

# Door - Loopio Integration Guide

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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:

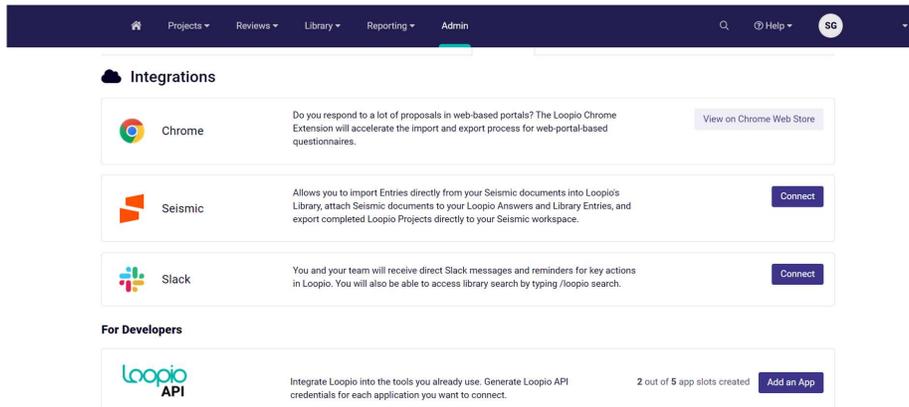
- An active account on the Door platform for Asset Managers
- An active account on the Loopio response platform at the Plus or Advanced Subscription level
  - Clients with Essentials subscription agreements will not be able to integrate with Door
- A Loopio API Key and API secret as provided by the Loopio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

## Loopio Setup

### Obtaining an API Key

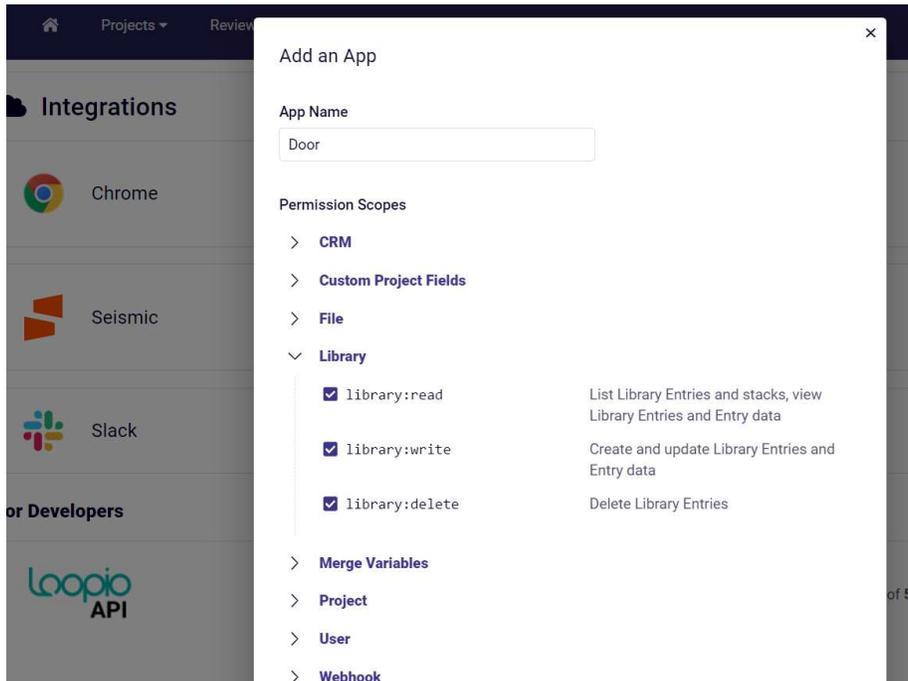
The Door-Loopio integration is enabled on a per customer basis. The following workflow describes how to obtain the Door-Loopio integration API key on a per customer basis.

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



- 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.
- Save

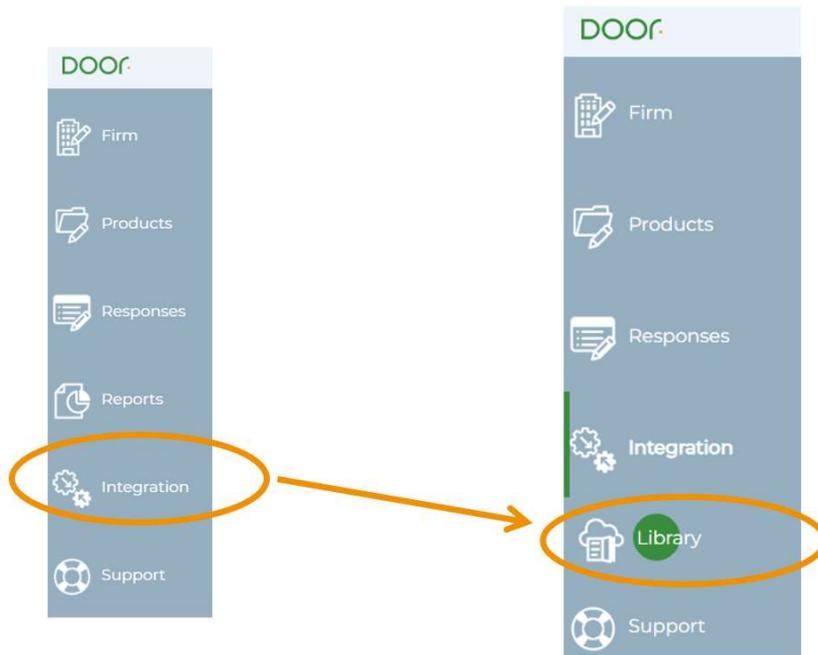
- **Important:** be careful to take note of the Secret. This information is only available at the time of creating the key and is not recoverable later. The Key information is available later, but the secret will not be.



## 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.

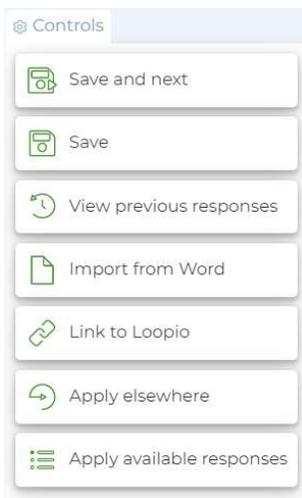
**NOTE:** Configuration of the integration is done once for the firm on Door. Only users with the role of AM Lead or AM Deputy will have permission to configure the integration. Other users will see a read-only version of the configuration status.

## Linking to Loopio Content

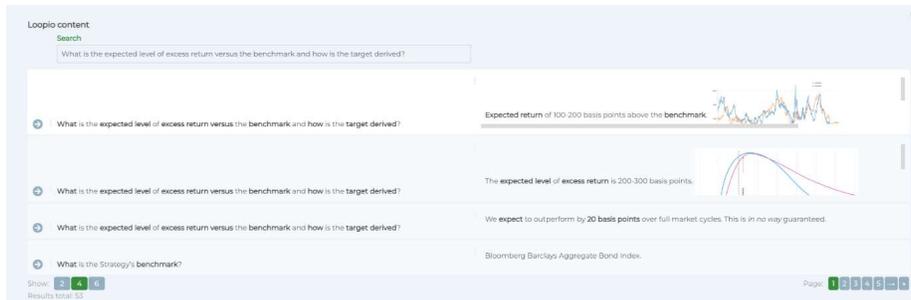
### Questionnaire Form - Right Hand Side – Call Out Menu

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
- **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



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).

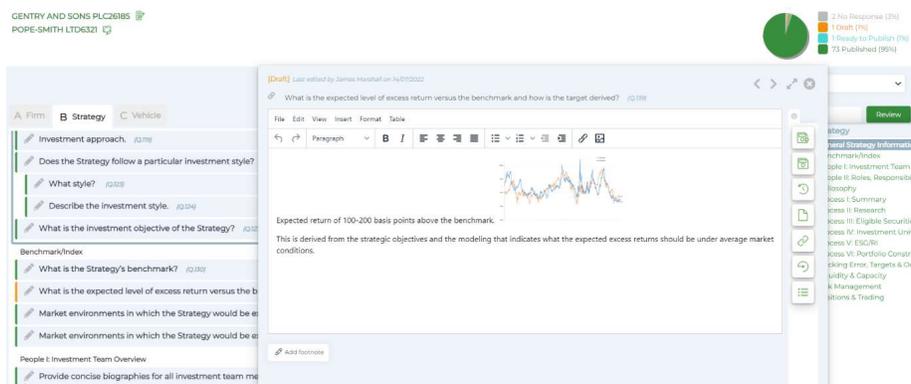


By default, the search is conducted using the Door Question statement (for instance “Describe the investment style.”). It is possible for the user to override that search content in order to search the Loopio content library using any terms that might help return a useful result set.

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.



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
  - 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

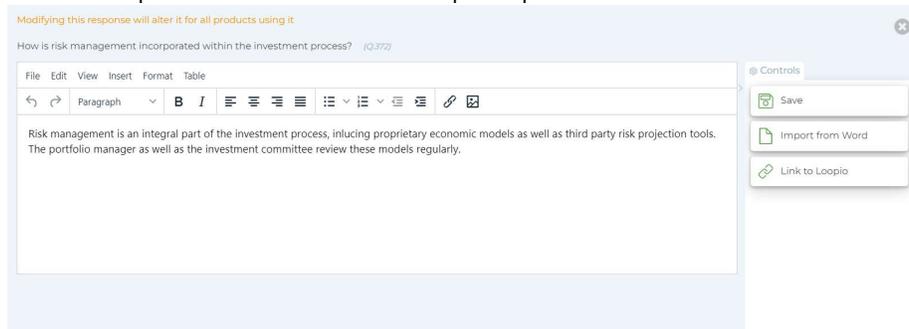
There are two aspects of Library Level Merge Variables to note:

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.



The screenshot shows a web interface for editing a response. At the top, there is a title "How is risk management incorporated within the investment process?" followed by a question ID "(Q,372)". Below the title is a rich text editor with a menu bar containing "File", "Edit", "View", "Insert", "Format", and "Table". The editor contains the text: "Risk management is an integral part of the investment process, including proprietary economic models as well as third party risk projection tools. The portfolio manager as well as the investment committee review these models regularly." To the right of the editor is a "Controls" panel with three buttons: "Save", "Import from Word", and "Link to Loopio".

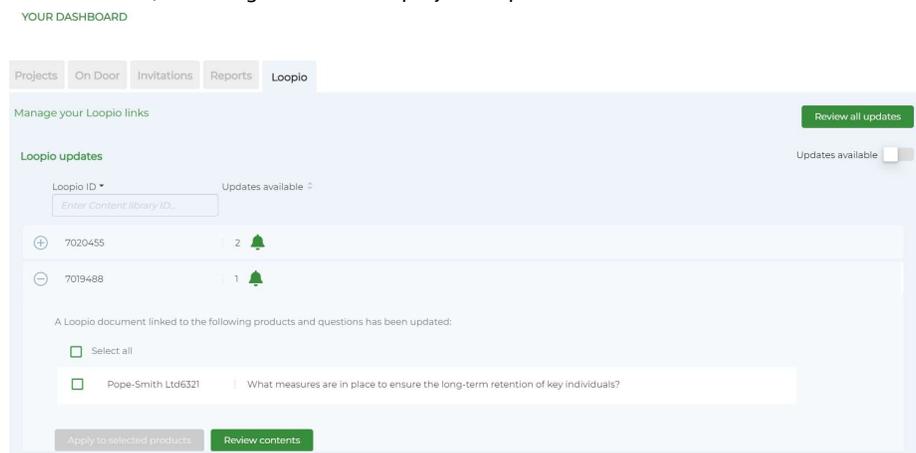
If the response is used for more than one product, linking from Manage Responses will establish the link across all products where the response is used. This will be reflected in the Manage Response listing, showing that every place where the response is used, the link exists.



## Content Updates

### Dashboard Tab for Loopio

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



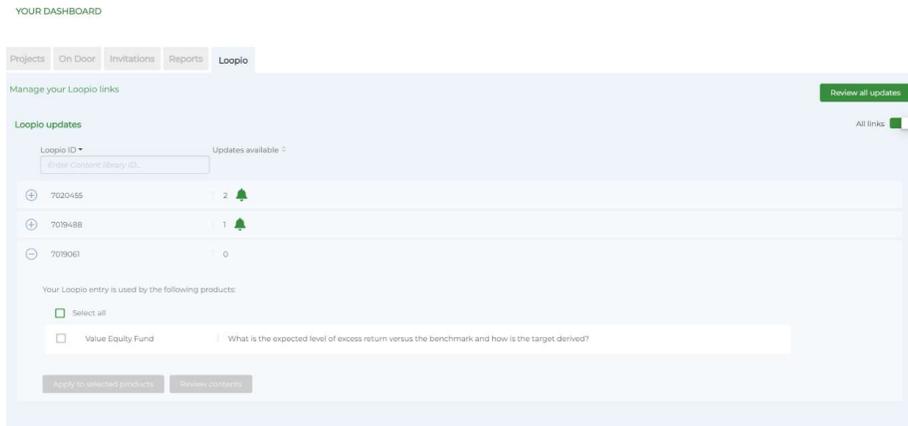
This tab includes by default a list of any Loopio Library Entry IDs used in Door question responses that have updates as indicated by Loopio.

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.

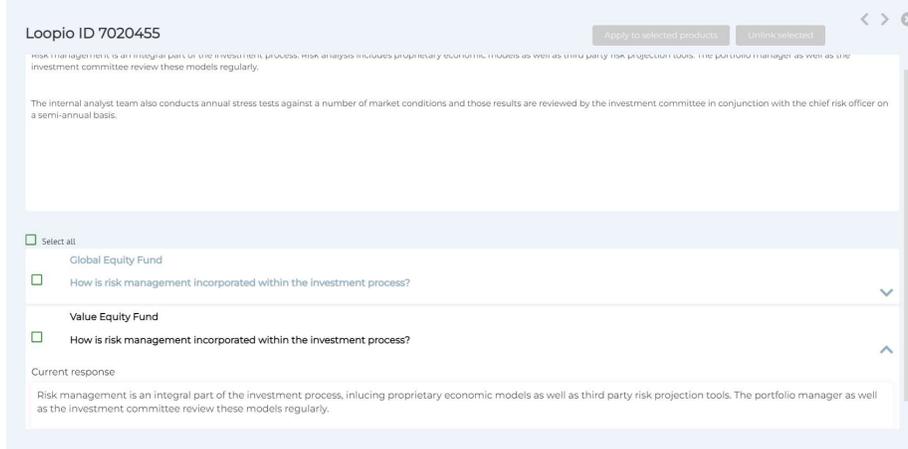
Use the (+) icon to expand section for a specific content ID to see the full text of the updated Library Entry response content and where it is used to reply to the Questions on Door, and for which Products.



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.



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.

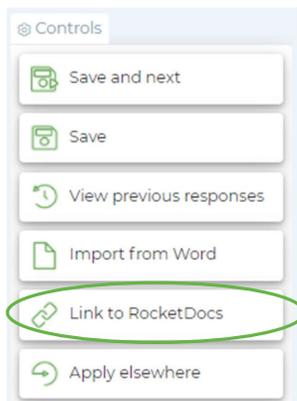
**NOTE:** The base URL should contain domain information. Do **not** include protocol prefix such as http:// or https://.

If you are having trouble connecting, contact Door's Support Team at [support@doorfunds.com](mailto:support@doorfunds.com)

## Linking to RocketDocs Content

DDQ Form - Right Hand Side – Call Out Menu

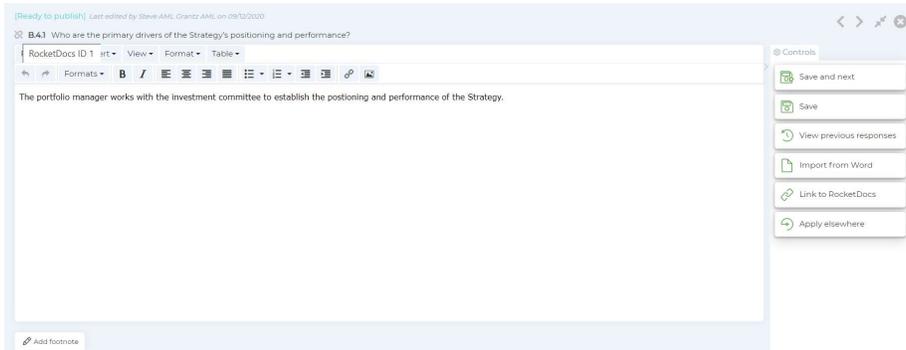
When in The Standard Questionnaire form, click a question to start editing. The right hand controls menu in the edit question modal includes several options for working with response content:



**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.

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.



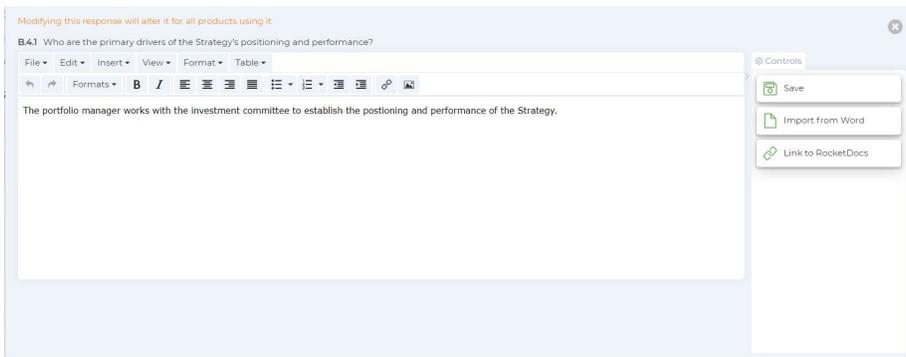
You may edit the Response at this point, but the link between this Question and the RocketDocs Content ID will remain. Changes to the Response here will not result in an update to the Answer stored in RocketDocs.

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.

MANAGE YOUR RESPONSES  
CHOOSE A CONTEXT TO DISPLAY  
RESPONSES BY SELECTING A PRODUCT  
BELOW

Region: United States  
Broad Category: Equity  
Investment Approach: Active  
Vehicle Type: Open-End Fund

Patapasco International Small Cap Fund

B Strategy C Vehicle

Current firm content Apply to products

B.1 B.2 B.3 B.4 People II: Roles, Responsibilities & Decision-Making B.5 B.6 B.7 B.8 B.9 B.10 B.11 B.12 B.13 B.14 B.15 B.16 B.17

B.4.1 / Who are the primary drivers of the Strategy's positioning and performance? 3 responses available

The portfolio manager works with the investment committee to establish the positioning and performance of the Strategy.

Used by 5 products

- Patapasco Small Cap Growth Fund
- Patapasco Dynamic Diversified Portfolio
- Patapasco Growth Fund
- Patapasco Large Cap Growth Portfolio
- Patapasco Diversified Income

Edit response

## Content Updates

### Dashboard Tab for RocketDocs

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



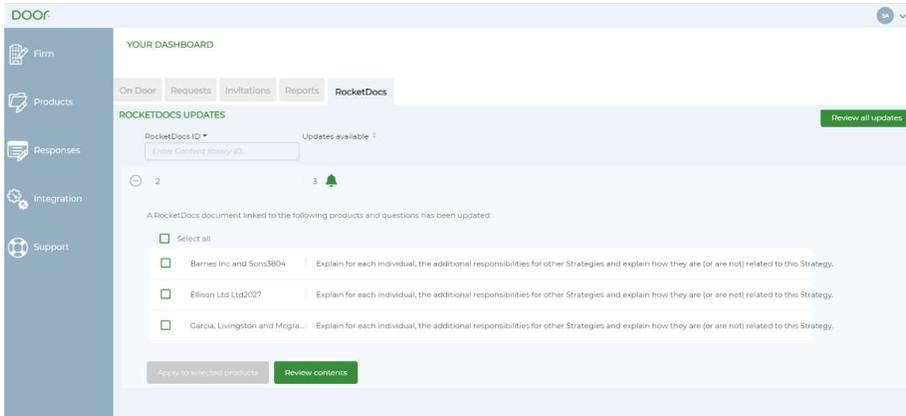
This tab includes by default a list of any RocketDocs content IDs used in TSQ responses that have updates as indicated by RocketDocs.

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.

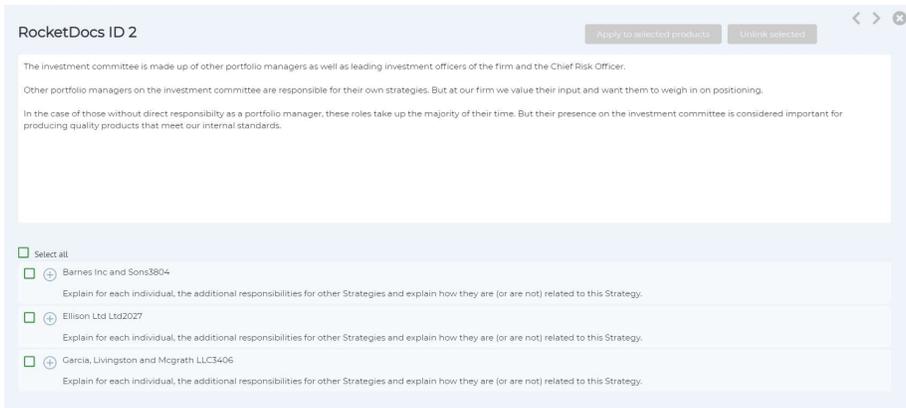
### Content Update Form

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.



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.



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. 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 to this Strategy.

Current response

The investment committee is made up of other portfolio managers as well as leading investment officers of the firm and the Chief Risk Officer.

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.

Difference

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.

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.