



PMAPS® 2008 New Feature Highlights

■ TRACKING MODULE

- [Auto-filters](#) added for the [Dashboard](#) view similar to those in the Search module allowing for more customization.
- Ability to [save](#) Dashboard [auto-filters](#) to each [Dashboard View](#).
- Ability to [archive](#) or [delete proposals](#) using the Administrator [Export/Import](#) tool for bulk processing.
- Ability to [search](#) all [Dashboard](#) columns, not just by proposal name.
- Ability to [Find Next](#) proposal matching your criteria.
- Ability for Administrator to [restrict viewing](#) based on [Filter](#).
- New [icon](#) showing what type of file the proposal is linked to: Word, Excel, or the Web.
- [Filter](#) all [contact name pick-lists](#) to only show those names which match a condition.
- Ability for Administrators to [push](#) default [Dashboard views](#) to other (new) users.
- Ability to capture up to **4** different [Shipping](#) address and [auto populate](#) default address from Client information captured in the system.

■ SEARCH MODULE

- Search screen redesigned to display [Search Criteria](#) and [Search Results](#) option on one tab.
- Ability to be automatically notified when a record you have inserted into an in process proposal, or any record you select, changes through the new [Notify Me](#) tool.
- New [Notify Me](#) prompt. When you insert a record with a status pending, you are now prompted to set a Notify Me task so that when the record changes you'll be notified according to your specifications.
- Ability to hold [multiple](#) copies on the [Clipboard](#). You can continue selecting text and clicking Clipboard until ready to paste into RFP. Right mouse click clears clipboard.
- [Repopulate](#) tool improved to include the ability to preview both PMAPS answers as well as the current proposal being populated side-by-side.
- [Repopulate](#) tool now has two options: Full Compare/Merge or Compare Each Record. Full Compare/Merge allows you to compare the new document with the proposal you completed using PMAPS and then PMAPS inserts the updated answers into the new proposal instead of into the proposal you completed before in PMAPS. Compare Each Record is the existing functionality but has been enhanced.
- When using the [Combine All](#) feature, user is prompted to [Track](#) each Q&A similar to the Verification tracking process.
- Ability to [search](#) through a record's [Revisions](#) tab.
- Ability for Administrator to create [Access Groups](#) to restrict searching and editing down to the record level.
- Ability for Administrator to [restrict viewing](#) based on [Filter](#).
- Option to auto-populate the [Summary](#) attribute with the [Question](#) (first paragraph) when adding new records. The user would always be able to edit prior to saving.
- Ability to [link Attribute Groups](#) to individual records for faster updating and Global Updates.
- Ability to [export](#) the [Attribute Groups](#) into Excel for editing and importing back into PMAPS
- [Copy Attribute Group](#) feature added to create new Attribute Groups from existing groups.
- Option to link [Topic](#) and [Sub Topic](#) attributes for faster entry.
- Ability to add attachments to each content owner's (SME) SmartCart email.
- Ability to save full searches, including [Auto-Filters](#) then select from saved list.
- Ability to use [Ctrl+F](#) to search within your current record to find additional text.
- Ability to track, on the [Record](#) (Document) [History](#) tab, the [full path of the file](#) into which the user inserts any record. Allows you to work on two proposals simultaneously and track which records you inserted into each proposal.

- **Add Bookmarks when Inserting Full:** This is no longer a user preference. Bookmarks are now automatically added when you insert a Full answer.
- Ability to **Include Additional Record** so that when you insert the primary record, the secondary record is always automatically inserted.

■ MISCELLANEOUS

- Added PMAPS **Team Conferencing** for any user logged into the application. No other downloads or plug-ins required. Share files, text, pictures with other PMAPS users far faster than emailing.
- Ability for each user to select, under **User Preferences**, a folder to send all **output** to, so you no longer need to send files to the Home Folder.
- Updated **Email** feature, which notifies users when the Supervisor uses **Force Closed** or **Allow Users Access**, to send emails via whatever email system they are using.
- Updated log in screen with a **Help** icon that allows you to quickly access the support phone number and email address in case you can't log in to the application to access support information.
- **Verify/Re-Link, Email/Print, and SmartCart** processes expanded to **include Short Answer (Forms)** tab's contents. User Preferences option allows team members to decide whether or not to use. SMEs can add/edit short answer field in record, and **Re-Link** process will import back into PMAPS.
- **Re-Link Review** screen now contains a display field for the short answer.
- **Re-Link** process updated to retain bookmarks, in case you need to Re-Link more than once.
- **Hotkey: Alt+O** opens the **Search Results Options** screen.
- **Hotkey: Alt+P** is the new shortcut or hotkey for **User Preferences**.
- Added **Codes for Word Replacement**. Similar to the <<Client Name>> code that automatically replaces the current client name with the code as you insert, you now have the option to create an unlimited number of codes to utilize in your records.
- Ability to access all **Search Results Options** from one screen instead of several tabs.
- Newly designed **Email/Print** screen with Small Window and Large Window views.
- Ability to **Reassign** an outstanding record in your **Tasks (In Box)** to a different SME.
- Ability to use **filters** when running Check for Dups report. Allows Supervisors to run utility by region or by product.
- Ability to select Strategy/Products from a drop-down list during Assembly Center Template creation.

...and over 100 other additions and improvements based on user feedback.

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