

## Qvidian Foundational Courses

If you are new to Qvidian and any of these responsibilities are yours:

- Maintaining RFP Q&A content
- Maintaining PowerPoint presentation content
- Configuring the product to automate RFPs, proposals, presentations, or other sales documents
- Creating users and managing permissions and system settings
- Analyzing the usage and effectiveness of Qvidian for your company

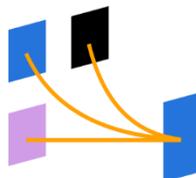
... then a Foundational course is right for you! The Foundational courses are designed to provide the instruction you need for the responsibilities you have. The more responsibilities you have, the more courses you will want to complete.

Pick from the following courses:

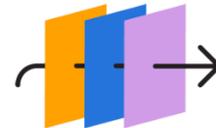
*Click the icon to jump to learn more*



**Qvidian Library Basics**



**Automating PowerPoint Presentations with Qvidian**



**Automating Word Documents with Qvidian**



**Qvidian & Microsoft Word Templates**



**Qvidian Reports & System Settings**

## Upland University Offers an Engaging and Effective Learning Experience

Each course enrollment gives you access for 4-weeks to:

- On-demand course videos and instruction following our why-how-try instructional design methodology
- A Qvidian sandbox to complete hands-on activities
- Access to a named Qvidian trainer who will provide personalized feedback on assignments and is available for questions via email
- A downloadable course handbook to keep

When you sign up for more than one course, your access is cumulative. For example, if you enroll in three courses, you will receive access to all three for 12 weeks. New enrollments are processed each Monday. You will pick your start date when you register.

## Pricing

Each course is: \$395

Pick four for: \$1295

All five for: \$1595

## Don't know where to start?

[Register Now>>](#)

Are you...

- **A new content manager responsible for populating and maintaining the Qvidian library?**

Then take:

- Qvidian Library Basics
- Qvidian and Microsoft Word Templates

Want to learn everything there is to know about content management? Go beyond the foundations and check out the [Content Management Pro Learning Path!](#)

- **A new Qvidian admin who will own the product for your company?**

Then take:

- Qvidian Library Basics
- Qvidian and Microsoft Word Templates
- One or both, depending on what type of automation the company is using:
  - Automating PowerPoint Presentations with Qvidian
  - Automating Word Documents with Qvidian
- Qvidian Reports and System Settings

- **An existing Qvidian admin who is expanding Qvidian usage to include PowerPoint presentations?**

Then take:

- Qvidian Library Basics
- Automating PowerPoint Presentations with Qvidian

## Ready for More?

Check out our Advanced courses and Certifications [HERE.](#)

# Qvidian Library Basics

## Course Overview

The library is the backbone of your Qvidian application. All content that will be used in automated documents and RFP projects is stored in the library. This course is a perfect starting point for new Qvidian content managers and administrators to ensure the library is created and maintained according to best practices. An accurate and efficient content library drives successful document automation and RFP projects that win more deals.

This course, along with Qvidian and Microsoft Word Templates combine to provide instruction for all topics covered in the Upland Qvidian Content Manager I certification exam.

For a comprehensive learning option, check out the [Content Management Pro](#) Learning Path!

### Course Objectives:

By the end of this course, participants will be able to:

- Create and organize folders and content records following best practices
- Format, upload and bulk load Word content to the library
- Maintain library content using independent editing methods
- Understand all searching and library user features

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# Qvidian and Microsoft Word Templates

## Course Overview

Stop fighting with Word! Let a Microsoft Word Template handle the formatting of your Qvidian content so you can spend less time on what your content looks like and more time on the quality of the writing.

This course provides in-depth training on Microsoft Word Templates and how a template interacts with Qvidian functionality. While you can use Qvidian without ever touching a template this often results in lots of manual formatting of the content after you pull it out of Qvidian. Templates make it possible to minimize formatting post-build as well as allow for an efficient rebranding of your Qvidian content.

This course, along with Qvidian Library Basics combine to provide instruction for all topics covered in the Upland Qvidian Content Manager I certification exam.

For a comprehensive learning option, check out the [Content Management Pro](#) Learning Path!

## Course Objectives:

By the end of this course, participants will be able to:

- Create a Microsoft Word template that contains paragraph, number, table and multilevel list styles
- Update an existing Microsoft Word template in Qvidian
- Rebrand a Qvidian library
- Understand how Microsoft Word templates interact with Qvidian library content, document types and RFP questionnaires

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# Automating Word Documents with Qvidian

## Course Overview

Your team may be experiencing lots of time savings by using the Qvidian library to find and manage RFP answers, but are they producing the RFP response document (cover page, cover letter and executive summary) as efficiently as possible? Do your sales teams create proposals and SOWs by copying and pasting content from old files? Take advantage of document automation to provide your teams a fast and reliable way to build documents that are tailored to their opportunity. This course is for the architect or administrator who will be responsible for configuring the document types your team will use to build their RFP responses, proposals, SOWs and more.

Please note: the architecture functionality in Qvidian can only be accessed from a Windows operating system.

## Course Objectives:

At the end of this course the participant will be able to:

- Design and create document types to build Word-based documents with Qvidian
- Utilize architecture elements: Static Content, Selection Driven Content, Data Entry Screen, Word Section Break

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**Just getting started with Qvidian?** Consider also taking Qvidian Library Basics if you need instruction on how to load and edit content stored in the Qvidian library, and Qvidian and Microsoft Word Templates if you need instruction on how to create, use and manage templates in Qvidian.

**Already comfortable with these foundational skills?** Consider taking Advanced Architecture [link to course] to learn how to use more architecture elements such as Structured Content, complex Selection Driven Content and PowerPoint-based automation.

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# Automating PowerPoint Presentations with Qvidian

## Course Overview

Are you ready to take advantage of the time savings Qvidian has to offer for managing and using PowerPoint slides? Qvidian allows you to manage each slide only once, even if it is used in dozens of decks. And, your sales team will never present an old or unapproved slide again! This course is for the architect or administrator who will be responsible for configuring the document types your team will use to automate presentations.

Please note: the architecture functionality in Qvidian can only be accessed from a Windows operating system.

### Course Objectives:

At the end of this course the participant will be able to:

- Design and create document types to build presentations with Qvidian
- Utilize architecture elements: Static Content, Selection Driven Content, Data Entry Screen and File List Screen
- Create, use and maintain a Microsoft PowerPoint Template for use in Qvidian to format and rebrand slides

[Register here >>](#)

**Just getting started with Qvidian?** Consider also taking [Qvidian Library Basics](#) if you need instruction on how to load and edit slides stored in the Qvidian library.

**Already comfortable with these foundational skills?** Consider taking [Advanced Architecture](#) to learn how to use more architecture elements such as Dynamic Slides, Structured Content, complex Selection Driven Content and Word-based automation.

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# Qvidian Reports & System Settings

## Course Overview

When your company first purchased Qvidian, everything was configured for you. However, times change. Your company's organizational structure or use of Qvidian may have changed, or you may have just joined the team. In this course you will learn how to use the system settings to ensure the product is configured to meet your company's processes and structure. In addition, you will learn about the data that is tracked and how to use Qvidian's standard reporting features.

### Course Objectives:

By the end of this course participants will be able to:

- Understand and configure user accounts, permissions, and roles
- Understand and configure settings such as email triggers, global settings, default homepages and more.

- Take advantage of Qvidian's data tracking to create reports using library and project properties, event audits, and standard Upland Analytics reports and dashboards

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