


This guide provides instructions to give new team members access to Qvidian.


We provide the steps for two scenarios:

1. You have **unused** Qvidian licenses that you want to assign to a new team member.
2. You want to **reassign** a Qvidian license from a team member to another team member.

Finally, we review what to do if:

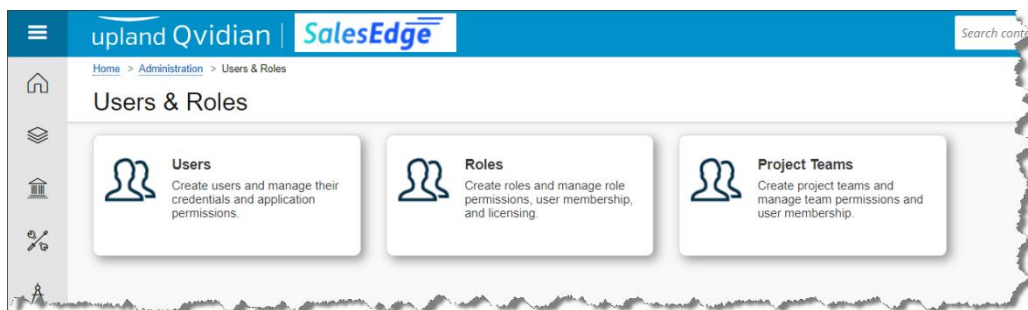
3. Your end-user **forgets** their Qvidian password and/or user name.


 **PC and Laptop Configuration for Qvidian.** Please remember that new users need to configure their PC browser and Microsoft Office® Word to use Qvidian. You can find configuration instructions in the online Upland Qvidian Help center. Select **Product Help** from your Qvidian **Help** menu. In Help, search for **Configure your browser for Qvidian**.

 If your new users prefer the **Chrome** browser, you can download and share this SalesEdge quick configuration guide:
<https://info.salesedgellc.com/hubfs/Qvidian/SalesEdge-Qvidian-PC-Set-Up-Chrome.pdf>

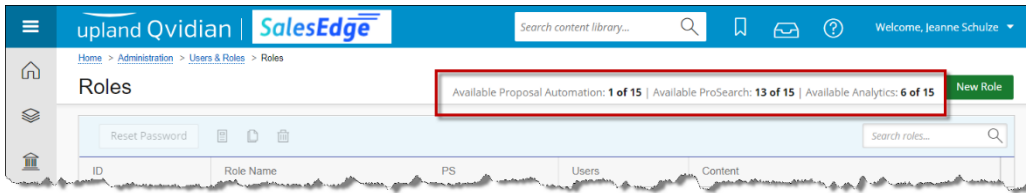
1. Assign Unused Qvidian License

1. Provide the new user(s) with the information that they need to configure their PC's browser and Microsoft Word for Qvidian.
2. A team member with Qvidian administrative permissions to manage users will login to **Qvidian**.
3. Go to **Administration**, select **Users & Roles**, and then select **Roles**.

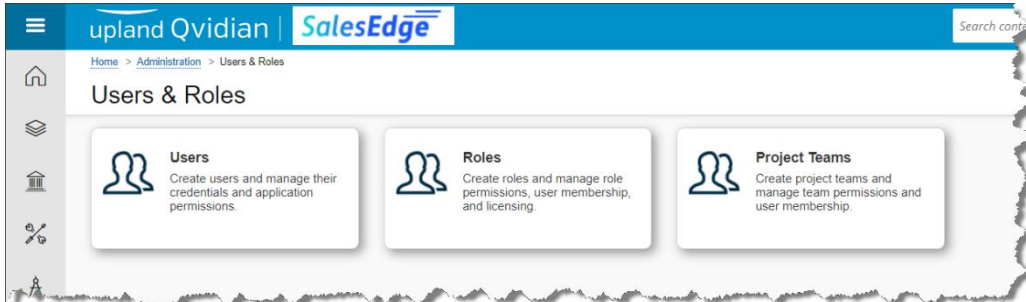


 You must have Qvidian administrative permission to assign a user license. Please contact your Qvidian system administrator or SalesEdge if you cannot access this area.

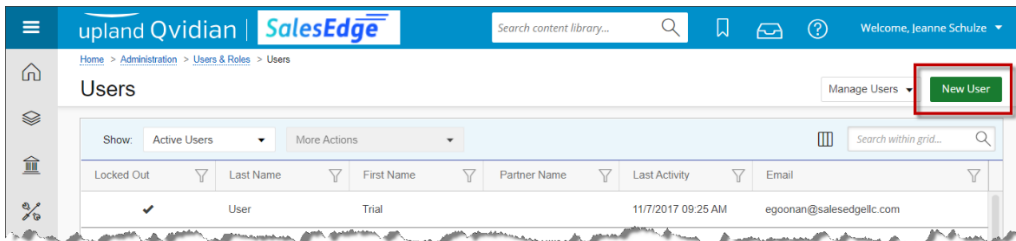
- In the **Roles** window, confirm that you have unused or “available” licenses for use.



- To create a new user, you need to go to the **Users** window. Return to **Users & Roles** and select **Users**.



- In the Users window, click **New User**.



- On the ***User Info** tab, complete at least all required fields denoted with the asterisk. The user’s email address is typically used for the **User Name**. On this tab, expand **Address** and **Contact Info** to define additional required fields.

8. On the Roles tab, select the **Role** to which you want to assign the new user.



Please note that there is no need to select the **Product** type. Your selected Role will apply the correct Product.

Member	Role	PA	PS
<input type="checkbox"/>	Clean up Role	✓	
<input type="checkbox"/>	Consultant	✓	
<input checked="" type="checkbox"/>	Everyone		
<input type="checkbox"/>	Guest User Role	✓	
<input type="checkbox"/>	Limited Collaboration	✓	
<input type="checkbox"/>	Master User	✓	

9. Based upon the Role that you selected for the new user, the **Permissions** tab will automatically display the user's permissions for **Application, Document Type, Template, Integration, and Partner**.



Best practice is to define all permissions through the Role – and to assign only one role to each user. Most likely you will not have to make any selections on the Permissions tab. If you feel that you do need to make an update, consider making the update to the Role—so that the permission is applied to all similar users.

10. Click **Create** to create the new user account.

11. In the **Users** window, the record for the new user will be checked as “locked out” until the new user defines their security password, question, and answer.

Locked Out	Last Name	First Name	Login Name	User ID	Partner Name	Last Activity	Email
<input checked="" type="checkbox"/>	Admin	System	admin@salesedge.com	1		8/8/2019 11:13 AM	admin@salesedge.com
<input type="checkbox"/>	Ernie	Ruby		128		8/8/2020 09:20 AM	

12. **New User Action:** The new user receives an automated “Activate your access to Qvidian” email message that includes a link to Qvidian. The new user must click this email message link and activate their account within 72 hours from when the account was created.

When the new user clicks the link in the Qvidian-generated email message, the user is prompted to enter a password, security question and answer, as well as reconfirm their email address. Once the user clicks **Submit**, the user is presented with a Qvidian login window.

A screenshot of the Qvidian account activation form. The form is titled "Qvidian" with the tagline "The Access of WinWin". It contains several sections: "Set your password" with "Password*" and "Confirm Password*" fields; "Enter a question (along with an answer) to be used when we need to confirm your identity. An example might be 'What was the name of your first school?'. Try to choose something that would be difficult for others to guess:" with "Question*" and "Answer*" fields; and "Ensure that your email address is accurate:" with an "Email*" field containing "guest@company.com" and a dropdown arrow. A "Submit" button is located at the bottom right.

2. Reassign Qvidian License

To reassign a Qvidian license from one team member to another, remove the first user from the assigned role and then *deactivate* the first user record to make it *inactive*—and then follow the preceding steps to assign the license to the new team member.

1. A team member with Qvidian administrative permissions to managed users will login to Qvidian.



You must have Qvidian administrative permission to assign a user license. Please contact your Qvidian system administrator or SalesEdge if you cannot access this area.

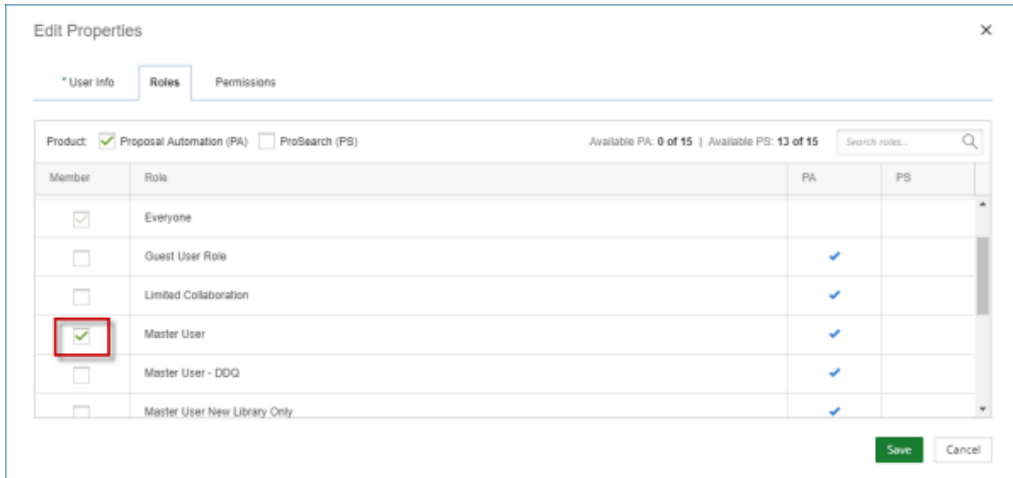
2. Go to **Administration**, select **Users & Roles**, and then select **Users**.
3. In the **Users** window, select the user account to be made *inactive*.
4. Double-click the user record, or select the user record and click **Properties**, to edit the User Properties.
5. On the Roles tab, uncheck the assigned Roles. This step ensures that the license is removed from the user account.



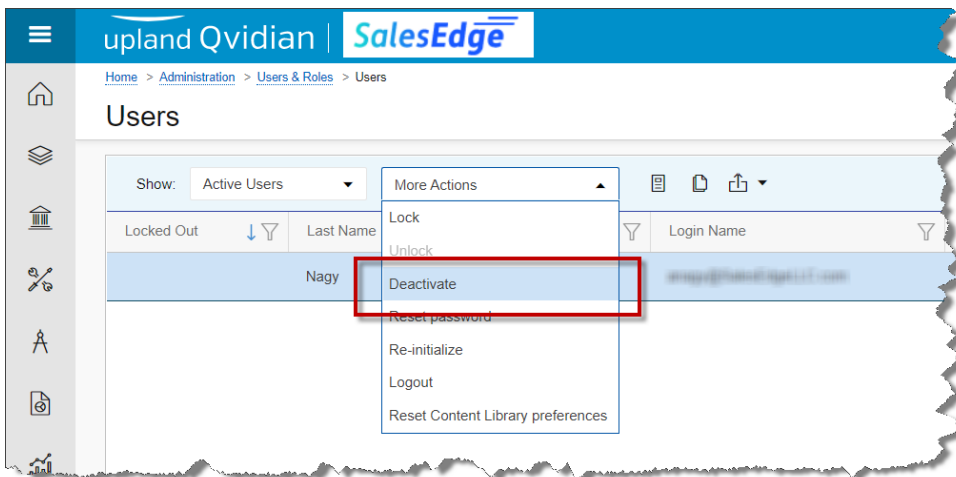
You will not be able to remove the user from the **Everyone** role. Everyone is a Qvidian-assigned role.



By deselecting the Roles, the selected product (Proposal Automation or ProSearch) should become automatically deselected. If not deselected, please deactivate the assigned product. Click to remove the checkmark.



6. Click **Save** to save the User record.
7. From the User list, select the user to be deactivated.
8. With the user record selected, from the **More Actions** drop down list, select **Deactivate**.



Inactive User: The deactivated user will no longer display under “Active Users.” They will remain in Qvidian as “Inactive Users”—along with their history of Qvidian activity.



GDPR: Qvidian provides GDPR compliant tools to fully remove all information about inactive users. Please contact your Customer Success Manager or SalesEdge Customer Care for assistance accessing this tool.

9. Once you remove a user from their role(s), your available license count will increase—and you will be able to create new user accounts by assigning the new user to a selected role.

Please refer to instructions provided in the first section, **1. Assign Unused Qvidian License** to assign the license to another team member.

3. End User Forgets Password

If a user forgets their password, there are two options to get a password reset.

User forgets their password

If the user knows their user name, they can initiate a password reset independently without assistance from an administrator.

1. The user navigates to the login screen with the Qvidian URL
2. Click **Reset my password**.
3. The user will be prompted to enter their user name and email address.
4. An email will be generated and sent to the user with a link. The user clicks the link and is prompted to reset their password.

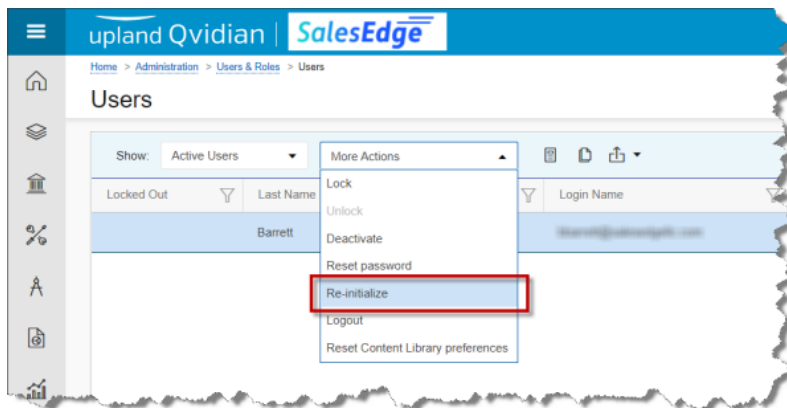


User forgets username and password!

The person with administrative permission to manage users can re-initialize users.

1. Go to **Administration**, select **Users & Roles**, then select **Users**.
2. Select the user and then click **Re-initialize User**.

A Qvidian-generated email message is sent to the user with the user name and a link. The user clicks on the link and is prompted to set up a new password.



Caution! Reset password is used to force users to set up a new password. Using this option requires that the user knows their existing password. This should *not* be used when the user has *forgotten* their password.

Need Assistance?

If you need any assistance, please connect with your Customer Success Manager or the extended SalesEdge team at CustomerCare@SalesEdgeLLC.com