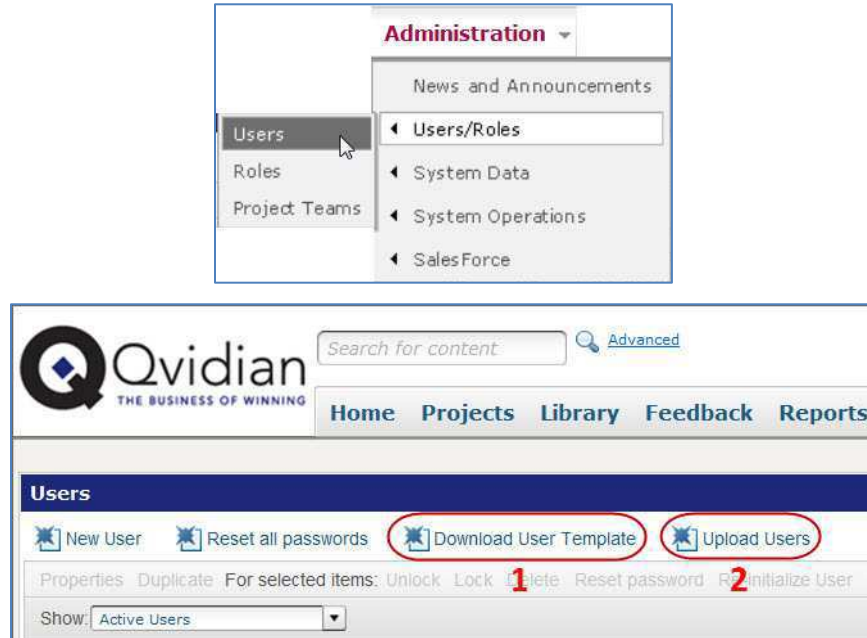


Download User Template / Upload Users

Qvidian Proposal Automation (QPA) Quick Reference Guide

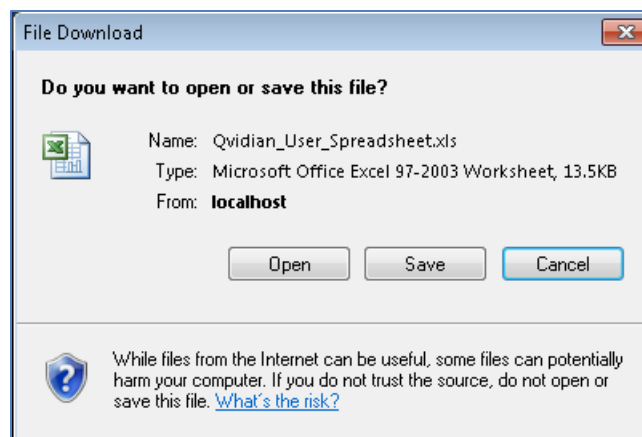


The Process

The User Upload process enables you to bulk create QPA Users via an Excel spreadsheet rather than creating Users manually. The first step is to download and populate the User Spreadsheet (Template) form containing all available standard fields, roles, and custom fields. The second step is to upload the completed Spreadsheet so that QPA can bulk create the Users.

1 Download User Template

Click the **Download User Template** to obtain a copy of the spreadsheet.



You can either **Open** the Spreadsheet now to work on it or **Save** the file.

Spreadsheet Template

The Spreadsheet's default name is **Qvidian_User_Spreadsheet.xls**. You can rename this file.

Example Spreadsheet Columns

	A	B	C	D	E	F
1	UserID (empty if new)	*LoginName (Field:2)	Salutation (Field:3)	*FirstName (Field:4)	MiddleName (Field:5)	*LastName (Field:6)
2						

Column Headers, Rows, and things to know

- First row contains column headers for each field to be populated, subsequent rows represent Users. Do NOT edit column headers, Do NOT re-order, delete, or insert columns.
- The headers will contain the name of the field, row, or custom field.
- The required entry fields' font text is red leading with an asterisk.
- The UserID column header is marked (empty if new), to inform you to leave the field empty for new users.
- Each column contains a type:id pair (Field:2), (Field:3), etc. in the column header that the upload process uses to identify each column's data.
- A "freeze pane" for the first row column headers is set on field C2 to keep these heading visible during scrolling.

Available Fields

UserID: This field is left empty for new users, but can contain the ID of an existing user if you're editing the existing user's data. This should be an integer that matches an existing UserID.

***Login Name:** Required field. The maximum length is 50 characters.

Note: The User Upload process will skip rows that do not contain a login name, even if they have other data. If you have not specified a UserID, but the entered login name matches an existing user, that user will load. This allows you to use the same spreadsheet to create and then update a set of users.

Salutation: Optional field containing the salutation (Mr., Mrs., etc.) for User. The maximum length is 10 characters.

***First Name:** Required field. The maximum length is 50 characters.

Middle Name: Optional field. The maximum length is 50 characters.

***Last Name:** Required field. The maximum length is 50 characters.

Title: Optional field. The maximum length is 80 characters.

Address 1: Optional field. The maximum length is 100 characters.

Note: Although this field is not required, it is required in QPA's User Administration; therefore, if you do not enter this value but later edit this User, you will be required to enter an Address at that point.

Address 2: Optional field. The maximum length is 100 characters.

City: Optional field. The maximum length is 50 characters.

Note: Although this field is not required, it is required in QPA's User Administration; therefore, if you do not enter this value but later edit this User, you will be required to enter a City at that point.

State: Optional field. The maximum length is 50 characters.

Zip: (Postal Code) Optional field. The maximum length is 20 characters.

Country: Optional field. The maximum length is 50 characters.

Phone: Optional field. The maximum length is 50 characters.

Fax: Optional field. The maximum length is 50 characters.

***Email:** Required field. The maximum length is 50 characters.

PA User (QPA User): Optional field to indicate whether the user is licensed to use the Proposal Automation application.

Notes: If the value is empty, no changes are made to the user (new users will not have the license, existing users will not be changed). If a value of 0 is entered, the user will explicitly not have the license. If a value of 1 is entered, the license will be assigned to the user, if seats are available.

PS User (ProSearch User): Optional field to indicate whether the user is licensed to use the ProSearch application.

Notes: If the value is empty, no changes are made to the user (new users will not have the license, existing users will not be changed). If a value of 0 is entered, the user will explicitly not have the license. If a value of 1 is entered, and if the user doesn't already have the SS (QPA) User license, the user will be assigned the license, if seats are available.

Deleted: Optional field to flag a user as deleted.

Note: For new users, you are unlikely to set this unless you do not want them to be enabled at this time. For existing users, you can use this to bulk disable/enable users.

Roles: Optional fields applied to any columns added for the customer's roles. These are optional fields.

Note: If the value is empty, no changes are made to this user's assignment to this role. If a value of 0 is entered, the user will be explicitly removed from the role. If a value of 1 is entered, add the user will be added to the role, if they have the appropriate product licenses to be assigned to the role. If the user has SS (QPA) User, they can be assigned to any role. If the user has PS (ProSearch) User, they can only be assigned to PS roles.

Custom Fields: Optional field(s) applying to any columns added for Custom User info fields. The maximum length is 1000 characters.

Error Handling and Validation

If you receive any Validation error, you can correct the error and upload the spreadsheet again. Because the process stops where the error occurs and because you can re-run the same spreadsheet again, you can simply upload the corrected spreadsheet to continue where you left off (any users already created will be edited, any users not yet created will be created as new).

If any columns for required fields are missing, an error message will be displayed and the upload will not continue.

If you begin the upload process with negative licenses available, an error message will be displayed and the upload will not continue. This doesn't apply to concurrent licensing.

If a role column is included but the ID doesn't match an existing RoleID in the database, an error message will be displayed and the upload will not continue.

If a header is edited so that it is not recognizable, an error message will be displayed and the upload will not continue.

If an error occurs creating/saving the user, an error message will be displayed and the upload will not continue.

If an error occurs updating role assignments, an error message will be displayed and the upload will not continue.

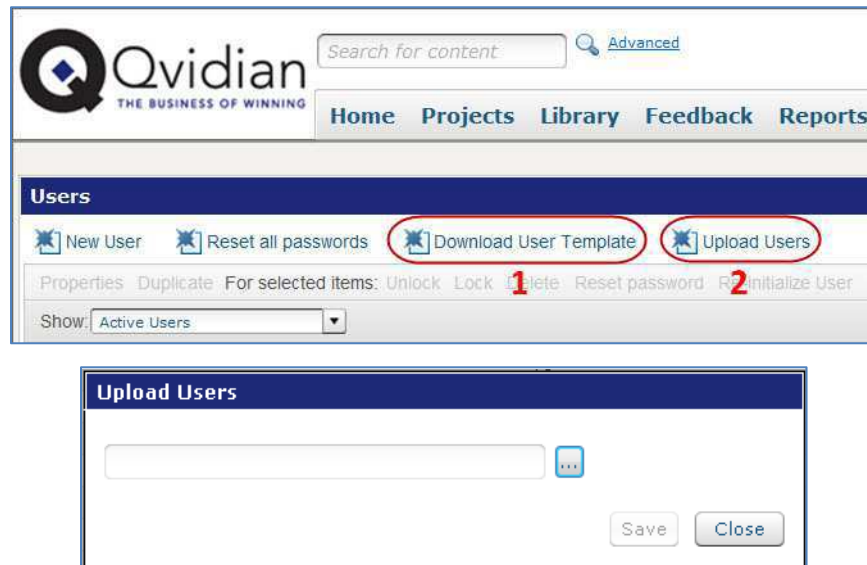
If an error occurs saving custom field values, an error message will be displayed and the upload will not continue.

If an error occurs creating New User email notifications and the error is handled by the email process, the email notification will appear in the pending emails to be sent. If the error is not handled by the email process, an error message will be displayed and the upload will not continue.

If no data rows were entered, an error message will be displayed and the upload will not continue.

If any other error occurs, an error message will be displayed and the upload will not continue.

2 Upload Users



- When you have populated and saved the Qvidian User Spreadsheet, click **Upload Users** link.
- Click the Browse icon to display the 'Select file' dialog. Locate the Spreadsheet and then click open. The Spreadsheet file name displays on the Upload Users screen. If this is the correct file, click Save. The Users are created.

When the upload completes, the dialog will close and the Users grid will refresh.

Notes: If a validation error occurs, you will be notified of what happened, where it stopped, and what can be done to fix the problem (if known). The dialog will remain open, and the you can browse out to the spreadsheet once the issue has been corrected.

The spreadsheet can be uploaded multiple times. Users that have already been created will be updated to reflect the current data in the spreadsheet. This means you can populate the spreadsheet, create the users, change the spreadsheet, and upload it again to edit the users. This mechanism allows you to recover if the upload process fails in the middle.