Generate a RACI Matrix

Responsibility Assignment Matrix

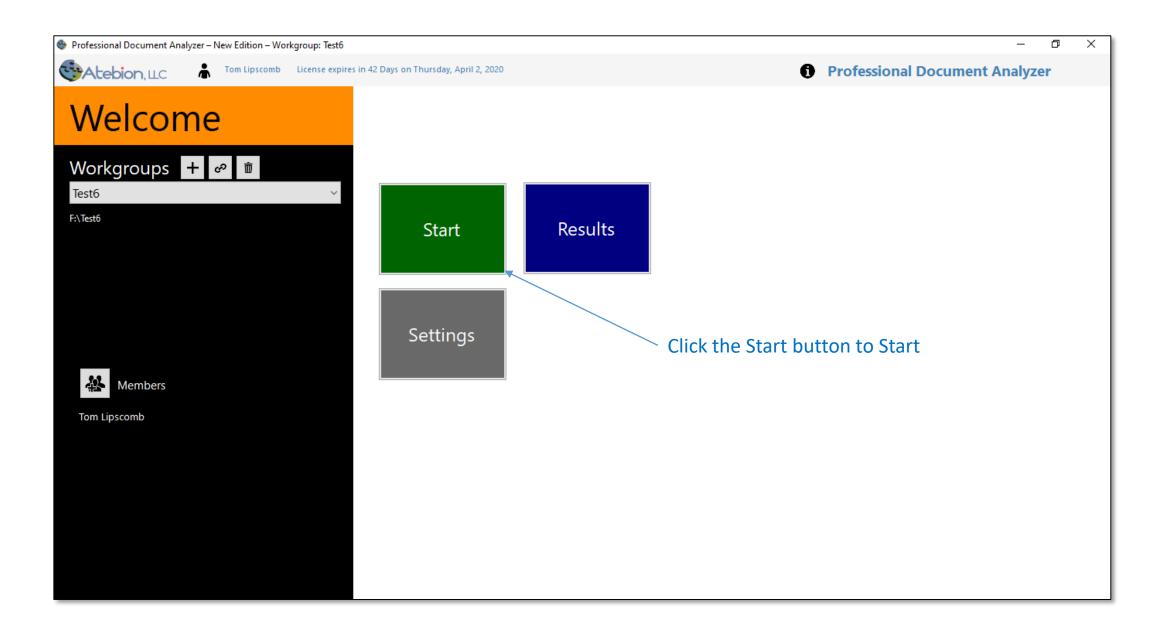RACI is an acronym for Responsible, Accountable, Consulted and Informed.

A RACI chart is a Responsibility Assignment Matrix (RAM) containing activities and decision making authorities within an organization for people or roles.

The Professional Document Analyzer provides 9 RAM models. Additionally, you can create your own RAM model and customize your own Excel RAM template.

Ref	Page	Content	Project Director	Project Manager	Procurement Manager	Risk Manager	Administrative Manager	Administrative Staff Support	Financial Analyst	Contract Manager	Project Librarian	Project Scheduler	Quality Manager	Technical Manager	System Engineer	Implementation Manager	Application Support Manager	Test Manager	Configuration Manager	Operations Manager	Customer Support Manager	Project Sponsor	Executive Steering Committee
Header Area	1	SECTION C - DESCRIPTION/SPECIFICATION/WORK STATEMENT PART 1 - CONTRACT LINE ITEM DESCRIPTION GENERAL SCOPE OF WORK The Contractor shall perform the Detail Design and Construction of the T-ADC(X) Class ship(s) at the Contractor's facilities in accordance with:	A	A, C		I	R			C	A			C, A				I		A			
(a)	1	(a) The provisions of this contract;	A	A		I	R						C							A			
(b)	1	(b) System Specification, Attachment J-1;																					
(c)	1	(c) Other documents, exhibits, and attachments listed in SECTION J of this contract; and	A	A		I	R						C							A			

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Professional Document Analyzer – New Edition – Workgroup: Test6

Atebion, LLC 👤 Tom Lipscomb   License expires in 42 Days on Thursday, April 2, 2020   ⓘ **Professional Document Analyzer**

Welcome

Workgroups ➕ 🔗 🗑

Test6

F:\Test6

Start

Results

Settings

👥 Members

Tom Lipscomb

Click the Start button to Start

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WorkGroup: Test6 - **Task:** RACI - >Select a project and document >Generate a RACI Matrix

Tasks 31

☐ Show Details

Click on the 'Next' button to Select a project and document

Create a RACI Matrix

Deep Analysis for RFP
Shred RFP into parse segments and then run Deep Analysis to break do...

Check Numbered (Legal) Document Readability
Parses document by the numbering (e.g. 1.0, 1.2, 1.2.1...) and checks its...

Check Document Readability
Check Document Readability

Generate RACI Matrix
Create a RACI Matrix

Generate a Responsibility Matrix
Identify responsibility terms in a selected RFP per the Responsibility key...

Review RFP
Review an RFP for differnent departments

Generate WBS
Generate WBS

Find FAR252s
Find FARs in document

Generate a Gap Analysis Report
Generate an RFP to Proposal Gap Analysis Report

Compare Proposal Manager's Resumes
Compare Proposal Manager's Resumes and find the best candidate

Generate a Responsiblity Matrix
Identify responsibility terms in a selected RFP per the Responsibility key...

Select the Generate RACI Matrix task

Then click the Next button

Back to Welcome   Back   Next

Professional Document Analyzer – New Edition – Workgroup: Test6

WorkGroup: Test6 - **Task:** RACI - >Select a project and document >Generate a RACI Matrix

Analysis Name

Projects

Select or Create a new Project for Documents

New   Remove

Test1
Chickasaw
Frank
Test6

Select a Project or Click the New button to create a new Project

Back to Welcome

Back

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WorkGroup: Test6 - **Task:** RACI - >Select a project and document >Generate a RACI Matrix

Analysis Name: RACI_2

Projects

Select or Create a new Project for Documents

New   Remove

Test1
Chickasaw
Frank
Test6

This is a test

Documents

New   Open   Remove   Replace

DLAD+AND+LOCAL+CLAUSES
PWS MNQ008_QA_20Dec2019 tracked changes
PWS MNQ008_QA_20Dec2019_Amend one
QQ-01527
T-ADC(X) 700
T-ADC(X) Ship 800
T-ADC(X) Ship RFP Section C 500
T-ADC(X) Ship RFP Section C 600
T-ADC(X) Ship RFP Section C_Mod
T-ADC(X) Ship RFP Sections C-M 12
T ADC(X) Ship RFP L

W T-ADC(X) Ship RFP Section C.docx
✅ Default Analyzed: Yes
Pages: 10
Size: 29.18 KB
Created: Saturday, March 24, 2018
Added by:
Added Date: Thursday, July 18, 2019
Source: I:\Tom\Atebion\RFP Samples\T-ADC(X) Ship RFP Section C.docx

Select a Document and then Click the Analyze button to Generate a RACI matrix

Back to Welcome

Back   Analyze

An example of a RACI matrix generated using the Professional Document Analyzer

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
	Ref	Page	Content	Project Director	Project Manager	Procurement Manager	Risk Manager	Administrative Manager	Administrative Staff Support	Financial Analyst	Contract Manager	Project Librarian	Project Scheduler	Quality Manager	Technical Manager	System Engineer	Implementation Manager	Application Support Manager	Test Manager	Configuration Manager	Operations Manager	Customer Support Manager	Project Sponsor	Executive Steering Committee
Header Area	1	SECTION C - DESCRIPTION/SPECIFICATION/WORK STATEMENT PART 1 - CONTRACT LINE ITEM DESCRIPTION GENERAL SCOPE OF WORK The Contractor shall perform the Detail Design and Construction of the T-ADC(X) Class ship(s) at the Contractor's facilities in accordance with:	A	A, C		I	R			C	A			C, A				I		A			
(a)	1	(a) The provisions of this contract;	A	A		I	R							C						A			
(b)	1	(b) System Specification, Attachment J-1;																					
(c)	1	(c) Other documents, exhibits, and attachments listed in SECTION J of this contract; and	A	A		I	R							C						A			

Create a Customized RACI Matrix
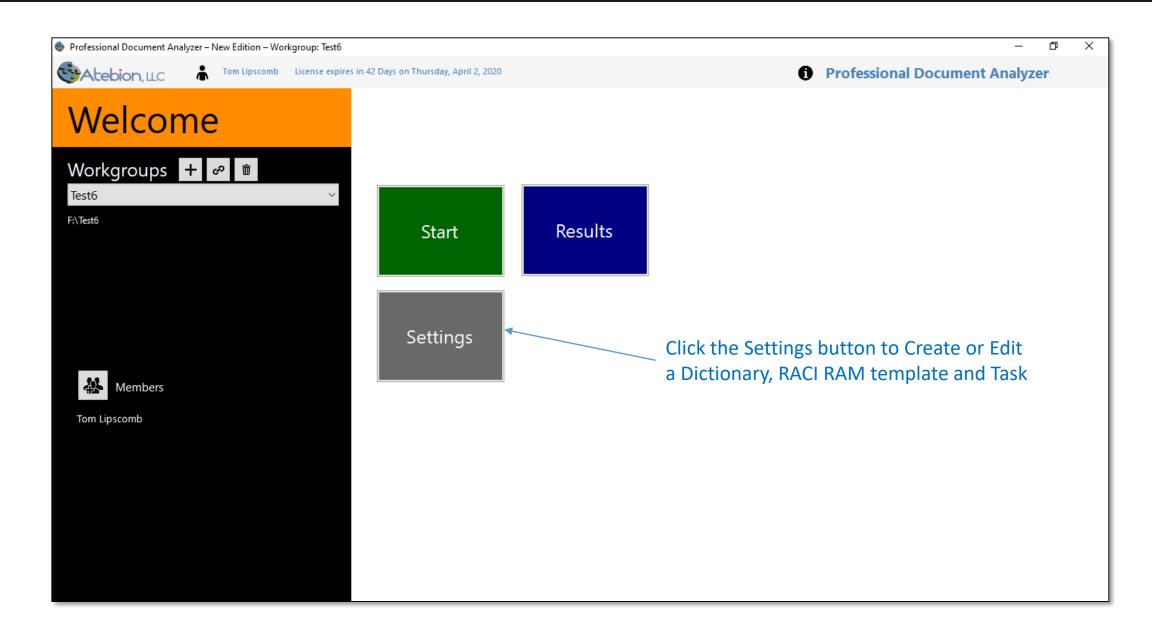
Responsibility Assignment Matrix (RAM)

How does it work?

- The Professional Document Analyzer's RAM supports numerous models, e.g. RACI, plus customs models

- Mapping responsibilities use dictionary categories mapped to an Excel column (e.g. D) with an associated roles model

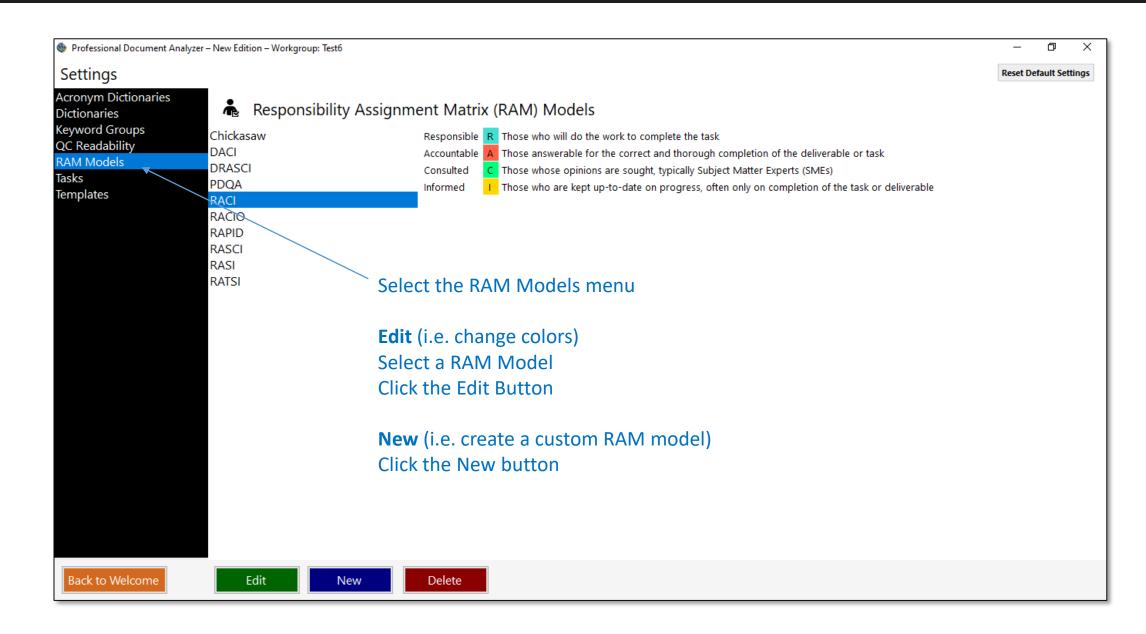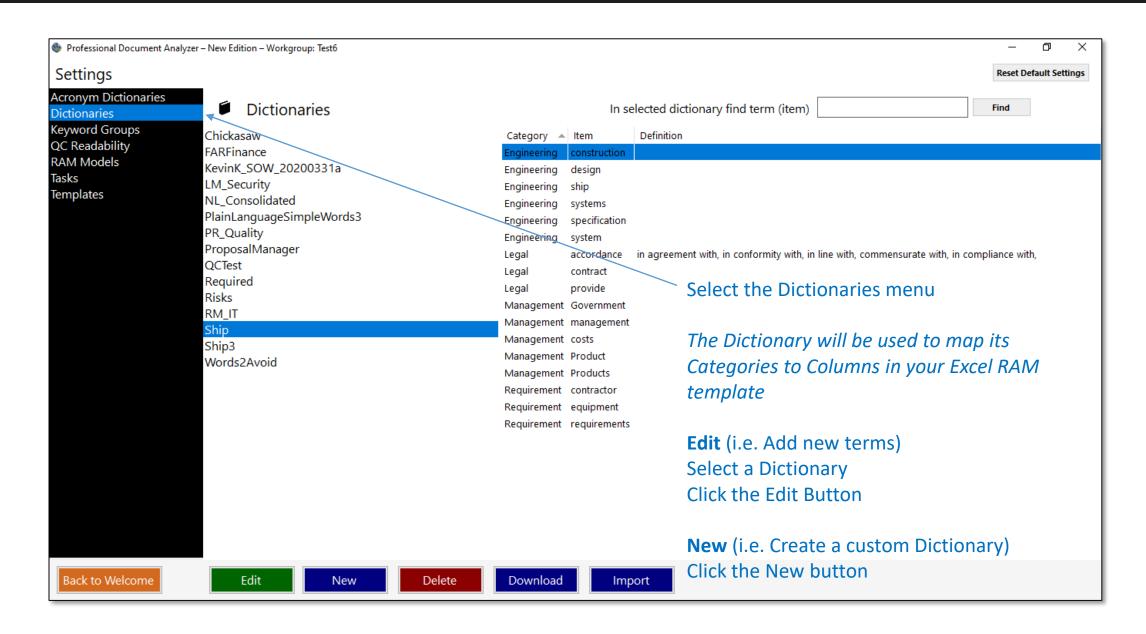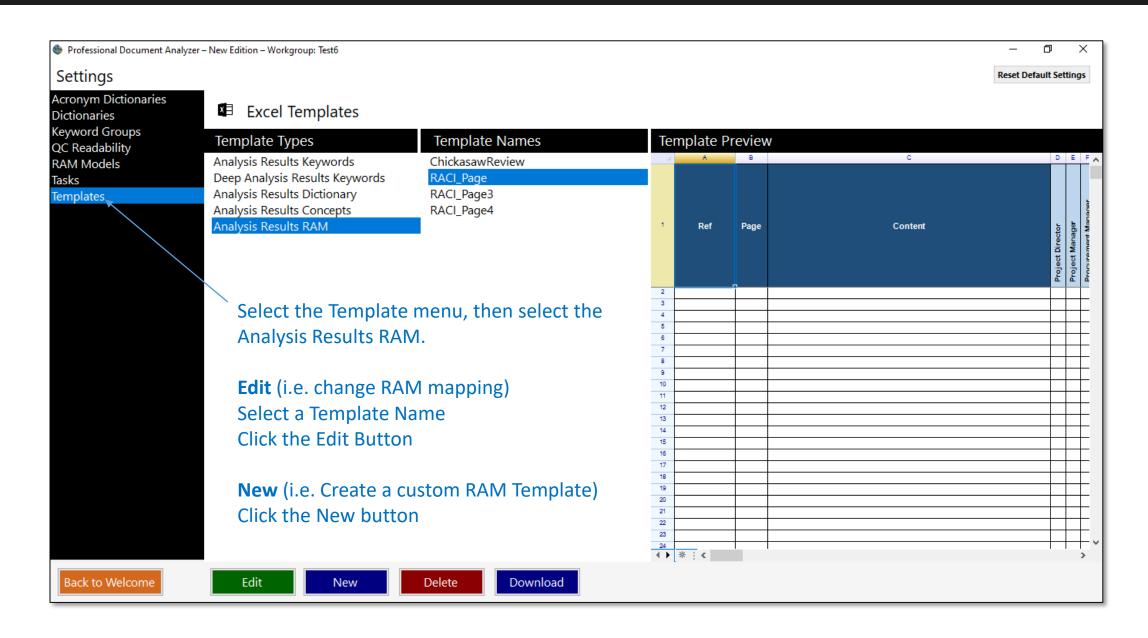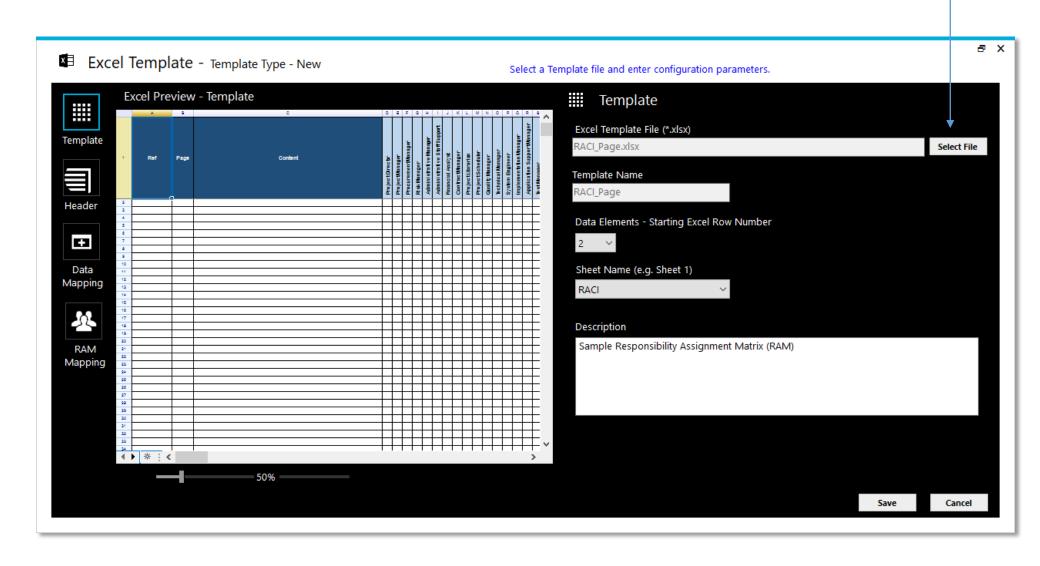- Role Colors are defined in the Model definition

Example

Dictionary: Ship
   Category: Legal
      Term: Contract

Excel Column: H

Model: RACI
   Role Notation: R
   Role Name: Responsible
   Role Color: Turquoise

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Results

Settings

Click the Settings button to Create or Edit a Dictionary, RACI RAM template and Task

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Settings

Reset Default Settings

Acronym Dictionaries
Dictionaries
Keyword Groups
QC Readability
RAM Models
Tasks
Templates

Dictionaries

In selected dictionary find term (item) [   ] Find

Chickasaw
FARFinance
KevinK_SOW_20200331a
LM_Security
NL_Consolidated
PlainLanguageSimpleWords3
PR_Quality
ProposalManager
QCTest
Required
Risks
RM_IT
Ship
Ship3
Words2Avoid

Category ▲	Item	Definition
Engineering	**construction**	
Engineering	design	
Engineering	ship	
Engineering	systems	
Engineering	specification	
Engineering	system	
Legal	accordance	in agreement with, in conformity with, in line with, commensurate with, in compliance with,
Legal	contract	
Legal	provide	
Management	Government	
Management	management	
Management	costs	
Management	Product	
Management	Products	
Requirement	contractor	
Requirement	equipment	
Requirement	requirements	

Select the Dictionaries menu

The Dictionary will be used to map its Categories to Columns in your Excel RAM template

Edit (i.e. Add new terms)
Select a Dictionary
Click the Edit Button

New (i.e. Create a custom Dictionary)
Click the New button

Back to Welcome | Edit | New | Delete | Download | Import

Select the Template menu, then select the Analysis Results RAM.

Edit (i.e. change RAM mapping)
Select a Template Name
Click the Edit Button

New (i.e. Create a custom RAM Template)
Click the New button

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- Click the Select File button to import your RAM Excel file
- Enter values into the other fields

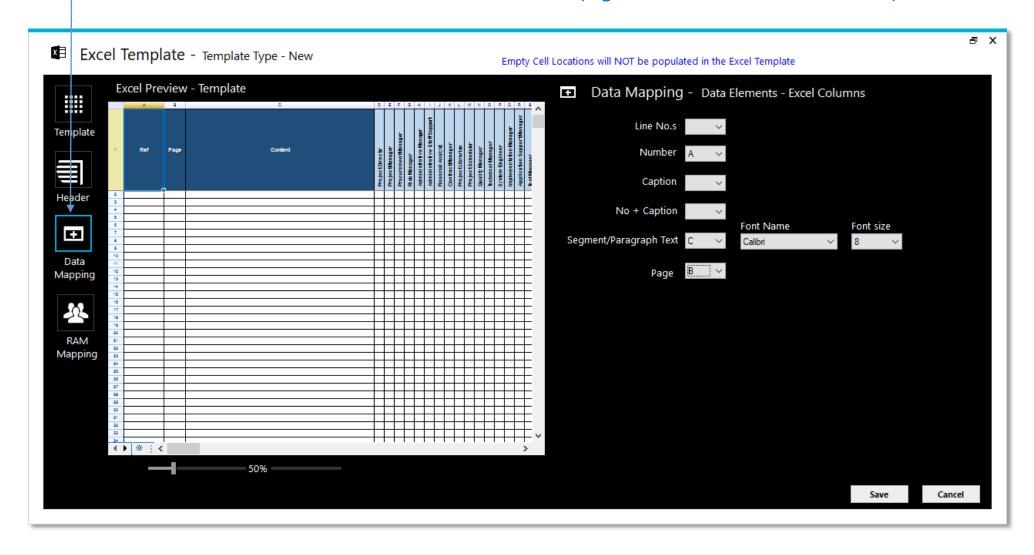**Excel Template** - Template Type - New

Select a Template file and enter configuration parameters.

Excel Preview - Template

Template

Header

Data Mapping

RAM Mapping

50%

Template

Excel Template File (*.xlsx)

RACI_Page.xlsx   Select File

Template Name

RACI_Page

Data Elements - Starting Excel Row Number

2

Sheet Name (e.g. Sheet 1)

RACI

Description

Sample Responsibility Assignment Matrix (RAM)

Save   Cancel

- Click the Header button
  - Enter values into the fields if applicable

- Click the Data Mapping button
  - Select Excel columns for location of content insertion (e.g. A = column A in the Excel sheet)

Excel Template - Template Type - New

Empty Cell Locations will NOT be populated in the Excel Template

Excel Preview - Template

Template

Header

Data Mapping

RAM Mapping

Data Mapping - Data Elements - Excel Columns

Line No.s

Number   A

Caption

No + Caption

Segment/Paragraph Text   C   Font Name   Calibri   Font size   8

Page   B

50%

Save   Cancel

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- Click the RAM Mapping button
  - Select the Dictionary you want to use
    - Enter Excel column letters as comma separated values for role assignments
      - Select the RAM Model you want to use (e.g. RACI)
        - Select Model notations for columns in the table – Reference (left-side) Excel Preview for column letters
      - Click the Start RAM Config. Mapping button

Excel Template - Template Type - New

Map responsibilities using dictionary categories to Excel columns (e.g. D) with associated roles.

Excel Preview - Template

Template
Header
Data Mapping
RAM Mapping

Responsibility Assignment Matrix (RAM) Mapping

Map responsibilities by associating dictionary categories to Excel columns (e.g. D, E, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X) with role notations from the selected model.

Dictionary
Ship

Role Columns e.g. E, F, G

D, E, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X

Model
RACI

Responsible R
Accountable A
Consulted C
Informed I

Dictionary Category	D	E	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
General																				
Legal	R																			
Engineer...																				
Require...																				
Manage...																				

R
A
C
I

Start RAM Config. Mapping

Save   Cancel

- When completed, click the Save button

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Settings

Reset Default Settings

- Acronym Dictionaries
- Dictionaries
- Keyword Groups
- QC Readability
- RAM Models
- **Tasks**
- Templates

Tasks

Change Sort Order ↑ ↓

- ☑ Check Numbered (Legal) Document Readability
- ☑ Check Document Readability
- ☑ **Generate RACI Matrix**
- ☑ Generate a Responsibility Matrix
- ☑ Review RFP
- ☑ Generate WBS
- ☐ Find FARs
- ☑ Find FAR252s
- ☑ Generate a Gap Analysis Report
- ☑ Compare Proposal Manager's Resumes
- ☑ Generate a Responsiblity Matrix
- ☑ Find Dictionary Terms between Documents
- ☑ Test - Find Dictionary Terms & Report
- ☑ Run Deep Analysis
- ☑ Identify and Validate Acronyms
- ☐ Find Ship Dic. terms for multi-docs
- ☑ Multiple Docs Dictionary Analysis
- ☑ Test Dictionary Template
- ☐ TestDicTemp5
- ☐ TestDicTemp55

This selected Task is shown in the Task List.

Create a RACI Matrix

1. Parse
Use Default Parse Analysis? = No
Show Parse Type? = No
Parse Type = Legal
Quantity of Documents = 1
Use Numerical Hierarchy Concatenation? = No

2. Generate Responsibility Assignment Matrix
Use RAM Template = RACI_Page
Find Synonyms? = No
Use Color = Yes

Select the Task menu

Edit
Select a RAM Task
Click the Edit Button

New (i.e. Create a custom Task)
Click the New button

| Back to Welcome | Edit | New | Delete | Download |

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Task Workflow Configuration

Short Task Name (no spaces)
`RACI`

Descriptive Task Name
`Generate RACI Matrix`

Description
`Create a RACI Matrix`

Action 1 `Parse`

Step Text: `Select a project and document`

Use Default Parse Analysis? `No`
Show Parse Type? `No`
Parse Type `Legal`
Quantity of Documents `1`
Use Numerical Hierarchy `No`

Action 2 `Generate Responsibility Assignme`

Step Text: `Generate a RACI Matrix`

Use RAM Template `RACI_Page`
Find Synonyms? `No`
Use Color `Yes`

Save   Cancel

When completed, click the Save button

1. Enter the Short Task Name – Keep it short. Will be used for creating Data references

2. Enter a Descriptive Name – Shown in Tasks list.

3. Enter a Description

4. Action 1 – Select Parse and set parameters as shown

5. Action 2 – Select Generate Responsibility Assignment Matrix

6. Action 2 – Select your RAM template

7. Action 2 – Set Find Synonyms as "No" -- Synonyms is currently not supported for RAM

8. Action 2 – Use color is optional

The Professional Document Analyzer's RAM customization gives you the ability to create some unique reports, other than RAM charts.

For example below, is a RFP review report for a Bid / No Bid process. -- It uses a custom RAM model with a RAM template with a single role column.