Door - RocketDocs Integration Guide

January 2024

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Overview

This document lists the steps for integrating the Door Platform for Asset Managers with RocketDocs 2.0 for Collaborative Response Management. This integration allows enterprises to make best use of RocketDocs 2.0 for managing content while leveraging the power of the Door Standard Questionnaire for efficiency and speed in publishing and sharing due diligence information for fund investors.

This document contains information on how to organize your content on RocketDocs 2.0 for use on Door, as well as connecting the two platforms, and finally, using and maintaining linked content through Door.

Requirements

The Door-RocketDocs integration has the following requirements:

- RocketDocs 2.0 is required for integration
- Content must be stored as inline text (not as attachments or imported Word documents)
- Content must be part of a dedicated Content Library or use a Content Attribute specifying that Door may access and use the content

RocketDocs Setup

Content Organization

Content for the Door-RocketDocs integration can be identified in one of two ways.

1. Content Library

RocketDocs 2.0 has the concept of a Content Library. Storing content in a Content Library allows content managers to store related content into specific Libraries complete with a similar workflow and similar permissions. In this scenario, a content manager can store Door specific content in a single location allowing for easier management of who, in the organization, can interact with the content. This is the simplest setup for the Door-RocketDocs integration.

Add a Content Library

- From the RocketDocs 2.0 Main Navigation, select Administration then select Content Settings
- Under the Library heading, select the plus sign
- Fill in the appropriate information for the Content Library and select Save
- Provide the name of the Content Library to your RocketDocs Account Manager

2. Content Attribute

RocketDocs 2.0 has the concept of Content Attributes. Having Content Attributes available allows content managers to “tag” content records with metadata.

Examples

Below are a few examples of how Content Attributes can be used to specify that a content record is available for the Door-RocketDocs 2.0 integration:

- A content manager can create a List Attribute with the values: Policy Document, Sales Document, Human Resources Document, Door Document

- If a content manager selects “Door Document” from the list above when categorizing the content record, that specific record would be made available for the integration
- A content manager can create a Contact Attribute with a default value of the Door Content Manager. If a content manager selects to “tag” a content record with the Door Content Manager, that specific record would be made available for the integration.
- A content manager can create a Yes/No Content Attribute that signifies a content record is available for the integration

Acceptable Content Attribute Types for Door Integration

The following Content Attribute types may be used to mark content as available for use on Door:

- Yes/No
- Text

Add a Content Attribute

- From the RocketDocs 2.0 Main Navigation, select Administration then select Content Settings
- Under the Attributes heading, select the plus sign
- Fill in the appropriate information for the Content Attribute and select Save
- Provide the name and value of the Content Attribute to your RocketDocs Account Manager

Enable Content Record for integration

- From the RocketDocs 2.0 Main Navigation, select Content Libraries then select the Content Library that contains the content where you want to set the Content Attribute
- Select the link for the Content record then select Taxonomy and Tags on the Content Navigation
- Set the value for the Content Attribute from the previous section then select Save

Notes on Content Availability

- There is not a required published status for Door to retrieve RocketDocs content.
- Door cannot retrieve Archived content from RocketDocs.

Obtaining an API Key

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

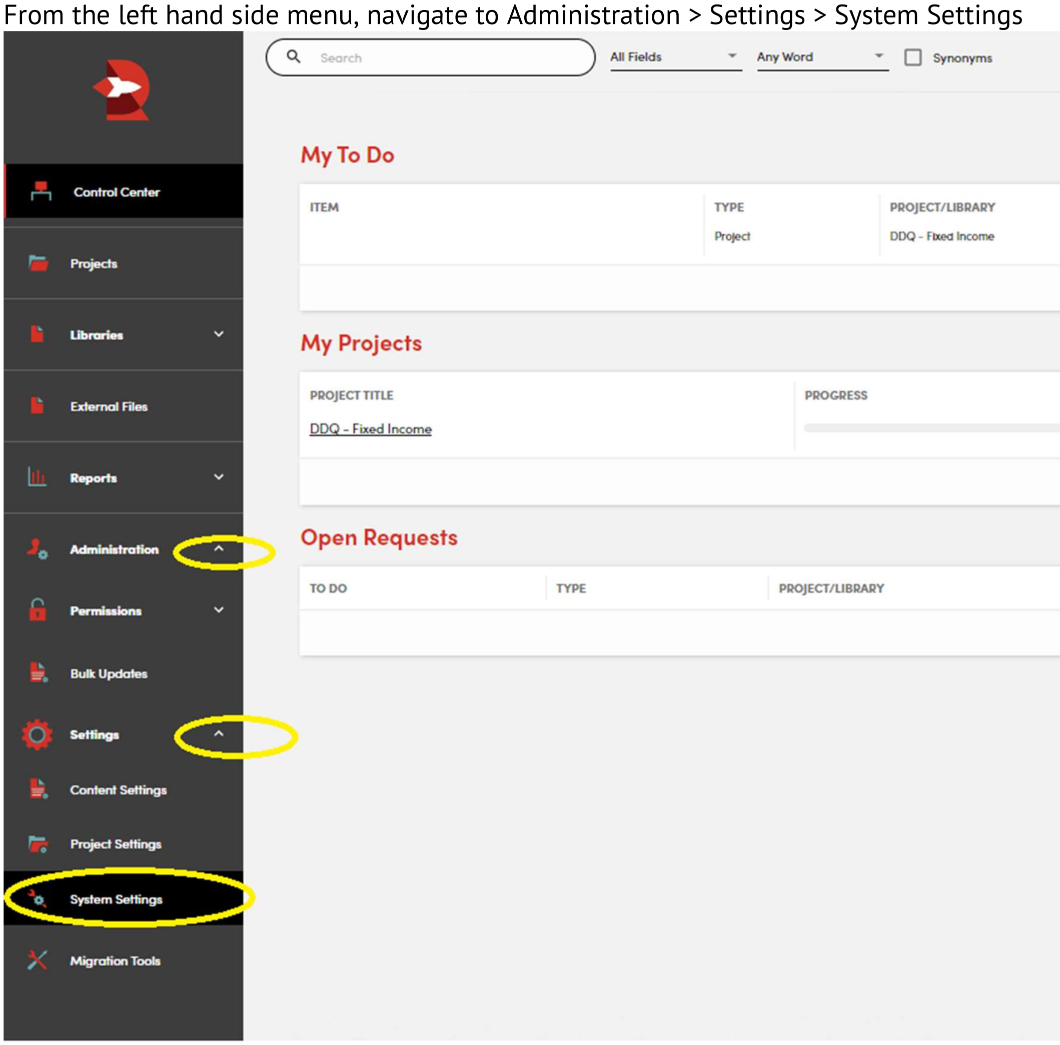
- The customer must contact their RocketDocs Account Manager with their desire to enable the Door-RocketDocs integration.
- The RocketDocs Account Manager will work with the customer to determine their path for enabling content for Door.

- The RocketDocs Account Manager will reach out to the RocketDocs Technical Team with the information gathered from the customer.
- The RocketDocs Technical Team will make the appropriate database entries to enable the Door-RocketDocs integration.
- The RocketDocs Technical Team will reach out to both the RocketDocs Account Manager and Door Technical team with the API Key.

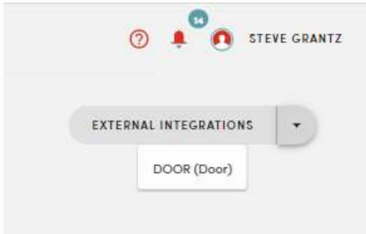
Confirming Configuration

Once an API key issued and in use, a RocketDocs user with appropriate permissions can verify the Content Configuration (either library or attribute) as follows:

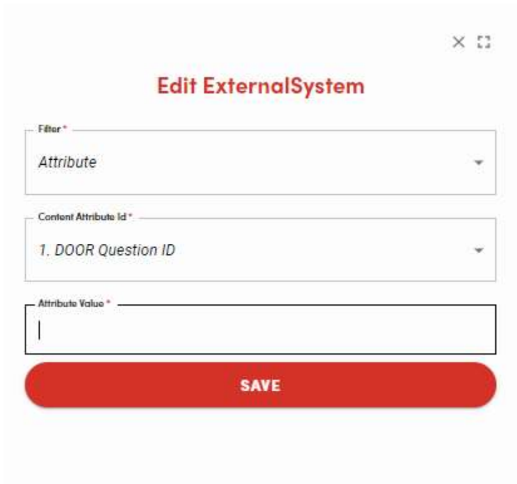
1. From the left hand side menu, navigate to Administration > Settings > System Settings



2. From the System Settings page, on the upper right hand side, select the dropdown menu for "External Integrations" and select DOOR.



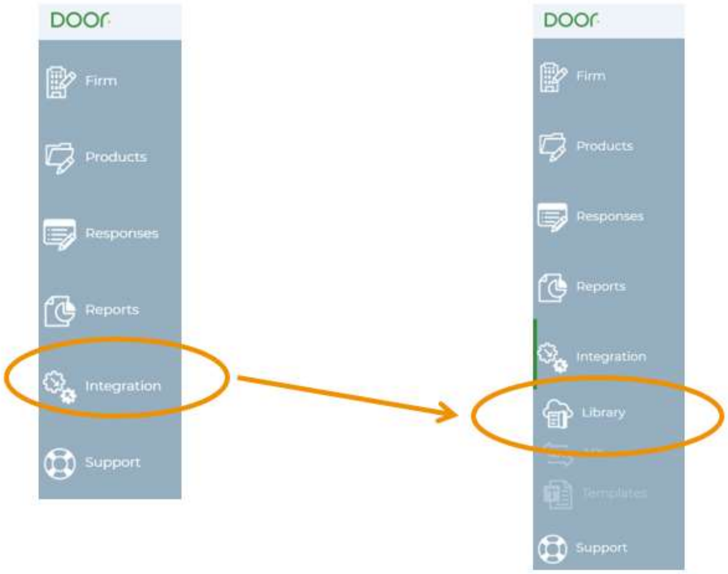
3. Select either Library and Attribute, populate the options, and use the "SAVE" button.



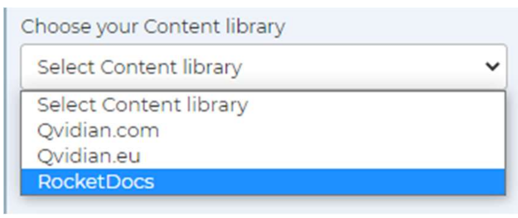
Door Setup

Connecting to RocketDocs

From the left-hand side main menu of the Door interface, select Integration, and then the Library sub-menu item.



Select RocketDocs from the Content Library dropdown menu:



Once RocketDocs is selected, enter in the base URL and API key details, then use the "Add credentials" button to connect.

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

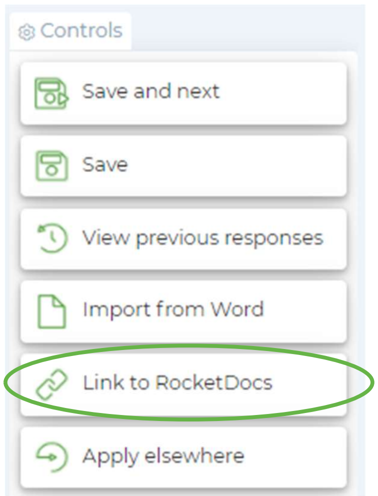
If you are having trouble connecting, contact Door's Support Team at support@doorfunds.com

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 RocketDocs Content

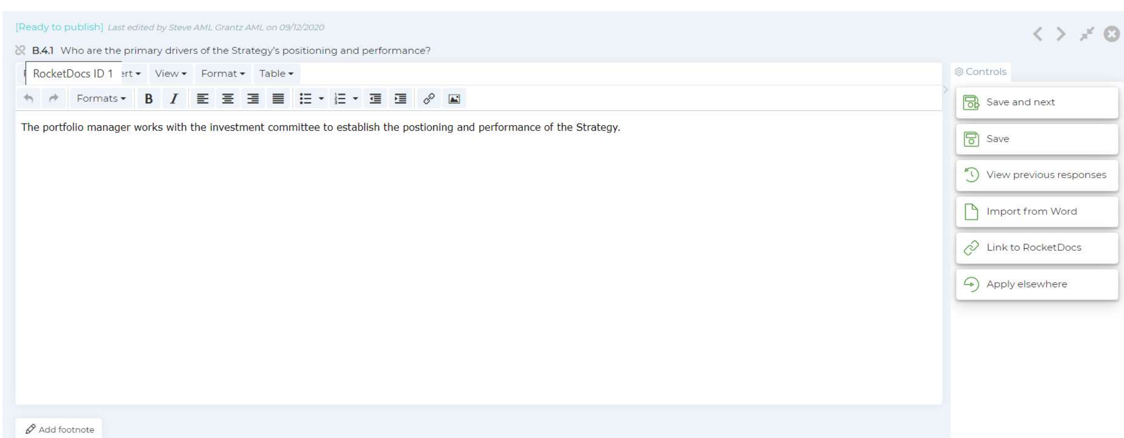
DDQ Form - Right Hand Side – Call Out Menu

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:



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.



Content Usage

RocketDocs response content information includes a question/topic and two ways to provide a response:

1. **Short text** (also referred to as inline content)

2. **Attachment content** - which may be entered and edited with a WYSIWYG editor in the RocketDocs UI, but results in an update to the attachment (DOCX format)

By default, Door will use the response content found in the short text field. However, in the case that the short text field is blank, and an attachment exists, Door will use the attachment as the source of the response.

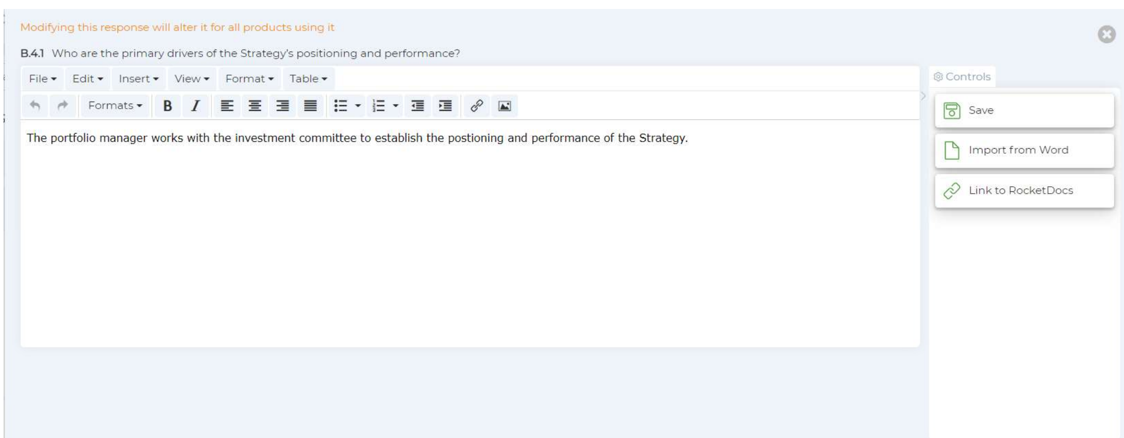
You may edit the Response at this point, but the link between this Question and the RocketDocs Content ID will remain. Changes to the Response here will not result in an update to the Answer stored in RocketDocs.

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.

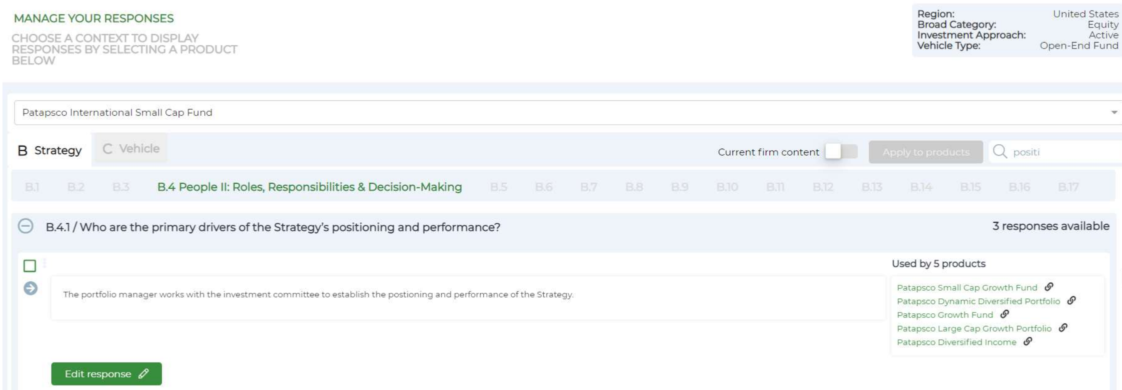
You can remove this link from within the response form by choosing the “remove link” icon.

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.



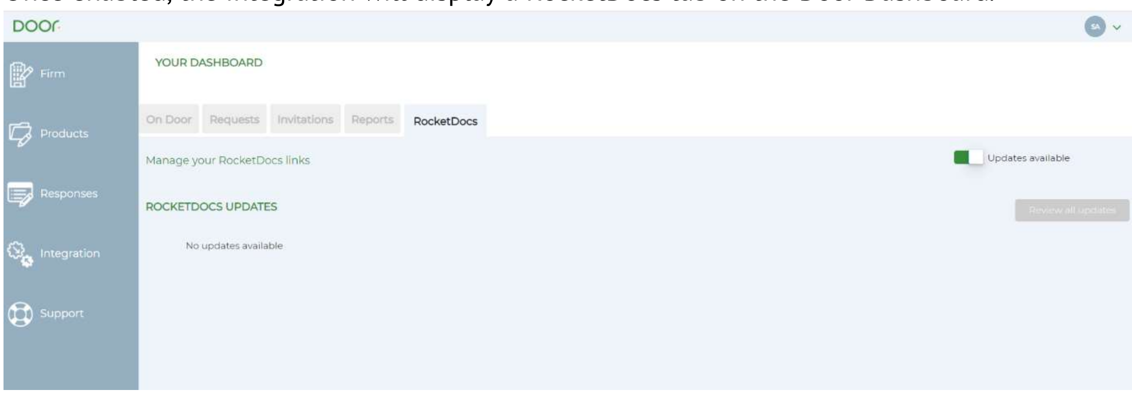
This will apply to all the products where this Response is used. This is reflected with a link that appears for each product where the response is used.



Content Updates

Dashboard Tab for RocketDocs

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



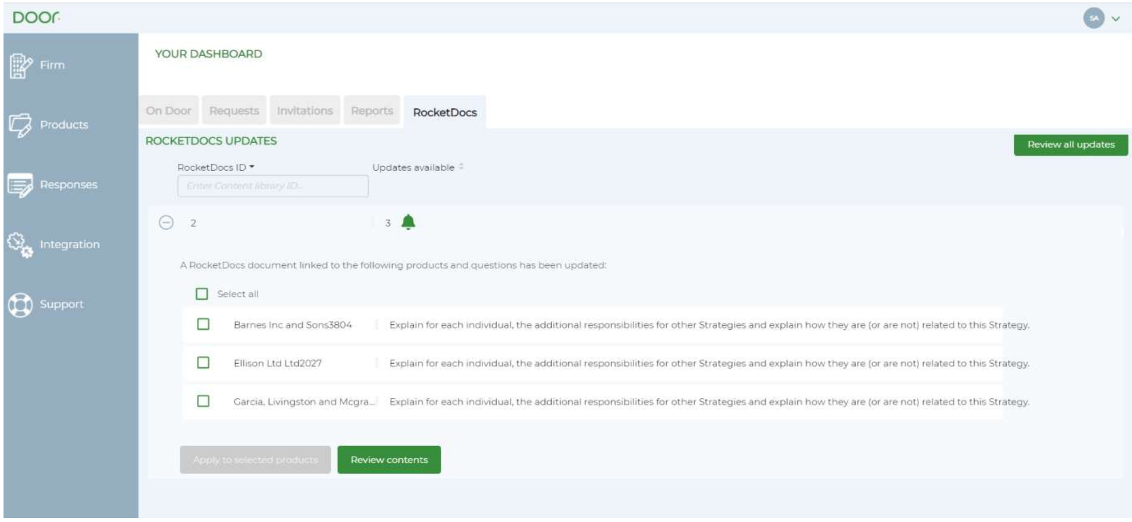
This tab includes by default a list of any RocketDocs content IDs used in TSQ responses that have updates as indicated by RocketDocs.

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

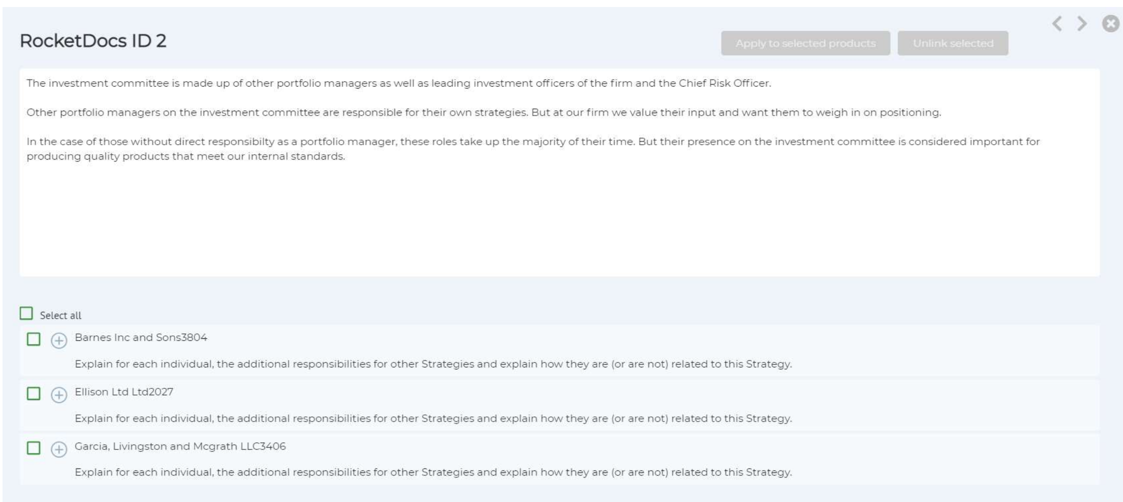
If there are updates available, the RocketDocs tab on the Door Dashboard will show a list of the content IDs with an update.

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.

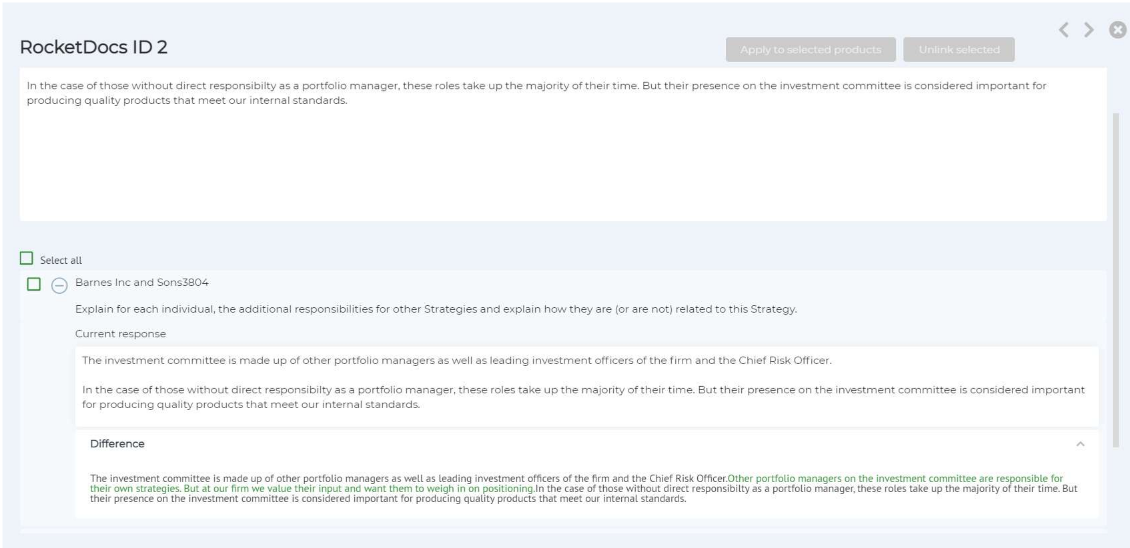


You may select a combination of question and product using the checkboxes to the left (or use "Select All") and then Apply to selected products directly.

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.



Use the checkboxes to select the updated content from RocketDocs 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.