



# **Wordman's Rextractor**

**An add-in for Microsoft Word 2007/2010/2013  
for Proposal Professionals**

## **User Guide**

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## Introduction

*Wordman's Retractor*, an add-in for Microsoft® Word 2007/2010/2013, Wordman Retractor.dotm, provides a tool for inserting hidden references to Request for Proposal (RFP) requirements, and then extracting these references from one of more proposal documents into a collated and sorted list as a template for a compliance matrix. You can also use visible references, e.g. “[L-3.2],” anywhere within your proposal document.

## Installation

*Wordman's Retractor* is supplied in a ZIP file, Wordman\_Retractor.zip. Save this file to your PC, open the ZIP file, and extract Wordman Retractor.dotm to one of the following hidden folders on your PC, where {User} is your user ID:

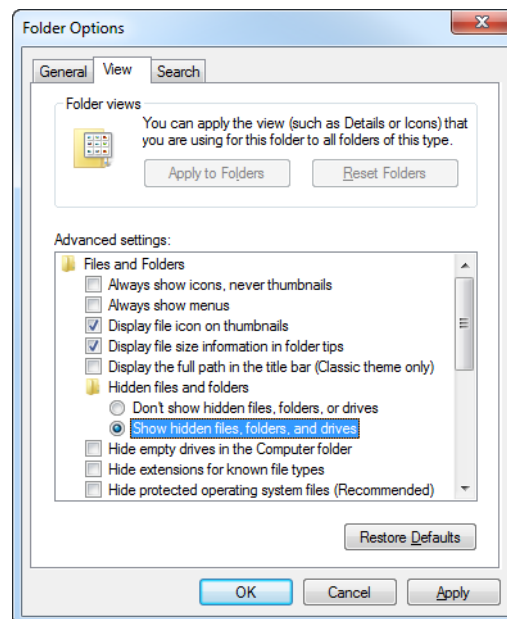
Windows XP:

C:\Documents and Settings\{User}\Application Data\Microsoft\Word\STARTUP

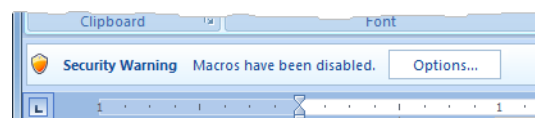
Windows Vista and Windows 7:

C:\Users\{User}\AppData\Roaming\Microsoft\Word\STARTUP

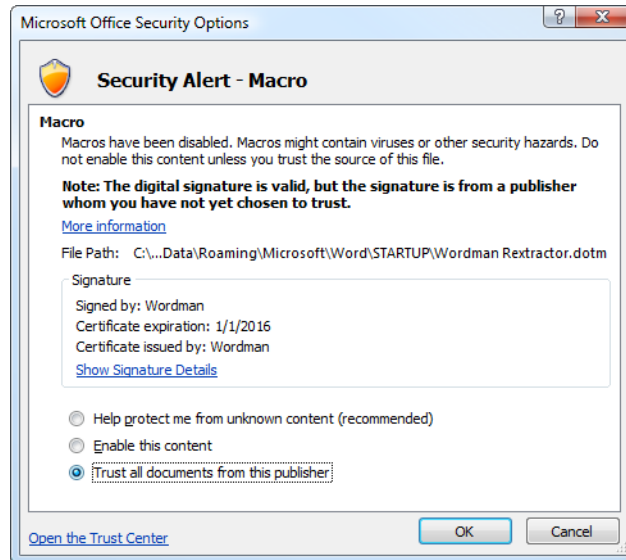
**Note:** If you cannot see the hidden folders in Windows Explorer, go to Organize > Folder and Search Options, select the View tab in the Folder Options dialog, click Show hidden files, folders and drives, and then click OK.



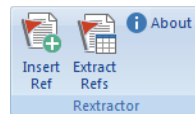
*Wordman's Retractor* will be loaded and available each time you start Word. The first time you start Word, a warning may be displayed:



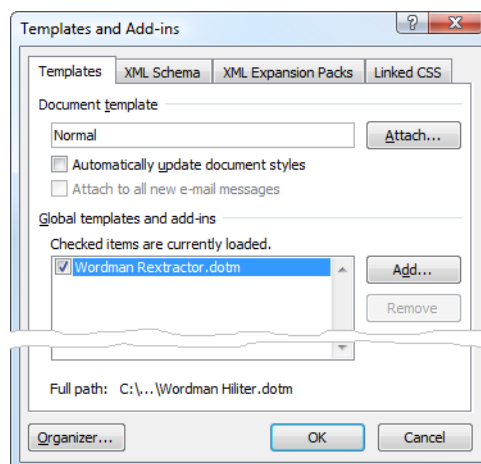
Click Options...



Select Trust all documents from this publisher and then click OK. Word displays the Rextractor group on the Wordman ribbon tab:



If the Wordman ribbon tab Rextractor group is not displayed, click the Office Button (2007) or File (2010/2013) and then select Word Options (2007) or Options (2010/2013). In the Word Options dialog, select Add-ins. In the Manage dropdown list, select Word add-ins and then click Go... Word displays the Templates and Add-ins dialog:



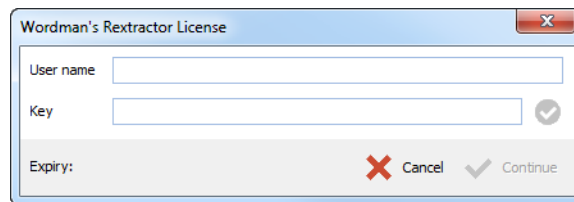
Check that Wordman Rextractor.dotm is loaded in the Global templates and add-ins list. If not, check that Wordman Rextractor.dotm is saved in one of the two STARTUP folder locations described above.

## Licensing

*Wordman's Rextractor* is a licensed product. After you have installed and first run *Wordman's Rextractor*, a thirty-day evaluation period is started, allowing full functionality. After the thirty-day evaluation period has expired, you will need to purchase a full license. To enter a full license key, click **i** About in the Rextractor group on the Wordman ribbon tab:



On the About Wordman's Rextractor dialog, click Enter Key. *Wordman's Rextractor* displays the Wordman's Rextractor License dialog:



Enter the User name and Key you received by email from Wordman when you purchased your *Wordman's Rextractor* license.


## Using Wordman's Retractor

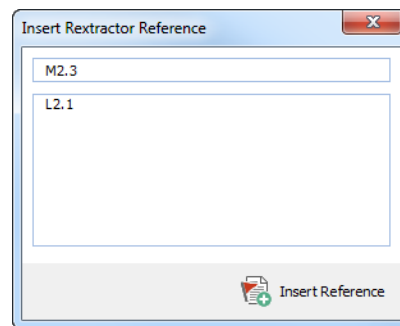
### Inserting References into Proposal Documents


You can insert RFP references into your proposal documents in two ways:

#### 1. Retractor (Hidden) References

Retractor references are hidden, i.e. they are only visible when you are displaying hidden text. The simplest way to display hidden text is to click Show/Hide ¶ in the Paragraph group on the Home ribbon tab (or press Ctrl+Shift+8, i.e. Ctrl+\*).

To insert a hidden reference, place your cursor at the end of the heading or paragraph that you wish to mark with an RFP reference, and then click  Insert Ref in the Retractor group of the Wordman ribbon tab. *Wordman's Retractor* displays the Insert Reference dialog:



Type your RFP reference in the text box at the top of the dialog. If you have already used this RFP reference in your proposal document, you can select it from the list. Click  Insert Reference to insert the reference into your proposal document. *Wordman's Retractor* inserts the reference using Word's built-in Table of Authorities feature:

¶  
 • 2.3 → Mission Approach {·TA\·s-"L2.1"·}·{·TA\·s-"M2.3"·}¶  
 ¶

You can insert references individually, as shown above, or grouped into one reference and separated by semicolons, e.g. L2.1; M2.3. Since Retractor references are hidden text, they are not included in your Table of Contents when added to headings.

You can also use a further level of grouping, separating references by commas, for example:

¶  
 • 2.3 → Mission Approach {·TA\·s-"L2.1;M2.3;SOW·1.1.2,2.1·3.4.1.1"·}¶  
 ¶

*Wordman's Retractor* provides options for splitting multiple references, as shown above, into separate references in your cross-reference matrix. *Wordman's Retractor* also strips off spaces after semicolons and commas when compiling the cross-reference matrix.

**Note:** you cannot insert a Retractor reference in a text box, in a header or footer, or in a comment.

## 2. Manual (Visible) References

You can add references into your proposal document by enclosing them with square or curly brackets, e.g.

• 2.3 → Mission Approach {L2.1; M2.3}

or

• 2.3 → Mission Approach {L2.1; M2.3}

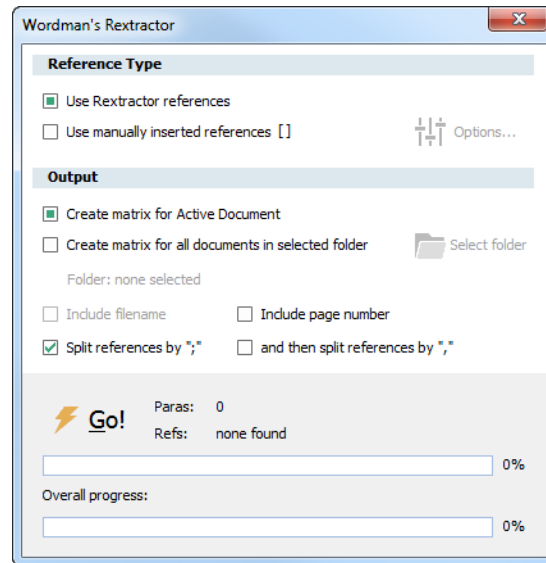
You cannot mix square and curly brackets in the same document (or set of documents). You must select one or the other and make this selection clear to all the authors on your team. *Wordman's Retractor* assumes square brackets by default when creating a cross-reference matrix.

Manually inserted references are always visible in your document, and are included in your Table of Contents if, as in the example above, you add them in your headings. As with Retractor references, you can combine references using semicolons (1st level) and commas (2nd level):




• 2.3 → Mission Approach {L2.1; M2.3; SOW-1.1.2, 2.1, 3.4.1.1}

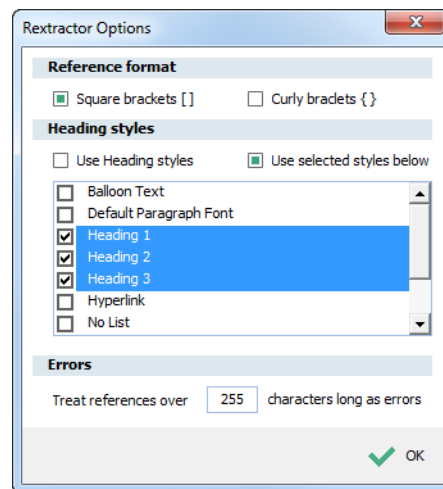
## Creating a Cross-Reference Matrix




To create a cross-reference matrix, click  Extract References in the Retractor group on the Wordman tab. *Wordman's Retractor* displays the Wordman's Retractor dialog:




### Options:




 **Reference Type.** Select Use Retractor references (default) or Use manually inserted references. If you select Use Manually inserted references, *Wordman's Retractor* enables the  Options... button. Click the  Options... button to display the Retractor Options dialog:









-  **Reference Format.** Select Square brackets [] (default) or Curly brackets {}
-  **Heading Styles.** You can select Use Heading styles, i.e. Word's built-in Heading X styles, or Use selected styles. If you select Use selected styles, *Wordman's Retractor* lists the styles in the active document. You can then select which styles you are using for headings.
-  **Errors.** Enter the number of characters above which *Wordman's Retractor* assumes that there is a missing right square or curly bracket.

*Wordman's Retractor* lists potential errors in the finished cross reference document. The default value is 255 characters.


Click  OK to save your options and close the Retractor Options dialog.

 **Output.** Select Create matrix for active document, or Create matrix for all documents in selected folder. If you select the latter, *Wordman's Retractor* enables the  Select Folder button. Click  Select Folder to select the folder containing your proposal documents.

If you are building a cross-reference matrix for multiple documents in a folder, and you are using manually inserted references, you must click  Options... to ensure that *Wordman's Retractor* uses the correct heading styles. When you click  Options..., and if you select Use selected styles, *Wordman's Retractor* opens the first Word document that it finds in your selected folder and lists the styles used in that document.

-  **Include filename:** check this option to include the filename with the heading number where *Wordman's Retractor* finds each reference. This option is only available when you are creating a cross-reference matrix for multiple documents. This option is unchecked by default.
-  **Include page number:** check this option to include the page number with the heading number where *Wordman's Retractor* finds each reference. This option is only available when you are creating a cross-reference matrix for multiple documents and you have checked Include filename, or if you are creating a cross-reference matrix for the active document. This option is unchecked by default.
-  **Split references by ";":** check this option to split multiple references that are separated by semicolons. This option is checked by default.
-  **and then split references by ",":** check this option to further split references separated by commas. This option is only available if you have checked Split references by ";", and is unchecked by default.

### Running Retractor

Once you have selected your options, click  Go! *Wordman's Retractor* displays the total number of paragraphs to scan, the number scanned, the elapsed time, the scanning speed (paragraphs per second), and the total and unique number of references found. The upper progress bar gives you a visual indication of how far *Wordman's Retractor* has scanned through the document. If you selected the multiple document option, the filename of the document being scanned is displayed, and the lower progress bar gives you a visual indication of how far *Wordman's Retractor* has scanned through the documents found.

### Output Document

*Wordman's Retractor* creates a document containing a three-column table, formatted in the default Table Grid style, and with the following column headings:

Requirement	Compliant?	Refer to
-------------	------------	----------

The "Compliant?" column is left blank and can be deleted if you are only building a cross-reference matrix rather than a compliance matrix.



Wordman's Rextractor sorts the references found in the document and adds them as rows to the table, depending on the output options you select. For example, if Wordman's Rextractor finds the reference "L2.1; M2.3; SOW 1.1.2, 2.1, 3.4.1.1" in heading 2.3, the results are:

Split references by ";" and then split references by "," unchecked:


Requirement	Compliant?	Refer to
L2.1; M2.3; SOW 1.1.2, 2.1, 3.4.1.1		2.3

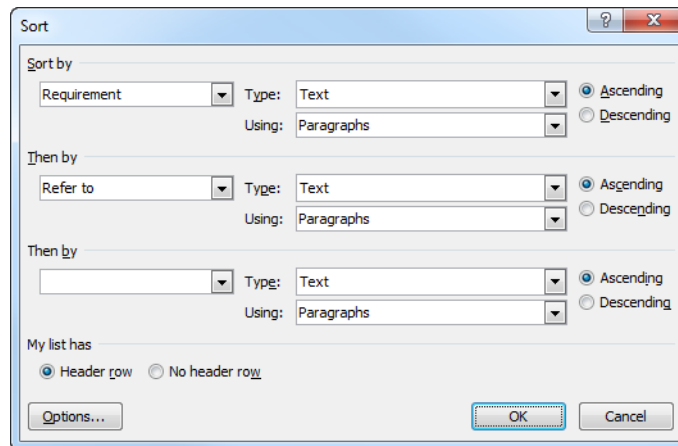
Split references by ";" checked:

Requirement	Compliant?	Refer to
L2.1		2.3
M2.3		2.3
SOW 1.1.2, 2.1, 3.4.1.1		2.3

Split references by ";" and then split references by "," checked:

Requirement	Compliant?	Refer to
2.1		2.3
3.4.1.1		2.3
L2.1		2.3
M2.3		2.3
SOW 1.1.2		2.3

**Note** Since Wordman's Rextractor simply splits the SOW references by the commas, you will need to insert "SOW" in front of the second and third SOW references, and then sort the table. To sort the table, click your cursor inside the table, and then click Sort  in the Data group of the Table Tools > Layout ribbon tab. Word displays the Sort dialog:



Make the settings in the Sort dialog as shown above and then click OK to re-sort the table.

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