

Getting Started with Qvidian for Microsoft Office

With this integration, users can access their Qvidian libraries directly in Word and Excel to search for and add answers to RFPs and automatically insert the best answers to questions in bulk. Contributors can also collaborate in real-time through Office Online, SharePoint, and Teams, and (if used with the Projects workspace) create and complete assignment workflows. This integration is optional and designed to complement (*not* replace) existing functionality.

What are the requirements to use this integration?

Licensed Qvidian User

- This integration is included for all licensed Qvidian users.
- All users must bring their own Microsoft Office licenses.

Run Microsoft Office Online, Office 365, or Office 2019

- This integration works with Office Online, Office 365, and Office 2019 (desktop).

Allow All Participants to View and Edit the Complete Response

- Owners cannot restrict participants from viewing or editing parts of the response.
- When used with Projects, assignments can help direct participants' attention.

Do Not Need to Submit New or Modified Content for Library Consideration

- Until a future release, closed-loop is only supported when working in Qvidian.

Who is this integration best for?

Teams that Work with Complex Excel-Based RFPs or Questionnaires

- Select Excel functionality, such as conditional cells, protected sheets, macros, adding/resizing columns, etc., is only supported in Qvidian for Microsoft Office.

Infrequent or Light Qvidian Users

- This integration's streamlined interface and controls make it easy for users who are less familiar with Qvidian to finish their work fast, with almost no learning curve.
- More advanced functionality is only available when working in Qvidian.

Teams Who Cut and Paste from Qvidian's Library

- If your team uses Qvidian as a library to cut and paste from into Word or Excel RFPs, this integration will likely boost productivity. Please see below for details.

How do I enable this integration?

Note: Search Product Help for "Qvidian for Microsoft Office" for detailed installation directions.

Self-Service Installation- Install on-demand from [Microsoft AppSource](#). Please download the version that matches the location of your Qvidian instance (this may be different from your physical location): [US-Version \[Download\]](#) | [EU-Version \[Download\]](#)

Guided Installation- If you cannot use self-service installation (see above), please ask your Qvidian admin to [contact Qvidian support](#) to get started with an alternate method.

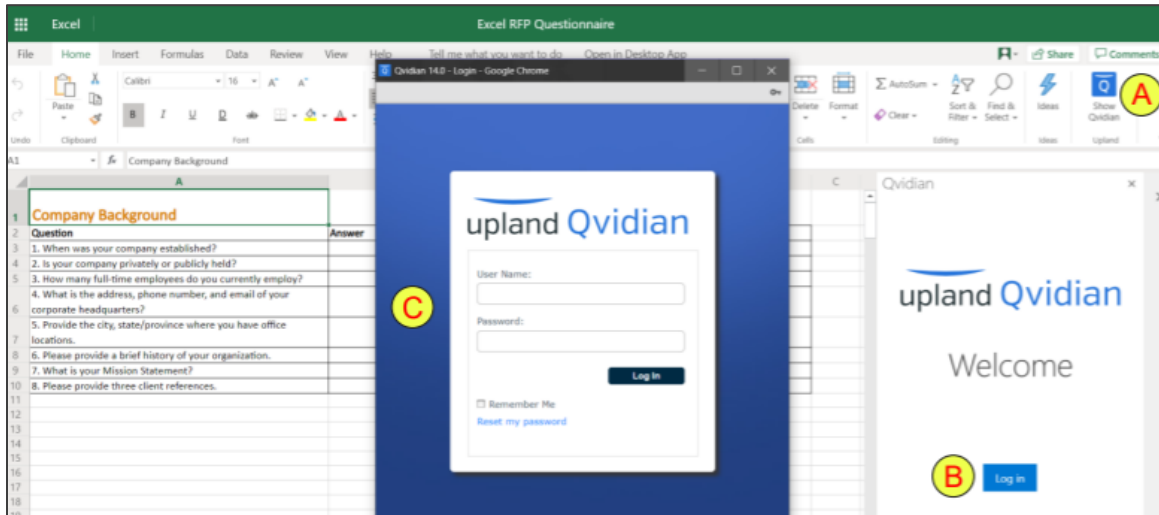
What user permissions are required?

1. "Allow user to log into Qvidian for Microsoft Office"
2. "Allow user to load unsliced RFP files to a project"

(*Note:* If these permissions are not visible, please verify that the Global Setting "Enable features related to the Qvidian for Microsoft Office web add-ins" is set to "On".)

How do I access Qvidian for Microsoft Office?

After installing and enabling permissions (see above), in Word or Excel, click the “Show Qvidian” button in the Home menu (see “A” below). In the screen that appears in the right sidebar, click the “Log In” button (see “B” below), and then complete the process by entering your standard Qvidian credentials in the Upland Qvidian pop-up window (see “C” below).



How is this integration better than cutting and pasting from Qvidian’s library?

This integration adds Qvidian search and automatic answer recommendation to Microsoft Office, so users can work faster, without switching back and forth between a Qvidian library window and a response. This integration also replaces tedious cutting and pasting with clicking “Insert” to add a single answer or using FirstPass to automatically answer groups of questions in bulk. Using Office Online, SharePoint, and Teams, teams can also collaborate more efficiently.

What are the key differences between Office Online and Office 2019 (desktop)?

Office Online- Ideal for teams that collaborate on responses. All participants can work together on the same response virtually and see each other’s feedback and edits in real-time.

Office 2019 (desktop)- Ideal for teams that do not need to collaborate in real-time. One user at a time can leverage the full editing power of Microsoft Office to work on a response.

How does this complement Qvidian’s Projects Workspace?

Projects enables teams to build complete, branded response packages (e.g., with cover sheets, tables of contents, etc.) and use assignment workflows. When loading a questionnaire into a Project, Qvidian prompts managers to select “Work in Qvidian” or “Work in Qvidian for Microsoft Office.” When working in Qvidian for Microsoft Office, the experience depends on the version:

Office Online- After each user logs in to Qvidian, all Project participants can work together on the response virtually and see each other’s feedback and edits in real-time.

Office 2019- After logging in to Qvidian, one Project participant can work on a response at a time. Once checked back in, the response is available for another participant to edit.

Where can I get help & more information?

Search Product Help for “Qvidian for Microsoft Office” for detailed information. (Access Product Help by logging in to Qvidian and clicking the question mark on the top right of the home page.)