# Door - Loopio Integration Guide January 2024





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### Overview

This document lists the steps for integrating the Door Platform for Asset Managers with the Loopio Re. This integration allows enterprises to make best use of Loopio for managing

content while leveraging the power of the Door Standard Questionnaire for efficiency and speed in publishing and sharing due diligence information with allocators.

This document contains information on how to connect Door with Loopio, and using and maintaining linked Library Entry content through Door.

#### Requirements

The Door-Loopio integration has the following requirements:

- An active account on the Door platform for Asset Managers
- An active account on the Loopio response platform at the Plus or Advanced Subscription level
  - Clients with Essentials subscription agreements will not be able to integrate with Door
- A Loopio API Key and API secret as provided by the Loopio support team

### Loopio Setup

#### Obtaining an API Key

The Door-Loopio integration is enabled on a per customer basis. The following workflow describes how to obtain the Door-Loopio integration API key on a per customer basis.

A Loopio user with the proper Admin permissions can create the API Key in the following way:

ŵ	Projects -	Reviews <del>-</del>	Library <del>-</del>	Reporting <del>-</del>	Admin			③ Help <del>-</del>	sa
📥 Inte	egrations								
0	Chrome		Do you respon Extension will questionnaires	d to a lot of propo accelerate the imp	osals in web-based portals? The Loopio Chrome port and export process for web-portal-based	Vie	w on Ch	rome Web Stor	e
5	Seismic		Allows you to i Library, attach export comple	mport Entries dire Seismic documen ted Loopio Project	ectly from your Seismic documents into Loopio's nts to your Loopio Answers and Library Entries, and ts directly to your Seismic workspace.			Connec	at .
-il-	Slack		You and your to in Loopio. You	eam will receive d will also be able to	firect Slack messages and reminders for key action to access library search by typing /loopio search.	\$		Connec	et
For Devel	opers								
			Integrate Loopi credentials for	o into the tools yo each application y	ou already use. Generate Loopio API you want to connect.	2 out of 5 app slots	created	Add an Ap	P

- First, navigate to the Admin menu and select the Integrations sub-menu.
- In the "For Developers" section, use the "Add an App" button. See the illustration below.
- In the new window, give a name like "Door". Be sure to expand the Library section and check the boxes to allow for Read, Write, and Delete access.

DOOG

Save

• **Important:** be careful to take note of the Secret. This information is only available at the time of creating the key and is not recoverable later. The Key information is available later, but the secret will not be.



### Door Setup

#### Connecting to Loopio

From the left-hand side menu of the Door interface, select Integrations, and from there, the Library sub-menu item.



From there select "Loopio" from the content library and populate the information for URL, API Key and API Secret.

For base URL, use the URL for API access, most likely api.loopio.com. You do not need to include the protocol prefix of https:// or include a trailing slash.

Once the information is entered, the Door interface will replace the form with an indication that the integration is active.

You can also check that the "Loopio" tab now appears on the Dashboard.

**NOTE:** Configuration of the integration is done once for the firm on Door. Only users with the role of AM Lead or AM Deputy will have permission to configure the integration. Other users will see a read-only version of the configuration status.

### Linking to Loopio Content Questionnaire Form - Right Hand Side – Call Out

The right hand side menu of the questionnaire response form includes a number of options for working with response content:

- Save and next save and move to the next question in one click
- Save the response

Menu

- View previous responses for more, see the section on Previous Responses
- **Import from Word** not available for certain question types such as Yes/No, date pickers, etc.
- Link to Loopio to link to a piece of content in a Loopio content library, if integration is enabled
- Apply Elsewhere push the response to other products

@ Controls				
Save and next				
Save				
Uiew previous responses				
Import from Word				
🔗 Link to Loopio				
Apply elsewhere				
Apply available responses				

Selecting "Link to Loopio" will bring up a dialog where you search Library Entries stored in Loopio, then on selecting a Library Entry, the response contents will be copied from the Library Entry into the Door response form (including images).

Looj	ilo content Search	e.
	What is the expected level of excess return versus the benchmark and how is the target derived?	
0	What is the expected level of excess return versus the benchmark and how is the target derived?	Expected return of 100 200 basis points above the benchmark
Ð	What is the expected level of excess return versus the benchmark and how is the target derived?	The expected level of excess return is 200 300 basis points.
Ø	What is the expected level of excess return versus the benchmark and how is the target derived?	We expect to outperform by 20 basis points over full market cycles. This is in no way guaranteed.
0	What is the Strategy's benchmark?	Bloomberg Barclays Aggregate Bond Index.
Show	12 4 6 Its total 53	Poge. 12345 и в

By default, the search is conducted using the Door Question statement (for instance "Describe the investment style."). It is possible for the user to override that search content in order to search the Loopio content library using any terms that might help return a useful result set.

Navigational elements at the bottom left control the number of results shown at once (default 4). The control on the bottom right pages through the results.

Use the arrow icon to the left of the Library Entry to link this response Library Entry to this question for this product on Door.

Once this link is created, Door will retrieve the content of the response stored in Loopio under this Library Entry, and populate the response to the question on Door with those contents.

GENTRY AND SONS PLC26185 🔐 POPE-SMITH LTD6321 🤯		5	2 No Response (3%)     1 Draft (7%)     1 Ready to Publish (7%)     73 Published (95%)
A Firm B Strategy C Vehicle	[Deadly care offset by tennes Associated on Notification     (Control of the expected level of encodes intum versus the benchmark and how is the target derived? . (2019)     [Encode in the Control Table.	20	Review
/ Investment approach. (0.19)			ategy
Does the Strategy follow a particular investment style?     What style? / 2020     Describe the investment style. / 2020     What is the investment objective of the Strategy? / 202     What is the Strategy's benchmark? / 2020     What is the Strategy's benchmark? / 2020     What is the expected level of excess return versus the b     Market environments in which the Strategy would be er	Espected return of 100-200 basis points above the benchmark. This is derived from the strategic objectives and the modeling that indicates what the expected excess returns should be under average market conditions.		Achmanikada spite i Investmeni Team jele i Release keepomisit. Isoophy ceas I: Summary ceas II: Released ceas II: Eliptic Securities ceas IV. Investment Ums ceas IV. Edition Const ceas IV. Edition Const ceas IV. Edition Const ching Error. Targets & OL. vility & Capacity Khanagement sitions & Trading
People I: Investment Team Overview  Provide concise biographies for all investment team me	Ø kalturna		

#### Content import includes:

- Basic text formatting for bold, italics
- Bullet points
- Justification and paragraph breaks
- Inline images
- Merge variable contents
- Tables created in Loopio
  - Includes table structure including merged cells
  - o Does not include color fills for table cells

Content import will not include:

- Changes in font face and style as used in Library Entry headings
- Attachments
- Project level Merge variable contents
- Color fills for table cells

You may edit it at this point. Edits made on Door will NOT result in suggested changes for review in the Loopio Library. However, a link is established between this question on Door and the specified Library Entry in Loopio.

Door will monitor this Library Entry in Loopio for a change in the response, and allow an update using the new response contents through the Update form on the Door Dashboard. See the next section for more on updates.

You can remove this link from within the response form by choosing the "remove link" icon.

#### Library Level Merge Variables

There are two aspects of Library Level Merge Variables to note:

The change detection used to list available updates of Loopio library entry contents does not take into account a change in Library Level Merge Variable. If a change is made to a used Library Level Merge Variable, best practice would be to update where used to propagate the change.

When performing a search of library entries on Door, the contents of the Merge variables are not included in the search. So for instance, if there were a library entry for address that included the content "1313 Mockingbird Lane, Toronto" then a search for Toronto would not necessarily pull up library entries that used that merge variable.

#### Manage Responses

When editing response content from Manage Responses, it is also possible to establish a link to Loopio content and insert the Loopio response content into the form.



If the response is used for more than one product, linking from Manage Responses will establish the link across all products where the response is used. This will be reflected in the Manage Response listing, showing that every place where the response is used, the link exists.



### **Content Updates**

#### Dashboard Tab for Loopio

Once enabled, the integration will display a Loopio tab on the Door Dashboard.  $\ensuremath{\mbox{vour Dashboard}}$ 

Projects	On Door	Invitations	Reports	Loopio								
Manage y	our Loopio l	inks										Review all updates
Loopio u	pdates											Updates available
Loc	opio ID • Inter Content		Updates	available 🌣								
÷	7020455		2	L								
	7019488		11									
AI	Loopio docum	ent linked to th	e following pr	oducts and	questions has l	been updated	ed:					
	Select a	1										
	Pope	e-Smith Ltd6321	Wh	iat measure	are in place to	o ensure the lo	long-term	retention o	f key individ	uals?		
			Review	contents								

This tab includes by default a list of any Loopio Library Entry IDs used in Door question responses that have updates as indicated by Loopio.

Use the toggle at the top of the Loopio area to move back and forth between showing All Links, and just those Links with updated content available.

#### **Content Updates**

If there are Updates available, the Loopio tab on the Door Dashboard will show a list of the Library Entry IDs with an update.

Use the (+) icon to expand section for a specific content ID to see the full text of the updated Library Entry response content and where it is used to reply to the Questions on Door, and for which Products.

Projects Manage	On Door your Loopio lin	Invitations	Reports	Loopio	Review all updates
Loopio	updates Iopio ID • Enter Content lit			Updates available 0	All links
$\oplus$	7020455			2 🌲	
$\oplus$	7019488			n 🌲	
	7019061			0	
Y	our Loopio entry	is used by the	ollowing pr	duets:	
	Select all				
	Value I	Equity Fund		What is the expected level of excess return versus the benchmark and how is the target derived?	
	Apply to selects	ed products	Review		

You may select a combination of question and product using the checkboxes to the left (or use "Select All") and then Apply to selected products directly.

Alternatively, use the "Review contents" button for a more detailed view of the current response as listed on Door everywhere that the response is linked to this content ID on Loopio.

Use the (+) icon to expand section for a specific combination of Product and Question, to view the current response and compare it the latest update retrieved from Loopio, including the ability to produce a difference to see what changed.

Loopi investm	о ID 7020455 надетнать в ат пладна рат. И чат плази тапь россезь наж ападов пысиме росследа у осология, посее не чен ек и на у ent committee review these models regularly.	Apply to selected products	Unlink selected	< ) IO	> c
The inte a semi-a	rnal analyst team also conducts annual stress tests against a number of market conditions and those results are reviewed by nnual basis.	the investment committee in conj	unction with the chief ris	k officer o	n
Select	att Global Equity Fund How is risk management incorporated within the investment process?				
Curren	Value Equity Fund How is risk management incorporated within the investment process? t response			,	~
Risk n as the	nanagement is an integral part of the investment process, inlucing proprietary economic models as well as the investment committee review these models regularly.	ird party risk projection tools. T	'he portfolio manager	as well	

Use the checkboxes to select the updated response content from Loopio and apply that content to the combination of Product and question listed.

**Note:** This will not publish the updated response. Navigate to the Product Review page for a final review and to publish the updated response.

**NOTE:** The base URL should contain domain information. Do **not** include protocol prefix such as http:// or https://.

If you are having trouble connecting, contact Door's Support Team at <a href="mailto:support@doorfunds.com">support@doorfunds.com</a>

### Linking to RocketDocs Content

DDQ Form - Right Hand Side - Call Out Menu

When in The Standard Questionnaire form, click a question to start editing. The right hand controls menu in the edit question modal includes several options for working with response content:

8	© Controls	
	Save and next	
	Save	
(	🕚 View previous responses	
	Import from Word	
<	Dink to RocketDocs	>
ĺ	Apply elsewhere	

Selecting "Link to RocketDocs" will bring up a dialog where you populate the RocketDocs ID for the piece of content to link.

Once this link is created, Door will retrieve the content of the Response stored in RocketDocs under this ID and populate the Response to the question on Door with those contents.

**Commented [SP1]:** I've added more details here to highlight where the right hand menu is located and how it can be accessed. Again, wording may need to be adjusted here to make it more clear.

You may edit the Response at this point, but the link between this Question and the RocketDocs Content ID will remain. Changes to the Response here will not result in an update to the Answer stored in RocketDocs.

Door will monitor this Content ID in RocketDocs for a change in the Answer, stored in RocketDocs. Door allows for an update using the new Answer contents through the Update form on the Door Dashboard. See the next section for more information on updates.

You can remove this link from within the response form by choosing the "remove link" icon.

Manage Responses - Edit Response

When in Manage Responses, it is possible to Edit Response to update content for every product where the Response was used. Inside the modal for editing the Response, it is possible to link to a RocketDocs content ID, and apply that Answer content as the Response.



This will apply to all the products where this Response is used. This is reflected with a link that appears for each product where the response is used.

MANA CHOO RESPO BELOV	IGE YOUR RESPONSES SEA CONTECT TO DISPLAY DATE BY SELECTING A PRODUCT W	Region: United States Broad neer Approach Webicle Type: Open End Fund
Patag	asco International Small Cap Fund	*
B Str	C Vehicle Current firm content	Apply to products Q positi
	B2 B3 B4 People II: Roles, Responsibilities & Decision-Making B5 B5 B7 B8 B9 B10 B11 B12	
Θ	B.4.1 / Who are the primary drivers of the Strategy's positioning and performance?	3 responses available
		Used by 5 products
0	The portfolio manager works with the investment committee to establish the postioning and performance of the Strategy Edit response 🖉	Patapico Small Cap Crowth Fund ${\cal O}$ Patapico Dynamic Diversified Portbalo ${\cal O}$ Patapico Cowth Fund ${\cal O}$ Patapico Large Cap Crowth Partfolio ${\cal O}$ Patapico Large Cap Crowth Partfolio ${\cal O}$ Patapico Diversified Income ${\cal O}$

### **Content Updates**

#### Dashboard Tab for RocketDocs

Once enabled, the integration will display a RocketDocs tab on the Door Dashboard.



This tab includes by default a list of any RocketDocs content IDs used in TSQ responses that have updates as indicated by RocketDocs.

Use the toggle at the top of the RocketDocs area to move back and forth between showing All Links, and just those Links with updated content available.

#### Content Update Form

If there are updates available, the RocketDocs tab on the Door Dashboard will show a list of the content IDs with an update.

Use the (+) icon to expand the section for a specific content ID to see the full text of the updated content and where it is used to reply to the Standard Questionnaire on Door, and for which Products.

DOOR	
Firm	YOUR DASHBOARD
	On Door Requests Invitations Reports RocketDocs
4	ROCKETDOCS UPDATES Review all updates
Responses	RocketDoss ID * Updates available * Criter Content Renty ID.
Same Integration	2 3 A Rocket/Docs document linked to the following products and questions has been updated:
Support	Select all
•	Barnes Inc and Sons3804 Explain for each individual, the additional responsibilities for other Strategies and explain how they are (or are not) related to this Strategy.
	Elicon Ltd Ltd2027     Explain for each individual, the additional responsibilities for other Strategies and explain how they are (or are not) related to this Strategy.
	Carcia, Livingston and Mogra Explain for each individual, the additional responsibilities for other Strategies and explain how they are (or are not) related to this Strategy.
	Apply to withinked products Filewere contents

You may select a combination of question and product using the checkboxes to the left (or use "Select All") and then Apply to selected products directly.

Alternatively, use the "Review contents" button for a more detailed view of the current Response as listed on Door everywhere that the Response is linked to this content ID on RocketDocs.

RocketDocs ID 2	Apply to selected products Unlink selected	<	>	0
The investment committee is made up of other portfolio managers as well as leading investment officers of the firm and the Chief Risk Officer.				
Other portfolio managers on the investment committee are responsible for their own strategies. But at our firm we value their input and want them to weigh in on positioning.				
In the case of those without direct responsibility as a portfolio manager, these roles take up the majority of their time. But their presence on the investment committee is considered important for producing quality products that meet our internal standards.				
Select all				
Barnes Inc and Sons3804				
Explain for each individual, the additional responsibilities for other Strategies and explain how they are (or are not) related	ted to this Strategy.			
Ellison Ltd Ltd2027				
Explain for each individual, the additional responsibilities for other Strategies and explain how they are (or are not) relat	ted to this Strategy.			
Garcia, Livingston and Mcgrath LLC3406				
Explain for each individual, the additional responsibilities for other Strategies and explain how they are (or are not) relat	ted to this Strategy.			

Use the (+) icon to expand the section for a specific combination of Product and Question, to view the current Response and compare it to the latest Answer update retrieved from RocketDocs, including the ability to produce a difference to see what changed.

RocketDocs ID 2	Apply to selected products Unlink selected
In the case of those without direct responsibility as a portfolio manager, these roles take up the majority of their time. Bu producing quality products that meet our internal standards.	t their presence on the investment committee is considered important for
Select all     S	hot) related to this Strategy. In firm and the Chief Bisk Officer. In time. But their presence on the investment committee is considered important In time. But their posterior on the investment committee is considered important In the Risk Officer.Other postfolio managers on the investment committee are responsible for direct responsibility as a portfolio manager, these roles take up the majority of their time. But identified.

Use the checkboxes to select the updated content from Loopio and apply that content to the combination of Product and Question listed.

**Note:** This will not publish the updated response. Navigate to the Product Review page for a final review and to publish the updated response.