CONTENTS

Introduction .......................................................................................................................... 4

What is RFPMonkey.com? ................................................................................................. 4

What is External Review? ................................................................................................. 4

Logging In .......................................................................................................................... 5

Getting Started ............................................................................................................... 6

Finishing Up .................................................................................................................... 11

About RFPMonkey.com .................................................................................................. 11
INTRODUCTION

WHAT IS RFPMONKEY.COM?

Put most simply, RFPMonkey.com is a web-based application used to store, categorize, and search for RFP-style questions and their answers. By storing this information and reusing it, RFP responders can greatly reduce the amount of time spent responding - and time is money. There are other benefits as well, such as team collaboration, entry aging, approval workflow, and RFP tracking.

The primary way you use RFPMonkey.com on a daily basis is composed of the following types of activities:

1. Searching for answers to RFP questions
2. Entering/editing current RFPMonkey.com entries
3. Tracking RFP response projects

Another way to think of RFPMonkey.com is as an RFP-related content management system. RFPMonkey.com is used to manage the information down to the level of a single entry. RFPMonkey.com lets users author entries, edit them, approve them, distribute them to other users via email, search for them by various methods, and track their need for periodic re-approval. The overall philosophy at RFPMonkey.com is that, in your efforts to respond to an RFP, what you need help with is finding the best, most recent, most approved answers to difficult questions.

One of the helpful features of RFPMonkey is the ability to request an External Review of selected content. Because you are reading this document (The External Reviewer Guide), there’s a good chance that you have been asked to provide an external review. The next section of this doc defines this concept.

If you are interested in more details about RFPMonkey, you can check out the main web site at www.rfpmonkey.com and/or you can download the full RFPMonkey.com User Guide from our site as well. Its location is: www.rfpmonkey.com/downloads/RFPMonkeyUserGuide.pdf

WHAT IS EXTERNAL REVIEW?

What is an External Review and why have you been asked to provide one? Most of the time, RFPMonkey users author content, edit it as needed, and approve it when it has been wordsmithed sufficiently. They do this so that they and/or other users can then search their RFPMonkey library and reuse the content as they respond to RFPs. This is a great time saver. Only approved content can be searched by the average user.

Occasionally, there may be pieces of content that are pending approval that require review or even edits by someone who is NOT a normal RFPMonkey.com user. Rather than making the client organization license additional users, and dedicate them to occasional reviewers, RFPMonkey.com includes a handful of External Reviewers in each account. And you must be one.
Rather than simply approving certain content, a regular content approver can request an External Review of anyone with an email address. They do NOT have to be RFPMonkey.com users, and don’t even have to be within the same organization as the normal approver.

If you have received an External Review request, one of these normal approvers would like your input on 1 or more pieces of content, or entries. You will be asked to log into RFPMonkey.com, read content entries and edit them as needed, then either return them for final approval, or maybe to apply the final approval yourself. Once you have done that for each entry assigned to you, your work is over. Your login credentials to RFPMonkey will be automatically cancelled, making them available for the next external review needed.

LOGGING IN

In performing an external review, your first task is to log into the temporary RFPMonkey.com account that has been created for you. The easiest way to do that is to open your External Review request email, and click the login link.

This will pass your credentials into RFPMonkey, bypassing the normal login screen.
GETTING STARTED

Once you successfully log in, you will see a pop-up message informing you of your temporary and limited access to RFPMonkey.com.

Limited/Temporary Access

You have been given limited temporary access to RFPMonkey as an external reviewer. Many standard features of RFPMonkey are not available in this mode. Please visit www.RFPMonkey.com to learn about the full solution. To start your review, dismiss this message then click List My Drafts to see the content that is awaiting your input.

After you dismiss the pop-up message, you can now use the RFPMonkey application to perform your external review. In fact, that’s all you can do, due to the limited nature of external reviewer accounts. Regular users have several more menu options so they can write, maintain, and search RFP content, configure their RFPMonkey account, import and export content, and track RFPs.

Note that it is also possible that the RFPMonkey.com user interface may have been customized by the client organization to include their own logo and color scheme.
To see the content that you are being asked to review, either click on the green GO icon or on the List My Drafts link in the sub-menu. Either will take you to a list where you will see any entries that have been assigned to you.

The list displays several columns of data to give you a good overview of the content right from this view. If you have more than one entry to work on, you can sort this display by clicking on the red up and down arrows in the column header.
To edit an entry, click its ID number link in the left column. This will drill into the selected entry. From the resulting detail screen, you can see everything about the entry, and can access 2 important links - **Edit** and either **Return Entry** or **Approve Entry** depending on the request.
Click the **Edit** link to open the entry in edit mode. Now you can make any necessary changes. You can edit the question, response, comments, filter drop-downs, and key words. Note that key words are purely optional, because the entire question is searchable, as is the entire response, and the entire comments field.

When you have finished your edits, click the Save button in the lower left. At this point, you have the following choices:

- Open the same entry again and do more edits.
- Open another entry and edit it (assuming you have more than one).
- Log out for now. You can log in again later by following the link in your external review request email again.
- Return or Approve a selected entry. This depends on the nature of the external review request. When the request was made, you were either asked to review and return the content, or to review and approve it. To return or approve an entry, just reopen it by selecting it from the List My Drafts list, then click the appropriate action link in the lower left.

- Return or Approve multiple entries. Rather then returning (or approving) entries one-at-a-time, you can select multiple items from the drafts list and act on them together.
FINISHING UP

Your user credentials will work as long as you have content to review (or until an administrator deletes your temporary user account). When you return or approve the last piece of content in your draft list, the system will automatically log you out of RFPMonkey.com and disable your credentials. Your work is done.

Thank You

Your requested review is complete. You can delete the request email now. Its login link will no longer work.

OK

ABOUT RFPMONKEY.COM

RFPMonkey.com LLC was formed in 2006 after years of involvement in the RFP processes of other companies - mostly software companies. With over 20 years of sales and pre-sales experience, our staff have responded to hundreds of RFP’s, with and without the benefit of software solutions. RFPMonkey was created to be what we wished we had access to while doing all of that RFP work.

To learn more visit www.RFPMonkey.com or call us toll-free at 844-Monkey8 (844-666-5398).