Proposal Procedures

Portal – Before (Redacted Excerpt)

March 2016

Note:

This earlier version of the procedures depended on screen images. When the user interface changed, the procedures became less useful. This is an excerpt of the more usable procedures, which I did not update.

I revised the format of the procedures to include an explanation of when to use the procedure, summary, and preparation information. The revision also has a more compact style that uses body-level text for the instructions rather than the headings and subheadings.

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Adding Executive Overviews to the Proposals Table

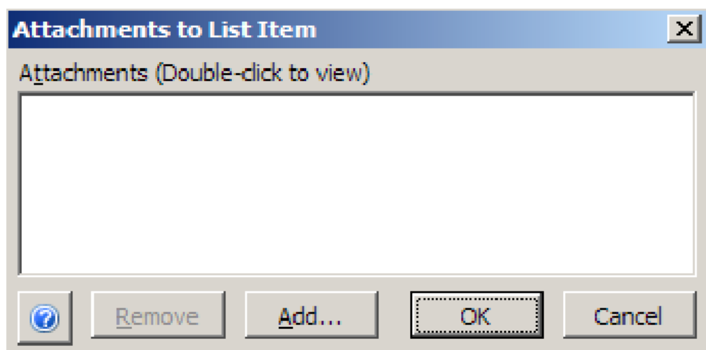
Go to the Proposals homepage
http://mymymycentral/sites/Sales/Pursuits/default.aspx.

[Image of home page page deleted]

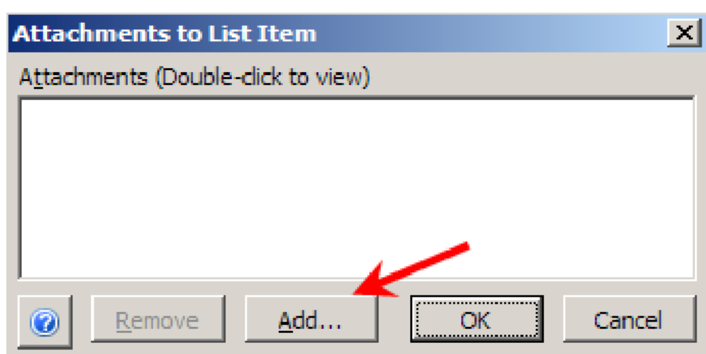
1.1. Go to the row for the proposal you wish to upload an Executive Overview for

1.2. Double click in the  field

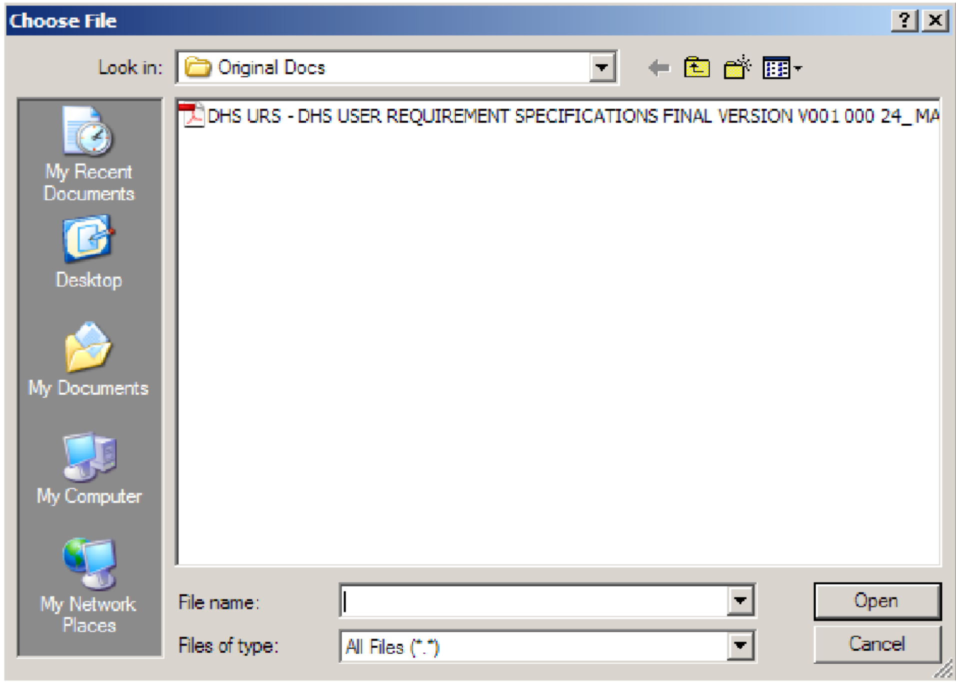
1.3. The below window will open



1.3.1. Click *Add*



1.3.2. The below window will open



1.3.3. Browse to the file, single click to select it, and click Open

[Image of page deleted]

The file should be named something like ProposalNumber_CompanyName or ProposalNumber_ExecutiveOverview.

1.3.4. The Executive Overview will now appear in the Attachments Screen

[Image of attachments page deleted]

1.3.5. Click OK

1.4. The page will refresh

1.5. The field in the  column will now look like this

Updating Product Boilerplate on the Proposal Website

Product boilerplate is posted to the Proposals boilerplate page http://mymymycentral/sites/Sales/Pursuits/Shared%20Documents/Forms/AllItems.aspx in product family documents. One document is created for short descriptions and one document is created for long descriptions. Follow the below steps to update product boilerplate on the proposals website.

Note: how to instructions for publishing documents from Sant, uploading documents to the portal, etc. are documented in separate procedures.

1.1. Publish a document from Sant with the boilerplate that needs to be updated

1.2. Save the product family complete with descriptions for all products in that family to an individual Word document

1.3. Make sure the name of the saved file exactly matches the name of the file on the portal

1.4. Upload the document to the portal

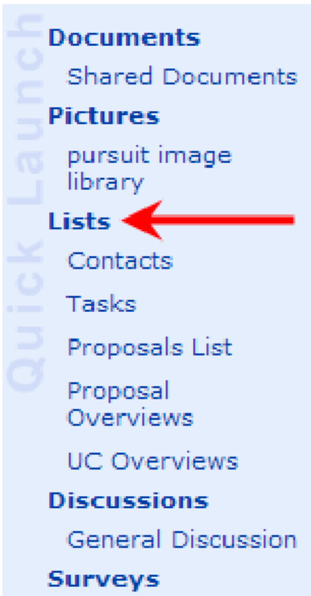
Creating a new List/Table Page -

The procedure only documents how to create a new list/table. If you need to add/edit/modify a newly created or existing lists/tables (for example add/rename/delete columns and/or rearrange the order of columns) you will need to reference the relevant, separate, procedures.

1.1. Go to the Proposals homepage

[Image of home page deleted]

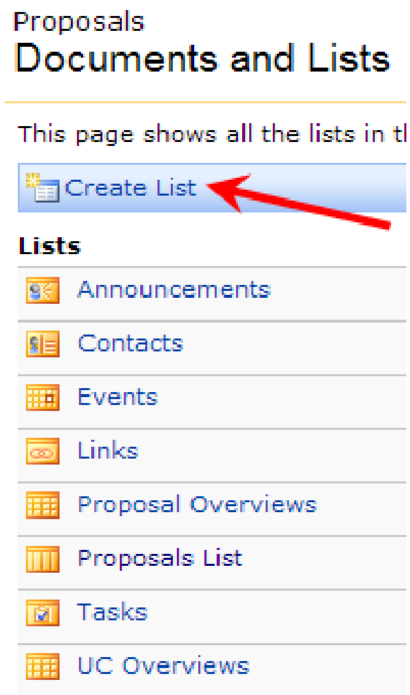
1.2. In the Quick Launch pane click *Lists*



1.3. The page will refresh

[Image of refreshed home page deleted]

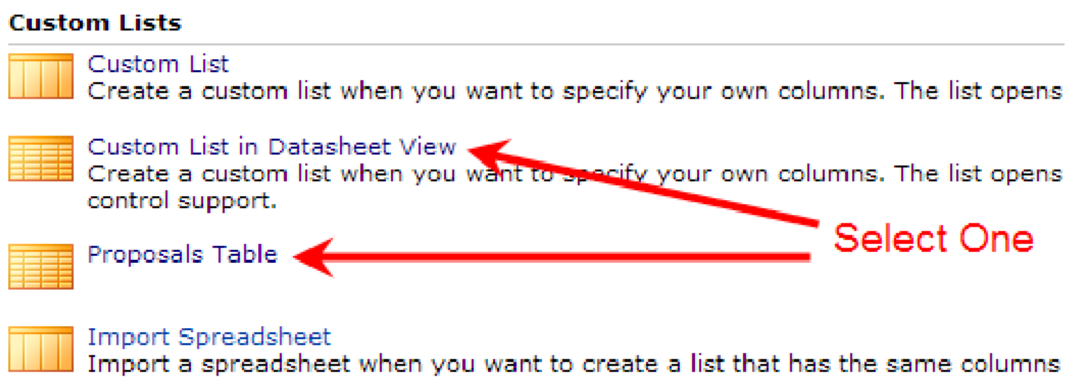
1.4. Click Create List



1.5. The Screen will Refresh

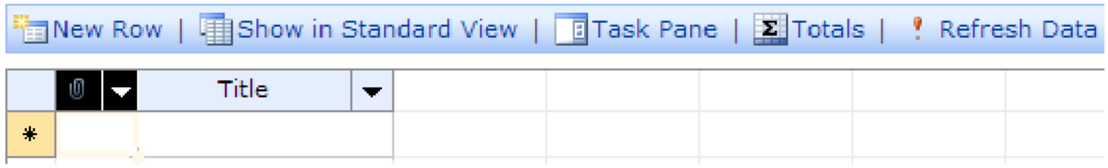
[Image of refreshed page deleted]

1.6. In the Custom Lists area select



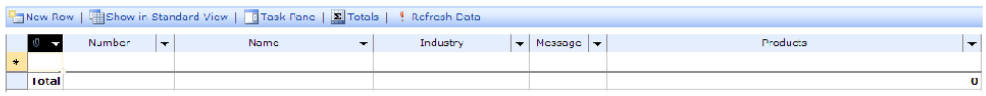
1.6.1. Custom List in Datasheet View

If you want a blank table that you can configure from scratch. A sample of this type of list/table is shown below.



1.6.2. Proposals Table

If you want a table pre-populated with common proposal related columns. You can add/edit/modify the columns as needed. A sample of this type of list/table is shown below.



1.7. The screen will refresh

[Image of refreshed page deleted]

1.8. Complete the information for the new list and click *Create*

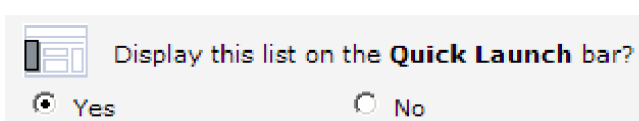
1.8.1. Name

This is the name of the list/table and will appear anywhere the list/table is referenced, for example: on the Lists Page, in Quick Launch, at the top of the List/Table.

1.8.2. Description

This field is not required but is recommended.

1.8.3. Select Yes or No for Display in Quick Launch



Quick Launch is the left hand panel on the Proposals home page.

1.8.4. Click *Create*

1.9. The List/Table will be created

Your screen will refresh and you will be taken to a full page view of the table.

Creating a new List/Table for a Proposal Site -

The Tables shown on the Proposals homepage, for example the Proposals List,
[Image of home page deleted]

and the table pages, for example the Proposals Overviews page
[Image of overview page deleted]

are not actually tables, they are SharePoint Lists and the mini tables/full table page are list views.

1.1. If you want a new table page (without a mini view) follow the *Creating a new List/Table Page* procedure

1.2. If you a new mini table on an existing proposal page (like the Proposals List on the top of the Proposals homepage)

1.2.1. Follow the *Creating a new List/Table Page* procedure

1.2.2. Follow the *Adding a mini List/Table view to a SharePoint page* procedures

Adding a mini List/Table view to a SharePoint page -

This procedure assumes that the:

- list/table has already been created and if needed, edited
- page you wish to add the mini view to has already been created

Directions on creating lists/tables, editing lists/tables, and creating SharePoint sites are documented in separate procedures. For the purposes of this procedure, it is further assumed that the new mini view is being added to the Proposals homepage.

1.1. Go to the Proposals homepage

[Image of home page deleted]

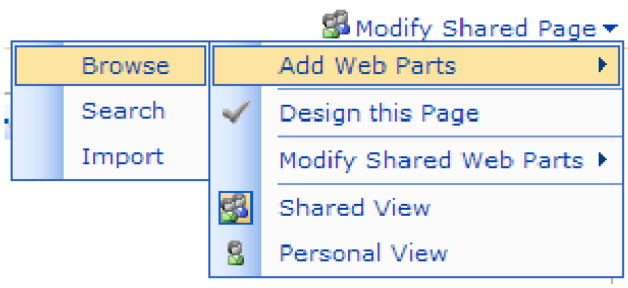
1.2. Click the drop down arrow under Modify Shared Page and select *Design this Page*

1.3. The page will refresh and you will be in design mode

This may take several minutes.

[Image of refreshed page deleted]

1.4. Select Modify Shared Page →Add Web Parts → Browse



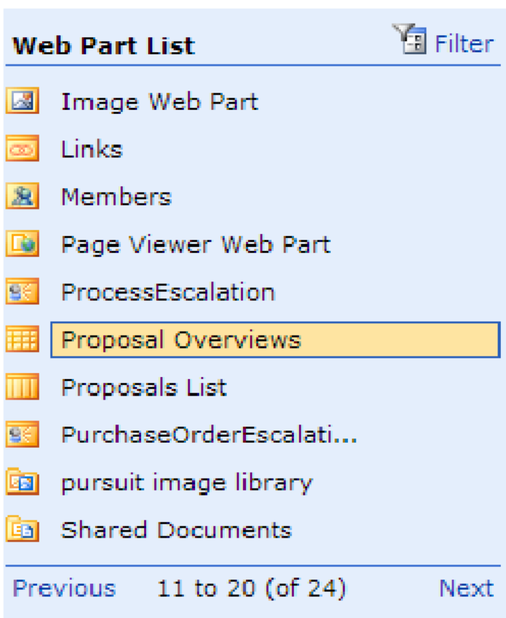
1.5. The page will refresh and the Add Web Parts panel will appear on the right hand side of the screen

This may take several minutes.

[Image of refreshed page deleted]

1.6. In the Add Web Parts panel make sure *Sales Top Level Site Collection* is selected

1.7. Navigate through the Web Part List using the Next/Previous links until you find the list you're looking for and Single Click to select it



Please note, it can take several minutes for the page to respond when you click Next or Previous.

1.8. Single Click on the list and drag it to the area on the page where you want it added

In the below picture we're adding a mini view of the Proposal Overviews table between the calendar and UC Overviews table.

[Image of refreshed page deleted]

1.9. The page will now refresh and a mini view of the selected list/table will be on the page.

This may take several minutes.

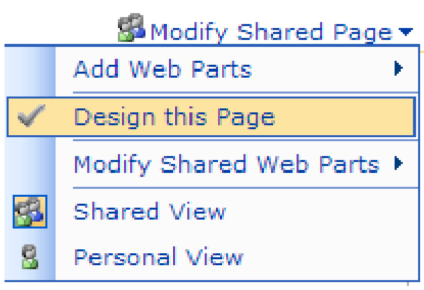
[Image of refreshed page deleted]

1.10. Click the *X* on the Add Web Parts panel to close it

1.11. The page will now refresh

This may take several minutes.

1.12. Click Modify Shared Page → Design this Page



1.13. The page will refresh and design view will be closed

[Image of refreshed page deleted]

How to add columns to a table on a proposal site - -

The below procedures are the ONLY methods that should be used to add a column to a table on a proposal site. For the purpose of these procedures it is assumed that the column is being added to the Proposal List table on the Proposals homepage. However, these procedures will work for any table on a proposal site, for example, the Proposal Overviews or UC Overviews tables.

1.1. Highlight the column to left of where you want the new column added

[Image of page deleted]

1.2. Right click and select Add Column

[Image of page deleted]

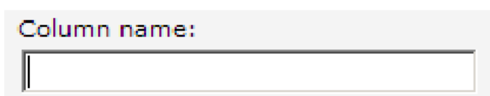
1.3. The screen will refresh

[Image of refreshed page deleted]

1.4. Enter in the information about the column

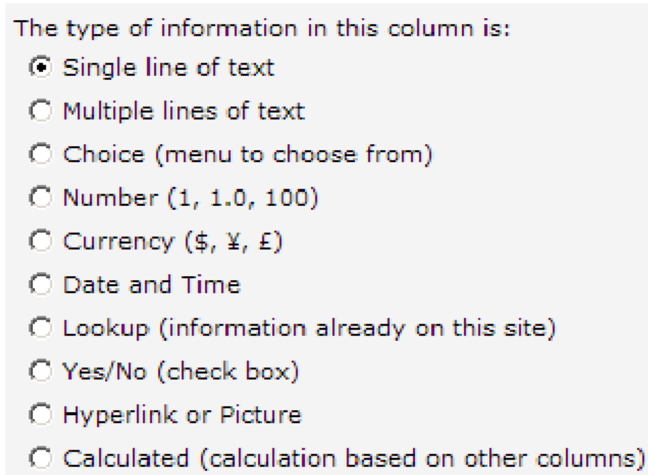
Please note some or all of the below categories will be available depending on the selection made for type of information.

1.4.1. Column Name



Enter a name for the column. This is the name that will appear in the table in the column header row.

1.4.2. Select what type of information will be entered into the column

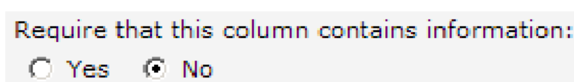


Please note: Multiple lines of text, Lookup, Yes/No, and calculated are not used. Single line of text should be used for text entry fields. For Yes/No selections, Choice should be used and the choice values should be entered as Yes and No.[1]

1.4.3. Description

You do NOT need to enter anything into this field.

1.4.4. Require that this column contains information



The general rule for proposal tables is that if information must, under every circumstance be entered into this field and if that information is available and required as of the first instance when data is being entered on the table that it can be required. Otherwise, even if we expect the field to always be populated, the column should NOT be required.

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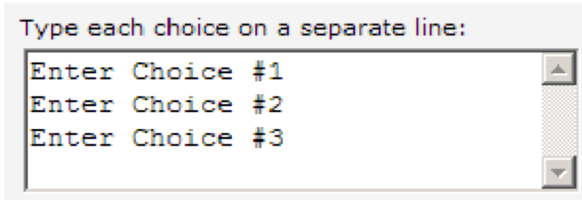
[1] The Yes/No field in SharePoint is viewed as a checked/not checked box and publishes as 1/0, True/False not Yes or No.

1.4.5. Enter Choices



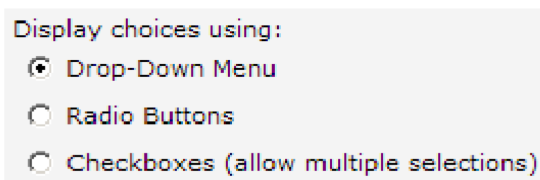
Replace the Enter Choice lines with your list. Make sure there are no blank lines after your last entry. The items in the list will appear *exactly* as typed. Do NOT include punctuation at the end of a value, for example:

Europe
AsiaPac
Americas

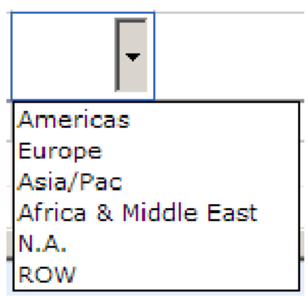
not:

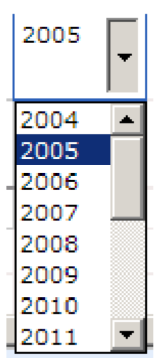
Europe,
AsiaPac,
Americas.

1.4.6. Display Choices As



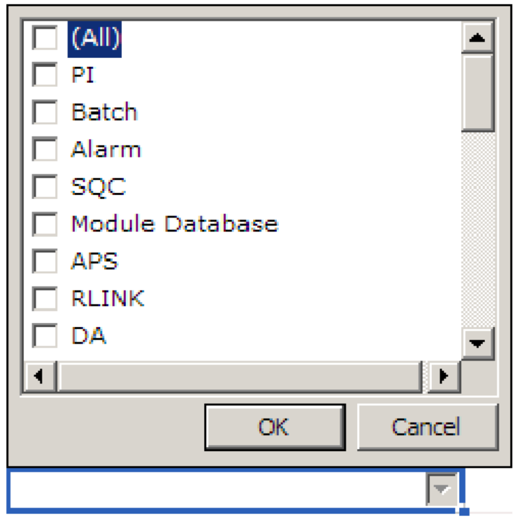
A drop-down menu will look like this in a table:



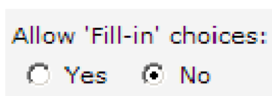


Radio Buttons are not currently used but look the same as drop-down menus.

Checkboxes will look like this:

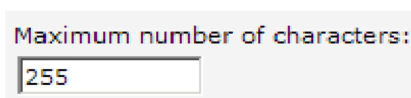


1.4.7. Allow Fill-in



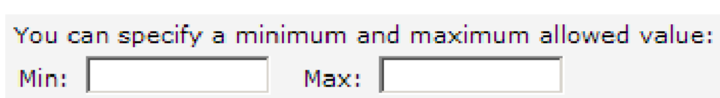
In general, when Choice has been selected, Allow Fill-in should be set to No. If a new option needs to be in the list, the column should be modified to include this option.

1.4.8. Maximum number of characters



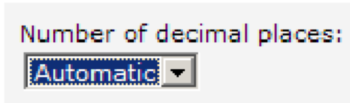
In general this field is left as is unless it's a column like Proposal number which has a defined syntax with a limited number of characters.

1.4.9. Minimum and Maximum Allowed Value



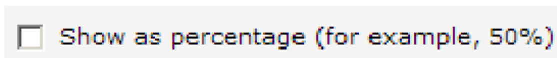
This field is optional.

1.4.10. Number of decimal places



If the number of decimal places that should be displayed is known, a number value for this field should be selected. Otherwise, leave it as Automatic.

1.4.11. Show as Percentage



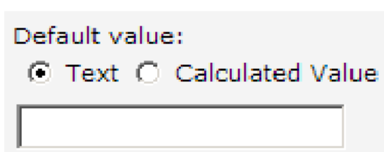
This field is optional

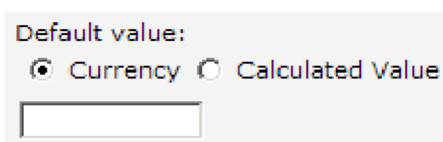
1.4.12. Date and Time Format

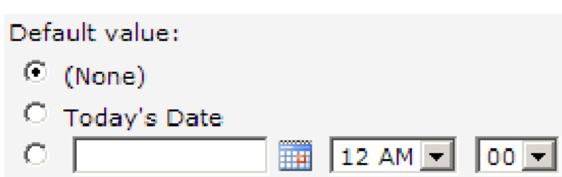
Date Only is the typical selection for this field.

1.4.13. Default Value

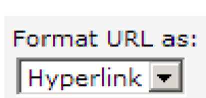
Depending on the selection made in Type of Information, this field may look different then shown below, but a few of the more common views are shown below. Typically this field is left blank. Typically the Default Value is Text or Currency.





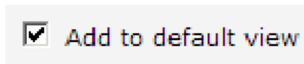


1.4.14. Format URL



1.4.15. Currency Format

1.4.16. Add to default view



Make sure this field IS checked.

1.5. Click *OK*

The screen will refresh and your column will now be appear in the table.

[Image of page deleted]

How NOT to add columns to a table on a proposal site -

If you wish to add columns to a table on a proposal site. **Do NOT use the below procedures.** Instead, follow the steps outlined in the **How to add columns to a table on a proposal site** procedure. If columns are added using this procedure, they WILL NOT appear on the default views for the table (those shown on the proposals homepage). These procedures are *only* included so that you will not, accidently, add a column incorrectly.

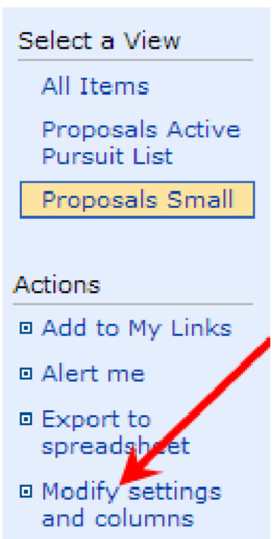
1.1. Click on the name for the table

[Image of page deleted]

1.2. The full view page for the table will open

[Image of page deleted]

1.3. Click Modify settings and columns



1.4. The Customize Lists page will open

[Image of page deleted]

1.5. Click Add new column

[Image of page deleted]

1.6. The Add Column page will open

[Image of page deleted]

1.7. Specified the column name, type, and associated information

1.8. Click *OK*

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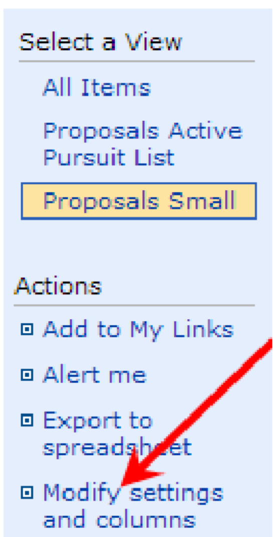

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[Image of page deleted]

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1.7. Specified the column name, type, and associated information

1.8. Click *OK*