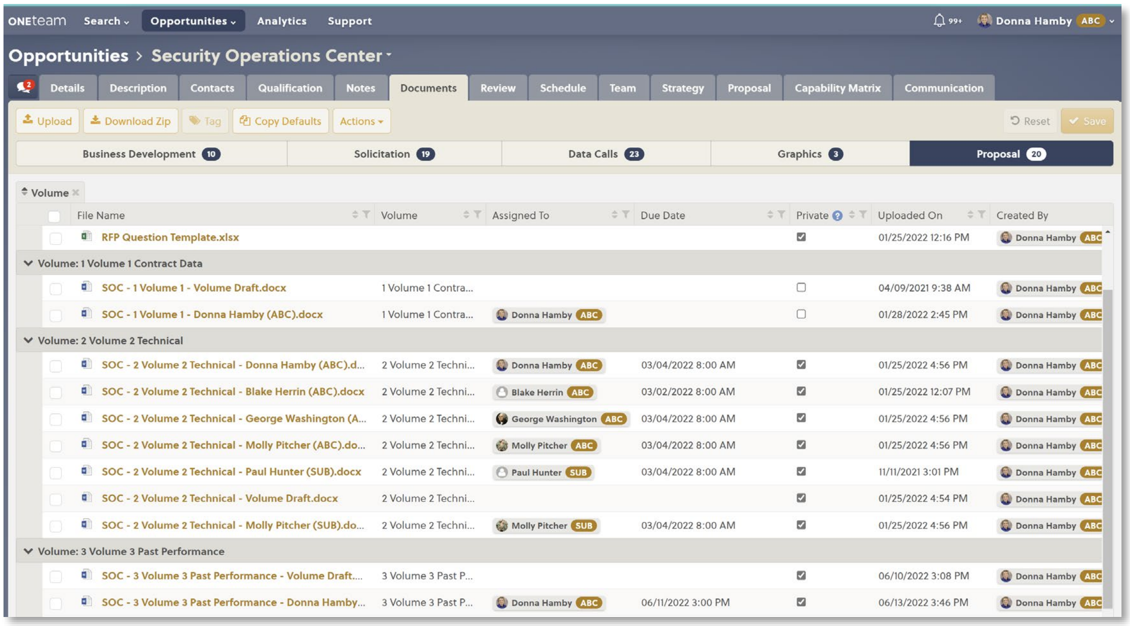
11 Select Volumes for Writer Packages by checking the box next to the volume name. By default, all Volumes are selected. Deselect any you do not wish to create. (Proposal Manager)

12 Select ✓**Generate.** (Proposal Manager)



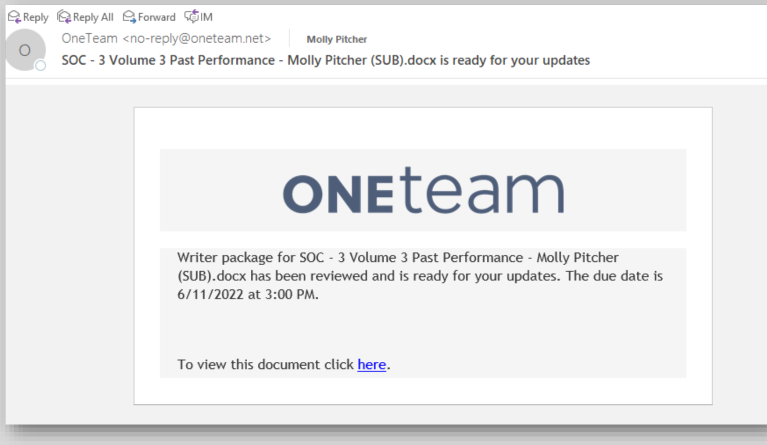
OneTeam auto-generates a Word Document for each Writer Assignment by volume.

13



24.0 Adding Content to Writer Packages — Completed ☐

1 Writers will receive an email with link to document and due date.

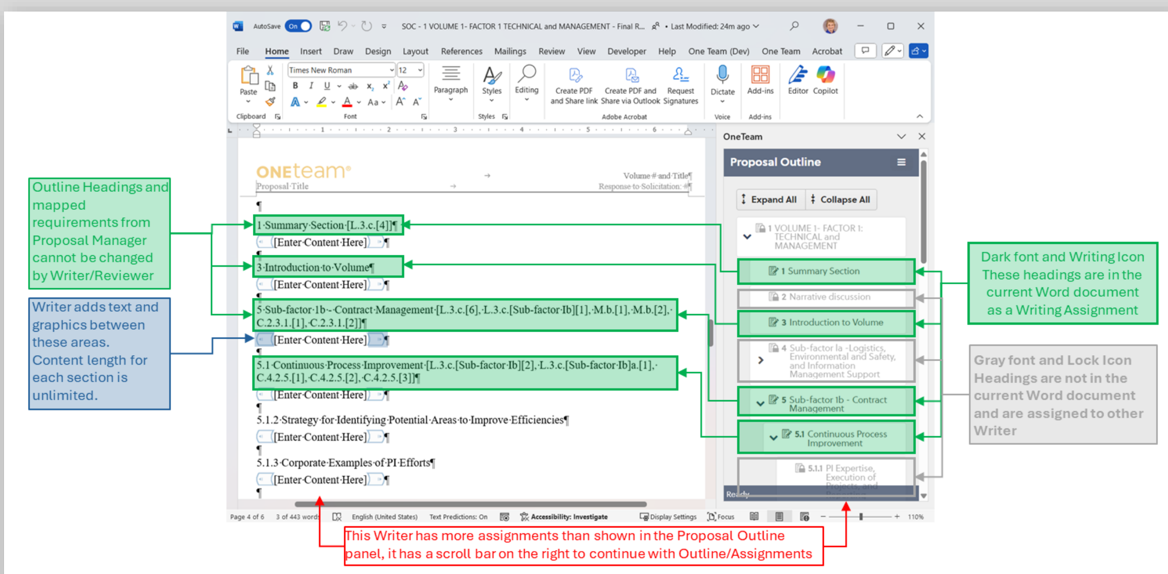


2 OneTeam will also create a Volume Draft for each Volume, which contains the entire Volume Outline.

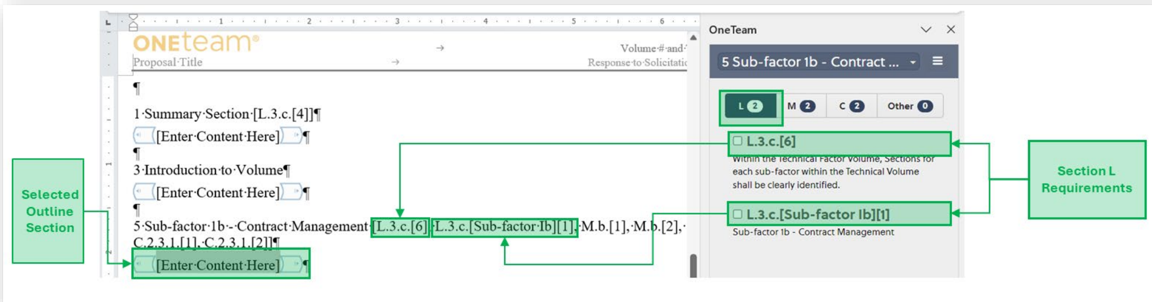
3 Writer Packages will look like this example, which has added notations.

Writers will add the custom OneTeam Word Add-in with panels for Outline, Requirements, and Required Terms. The first one shown below is the Proposal Outline panel

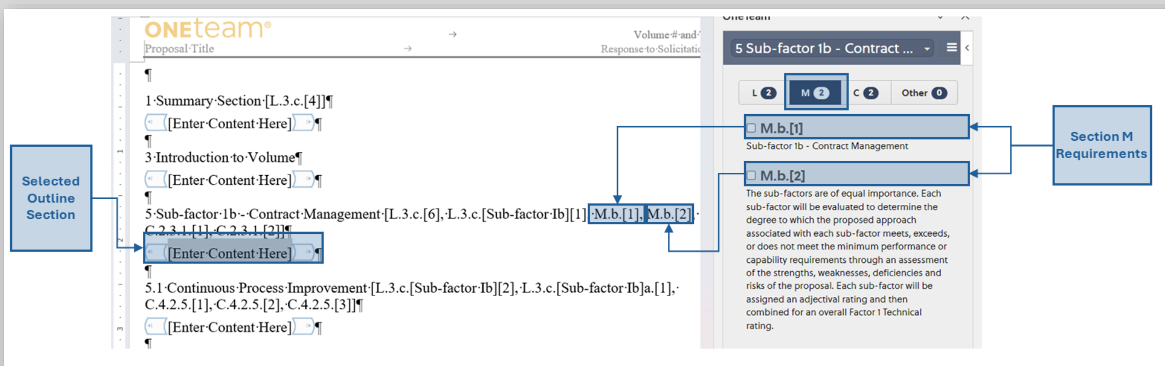
Writers see the entire Volume Outline, but only have headings for their assigned sections in the Word document. They will be able to see how their assigned sections fit in with the entire Volume Outline.



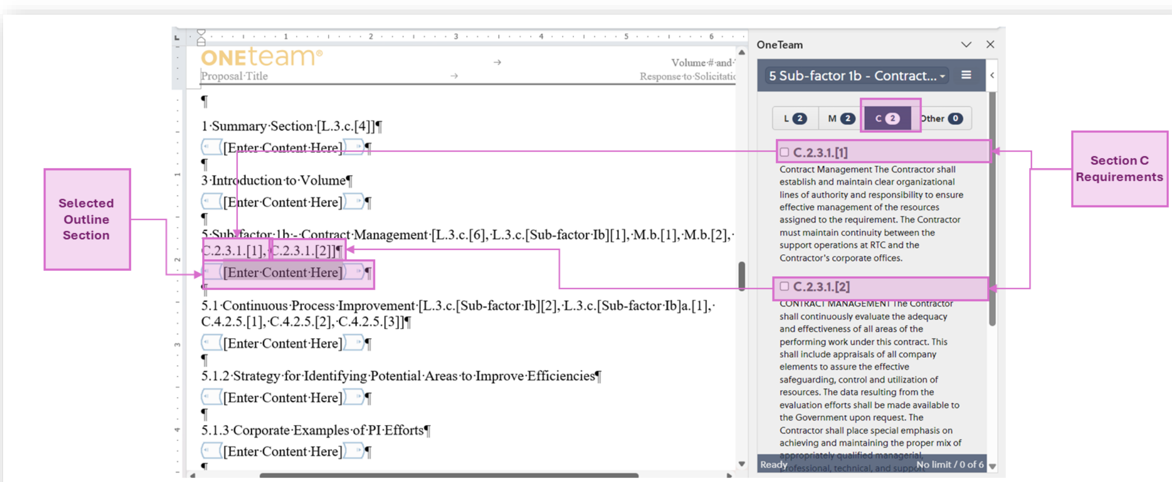
4 This is a View of the Word Add-in Panel with the Requirements panel selected, instead of the Proposal Outline Panel. This view shows Section L selected, and only shows the Section L requirements for a selected outline heading.

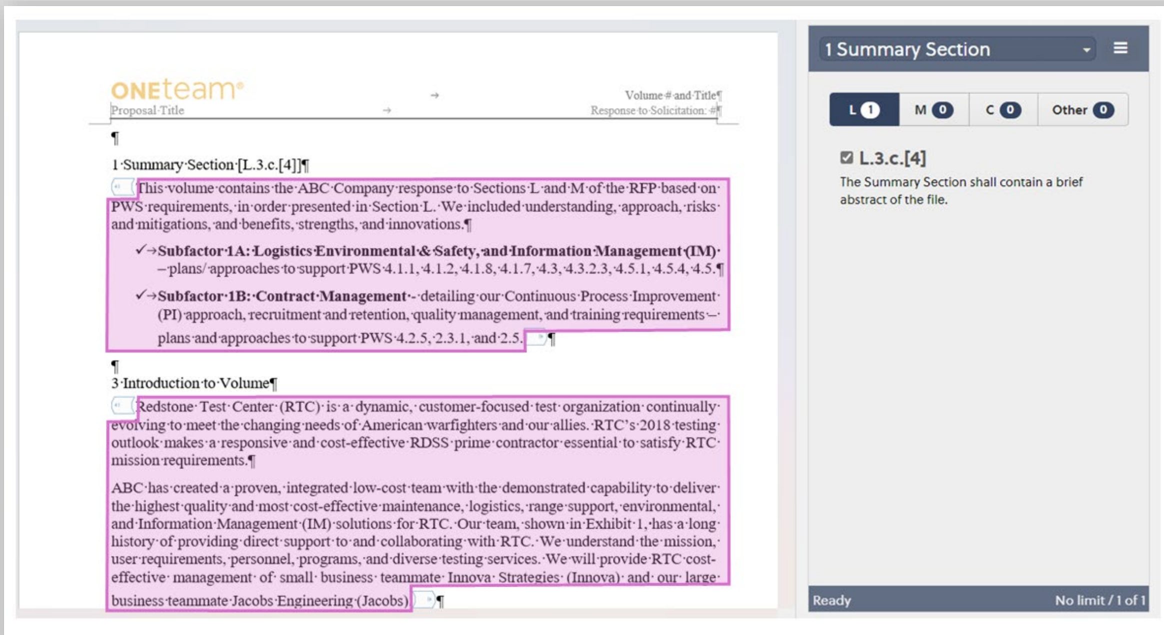


5 This is a View of the Word Add-in Panel with the Requirements panel selected. This view shows Section M selected, and only shows the Section M requirements for a selected outline heading.



6 This is a View of the Word Add-in Panel with the Requirements panel selected. This view shows Section C selected, and only shows the Section C requirements for a selected outline heading. Likewise, when selecting the 'Other' filter, any requirements mapped to 'Other' will be displayed.



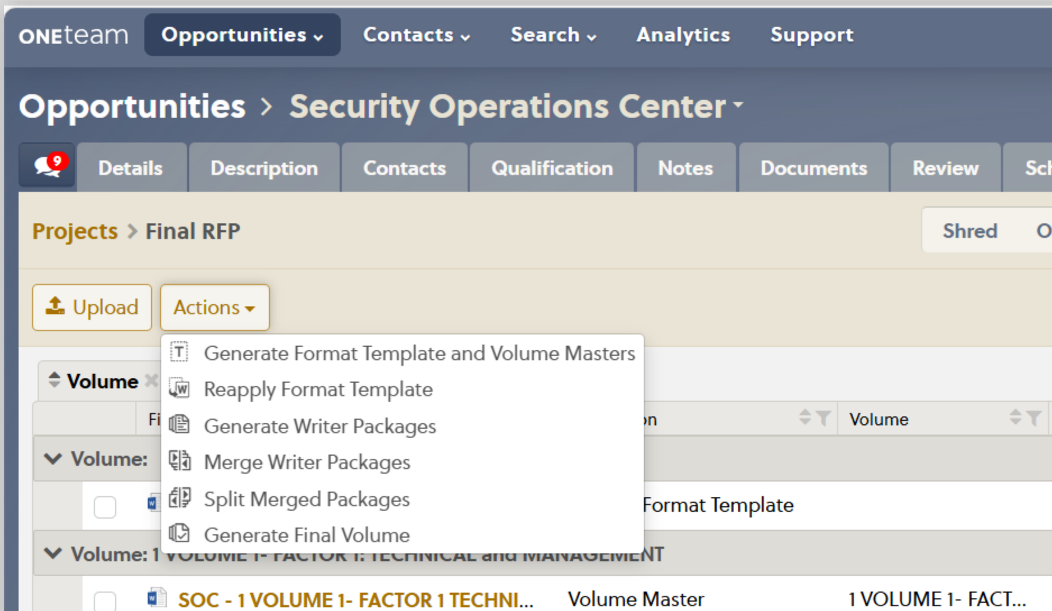
7	Writers add content to their assigned Writer Package. (Writers)
8	Select the {Enter Content Here] words to add text, pictures, tables, smart art either by inserting directly into their Word document, or by copying and pasting in between the two blue guides for each outine heading . (Writers) 
9	This screenshot shows how the section will appear once content has been added. 
10	Select ✓**Save** or Upload completed document to Proposal>Documents (drag and drop or Upload button). (Writers) When using Microsoft 365, you do not have to upload any documents. Word autosaves the documents and the Writer simply validates the document is saved, and closes the document.

25.0 Color Team Reviews — Completed ☐

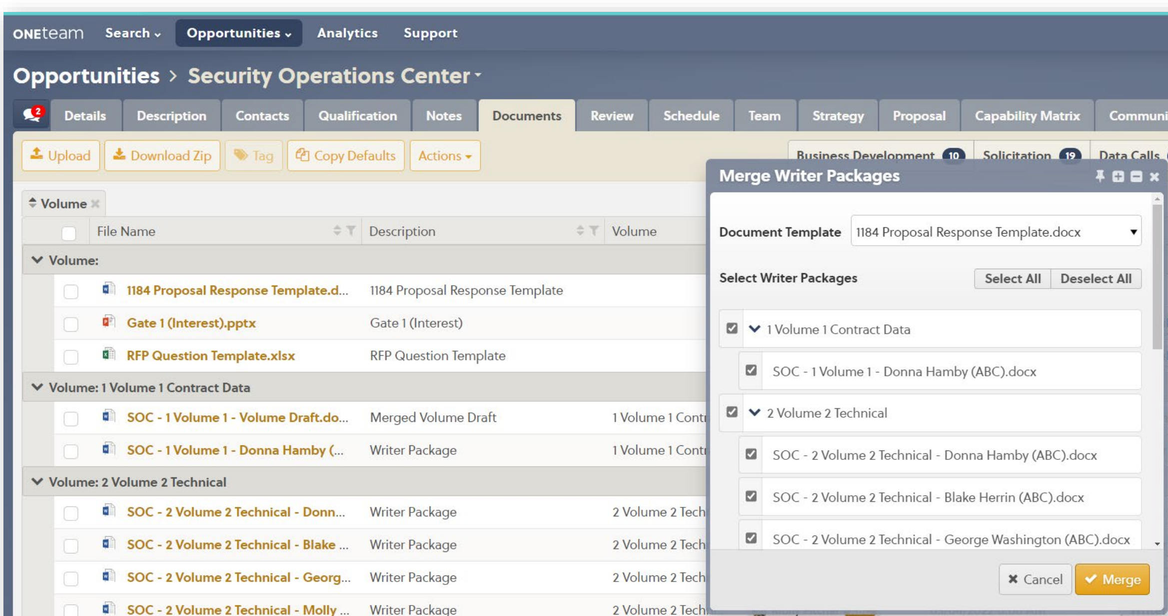
1 Select an Opportunity from the Pipeline or Opportunities list. (Proposal Manager)

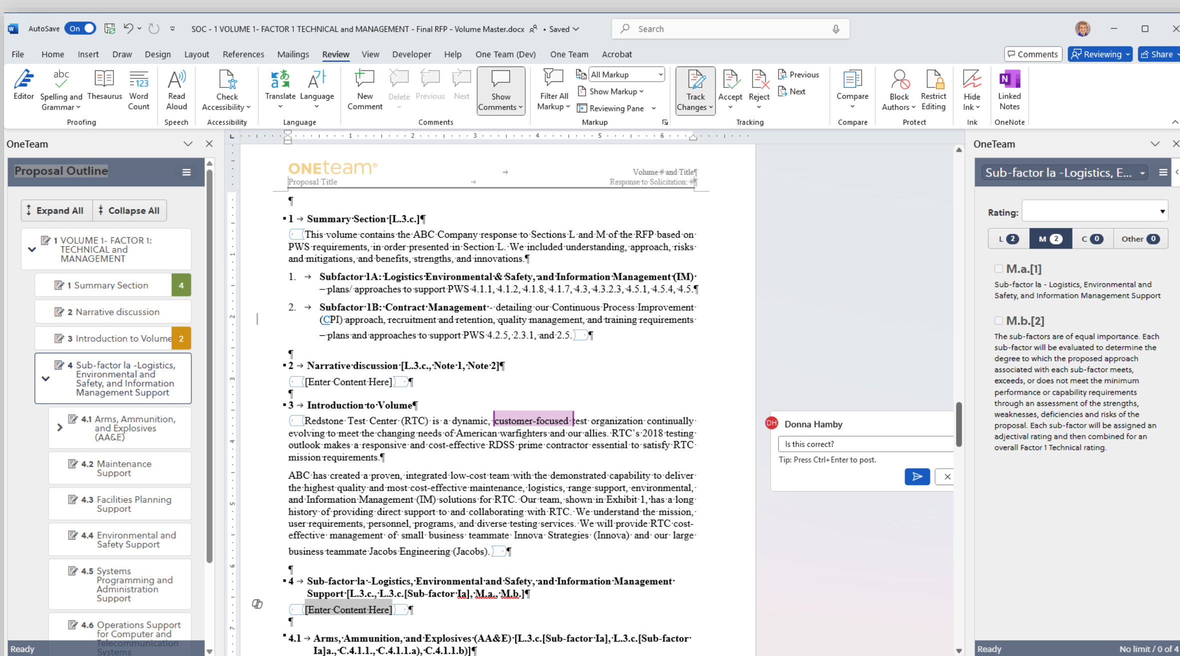
2 Select the **Document** tab, **Proposal** sub-tab. (Proposal Manager)

3 Select 'Merge Writer Packages' from the **Actions** button drop-down menu. (Proposal Manager)



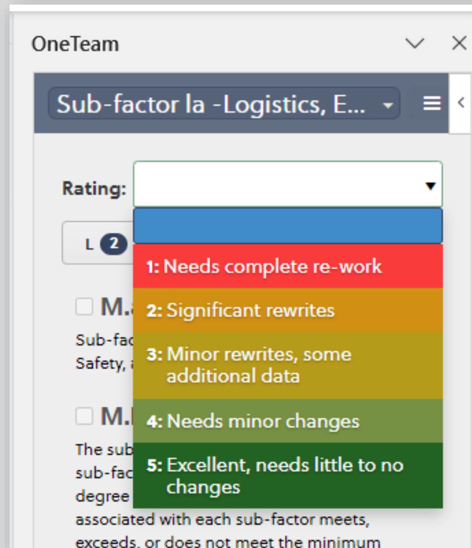
4 Select the appropriate template, if not previously selected, and which Volumes to Merge.(Proposal Manager)



5	Select **Merge** button. (Proposal Manager)
6	Select the **Communication** tab. (Proposal Manager)
7	Select the **New Message** button and select *03 Color Team Reviewer Kick-off or In-Brief Template*. (Proposal Manager)
8	Enter Review Team Kick-Off information such as date and time, telecon information and other instructions. (Proposal Manager)
9	During the Kick-Off Meeting, email the Reviewers a link to their review document – there is 1 document for each volume of the proposal and all reviewers share the document through Microsoft 365 Co-Authoring. Explain the Rating system for each Outline Heading/Section. Reviewers select a rating from the drop-down menu for EACH heading/section.
10	Share document link with the reviewers and ensure they can navigate to and open their document. Explain the Word Add-In to Reviewers and ensure they all load it to Word. (Proposal Manager)
11	Reviewers review their volume in Microsoft 365, using either Word Online and opening the document in Word 365. Reviewers DO NOT rename the file in any way, no initials or date/time in document name. Reviewers use comments and track changes to review document. (Reviewers) 

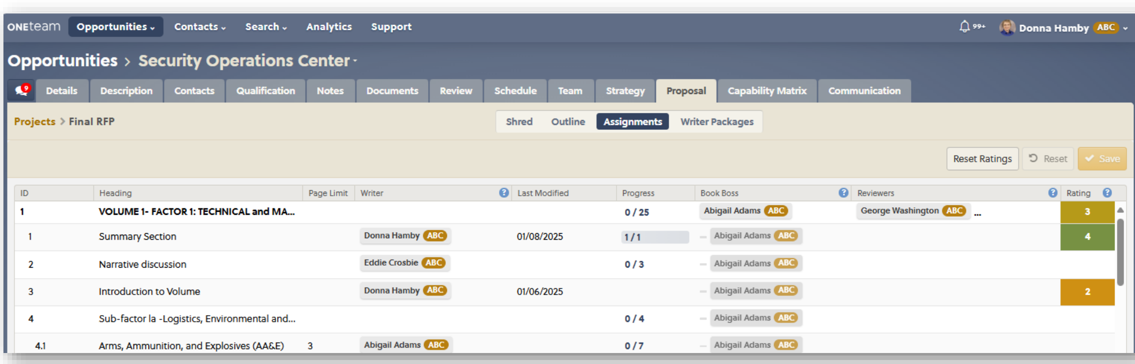
12 Reviewers may also use @ mentions to other members of the team – Writers, other Reviewers, Capture Manager or Proposal Manager.

13 Reviewers provide a rating for EACH proposal heading/section.



14 Reviewers ratings stay with the document and are also relayed to the Assignments Workspace, where the Proposal Manager can view them in near real-time, instead of waiting for the documents to be completed by Reviewers.

This is shown on the far right under the Rating column.



15 The Proposal Manager does NOT have to Combine or Compare documents for a completed review version. OneTeam and Microsoft Word combine the Review comments and track changes.