

Door - Responsive Integration Guide

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Overview

This document lists the steps for integrating the Door Platform for Asset Managers with the Responsive Response Management System. This integration allows enterprises to make best use of Responsive 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, analysts, and fund investors.

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

Requirements

The Door-Responsive integration has the following requirements:

- An active account on the Door platform for Asset Managers
- An active account on the Responsive response platform
 - Contact your Responsive relationship manager to verify you have the integrations package needed to integrate with Door.

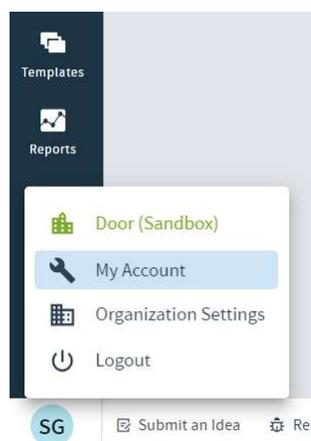
Responsive Setup

Obtaining an API Key

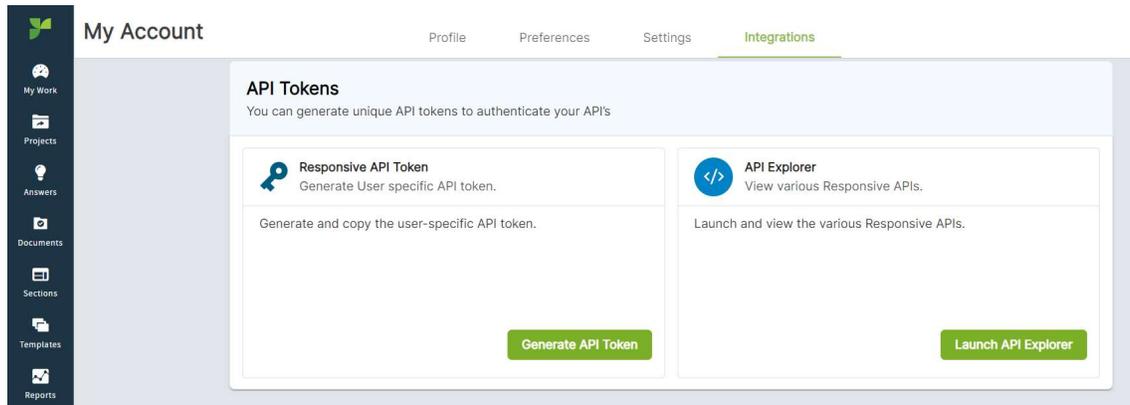
The Door-Responsive integration is enabled on a per customer basis. The following workflow describes how to obtain the Door-Responsive integration API key on a per customer basis.

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

- First, navigate to the username in the lower left hand corner and in the subsequent pop-up menu, select My Account.



- From the top of the My Account page, select the far right hand tab, “Integrations.”



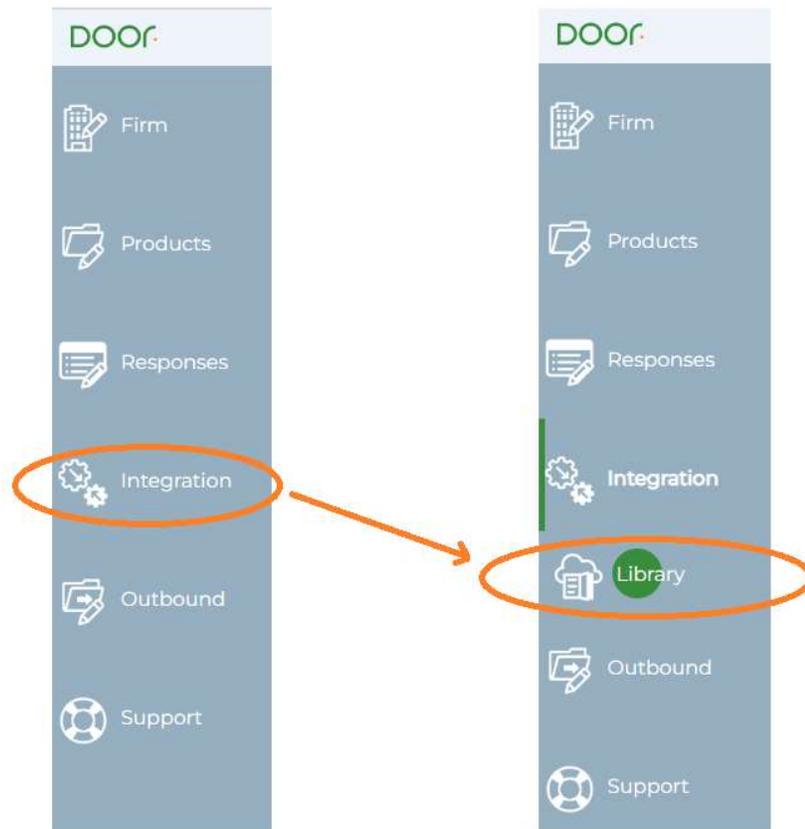
- From there, under API Tokens and the Responsive API Token panel, select the “Generate API Token” button.
- **Important:** be careful to take note of the API Token. This information May not be retrievable later.
- Note: if the API key is re-generated, existing configurations that use a previous API key generated by that user may become invalid. See best practice recommendation that follows.

Best Practice Recommendation: Create a service account on Responsive with a name like “Door Service Account” and generate the API Key from that user. This way if an API key is ever needed for an additional integration, creating it through a different account will not invalidate the key generated by the service account used to create the API Key used for Door integration configuration.

Door Setup

Connecting to Responsive

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



From there select “Responsive” from the content library and populate the information for API Token.

DOOR

Firm

Products

Responses

Table responses

Integration

CONTENT LIBRARY INTEGRATION

Choose your Content library

Responsive

Enter base URL

app.rfpio.com/rfpserver/ext/v1

Enter API token

Add credentials

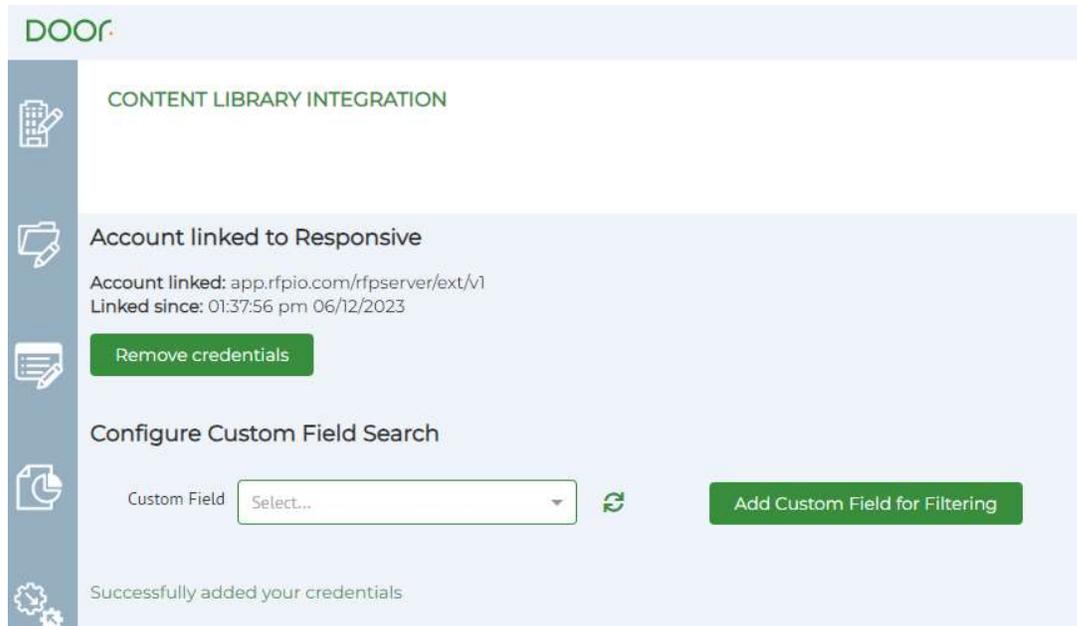
The base URL will default to the standard Responsive API location and should not require a change.

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 “Responsive” 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.

Once this is complete, a new form appears with the option to add custom fields for use with content search and filtering on Door.



This optional configuration allows you to add your own custom fields for use with content search and filtering. Select only the fields that you will use in filtering, as all configured fields appear in the search filter for all users.

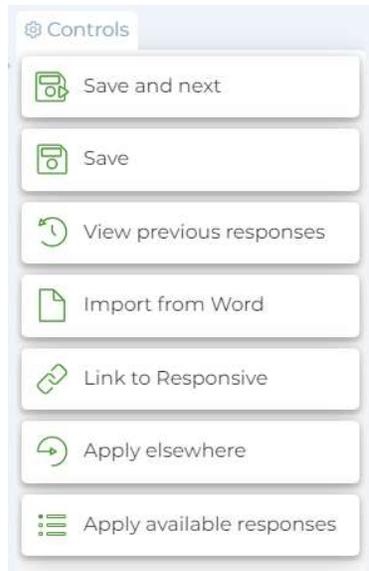
Note: Be sure that in your Responsive Organization Settings > Content Library the custom fields that you want to use for filtering on Door are marked as “Searchable”. Door will list all custom fields, but only those that are Searchable in Responsive can be used for filtering results.

Linking to Responsive 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 Responsive** - to link to a piece of content in a Responsive content library, if integration is enabled
- **Apply Elsewhere** - push the response to other products
- **Apply Available Responses**

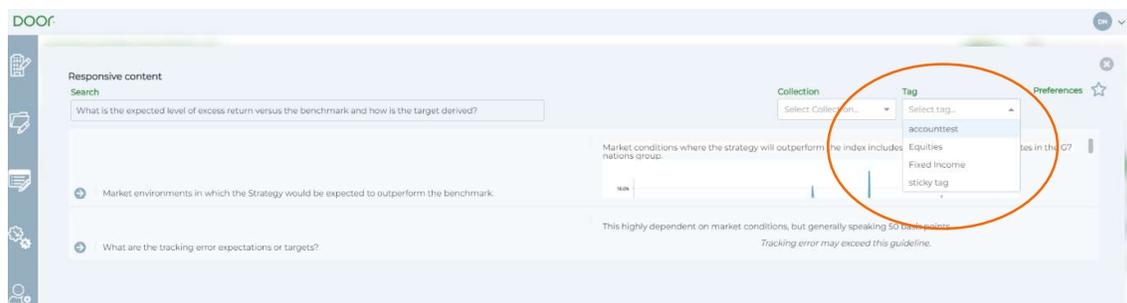


Selecting “Link to Responsive” will bring up a dialog where you search Library Entries stored in Responsive, then on selecting a Response content, the response contents will be copied from the Response content into the Door response form (including images).

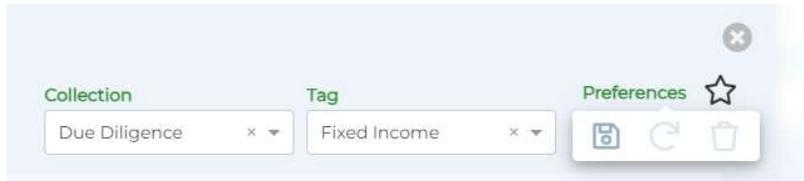


By default, Door conducts the search using the Door Question statement (for instance “Describe the investment style.”). It is possible for the user to override that search contents to search the Responsive content library using any terms that might help return a useful result set.

Note: It is also possible to narrow the search results by selecting a specific Responsive content Collection or Tag.. In the upper right hand side of the search modal are dropdowns for Collection and Tag. Select a Collection and/or a Tag to search only content that belongs to that Collection and./or is Tagged accordingly.



Note: The Preferences option in the upper right-hand side allows you to save Collection and Tag selections. This way, as an editor works through a question set where a particular set of Collection and/or Tag is appropriate for the entire product, these search filter settings may be saved for ease of reuse. Click the star and then the save icon in order to save the current search filter settings. Use the Trashcan icon in the Preferences window to clear the search filters.

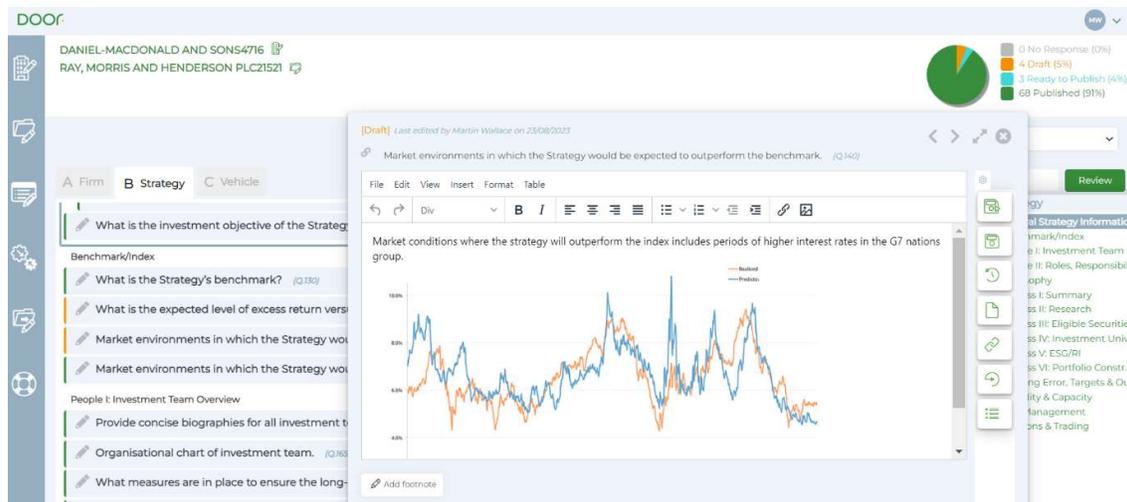


Note: If there are custom fields enabled, you will see those under the top filter row of text, category, and tag. See the illustration for an example. The Preferences option can save values used for filtering on custom fields as well as category and tag.



Use the arrow icon to the left of the Response content to link this Response content to this question for this product on Door.

Once this link is created, Door will retrieve the content of the response stored in Responsive under this Response content, 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 Tag contents
 - **Note:** Door is able to resolve Merge Tag contents for Responsive Merge Tags with Category: Content
 - Project level Merge tags are not supported
- Tables created in Responsive
 - Includes table structure including merged cells

Content import will not include:

- Changes in font face and style
- Attachments

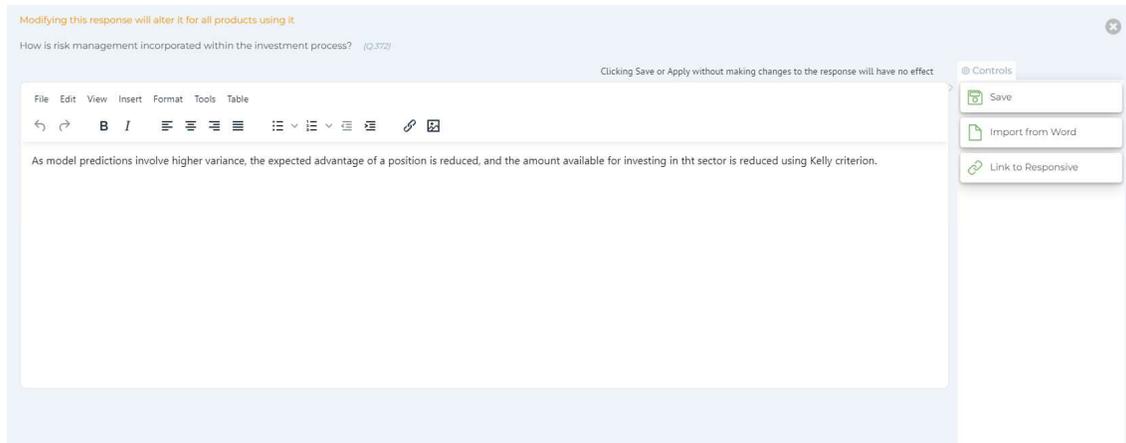
You may edit it at this point. Edits made on Door will NOT result in suggested changes for review in the Responsive Library. However, a link is established between this question on Door and the specified Response content in Responsive.

Door will monitor this Response content in Responsive 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.

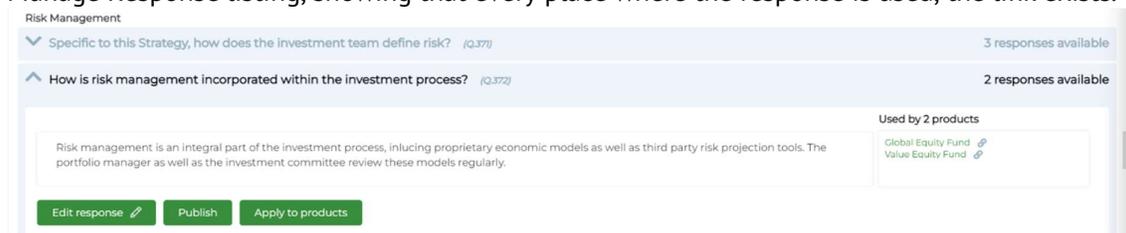
You can remove this link from within the response form by choosing the “remove link” icon.

Manage Responses

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



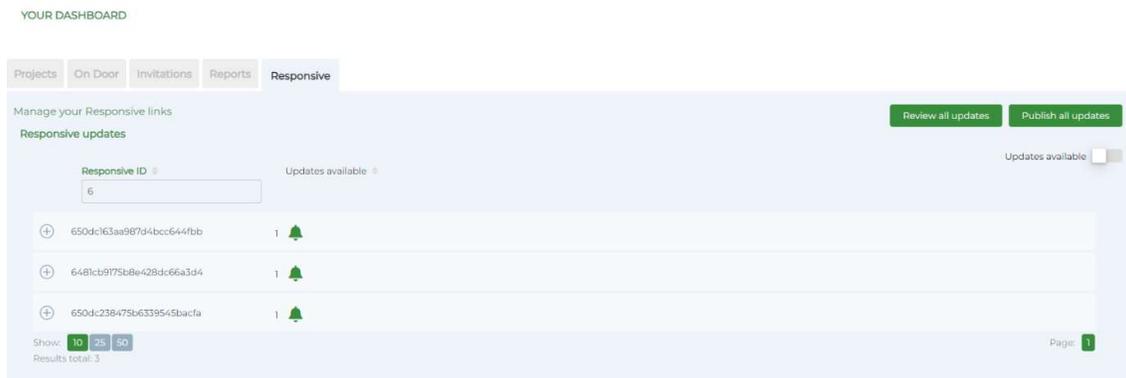
If the response is used for more than one product, linking from Manage Responses will establish the link across all products where the response is used. This will be reflected in the Manage Response listing, showing that every place where the response is used, the link exists.



Content Updates

Dashboard Tab for Responsive

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



This tab includes by default a list of any Responsive Response content IDs used in Door question responses that have updates as indicated by Responsive. Use the toggle at the top of the Responsive 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 Responsive tab on the Door Dashboard will show a list of the Response content IDs with an update.

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

Use the buttons at the top to “Review all updates”, or go directly to “Publish all updates” (there is a confirmation dialogue before publishing all available updates).

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 Responsive.

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 Responsive, including the ability to produce a difference to see what changed.



Responsive ID 650dc238475b6339545bacfa

Apply to selected products Apply and publish to selected products Unlink selected

Patapsco Advisors outsources the administration of our proxy voting to ISS. We have the ability to run an ESG screen when required. As a policy, all shares are voted. We generally take advantage of proxy voting as investors with interest in DEI and therefore an interest in behaving as an active shareholder.

Patapsco advocates for independent directors for firms where we invest, voting shares for board elections appropriately.

This is in keeping with our policy as a fiduciary to respect the interests of investors.

Select all

Firm information

Describe the proxy voting policy.

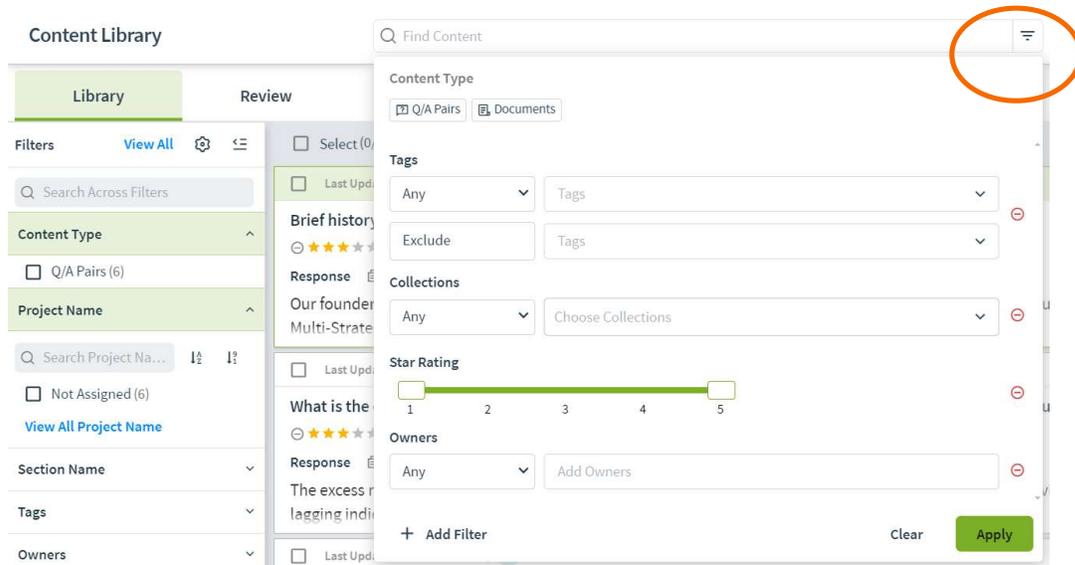
Use the checkboxes to select the updated response content from Responsive and apply that content to the combination of Product and question listed. There are optional buttons to apply the update (putting the response into “Ready to Publish” status), or apply and publish at the same time.

Responsive – Filtering for Content Used on Door

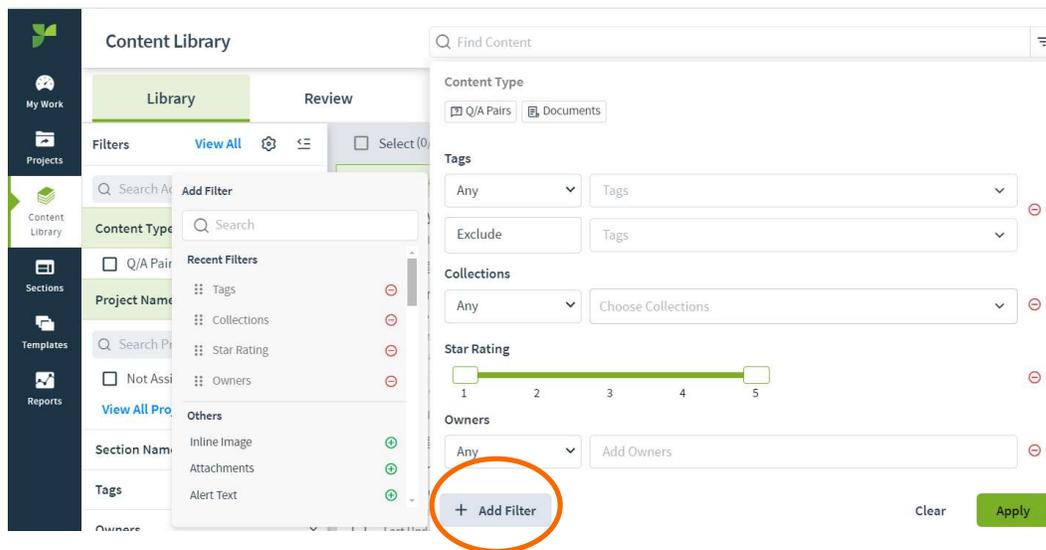
Responsive offers inside the Content Library to filter the library entries shown. This now includes the ability to add a Filter based on usage with External systems such as Door.

Filter Definition

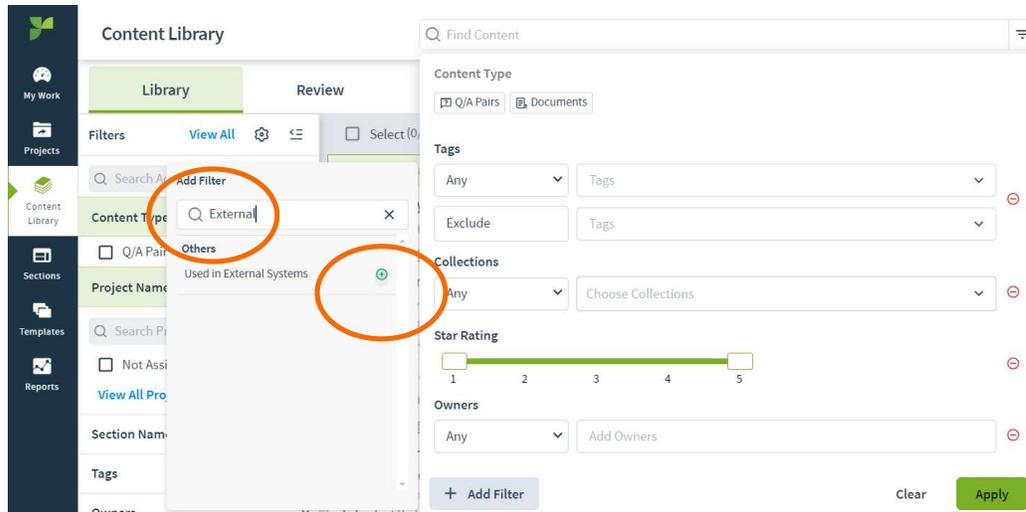
From the Content Library page, select the details link on the right hand side of the Find Content search bar above the list of library entries.



Then select **+ Add Filter** from the lower left-hand side of the popup to bring up a side menu of available filters:



If the filter options for External systems does not show, type "External" into the Search to enable it, then use the plus icon to add that filter, as shown in this figure:



Choose Apply.

Filter Use

Once the “Used in External Systems” filter is enabled, you can use it in a search and select Door to filter the content library to only show entries used in links on Door:

Find Content

Content Type
 Q/A Pairs Documents

Tags
Any Tags
Exclude Tags

Collections
Any Choose Collections

Star Rating
1 2 3 4 5

Owners
Any Add Owners

Used in External Systems
Door
 Door

Add Filter Clear Apply

Save this filter configuration using the floppy disk icon that appears to the right of the filter once it is in use:

Filtered: Used in External Systems: DOOR x Clear all   

Select (0/2)