



Deltek. ProPricer >

Connect for Office Quick Start Guide

Contents

Welcome to Connect for Office	1
Requirements	2
Installation	2
Client setup	3
User interface	4
ProPricer Connect ribbon	5
Task Pane	6
Proposal data	7
Task data	9
Resource data	11
Material data	13
Travel data	15
Data button	18
Leave Feedback button	21
Application Log	21
Contact Deltek	22
Contact information	22

Welcome to Connect for Office

ProPricer™ Connect for Office is a sophisticated web plug-in for Microsoft Excel and Microsoft Word. It allows you to include proposal data from ProPricer in your documents, update the data, and switch the data to reflect a different proposal.

With Connect for Office, there are countless ways to improve your efficiency. For example, you could maintain template documents, then quickly create copies that can be updated with the latest proposal data from ProPricer. Or you could create a single document with data from multiple proposals, so you can always stay up to date on everything you're working on.

Requirements

- The correct corresponding version of ProPricer. For example, Connect for Office version 4.6.101.0 requires ProPricer version 9.6.101.0.
- ProPricer Application Server version 9.6.101.0.
- A current license key purchased from Deltek, Inc.
- Microsoft Office 2016 (64-bit edition) or later.

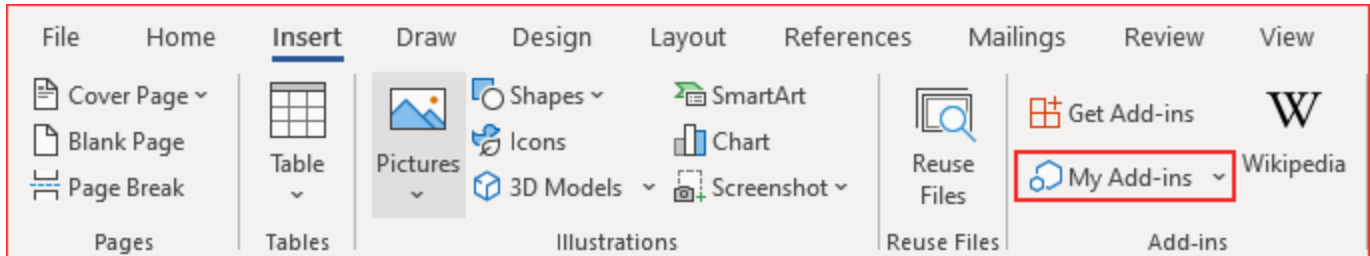
Installation

To learn how to install Connect for Office, reference the ProPricer Connect for Office Deployment Guide.

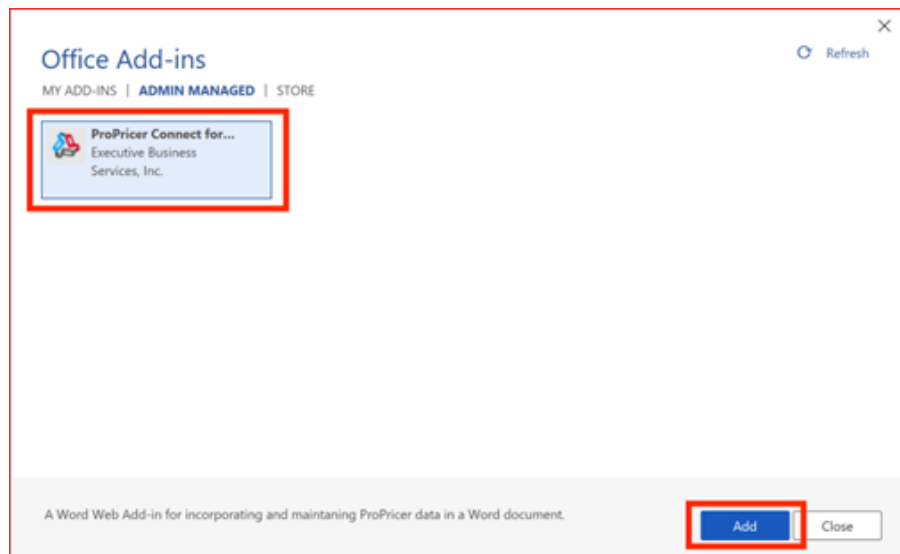
Client setup

When your deployment is complete, assigned users will be able to find Connect for Office in their respective Office applications. To set up Connect for Office in one of these applications, complete the following steps:


1. In the Office application, users will have to go to the Insert ribbon tab and click My Add-ins in the Add-ins section.



2. In the Office Add-ins dialog box, go to the ADMIN MANAGED section, and you should see the ProPricer Connect for Word/Excel Web Add-in. If the add-in does not show, click Refresh in the top-right corner of the dialog box. Remember that add-ins might take up to 24 hours to become available.




3. Click the Add-in and then click Add at the bottom of the dialog box.
4. Check that the add-in loaded successfully.

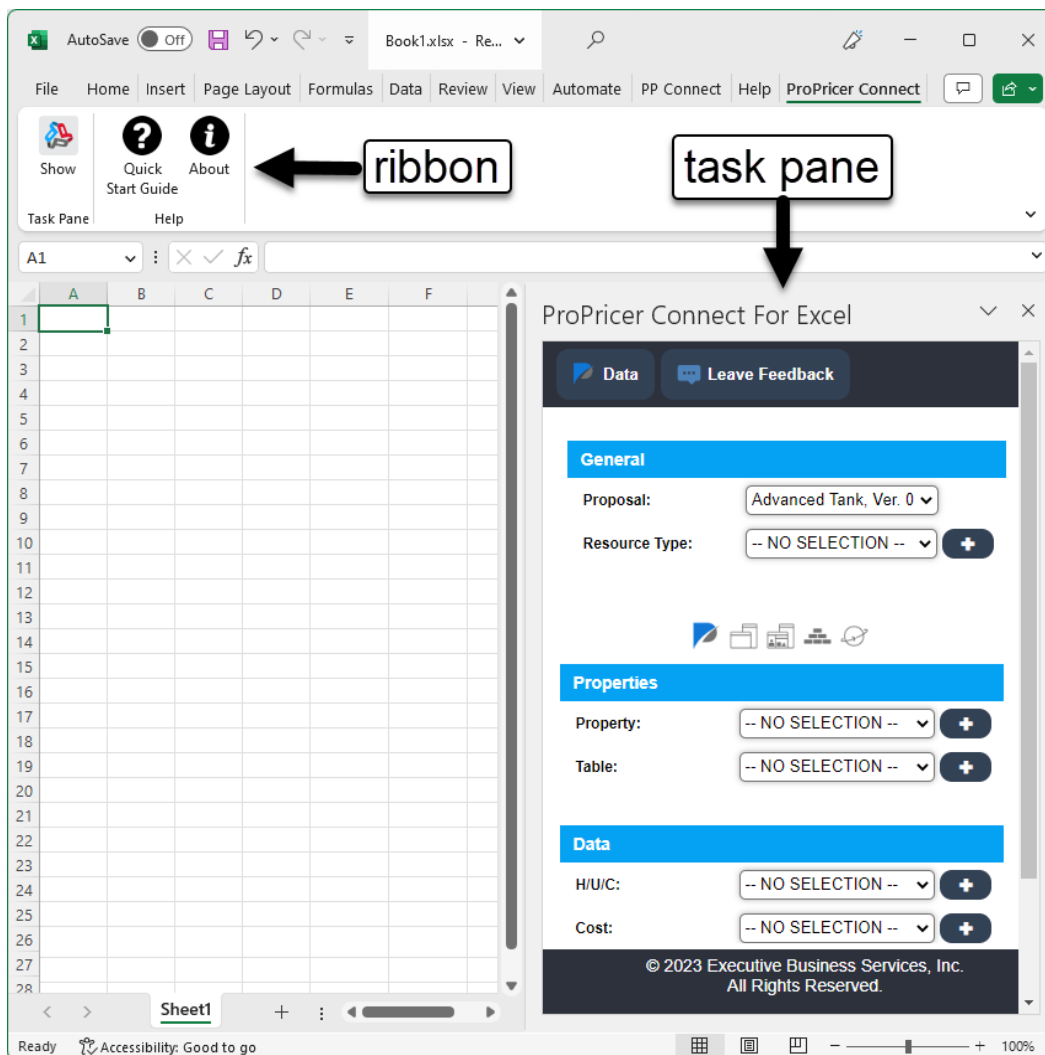
 Add-ins loaded successfully

User interface

Access the ProPricer Connect for Office user interface by opening Excel or Word, then clicking the ProPricer Connect ribbon.

On the ribbon, you can open the task pane, open this quick start guide document, and view some additional information about the plug-in.

In the task pane, you can select and add the ProPricer data that you would like to include in your Office document. To do this, select the cell or line you would like to add data to, select the ProPricer data from a field in the task pane, then click .



ProPricer Connect ribbon

The ProPricer Connect ribbon has three buttons that let you open the task pane, open this quick start guide document, and view some additional information about the plug-in.

Show Task Pane

The Show Task Pane button opens the task pane.

Quick Start Guide

The Help button will open a .pdf copy of this guide.

About

The About button opens a dialog box that provides version information about ProPricer Connect for Office.

Task Pane

The ProPricer data that can be added to your Office document is organized into five groups:

- [Proposal Data](#)
- [Task Data](#)
- [Resource Data](#)
- [Material Data](#)
- [Travel Data](#)

Above the data fields, there are a few buttons for accessing additional functions and settings:

- [Data](#): Manage the ProPricer data in your document.
- [Settings](#): Open the application log.
- [Leave Feedback](#): Open the Connect for Office Enhancements Portal where you can suggest and vote for enhancements to the product.

Proposal data

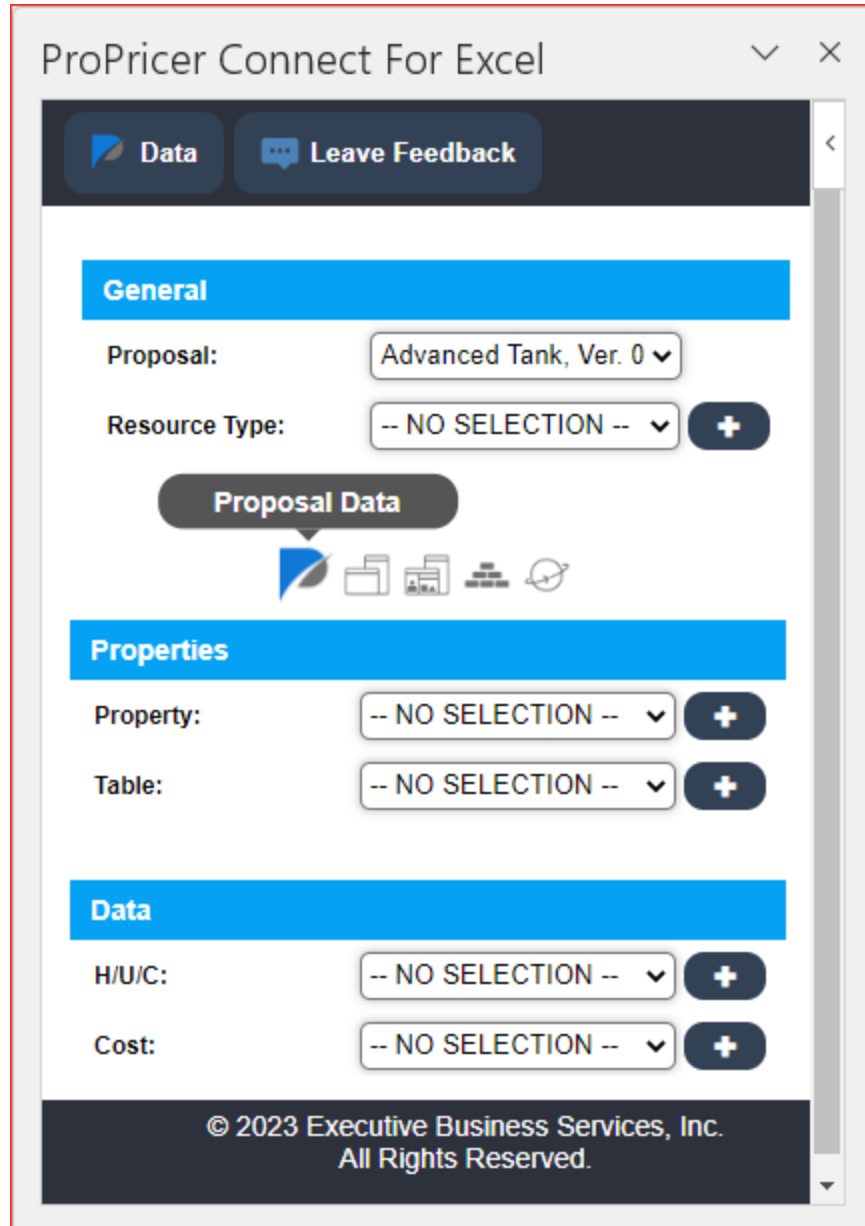
The following fields are available in the Proposal Data tab:

Properties

- Property: Select data from the proposal's properties.
- Table: Select a type of rate table to add the name of the rate table assigned to the proposal.

Data

- H/U/C: Select hours, units, or cost totals from the proposal.
- Cost: Select a cost level total from the proposal.



Task data

The following data fields are available in the Task Data tab:

Properties

- **Task:** Select a task ID from the proposal. The task ID that is selected here filters the data that can be added in the Property field.
- **Property:** Select task data such as the description, start date, end date, and more.

Data

- **Summary Field:** Select a summary field from the proposal. The summary field that is selected here filters the values that can be selected in the Summary Field Value field.
- **Summary Field Value:** Select a value from the selected summary field. The summary field value that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource:** Select a resource from the proposal. The resource that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Class:** Select a resource class from the proposal. The resource class that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Field:** Select a resource field from the proposal. The resource field that is selected here filters the values that can be selected with the Resource Field Value field.
- **Resource Field Value:** Select a value from the selected resource field. The resource field value that is selected here filters the values that are added with the H/U/C and Cost fields.
- **H/U/C:** Select hours, units, or cost totals for the selected filters.
- **Cost:** Select a cost level total for the selected filters.

ProPricer Connect For Excel

Data Leave Feedback

General

Proposal: Advanced Tank, Ver. 0

Resource Type: -- NO SELECTION -- +

Task Data

Properties

Task: -- NO SELECTION -- +

Property: -- NO SELECTION -- +

Data

Summary Field: -- NO SELECTION -- +

Summary Field Value: -- NO SELECTION -- +

Resource: -- NO SELECTION -- +

Resource Class: -- NO SELECTION -- +

Resource Field: -- NO SELECTION -- +

Resource Field Value: -- NO SELECTION -- +

H/U/C: -- NO SELECTION -- +

Cost: -- NO SELECTION -- +

© 2023 Executive Business Services, Inc.
All Rights Reserved.

Resource data

The following data fields are available in the Resource Data tab:

Data

- **Summary Field:** Select a summary field from the proposal. The summary field that is selected here filters the values that can be selected with the Summary Field Value field.
- **Summary Field Value:** Select a value from the selected summary field. The summary field values that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource:** Select a resource from the proposal. The resource that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Class:** Select a resource class from the proposal. The resource class that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Field:** Select a resource field from the proposal. The resource field that is selected here filters the values that can be selected with the Resource Field Value field.
- **Resource Field Value:** Select a value from the selected resource field. The resource field value that is selected here filters the values that are added with the H/U/C and Cost fields.
- **H/U/C:** Select resource hours, units, or cost totals for the selected filters.
- **Cost:** Select a resource cost level total for the selected filters.

ProPricer Connect For Excel

Data Leave Feedback

General

Proposal: Advanced Tank, Ver. 0

Resource Type: -- NO SELECTION -- +

Resource Data

Data

Summary Field: -- NO SELECTION -- +

Summary Field Value: -- NO SELECTION -- +

Resource: -- NO SELECTION -- +

Resource Class: -- NO SELECTION -- +

Resource Field: -- NO SELECTION -- +

Resource Field Value: -- NO SELECTION -- +

H/U/C: -- NO SELECTION -- +

Cost: -- NO SELECTION -- +

© 2023 Executive Business Services, Inc.
All Rights Reserved.

Material data

The following data fields are available in the Material Data tab:

Properties

- **Task:** Select a task ID from the proposal. The task ID that is selected here filters the data that can be added with the Material field.
- **Material:** Select parts or assemblies assigned to the proposal.
- **Property:** Select material data such as the description, unit of measurement, base unit cost, and more.

Data

- **Summary Field:** Select a summary field from the proposal. The summary field that is selected here filters the values that can be selected with the Summary Field Value field.
- **Summary Field Value:** Select a value from the selected summary field. The summary field value that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource:** Select a resource from the proposal. The resource that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Class:** Select a resource class from the proposal. The resource class that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Field:** Select a resource field from the proposal. The resource field that is selected here filters the values that can be selected with the Resource Field Value field.
- **Resource Field Value:** Select a value from the selected resource field. The resource field value that is selected here filters the values that are added with the H/U/C and Cost fields.
- **H/U/C:** Select material hours, units, or cost totals for the selected filters.
- **Cost:** Select a material cost level total for the selected filters.

ProPricer Connect For Excel

Data Leave Feedback

General

Proposal: Advanced Tank, Ver. 0

Resource Type: -- NO SELECTION -- +

Material Data

Properties

Task: -- NO SELECTION -- +

Material: -- NO SELECTION -- +

Property: -- NO SELECTION -- +

Data

Summary Field: -- NO SELECTION -- +

Summary Field Value: -- NO SELECTION -- +

Resource: -- NO SELECTION -- +

Resource Class: -- NO SELECTION -- +

Resource Field: -- NO SELECTION -- +

Resource Field Value: -- NO SELECTION -- +

H/U/C: -- NO SELECTION -- +

Cost: -- NO SELECTION -- +

© 2023 Executive Business Services, Inc.
All Rights Reserved.

Travel data

The following data fields are available in the Travel Data tab:

Properties

- **Task:** Select a task ID from the proposal. The task ID that is selected here filters the data that can be added with the Travel field.
- **Travel:** Select a travel destination assigned to the proposal.
- **Property:** Select travel destination data such as the number of people on a trip or the number of days in a trip.
- **Travel Expense:** Select a travel expense from a travel destination.
- **Expense Property:** Select a travel expense property from a travel expense, such as the quantity, rate, or cost.

Data

- **Summary Field:** Select a summary field from the proposal. The summary field that is selected here filters the values that can be selected with the Summary Field Value field.
- **Summary Field Value:** Select a value from the selected summary field. The summary field value that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource:** Select a resource from the proposal. The resource that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Class:** Select a resource class from the proposal. The resource class that is selected here filters the values that are added with the H/U/C and Cost fields.
- **Resource Field:** Select a resource field from the proposal. The resource field that is selected here filters the values that can be selected with the Resource Field Value field.
- **Resource Field Value:** Select a value from the selected resource field. The resource field value that is selected here filters the values that are added with the H/U/C and Cost fields.

- H/U/C: Select travel hours, units, or cost totals for the selected filters.
- Cost: Select a travel cost level total for the selected filters.

ProPricer Connect For Excel


Data **Leave Feedback**

General

Proposal: ▾

Resource Type: ▾ **+**

Travel Data



Properties

Task: ▾ **+**

Travel: ▾ **+**

Property: ▾ **+**

Travel Expenses: ▾ **+**

Expense Property: ▾ **+**

Data

Summary Field: ▾ **+**

Summary Field Value: ▾ **+**

Resource: ▾ **+**

Resource Class: ▾ **+**

Resource Field: ▾ **+**

Resource Field Value: ▾ **+**

H/U/C: ▾ **+**

Cost: ▾ **+**

© 2023 Executive Business Services, Inc.
All Rights Reserved.

Data button

The Data button lets you access the following features.

Update Data Fields

The Update Data Fields button will scan the entire document for ProPricer added fields and update them with the latest values for the fields. Each field contains a proposal identifier, so selecting the proposal on the task pane is not required to update fields.

In the example below, the Cost of the proposal has been updated. Changes appear in the Application Log after the update.

Before the update

	A	B	C	D
1	Advanced Tank, Ver. 0			
2	CREATED ON 3/15/2023			
3	Start Date:	01/2015	Hours:	22,340.60
4	End Date:	03/2017	Cost:	\$ 1,312,178.27
5				

After the update

The screenshot shows the Excel spreadsheet with the following data:

	A	B	C	D
1	Advanced Tank, Ver. 0			
2	CREATED ON 3/15/2023			
3	Start Date:	01/2015	Hours:	17,877.48
4	End Date:	03/2017	Cost:	\$ 1,049,745.62
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

The ProPricer Connect For Excel task pane is open, showing the following options:

- Data
- Leave Feedback
- Update Data Fields (highlighted)
- Switch Proposals (Advanced Tank, Ver. 0)
- Manage References (SELECTION --)

Switch Proposals

The Switch Proposals button allows you to change the proposal that is connected to Office to any proposal from your current ProPricer connection. All the fields in the document will be changed to reflect the new proposal and all the values will be updated.

The screenshot shows a window titled "ProPricer Connect For Excel" with a close button (X) and a dropdown arrow (v). Inside the window, there is a dark header bar with two buttons: "Data" (with a blue icon) and "Leave Feedback" (with a speech bubble icon). Below the header, the main title "Switch Proposals" is displayed in large white text. The form contains two dropdown menus: "From Proposal:" with the selected value "Advanced Tank, Ver. 0" and "To Proposal:" with the selected value "MY TUTORIAL, Ver. 0". Below the dropdowns, a warning message states: "This will switch all references in the Document from one Proposal to another." followed by the instruction "Press Process if you want to start the process." At the bottom of the form, there are two buttons: "Process" and "Go Home". A footer bar at the very bottom contains the copyright notice: "© 2023 Executive Business Services, Inc. All Rights Reserved."

Manage References

The Manage References button displays all added data, which proposal the data came from, and the data's cell and location in the document. In this grid, you can delete, copy, and move data in the document.

To copy or move data, select an action in the Action column, then enter a location for the data in the New Range and New Sheet columns. When you're done, click the Process button.

To delete data, use one of the following methods:

- Select the checkbox in the Select column, then click the Delete All Selected button.
- In the Action column, select Delete, then click the Process button.

To print or export data, right-click anywhere in the grid, point to Grid Data, then select an option.

ProPricer Connect for Excel - Manage References
×

Select	Proposal	Info	Range	Sheet	Error
<input type="checkbox"/>	Advanced Tank, Ver. 0	2 P S:Name	Sheet1 A1		
<input type="checkbox"/>	Advanced Tank, Ver. 0	2 P S:Description	Sheet1 A2		
<input type="checkbox"/>	Advanced Tank, Ver. 0	2 P D:StartDate	Sheet1 B3		
<input type="checkbox"/>	Advanced Tank, Ver. 0	2 P D:EndDate	Sheet1 B4		
<input type="checkbox"/>	Advanced Tank, Ver. 0	2 P H:Hours\	Sheet1 D3		
<input type="checkbox"/>	Advanced Tank, Ver. 0	2 P H:Cost\	Sheet1 D4		

6 references

Delete All Selected

Leave Feedback button

This button opens the Connect for Office Enhancements Portal. Here you can suggest and vote for enhancements to the product.

Application Log

The application log records information about the processes that are completed with Connect for Office. By default, this log is saved to your local Documents folder > Connect for Office.

Contact Deltek

We welcome any questions, comments, or suggestions you may have about Connect for Office and this Quick Start Guide.

Contact information

Support Center: deltek.custhelp.com