

Preparing RFPs for projects

Projects auto-slice Microsoft® Word and Excel® Requests for Proposals (RFPs) and other questionnaires to identify questions when you upload them. To get the best results, it is recommended that you:

- remove extra paragraph markers and column breaks in a Word document.
- remove blank spaces in cells in an Excel spreadsheets or Word document with tables.
- set the print area in an Excel file.
- save macro-enabled files as .docx or .xlsx files.

Note: If you rebrand your Word questionnaires to match your company's branding, apply your style template prior to uploading your RFP.

Note: Drop-downs are supported for Excel files.

Paragraph Markers & Column Breaks

Projects create slices at the uploaded file's paragraph returns and cells. Blank lines will create empty slices. While this will not hinder project functionality, it will create unnecessary blank spaces in your workspace that cannot be deleted. There is no need to leave spaces for answers in Word RFPs. The system inserts answer paragraphs when answers are added. Projects do not support column breaks.

Note: The more pages or tabs, cells, tables and paragraphs, the longer it will take for the RFP to load.

Print Area (Excel)

Set the print area, under **Page Layout > Page Area**, so that only the appropriate cells are imported. If the print area is not set, the project will load all the cells in the file which will extend the time it takes to load and refresh. For more information on setting the print area in Excel, visit the Microsoft Support website (<https://support.microsoft.com>).

Blank Cells (Excel)

The cells will display same size the in the project workspace as they do in Excel. The text in a cell without text wrapping will bleed into the cell next to it. However, if the cell next to it has a blank space in it, the text in the previous cell will not bleed into it. While you can see the entire text of a cell by using the **View Cell Inline** function, it will be easier for users to read within the workspace if you remove the space. The answer cells will also remain the size they are in Excel as it was uploaded. They will not expand when text is added.

Macros

Macros are not supported in projects. If you are using a macro-enabled file (.docm or .xlsm file,) save it as a .docx or .xlsx file.