PartnerVault
Partner Guide

Upic Solutions • Secure Document & Service Management Portal

What is PartnerVault?

PartnerVault is your dedicated, secure portal for managing the relationship between your organization and Upic Solutions — all in one place. From accessing delivered documents and tracking support ticket trends to managing user provisioning and monitoring software licenses, PartnerVault puts the tools you need at your fingertips. Everything is encrypted, access-controlled, and built to give you real-time visibility into the services Upic manages on your behalf.

Think of PartnerVault as your command center. Instead of juggling emails, spreadsheets, and phone calls to stay on top of your managed services, you get a clean, modern dashboard that keeps your team informed and in control.

> ■■ **A note on Beta features:** PartnerVault is actively evolving, and several features are currently in Beta. Beta features are enabled on a per-partner basis by Upic Solutions — not all Beta features will be available to every partner. When enabled, Beta features appear in your navigation with a **Beta** badge. If you're interested in a Beta feature that isn't currently enabled for your organization, reach out to your Upic account manager.

Table of Contents

Signing In

PartnerVault uses **passwordless email login** — no password to remember.

- Go to the PartnerVault sign-in page.
- Enter your email address and click **Send Code**.
- Check your inbox for a 6-digit code (arrives within seconds).
- Enter the code to sign in.

Your session lasts **24 hours**. If it expires, just sign in again with a new code.

> ■ **Tip:** Check your spam folder if the code doesn't arrive within a minute. The email comes from Upic Solutions via *partnervault.Upicsolutions.org*.

My Organization

My Organization is your read-only view of your company's profile in PartnerVault.

What you'll see

- Company name, short name, and account number
- **Status** — Active or Disabled
- Phone and address
- **Email domains** — the domains your users' emails must come from
- **Relationship Manager card *(if enabled)*** — your assigned Upic contact with name, email, phone, and a scheduling link
- **Your Services card *(Beta, if enabled)*** — a list of the services Upic manages for your organization, grouped by category

You cannot edit anything on this page. Contact your Upic Solutions representative to request changes.

Documents

The **Documents** section is where you access files that Upic Solutions has delivered to your organization.

Browsing Documents

Documents are displayed in a table with:

- File name and type
- Upload date
- Tag (the category the document belongs to)

- Reference number (if provided)
- Uploader

Searching and Filtering

Use the search bar and filters to find specific documents:

- **Search** — filter by file name, email subject, or reference number
- **Tag filter** — show only documents under a specific tag
- **Date range** — filter by upload date

Downloading Documents

- **Single download** — click the download icon on any row, or open the document detail panel and click **Download**
- **Batch download** — check the boxes next to multiple documents, then click **Download Selected**

Downloads use time-limited secure links. If your download link expires before the file finishes, simply click download again.

Sending Documents

From the document detail panel, you can use the **Send Document** button to email a document directly to people in your organization. This is a convenient way to share deliverables with team members without needing to download and forward them manually.

Document Detail

Click any document row to open the detail panel on the right. It shows:

- Full file name and size
- Upload date and uploader
- Tag and reference number
- Download and Send buttons

> ■■ **Note:** You can only see documents that match the tags assigned to your people. Documents outside your tags are not visible.

People

The **People** section lets you manage the users in your organization — both regular users (People) and other Partner Admins.

User Roles

Role	What they can do
Person	View and download documents matching their assigned tags
Partner Admin	Everything a Person can do, plus manage people and access all documents

Adding a New Person

- Click **Add Person**.
- Enter their name and email address. Email must use one of your organization's configured domains.
- Select their role (Person or Partner Admin).
- **Assign tags** — they will only see documents matching these tags.
- Click **Create**.

The person will receive an email invitation. They sign in using the same passwordless email flow.

Managing Existing People

- **Edit tags** — click a person's row to update their tag assignments
- **Disable/Enable** — temporarily block access without deleting the account
- **Delete** — permanently remove a person from your organization

> ■■ **Note:** You cannot remove all Partner Admins from your organization. At least one must remain active.

The People table shows when each person last signed in, so you can identify inactive accounts.

Allowed Tags

Allowed Tags shows the global list of document categories (tags) available in PartnerVault. Tags determine which documents a person can see. For example, a person with the **Invoices** tag can see all documents delivered to your organization under that tag.

This page is **read-only** — tags are managed by Upic Solutions globally.

Known Authorizers

Known Authorizers is a list of individuals from your organization who are authorized to submit user lifecycle requests (provisioning, changes, terminations).

What you can do

- View the current list of authorized contacts on file
- **Request changes** — if someone needs to be added or removed, use the **Request Change** button to send a request to Upic Solutions

Changes to the authorizer list are handled by Upic Solutions. The request creates a support ticket on your behalf.

> ■■ **Note:** Only known authorizers with the Partner Admin role can submit provisioning requests in the Provisioned Users section (if enabled for your organization).

Audit Log

The **Audit Log** gives you a full record of activity within your organization in PartnerVault.

What's Logged

- Document downloads and views
- People created, edited, or deleted
- Sign-in activity
- Provisioning requests submitted
- And more

Filtering

- **Date range** — narrow to a specific period (defaults to the last 7 days)
- **Action type** — filter by event type (e.g., document.download, person.create)
- **Actor** — filter by which user performed the action

The log is read-only and cannot be modified. It is intended for your own compliance and audit purposes.

Beta Features

The following features are optional and must be enabled for your organization by Upic Solutions. When enabled, they appear in your left-hand navigation with a **Beta** badge. Not all Beta features are available to every partner — if you'd like access to a feature listed below, contact your Upic account manager.

Managed Licenses

Managed Licenses shows a read-only dashboard of software licenses Upic manages on your behalf (e.g., Microsoft 365).

What you'll see

- A list of license snapshots with dates
- Summary cards showing total, active, unassigned, and overallocated seats
- License details: product name, assigned seats, available seats, utilization percentage
- **Historical snapshots** — browse back in time using the calendar navigation
- **Change indicators** — see how usage has changed between snapshots

This page is **read-only**. License data is pushed by Upic Solutions automatically.

Ticket Summaries

Ticket Summaries gives you an AI-generated view of your support ticket history with Upic Solutions, including trend reports at weekly, monthly, quarterly, and yearly levels.

Tabs

Tab	What it shows
Tickets	Individual ticket summaries with status badges
Weekly	Weekly rollup reports
Monthly	Monthly rollup reports
Quarterly	Quarterly rollup reports
Yearly	Yearly rollup reports

Reading a Summary

Click any row to open the detail panel. Summaries may include:

- A public summary of what was accomplished
- Key topics covered
- Status and resolution details

- Metrics (first reply time, resolution time)

Rollup Reports

Rollup reports aggregate ticket activity over a period and may include trend comparisons to the previous period. Rollups require a minimum number of tickets to generate (weekly: 3, monthly: 5, quarterly: 10, yearly: 15).

Exporting

Use the **Export to PDF** button in the detail panel to print or save a summary as a PDF.

> ■■ **Note:** Some internal analysis fields visible to Upic administrators are not shown in your view.

Provisioned Users

Provisioned Users lets you submit and track user lifecycle requests — onboarding new employees, making changes to existing accounts, and processing terminations — with automated ticket creation in Upic's ticketing system.

> ■■ **Authorization required:** Only Partner Admins who are also listed as Known Authorizers can submit new requests.

Request Types

Type	When to use
New User	Onboard a new employee across your managed services
User Change	Update an existing user's access, group memberships, or other details
Suspension	Temporarily suspend a user's access
Termination	Deprovision a departing employee
Reinstatement	Reinstate a previously terminated or suspended employee

Submitting a Request

- Click **New Request** and choose the request type.
- **Step 1 — User Info:** Enter the user's name, email, and any other required fields. Some fields (like logon names) may auto-calculate as you type.
- **Step 2+ — Services:** Each enabled service appears as its own step. Toggle services on or off for this request, then fill in the service-specific fields.
- **Review:** Check all entered data before submitting.

- **Click Submit** — a ticket is automatically created in Upic's ticketing system with all the details attached.

Your form is **auto-saved as a draft** every few seconds. If you need to stop and come back, your in-progress drafts are surfaced at the top of the Provisioned Users page for easy resumption.

Templates

If you regularly submit the same type of request (e.g., standard onboarding for a new Marketing hire), you can save the form as a **template**:

- Fill in the form.
- Before submitting, click **Save as Template** and give it a name.
- Next time, click **Load Template** to pre-fill the form instantly.

Templates are universal and can be applied to any request type. Manage your templates from the **Templates** page (accessible from the Provisioned Users section).

Tracking a User

The Provisioned Users list shows all users with status badges:

Status	Meaning
Pending	Request submitted, waiting for Upic to process
Active	User is provisioned and active
Suspended	User is temporarily suspended
Terminated	User has been deprovisioned

Click any user card to view their full **lifecycle timeline** — a chronological history of all requests submitted for that user, including what changed each time.

Terminated users are shown with a badge for 30 days, then hidden from the default view. Use the **Show Terminated** filter to see them.

What Happens After Submission

- PartnerVault creates a ticket in Upic's ticketing system with a JSON summary of the request attached.
- The status updates automatically as Upic resolves the ticket (checked every 6 hours).
- You'll see the status change reflected on the user's card and timeline.

If a ticket fails to create (e.g., a connectivity issue), it will be retried automatically. If it continues to fail, Upic will be notified to resolve it.

Billable Users

Billable Users gives you a monthly snapshot view of the users Upic manages on your behalf, with clear visibility into who is billable, enabled, and active across your services.

What you'll see

- **Calendar navigation** — browse monthly snapshots to see your user base at any point in time
- **Summary cards** — total billable users, enabled users, and resource accounts at a glance
- **Searchable table** — columns include name, email, billable status, enabled status, resource account flag, and user status
- **Filters** — narrow the view by billable/non-billable, enabled/disabled, resource/non-resource, and active/deprovisioned
- **Export CSV** — download the current snapshot as a CSV for your own reporting

This page is **read-only**. User data is consolidated and pushed by Upic Solutions on a monthly basis.

Getting Help

- **Document access issues** — Contact your Upic Solutions representative
- **Adding or removing authorized contacts** — Use the Known Authorizers request flow
- **Account or login problems** — Contact Upic Solutions support
- **Feature requests or feedback** — Reach out to your Upic account manager

> ■■ *PartnerVault is operated by Upic Solutions. All data is encrypted at rest and in transit.*