

Tailoring Compliance Matrix Designs

The Compliance Matrix can be tailored to any requirements. Adding or changing headings is simple. Open the original Compliance Matrix that best suits your needs by right clicking on the template and selecting open. Remember, when you first open a template, you will be asked if you want to run a SQL command. You want to select “No”.

Changing the Table Headings

To change a table heading, double-click in the Header to open the table. Highlight the title you would like to change and click delete. Type the new heading you would like to use. You will now need to change the Merge Field below to insert the corresponding merge field to this new heading. Please see “Inserting Merge Field”.

Adding a New Table Heading

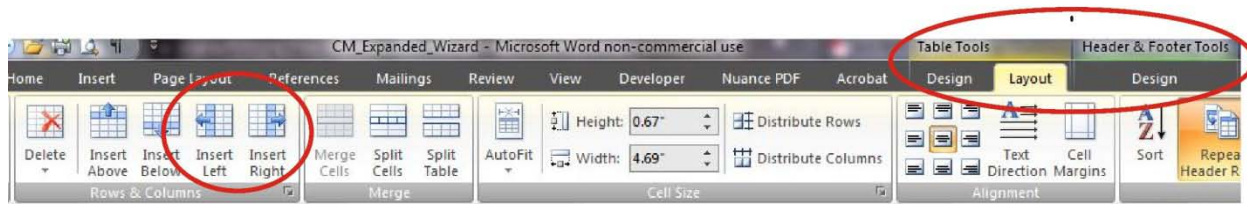
To add a new heading, double-click in the header. Put your cursor in the cell next to where you would like to add a heading.

EXPANDED COMPLIANCE MATRIX (DATE @ "MMMM d, yyyy")

| Section | Title | RFP Requirement – Section L | Section M | Other RFP Requirements SOW Requirement | Proposal Page | Page Limit | Author |
|--|--|--|--|---|-------------------------------|----------------------------|----------------------------|
| { MERGEFIELD Proposal_Section _1 } | { MERGEFIELD Proposal_Section_Title } | { MERGEFIELD RFP_Requirement_Section_L } | { MERGEFIELD Sect_M_a } { MERGEFIELD Section_M_Req_a } { MERGEFIELD Sect_M_b } { MERGEFIELD Section_M_Req_b } | { MERGEFIELD PWS_SOWC_a } { MERGEFIELD SOW_A_Req } { MERGEFIELD PWS_SOWC_b } { MERGEFIELD SOW_E_Req } { MERGEFIELD PWS_SOWC_c } { MERGEFIELD SOW_C_Req } { MERGEFIELD PWS_SOWC_d } { MERGEFIELD SOW_D_Req } { MERGEFIELD PWS_SOWC_e } { MERGEFIELD SOW_E_Req } | MERGEFIELD "Proposal_Page" | MERGEFIELD Page_Limit } | { MERGEFIELD "Author" } |

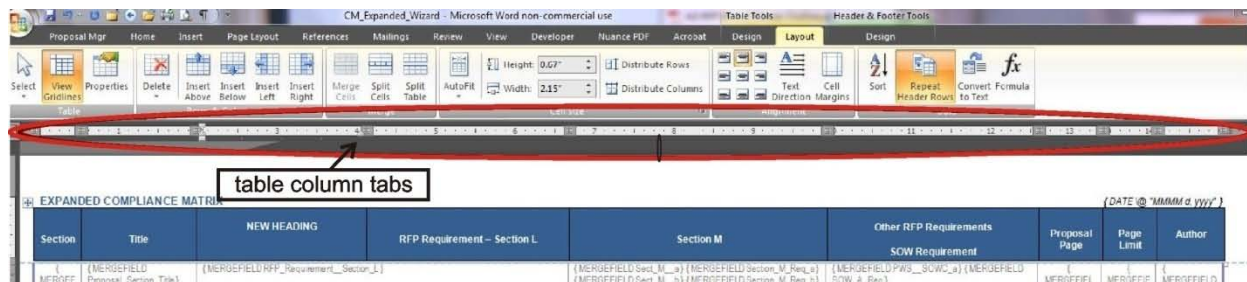
Header Table. Adding a new Heading

Click on the insert tab.



Inserting Column. This is where you will insert a new column.

You will now have a new column in your Header. You will need to adjust the table by moving the table column tabs on your ruler bar as shown below. Once you have the table adjusted, click the “Close Header and Footer” button.

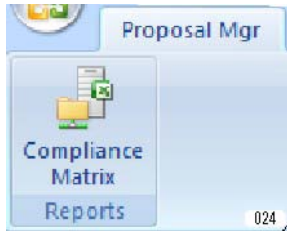


Adjusting the columns. This is where you will adjust the columns.

Inserting Column in Table below Header

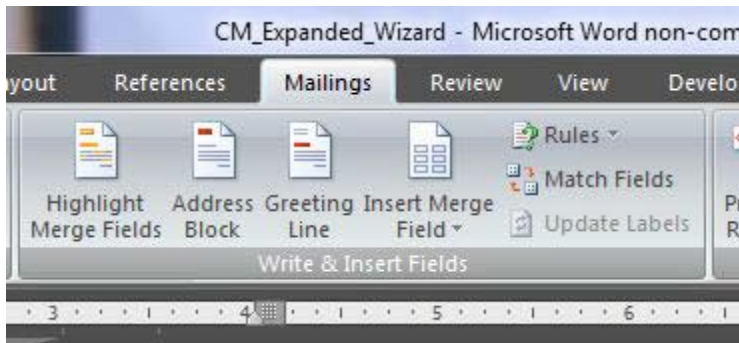
The Heading Table is separate from the table in the body of the document. You will need to insert a column in both tables. You need to follow the same steps that you used to insert a new column and table heading to insert a new column for the merge field.

Inserting Merge Fields



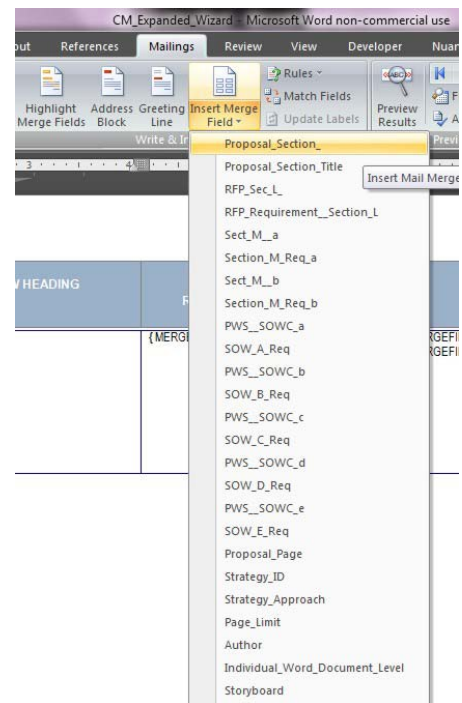
You will now need to run the Compliance Matrix by clicking the Compliance Matrix button. Once you run the report a new document will open. Close this document and return to your template. The Insert Merge

Field button is now available. Click in the new cell you inserted before running the Compliance Matrix. On the ribbon, go to the Insert Merge Field drop down arrow on the Mailings tab.



Mailings Tab. Use the drop down arrow on the Insert Merge Field button.

Choose the New Heading from the drop down menu that you would like to use from the RFP Database.



Once you have inserted the new heading, save and close the document. You are now ready to double-click the template with the new heading(s) and run the report.