Door - Qvidian Integration Guide January 2024



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Overview

Requirements

The Door-Qvidian integration has the following requirements:

- An active account on the Door platform for Asset Managers
- An active account on the Upland Qvidian platform
- A valid Qvidian username and password
 - \circ $\;$ Best practice is to establish a service account user name and password for use with this integration

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Door Setup

Connecting to Qvidian

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



From there select either "Qvidian.com" or "Qvidian.eu" depending on where you normally log in to the application.

Once selected enter a valid user name and password.

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 Qvidian 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 Qvidian to link to a piece of content in a Qvidian content library, if integration is enabled
- Apply Elsewhere push the response to other products

@ Controls
Save and next
Save
🕥 View previous responses
Import from Word
🔗 Link to Qvidian
Apply elsewhere
E Apply available responses

Selecting "Link to Qvidian" will bring up a dialog where you can enter the Qvidian ID for a piece of content available in the Qvidian content library. After selecing "Link" the response contents will be copied from the Library Entry into the Door response form (including images).

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Enter Ovidian ID	
Enter Qvidian ID	

Content import includes:

- Basic text formatting for bold, italics
- Bullet points
- Justification and paragraph breaks
- Inline images
- Merge variable contents
- Tables
 - Includes table structure including merged cells
 - Does not include color fills for table cells

Content import will not include:

- Changes in font face and style
- Changes (such as resizing and cropping) made to images after copying into Word content stored to Qvidian
- Attachments
- Merge code and Gallery Link content

You may edit it at this point. Edits made on Door will NOT result in any changes to content stored in Qvidian.

Door will monitor this Library Entry in Qvidan 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 Qvidian content and insert the Qvidian response content into the form.



How is risk management incorporated within the investment process? (0.372)* Clicking Save or Apply without making changes to the response will have no effect © Controls File Edit Vew Intert Format Tools Table Import form Word Import form Word Import from Word Import from Word particular exposure to certain market trends (commodify price risk, change in key exchange rates, etc). This is used to produce guardnails for amounts invested in specific markets. Import from Word	Addifying this response will alter it for all products using it.	6
File Edit View Insert Format Tools Table Import form Word Import from word Import from word Import from Word Import from word Import from word Import from Word Import from word Import from word Import from Word Import from word Import from word Import from Word Import from word Import from Word Import from Word Import from word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word Import from Word	low is risk management incorporated within the investment process? (Q.372)	
File Edit View Insert Format Tools Table $\bigcirc \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	Clicking Save or Apply without making changes to the response will have no effect	Controls
	File Edit View Insert Format Tools Table	Save
The risk team has developed a model to ensure that the risk of any one idividual market does not dominate that of the fund, including identifying correlated markets based on geography or particular exposure to certain market trends (commodity price risk, change in key exchange rates, etc.). This is used to produce guardralis for amounts invested in specific markets.		Import from Word
	The risk team has developed a model to ensure that the risk of any one idividual market does not dominate that of the fund, including identifying correlated markets based on geography or particular exposure to certain market trends (commodity price risk, change in key exchange rates, etc.). This is used to produce guardrails for amounts invested in specific markets.	C Link to Qvidian

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.

Risk Management Specific to this Strategy, how does the investment team define risk? (2377)	3 responses available
A How is risk management incorporated within the investment process? (Q372)	2 responses available
	Used by 2 products
Risk management is an integral part of the investment process, inlucing proprietary economic models as well as third party risk projection tools. The portfolio manager as well as the investment committee review these models regularly.	Global Equity Fund 🔗 Value Equity Fund 🔗
Edit response 🖉 Publish Apply to products	

Content Updates

Dashboard Tab for Qvidian

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

DOOR			🥙 🖉 🚽
Firm	YOUR DASHBOARD		
Products	Projects On Door Invitations Reports	Qvidian	
Le Producis	Manage your Qvidian links		Review all updates Publish all updates
Responses	Qvidian updates Qvidian ID: =	Updates available 🗇	Updates available
	⊕ 1	5 🌲	
🚱 Integration	⊕ 3	2 🌲	
~	÷ 2	5 🌲	
Management	÷ 4	15 🌲	

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

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

DO	Or				🥙 💿 🗸
ľ		YOUR	DASHBOARD		
~		Projects	On Door Invitations Reports	Qvidian	
4		Manage	your Qvidian links		Review all updates Publish all updates
Ţ		Qvidiar	Qvidian ID	Updates available =	Updates available
67					
g		Ð	î.	5 🌲	
୍ଦ୍		Θ	3	2	
075			A Qvidian document linked to the followi	ng products and questions has been updated:	
2.	User Management		Select all		
٤.			Patapsco Growth Fund	Why was this benchmark chosen?	
_			Patapsco Multi Strat Fixed Income F	- Why was this benchmark chosen?	
B			Results total: 2		
			Apply and publish to selected product	a Apply to selected products Review contents	

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 Qvidian.

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 Qvidian

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

Use the checkboxes to select the updated response content from Qvidian 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. There is a separate button that allows you to update the content and publish at the same time, if the user has permissions to move content to the Published state.

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

