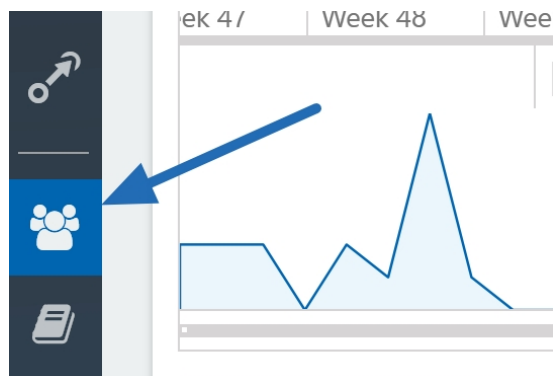


# How to Manage Users

Last Modified on 05/24/2022 7:08 pm EDT

As a Company Admin, you are in control of user access in UNIFI. In the User Management Portal, you can manage users, groups, sign-on providers, and licenses. UNIFI also provides an automated way for user provisioning via SCIM protocol - see more details [here](#).

Let's go ahead and access the User Management Portal. **It's important to note that only company admins can access the user management portal.** To access the portal, click on the people icon on the left side of the screen.



## Managing Groups

Groups are an excellent way to manage sets of UNIFI users. They make it easier to manage library permissions, control who receives different content request notifications, grant specific groups access to manufacturer content, and more.

Here are some examples of user groups that you could create:

- Library User Groups - grant sets of users *access* to individual company libraries
- Library Admin Groups - allow specific users to *manage* library content
- Content Notification groups - manage different types of content requests.

As you decide how you want to create your groups, keep in mind that you will need to set up at least one group, as groups also provide users with access to our Manufacturer Channel Subscriptions feature that is provided for free

with your UNIFI service.

To get started, select **Manage Groups** at the top of the screen.


## User Management



Next, select **Add** in the upper right corner.

Search user groups					ADD	EDIT	DELETE
Name	# of users	Default?	Notifications?				
Admins	4	<input type="checkbox"/>	<input type="checkbox"/>				
Admins - Content Request Notifications	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
Architecture - AU	4	<input type="checkbox"/>	<input type="checkbox"/>				

Now enter the new user group name and select **OK**.

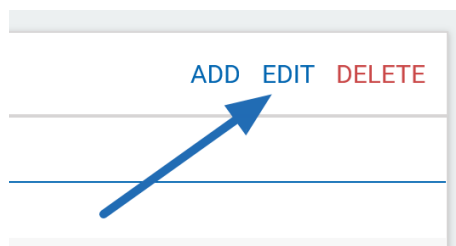


### New User Group

Enter new user group name

**Ok** Cancel

In order to add users to a group, click on the specific group that you want to edit and then you can either select **Edit** in the upper right of the screen OR right click on the group and select Edit.



From here, you can search for users by name to add or remove from groups. You have the option of automatically including new users in this group when they are added to UNIFI.

Name:

**Save Group** **Delete Group**

Automatically Include New Users? ☐  
Content Request Notification Group ☐

Included **Remove All** To Add **Add All**

You can also create a Content Request Notification Group. This type of group allows non-library admins to receive notifications for content requests. Since content requests can be used to manage all types of content, you may have a group for AutoCAD or Sketchup users to create requested content.

Name:

Automatically Include New Users? ☐  
Content Request Notification Group ☐

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Included  To Add

When you are done editing your group, you'll want to select **Save Group**.

Name:

Automatically Include New Users? ☐  
Content Request Notification Group ☐

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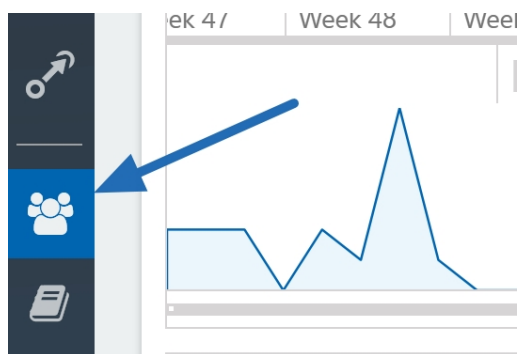
Included  To Add

## SSO Setup

Once you have subscribed to our Single Sign-On service (SSO), we will be in touch with you to properly set up the SSO. You may also check out [our SSO guide to documentation instructions for various providers](#), or you can reach out to us at [support@unifilabs.com](mailto:support@unifilabs.com) to properly configure your service directory within the UNIFI platform.

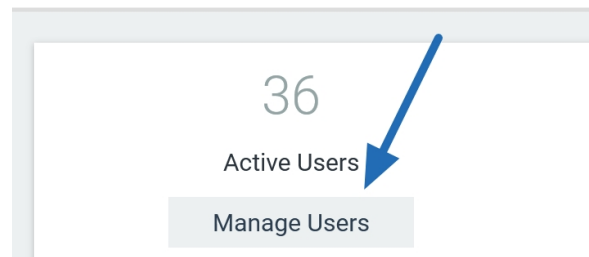
## Adding Users

Let's look at how to manage specific users. Go to the User Management Portal by clicking on the **people icon** on the left side of the screen.

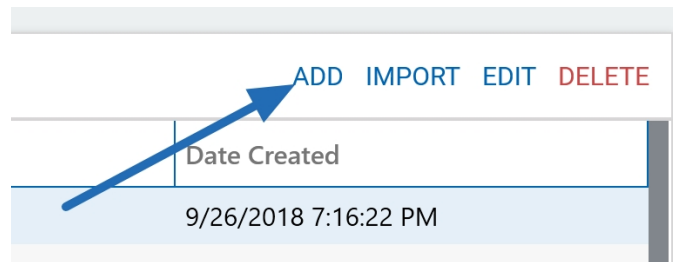


Next, select **Manage Users**.

## User Management



To add a user, click on the **Add** button in the top right of the screen.



Next, enter the user information. You can grant the user administrative access as well as indicate which groups the user may belong to.

First Name:  Last Name:

Email:

☐ Company Administrator

☒ Send Activation Email?

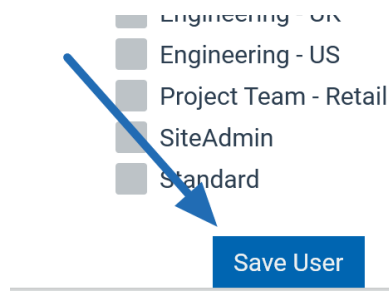
Sending the activation email will set a random password for the user. To define your own password, uncheck this option and enter the desired password below.

Identity Provider:

Groups

- ☐ Admins
- ☐ Admins - Content Request Notifications
- ☐ Architecture - All

Once you have filled in the appropriate information, select **Save User**.



## Importing Multiple Users at Once

To add multiple users at once, you can use the Import feature. Select **Import** from the top right of the screen.

ADD IMPORT EDIT DELETE	
or	Date Created
	9/26/2018 7:16:22 PM
	9/26/2018 7:16:23 PM

You have two import options: (1) Import from Excel or (2) Import manually.

### Option 1: Import from Excel

The screen will automatically put you on the Paste from Excel page. Before you paste from Excel, you will want to make sure that the columns are ordered as follows:

1. Email Address
2. First Name
3. Last Name
4. Groups (separated with commas)

Then copy the contents from your Excel spreadsheet and paste them into the large space provided towards the bottom of the page.

Paste from Excel

Manual Import

Paste your data from an excel spreadsheet below. You must copy and paste from either a normal excel spreadsheet (CSV) file. Make sure that the column orders are the same: 1) Email Address, 2) First Name, 3) Last Name 4) Groups (commas). All other columns will be ignored.

☐ Company Admin  
☒ Automatically send out activation email

Sending the activation email will set a random password for the user. To define your own password, uncheck this option and enter the password:

Email Address	First Name	Last Name	Groups
<div></div>			

Note: Values in the 'Groups' column must match the exact names of groups in UNIFI. All users in this will be assigned to default group designate.

You'll notice that you can assign company admins as you add users. If some of your users will be assigned as company admins, but others will not, you'll want to import those separately since checking the **Company Admin** box assigns all imported users to be admins.

(CSV) file. Make sure that the column orders are the same (commas). All other columns will be ignored.

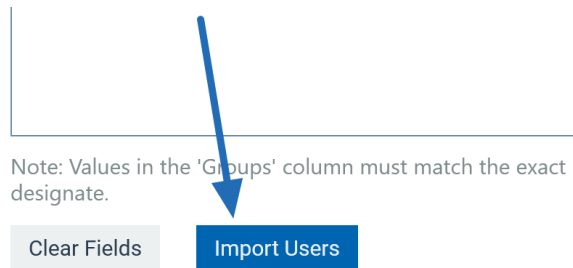
☐ Company Admin

☒ Automatically send out activation email

Sending the activation email will set a random password for the

Password:

Once you have pasted all of the contents, select **Import Users**.



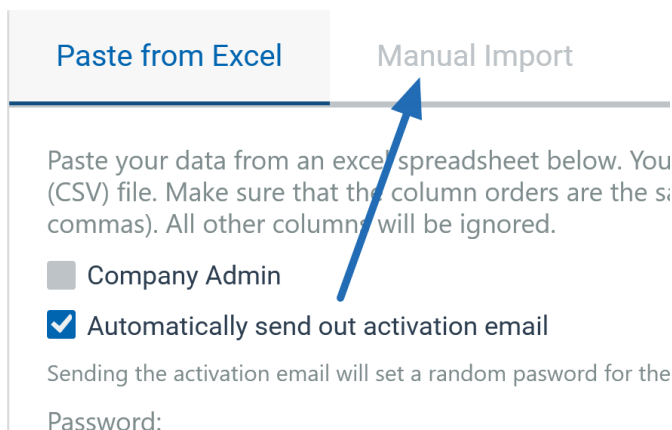
Note: Values in the 'Groups' column must match the exact designation.

Clear Fields Import Users

UNIFI will then send each user an activation email with a random password. You might also like to create your own password (for example, if you have a company password). To do this, simply uncheck the **Automatically send out activation email** box and paste in your own password.

## Option 2: Import Manually

To import individuals manually, select the **Manual Import** tab.



Paste from Excel Manual Import

Paste your data from an excel spreadsheet below. You (CSV) file. Make sure that the column orders are the same (commas). All other columns will be ignored.

☐ Company Admin

☒ Automatically send out activation email

Sending the activation email will set a random password for the

Password:

Then enter email addresses (one on each line) in the field provided.

Keep in mind that this method will not import first and last names; you (or the user) will need to edit that after the import.

And just like with the Excel import, you will want to do a separate import for company admins versus the standard users.

You can also customize the password.

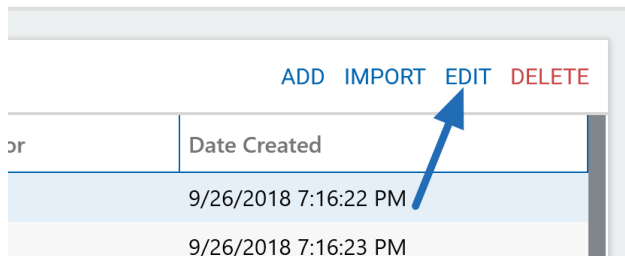
Sending the activation email will set a random password for the user. To define your own password, uncheck this option and enter the desired password below.

Password:

Once you are done, select **Import Users**.

## Editing Users

Now let's say that you want to edit a user. You can search for the individual's name and then either select their name and click **Edit** on the top right of the screen OR you can right-click on their name and select **Edit**.

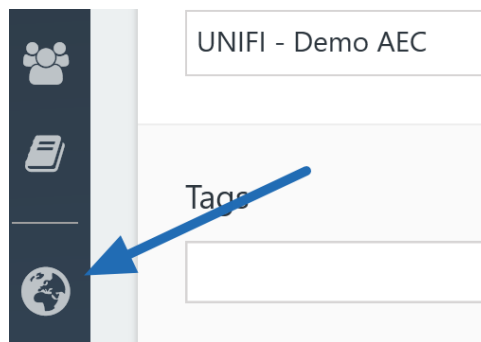


Once you have edited the user's information, select **Save User** (or, if you'd like to delete a user, you can select **Delete User**).

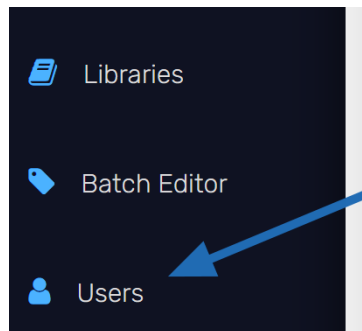
First Name:	Last Name:
<input type="text" value="Anne"/>	<input type="text" value="Fratelli"/>
Email: <input type="text" value="ramseyfratelli@example.com"/>	
<input type="checkbox"/> Company Administrator	
Password: <input type="password"/>	
Identity Provider: <input type="text" value="UNIFI"/>	
<b>Groups</b>	
<input type="checkbox"/> Admins	
<input checked="" type="checkbox"/> Admins - Content Request Notifications	
<input checked="" type="checkbox"/> Architecture - AU	
<input checked="" type="checkbox"/> Architecture - UK	
<input checked="" type="checkbox"/> Architecture - US	
<input checked="" type="checkbox"/> AutoCAD Content Request	
<input checked="" type="checkbox"/> BIM Team	
<input type="checkbox"/> CFA_Architecture Team	
<input checked="" type="checkbox"/> CFA_Components Team	
<input type="checkbox"/> CFA_Electrical	
<input type="checkbox"/> Content Review Team - US	
<input checked="" type="checkbox"/> Engineering - AU	
<input checked="" type="checkbox"/> Engineering - UK	
<input checked="" type="checkbox"/> Engineering - US	
<input checked="" type="checkbox"/> Project Team - Retail	
<input type="checkbox"/> SiteAdmin	
<input checked="" type="checkbox"/> Standard	
<input type="button" value="Save User"/>	<input type="button" value="Resend Activation Email"/>
<input type="button" value="Delete User"/>	

## Export User Report

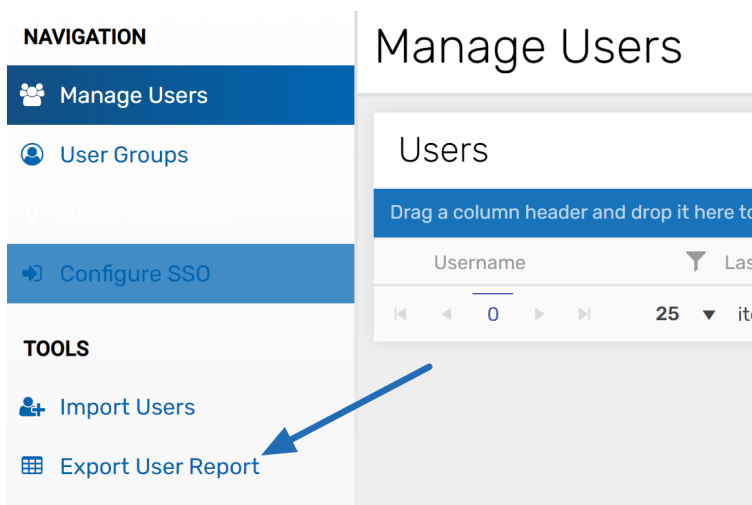
UNIFI also allows you to Export User information. To do this, begin by going to the Web Portal in UNIFI by selecting the globe icon on the left side of the screen.



Next, select **Users** from the sidebar in the Web Portal.



Then select **Export User Report** from the left side of the screen.



A CSV file will then download, giving you information on each user, including the name, admin status, user groups, date of account creation, and timestamp of the last login.



AutoSave Off UNIFI\_users Search

File Home Insert Draw Page Layout Formulas Data Review View

Clipboard Font Alignment Number

A1 Email

	A	B	C	D	E	F	G	H	I
1	Email	First Name	Last Name	Company	User Group	Created	Last Login		
2	Cody.Winc	Cody	Wincheste	Y	Digital Pra	2019-09-1	2020-09-03T02:46:29.793		
3	Eddy.Salis	Eddy	Salis	Y	UMC Tech	2019-07-0	2020-10-08T14:30:58.787		

And that's it! As you can see, UNIFI makes it easy to manage users & groups in one place.

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