



Generate a RACI Matrix
Responsibility Assignment Matrix



RACI Matrix - Responsibility Assignment Matrix (RAM)

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.

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		SECTION C - DESCRIPTION/SPECIFICATION/WORK STATEMENT																					
	1	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)	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		



Professional Document Analyzer – New Edition – Workgroup: Test6

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Welcome

Workgroups + ↻ 🗑️

Test6

F:\Test6

Members

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Start Results

Settings

Click the Start button to Start



Professional Document Analyzer – New Edition – Workgroup: Test6

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

Show Details

Tasks 31

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

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

Create a RACI Matrix

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

Test1
Chickasaw
Frank
Test6

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



Professional Document Analyzer – New Edition – Workgroup: Test6

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

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

Back to Welcome

Back Analyze

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



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)



RACI Matrix – RAM – How Does it Work?

How does it work?

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

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		SECTION C - DESCRIPTION/SPECIFICATION/WORK STATEMENT																					
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		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)	1	(a) The provisions of this contract;	A	A		I	R							C					I		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		

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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Welcome

Workgroups + [link] [trash]

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Members

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Start Results Settings

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



Professional Document Analyzer – New Edition – Workgroup: Test6

Settings

Acronym Dictionaries
Dictionaries
Keyword Groups
QC Readability
RAM Models
Tasks
Templates

Responsibility Assignment Matrix (RAM) Models

Chickasaw	Responsible	R	Those who will do the work to complete the task
DACI	Accountable	A	Those answerable for the correct and thorough completion of the deliverable or task
DRASCI	Consulted	C	Those whose opinions are sought, typically Subject Matter Experts (SMEs)
PDQA	Informed	I	Those who are kept up-to-date on progress, often only on completion of the task or deliverable

RACI
RACIO
RAPID
RASCI
RASI
RATSI

Reset Default Settings

Select the RAM Models menu

Edit (i.e. change colors)
Select a RAM Model
Click the Edit Button

New (i.e. create a custom RAM model)
Click the New button

Back to Welcome Edit New Delete



Professional Document Analyzer – New Edition – Workgroup: Test6

Settings

Acronym Dictionaries

Dictionaries

Keyword Groups

QC Readability

RAM Models

Tasks

Templates

Chickasaw

FARFinance

KevinK_SOW_20200331a

LM_Security

NL_Consolidated

PlainLanguageSimpleWords3

PR_Quality

ProposalManager

QCTest

Required

Risks

RM_IT

Ship

Ship3

Words2Avoid

Reset Default Settings

In selected dictionary find term (item) Find

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



Professional Document Analyzer – New Edition – Workgroup: Test6

Settings

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

Excel Templates

Template Types	Template Names	Template Preview
Analysis Results Keywords	ChickasawReview	
Deep Analysis Results Keywords	RACI_Page	
Analysis Results Dictionary	RACI_Page3	
Analysis Results Concepts	RACI_Page4	
Analysis Results RAM		

Template Preview

	A	B	C	D	E	F
1	Ref	Page	Content	Project Director	Project Manager	Procurement Manager
2						
3						
4						
5						
6						
7						
8						
9						
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11						
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21						
22						
23						
24						

Buttons: Back to Welcome, Edit, New, Delete, Download

Reset Default Settings

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



- 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

	Ref	Page	Content	Project Director	Project Manager	Procurement Manager	PM Manager	Administrative Support	Financial Analyst	Contract Manager	Project Librarian	Quality Manager	Technical Manager	System Engineer	Implementation Manager	Application Support Manager	System Administrator
1																	
2																	
3																	
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34																	

Template

Excel Template File (*.xlsx)
RACI_Page.xlsx

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

Excel Template - Template Type - New

Enter Header parameters.

Excel Preview - Template

1	Ref	Page	Content	Project Director	Project Manager	Procurement Manager	RAM Manager	Administrative Support	Financial Analyst	Contract Manager	Project Librarian	Quality Manager	Technical Manager	System Engineer	Implementation Manager	Application Support Manager	Network Manager
2																	
3																	
4																	
5																	
6																	
7																	
8																	
9																	
10																	
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Header

Header Info - Excel Cell (e.g. A1)

Project Name

Document Name

Date

Your Name

Save Cancel



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

The screenshot shows the 'Excel Template - Template Type - New' window. On the left, a vertical sidebar contains four icons: 'Template', 'Header', 'Data Mapping' (highlighted with a blue box and a blue arrow pointing to the 'Data Mapping' button in the main panel), and 'RAM Mapping'. The main area is split into two panes. The left pane, titled 'Excel Preview - Template', shows a grid with columns labeled 'Ref', 'Page', and 'Content', and rows numbered 1 through 24. The right pane, titled 'Data Mapping - Data Elements - Excel Columns', contains several configuration options: 'Line No.s' (dropdown), 'Number' (dropdown set to 'A'), 'Caption' (dropdown), 'No + Caption' (dropdown), 'Segment/Paragraph Text' (dropdown set to 'C'), 'Page' (dropdown set to 'B'), 'Font Name' (dropdown set to 'Calibri'), and 'Font size' (dropdown set to '8'). At the bottom right of the window are 'Save' and 'Cancel' buttons. A zoom slider at the bottom center is set to 50%. A status bar at the top right of the window reads 'Empty Cell Locations will NOT be populated in the Excel Template'.



- 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

	N	O	P	Q	R	S	T	U	V	W
1	Quality Manager	Technical Manager	System Engineer	Implementation Manager	Application Support Manager	Test Manager	Configuration Manager	Operations Manager	Customer Support Manager	Project Sponsor
2										
3										
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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: Shp

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...																				

Start RAM Config. Mapping

Save Cancel

- When completed, click the Save button



Professional Document Analyzer – New Edition – Workgroup: Test6

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 Responsibility 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.

Reset Default Settings

Create a RACI Matrix

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



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

When completed, click the Save button



Custom Responsibility Assignment Matrix (RAM) - Completed

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.

Caption	Text	Page	Assignment
(d) The examination of patent and trademark ...	(d) The examination of patent and trademark applications results in the need for extensive information access and retrieval along with instructional support and training on how to use automated information systems, tools, and information resources. The USPTO utilizes a Contractor to provide this instructional and training support.	5	Security, Legal
(e) To appropriately perform the process of ...	(e) To appropriately perform the process of examination of patent applications, Patent examiners require technology specific information dated earlier than the effective filing date of the patent application. Pre-application dated information, in this context, is referred to as prior art. Prior art can include United States (US) patents, foreign patents, published patent applications and related materials, and non- patent literature (NPL), which can be legal materials, journal articles, standards, manuals, books, conference proceedings, films, videos, images, web pages, and the like. USPTO's information needs differ from the information needs of many other organizations served by technologically-oriented libraries that typically identify the most recent state of the art technology.	5	Security, Accounting, Legal, QA
(f) Trademark Examining Attorneys review ...	(f) Trademark Examining Attorneys review trademark applications and register or refuse marks for use in commerce. The Trademark Examining Attorney corps is organized into Law Offices (LOs). There are currently 580+ Trademark Examining Attorneys grouped into twenty-seven (27) Law Offices that process applications across the spectrum of goods and services available for purchase in the United States. The Trademark Examining Attorney corps is expected to increase proportionally to mirror the increase of trademark application filings over the next five (5) years.	5	QA
(g) To appropriately perform the process of ...	(g) To appropriately perform the process of examination of trademark applications, Trademark Examining Attorneys review applications to determine whether they comply with all applicable rules and statutes. To assist Examining Attorneys in the process of application examination, the TMLL collects and provides legal, marketplace, and authoritative published information to be used as evidence in legal office actions.	5	QA
4. Scope.	4. Scope.	5	
(a) The Contractor shall provide the following ...	(a) The Contractor shall provide the following services: Task Area 1: Training Services Task Area 2: Training - Regional Office Support Task Area 3: Library Services for STIC Task Area 4: Library Services for TMLL	5	Accounting
(b) The Contractor shall provide the required ...	(b) The Contractor shall provide the required services during regular operating hours (Monday Friday) from 8:00 a.m. to 5:00 p.m. Eastern Time (ET) unless otherwise specified within the individual task areas.	6	Accounting