



upland

Qvidian

Browser & Microsoft® Office
Configuration Guide

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Overview

Upland Qvidian is a Software as a Service (SAAS) application that is accessed via a web browser, opens new windows and dialog boxes in the user interface, and interacts with Microsoft® Office. To allow Upland Qvidian to do this, you must configure your browser. Some Upland Qvidian users who will be working with library content records, including bulk loading records, must also download the Upland Qvidian add-ins for Office and configure Office. For more information on the types of users that should download add-ins, see ["Configure Microsoft® Office" on page 7](#).

If you need assistance, please contact Upland Qvidian Technical Support. Assistance may be limited based on your company security policies. If Upland Qvidian Technical Support is unable to assist you, you will be advised to contact your internal IT support.

Browser configuration

Upland Qvidian only supports the latest browser versions of Microsoft Edge™, Mozilla® Firefox®, Google Chrome™, and Apple Safari®. Configurations vary depending on your browser.

Note: If you are upgrading to a new Upland Qvidian version, you must clear your cache prior to configuring your browser. For more information on clearing the cache, see your browser's online help resource.

Caution: Upland Qvidian functionality is not supported on a mobile device.

Configuring Trusted Sites with Edge, Firefox, Chrome, and Safari

Edge, Firefox, Chrome, Safari require additional steps when performing some actions.

Action	Edge, Firefox, Chrome, & Safari
Editing, exporting, or opening content in Office applications	Users are prompted to open the file in the application or save it to their computer.
Detecting if the template is current upon a log-in or connection	Does not detect if the template is current. Users must manually initiate the download of the Upland Qvidian template from the Options menu.
Save to clipboard	Users are prompted to open and then close the content, which is automatically copied to the clipboard. Note: To work properly, Qvidian Add-Ins must be installed on the client machine.
Operations performed in Word, PowerPoint, and Excel and then saved using the Upland Qvidian Toolbar	Users must manually refresh Upland Qvidian views upon save.

Setting Default Browser in Windows 11

1. Select **Settings** from the **Start** menu.
2. Go to **Apps > Default Apps**, and then click the browser currently listed under **Web browser**.

3. Select your desired browser from the **Choose an app** menu.

Configure Microsoft Edge

If you will be using Edge as your browser, you must set Edge as your default browser and configure it to allow pop-ups on the Upland Qvidian site.

Set Edge as your default browser

1. In Edge, click ... in the upper right corner.
2. Select settings and then select **Change My Default**. The Settings dialog box displays.
3. Under **Web browser**, click the current default browser displayed.
4. Select **Edge** from the list.
5. Click the **X** in the upper right corner to close the dialog box.
6. Click **More ...** again to close the panel.

Allow Pop-ups from Upland Qvidian

- Allow pop-ups from Upland Qvidian when prompted by selecting **Always Allow** when prompted the first time Upland Qvidian attempts to open a pop-up window or turn off **Block pop-ups** setting

Configure Mozilla® Firefox®

If you will be using Firefox as your browser, you must install the Microsoft® Silverlight® or Adobe® Shockwave Flash® plug-in for Firefox, set Firefox as your default browser and configure it to allow pop-ups on the Upland Qvidian site.

Install Microsoft Silverlight or Adobe Shockwave Flash for Firefox

To provide an enhanced interactive experience in Upland Qvidian, including the ability to select multiple files on your computer, you must install either the Silverlight or the Flash plug-in for Firefox. If neither plug-in is not currently installed, you will be prompted to install one when performing any Upland Qvidian functions that require the plug-in. When prompted, follow the on-screen instructions to install the plug-in.

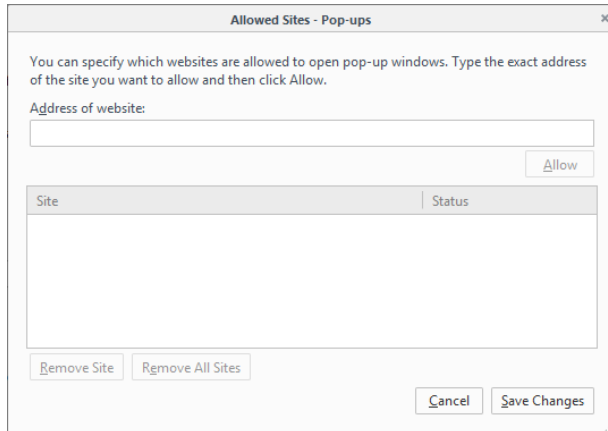
Set Firefox as your default browser

1. Click the menu button in the upper right corner and then click **Options**.
2. Under **Startup**, select the **Always check if Firefox is your default browser** check box.
3. Close the tab.

Allow Setup Upland Qvidian as a pop-up blocker exception

1. Click the menu button in the upper right corner and then click **Options**.
2. Click **Privacy & Security** on the left side menu.

3. Under **Permissions**, select the **Block pop-up windows** check box, and then click the **Exceptions** button.
4. In the **Address of Website** box, type the Upland Qvidian web site address (either **https://*.qvidian.com** for the United States Data Center or **https://*.qvidian.eu** for the European Data Center), and then click the **Allow** button.



Example of the Allowed Sites – Pop-ups dialog box in Firefox.

- United States Data Center:
 - https://qplogin.qvidian.com
 - https://qpa.qvidian.com
 - https://training.qvidian.com
- European Data Center:
 - https://qplogin.qvidian.eu
 - https://qpa.qvidian.eu
 - https://training.qvidian.com

Configure Google Chrome™

If you will be using Chrome as your browser, you must set it as your default browser and configure it to allow pop-ups on the Upland Qvidian site.

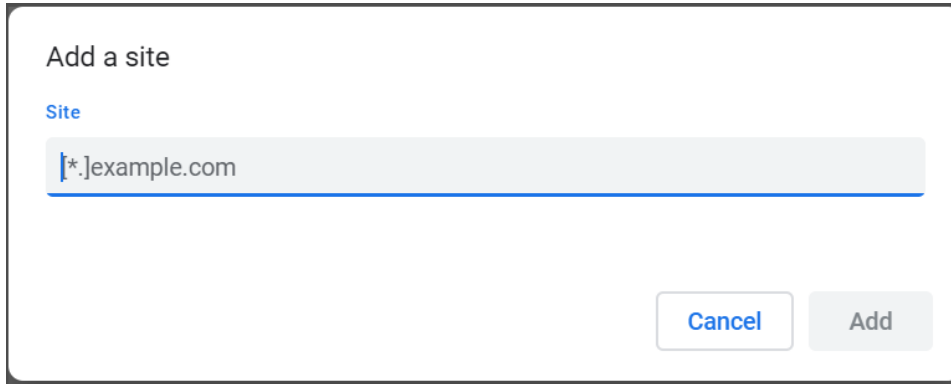
Upland Qvidian supports both the current version of Chrome and one release prior to the current version, but will only fix defects for the current version.

Set Chrome as your default browser

1. Click the **Chrome Menu** button  and then click **Settings**.
2. Under **Default browser**, click the **Make Default** button.

Setup Upland Qvidian as a pop-up blocker exception

1. Click the **Chrome Menu** button  and then click **Settings**.
2. Click **Advanced** at the bottom of the page.
3. Under **Privacy**, click **Content settings**.
4. Under **Pop-ups and redirects**, click the **Allow** button.



Example of the Add a site dialog box in Chrome.

5. Under **Site**, type the following for Upland Qvidian, as indicated below.
 - United States Data Center: *.qvidian.com
 - European Data Center: *.qvidian.eu
6. Click **Add**.

Configure Apple Safari

If you will be using Safari as your browser, you must set it as your default browser and configure it to allow pop-ups on the Upland Qvidian site. Upland Qvidian supports Safari 6.0.1 and higher.

Note: If you are upgrading to a new Upland Qvidian version, you must clear your cache prior to configuring your browser. For more information, see your browser's online help resource.

Set Safari as your default browser

1. From the Apple menu, select **System Preferences**.
2. Click **General**
3. Select **Safari** from the **Default web browser** pop-up menu.

Turn off pop-up blocker

1. From the Safari menu, select **System Preferences**.
2. Click **Security**.

3. Clear the **Block pop-up windows** check box.

Legacy add-ins for Microsoft® Office

Additional legacy features are available to Upland Qvidian, Microsoft Windows® users who download and install the Upland Qvidian add-ins for Microsoft Office. When you install the add-ins, a Qvidian tab is added to Microsoft Word, Excel® and PowerPoint® toolbars. The add-ins are stored in the Office start-up folders on your computer.

Caution: As of the February '22 release, the legacy add-ins have been updated to fix defect QPA-74807. If you plan to continue using the Legacy Add-Ins, you must redownload them after the release from the Qvidian application or the set-up utility, which is available in the Community.

Caution: For now, the legacy add-ins and Qvidian for Office will both exist in parallel and will not impact each other. However, there is a required update to the legacy add-ins with the September '20 release to change the security certificate to be signed as Upland Software. Please have your Qvidian admin notify your IT team if you wish to update your legacy add-ins. If you no longer need Qvidian's legacy add-ins, but still have them installed, please consider removing the add-ins to help improve Office performance. Qvidian is working to replace legacy add-ins with modern functionality and eventually, when they are not needed, will retire them. If you use the legacy add-ins, consider emailing the Product team to help us understand why they are useful to you.

Note: Users cannot download the Qvidian add-ins for Microsoft Office on an Apple® Mac® without a virtual PC.

Caution: Some add-in functionality (e.g. bulk-loading PowerPoint slides using add-ins) is not supported by MS Office 2021.

There are newer features that can be used as alternatives to most legacy features that require add-ins. Refer to the table below for the features that require add-ins and alternative methods for achieving similar results without them. The legacy add-ins are only suitable for Content Managers (specifically Architects). The Qvidian for Microsoft Office integration is most suitable for individual contributors.

Legacy features that require add-ins	Alternative features
Editing documents in the library using the Quick Edit or Edit Individually functions.	Additional editing optionsediting options, such as Editing in Microsoft Word, dragging and dropping a zip file, and uploading a new revision, are available to users without add-ins.
Working with RFPs in created documents.	Create RFPs in projects.
Editing content records or other files in Structured Content, Agenda Slide, and Dynamic Slide components in document types within Architecture .	There are no alternatives at this time.

Legacy features that require add-ins	Alternative features
Inserting merge codes from a list of existing merge codes in Upland Qvidian into Word documents, PowerPoint slides, or Excel spreadsheets.	Download a spreadsheet of the existing merge codes in your Qvidian instance and manually type in merge codes.

Most users, including RFP and proposal writers, and Subject Matter Experts (SMEs), typically do not need to download the add-ins. These users normally perform the following actions in Upland Qvidian:

- Build proactive Word documents and PowerPoint presentations.
- Answer RFP questions inline, using the HTML editor, in created documents.
- Manage and work with content in the library, including submitting and editing content.
- Search for and use content, including copying content to the clipboard from the preview screen and pasting it into other documents and applications, downloading library records to the user's computer, and generating content URLs.
- Manage and work in projects, including uploading files and answering RFP questions.
- Provide general and content feedback
- Work with Word or PowerPoint content assigned to them by Content Administrators via the Send to SME or Assign Review Job features.
- Work on RFP answers emailed to them by RFP file owners from Created Documents (not using the Assign Question function).
- As an SME, edit content on the SME Edit page.

Downloading the Add-Ins for Microsoft® Office

1. Verify Microsoft Office has been configured and all Office applications are closed.
2. (Optional) If the add-ins were previously setup, delete the Qvidian.dot file from the Start Up Folder. For example: c:\documents and settings\\application data\microsoft\word\startup.
3. Log into Upland Qvidian.
4. From the header, click the **Profile menu**, and then select **Download Add-Ins** from the drop-down menu. An instructions document displays.
5. Review the instructions document.
6. Click **Setup**.
7. Follow the on-screen instructions to complete the process.

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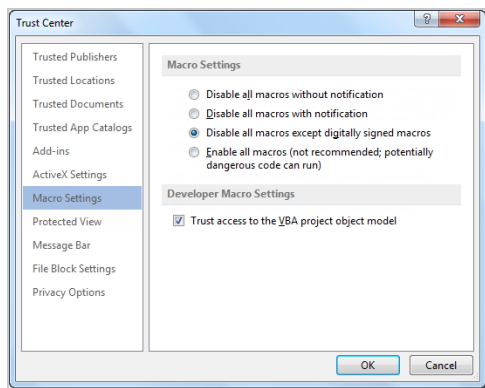
Configure Microsoft® Office

The Upland Qvidian add-ins communicate with and control Microsoft® Office using macros. If you want to download and install the add-ins, you must configure Microsoft Word, PowerPoint®, and Excel® to allow these macros for Upland Qvidian to interact properly with them. If you are not using add-ins, you do not need to configure Microsoft Office as instructed below.

Macro Security Levels and Protected View settings

To allow Upland Qvidian to run macros within Office, you must set your Macro Security Levels. This enables Upland Qvidian to run macros within Office while still protecting your computer. In addition, Protected View settings should be disabled to avoid issues between Upland Qvidian and Office interactions. You must update the both settings in Word, PowerPoint, and Excel.

1. In Word, PowerPoint, or Excel , click the **File** tab and then select **Options**.
2. Select **Trust Center** from the left side menu.
3. Click **Trust Center Settings**.
4. Select **Macros Settings** from the left side menu.
5. Select the **Disable all macros except digitally signed macros** radio button.



Example of the Macro Settings tab of the Trust Center in Microsoft Word 2013.

6. Click **OK**.
7. Select **Protected View** from the left side menu.
8. Clear the **Enable Protected View for files originating from the Internet** and **Enable Protected View for files located in potentially unsafe locations** check boxes.
9. Click **OK**, and then click **OK** again.
10. Repeat the steps above for each application until all three have been configured.

Microsoft Office Macro Security and Trusted Publishers settings

The first time a you open a file that uses the add-ins in each Office product, you will receive a warning in the Office application that prompts you to allow, disallow, or always trust the macros in the add-in. You must allow these macros in order to use add-in functionality, such as the Qvidian toolbar. We recommend that you select the option to always trust macros from Qvidian so that you will not be prompted each time an add-in is opened. You will need to do the following for Word, PowerPoint and Excel.

When prompted by the Office alert, follow the steps below.

1. On the **Message Bar**, click the **Enable Editing** button.
2. Click **Enable Editing**, and then click **OK**.