

# Door - Qvidian Integration Guide

January 2024



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## Overview

### Requirements

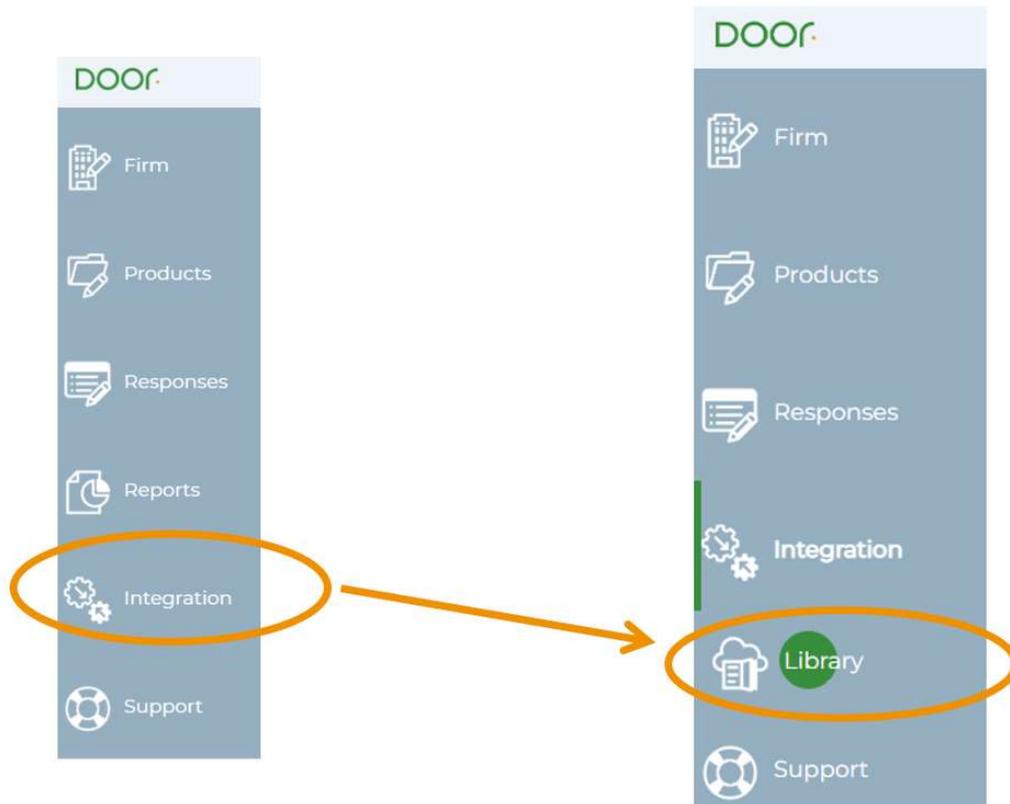
The Door-Qvidian integration has the following requirements:

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

# 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.

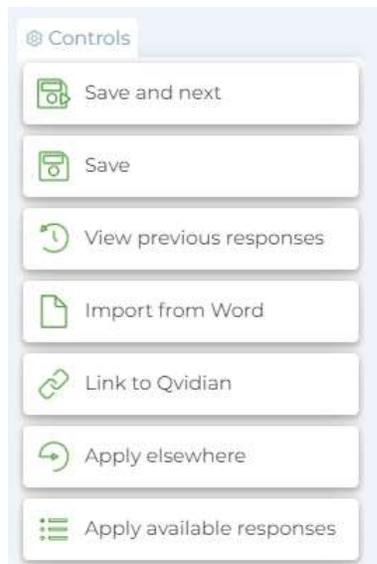
**NOTE:** Configuration of the integration is done once for the firm on Door. Only users with the role of AM Lead or AM Deputy will have permission to configure the integration. Other users will see a read-only version of the configuration status.

# 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



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 selecting “Link” the response contents will be copied from the Library Entry into the Door response form (including images).

A screenshot of a light blue dialog box. At the top left, it says "Enter Qvidian ID" in a dark grey font. To the right of this text is a small grey circle with a white "x" inside. Below the text is a white rectangular text input field with a thin grey border. Underneath the input field is a green rectangular button with the word "Link" written in white text.

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

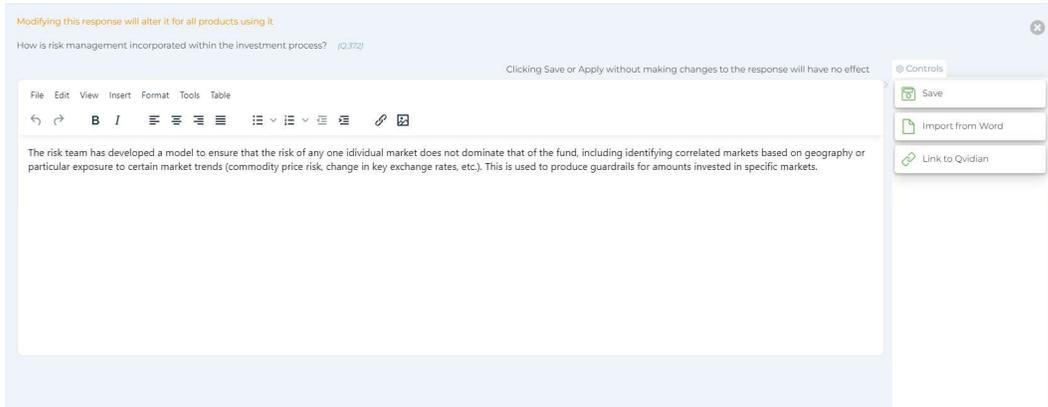
You may edit it at this point. Edits made on Door will NOT result in any changes to content stored in Qvidian.

Door will monitor this Library Entry in Qvidian 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.

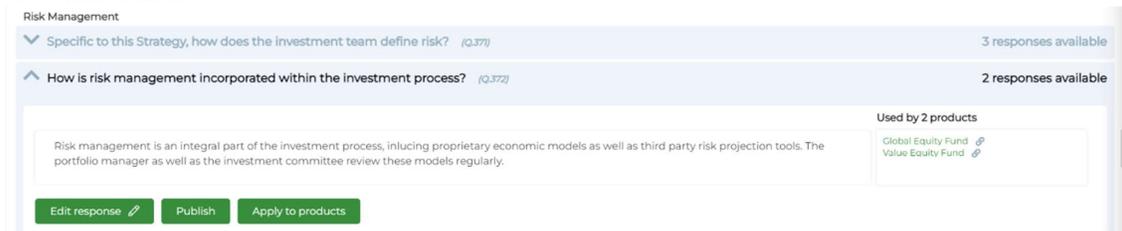
You can remove this link from within the response form by choosing the “remove link” icon.

## 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.



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.



## Content Updates

### Dashboard Tab for Qvidian

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

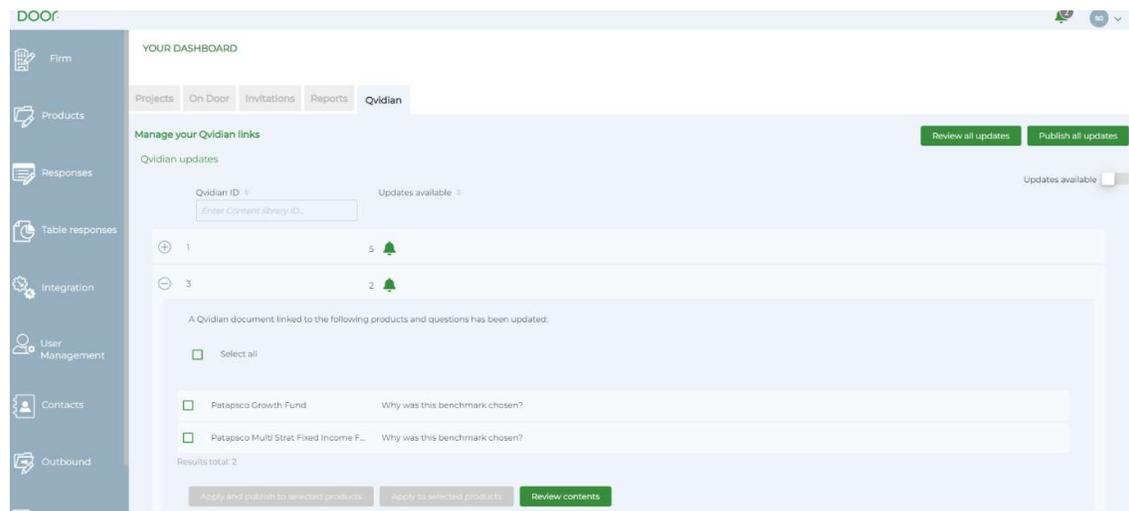


This tab includes by default a list of any Qvidian Library Entry IDs used in Door question responses that have updates as indicated by Qvidian. Use the toggle at the top of the Qvidian area to move back and forth between showing All Links, and just those Links with updated content available.

## 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.



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](mailto:support@doorfunds.com)