Overview of the Web Portal

In this article, we give you an overview of the Web Portal and show you how you can use this feature to manage your UNIFI account and content.

First, start by clicking on the globe icon on the left side of the screen.

This will open a web browser window (preferably Google Chrome or Firefox).

Dashboard

The web portal landing page is your Company Dashboard. Let's take a look at the different components of the dashboard. The Notifications section gives you an overview of all existing notifications. It's important to note that the notifications view in the UNIFI app defaults to only showing you those from the last 30 days; the view in the Web Portal shows you *all* pending uploads, requests, and in-progress requests, so nothing gets lost.
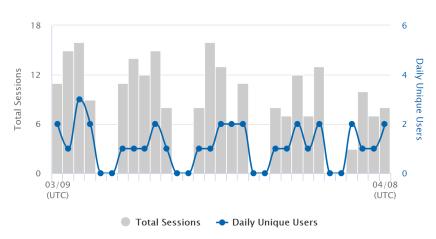
Company Dashboard

Notifications

44 Pending Uploads   13 Pending Requests   15 In Progress Requests

Library Requests

Categories (top to bottom):
- MEP - Electrical
- MEP - Mechanical
- AEC - Architecture
- GC - Manufacturers
- Internal - Sandbox
- MEP - Plumbing
- Main Library (UNIFI - Demo OM)
- Internal - Development
- GC - Construction
- AEC - Civil

Legend: ● Pending Uploads ● Pending Requests ● In Progress Requests
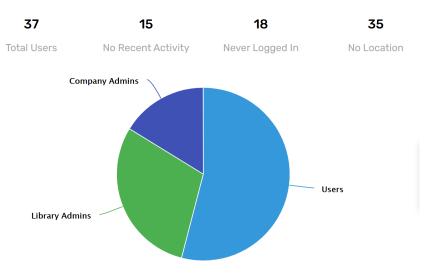
The Licenses section shows you how many times users have logged into the platform each day, as well as how many unique users have logged into the platform each day.

Licenses

03/09 (UTC) — 04/08 (UTC)

Legend: ○ Total Sessions ●— Daily Unique Users

The Users section gives you a pie chart overview of those invited to the platform.

Users

37	15	18	35
Total Users	No Recent Activity	Never Logged In	No Location

Pie chart segments: Company Admins, Library Admins, Users

Active Users shows you how many people you've invited to the platform.

No Recent Activity refers to people who have logged in but haven't used the platform in more than 30 days.
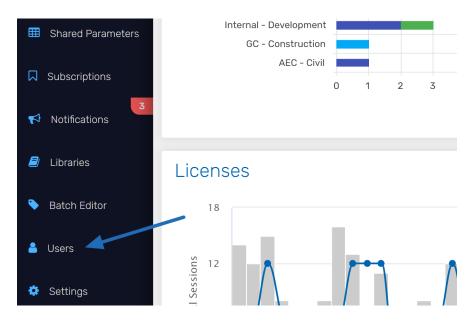
Never Logged In shows you how many individuals have been invited to the platform but have never logged in.

No Location tells you the location of each user.

To manage the information shown in the pie chart, you'll need to go to the Users section of the Web Portal.
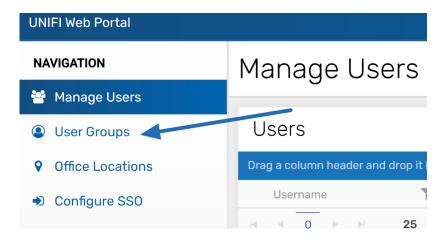
Users

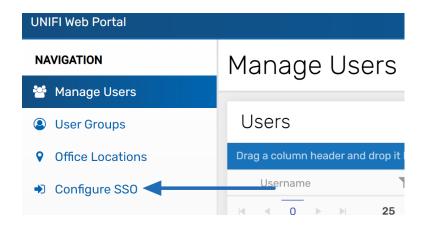To manage users in the portal, click on **Users** on the left side of the screen.

This section gives you an overview of all users invited to the platform. You can view their username, name, office location, role, and date of the last login.
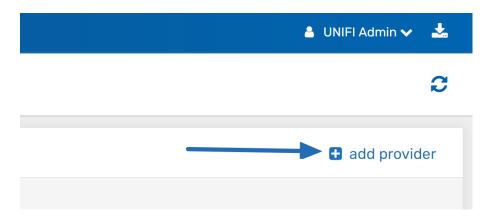
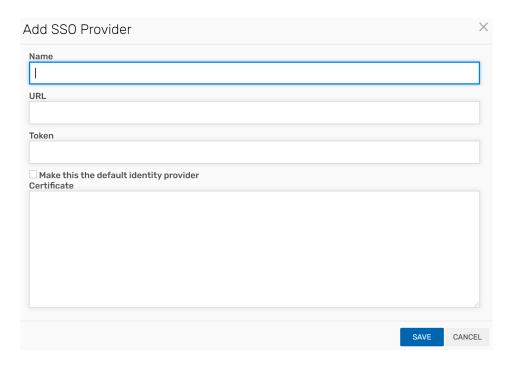You can also create user groups by selecting **User Groups.**

If you click on **Configure SSO**, you can modify SSO settings. UNIFI integrates with any SSO service that is SAML 2.0 compatible.

To add a provider, select **add provider** in the top right of the screen.
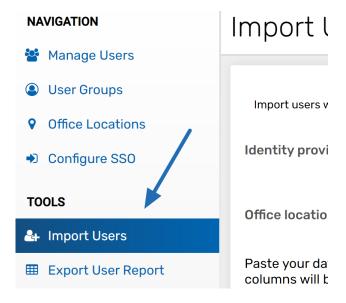
Next, put in the provider name, their URL, token, certificate, and then select **Save.**
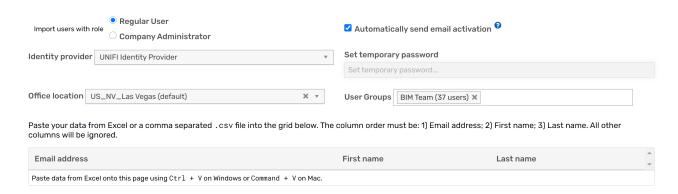
Be sure to reach out to support@unifilabs.com as additional steps are required based on your specific SSO provider to complete SSO integration.

One important tip: If you are going to be using SSO, you still need to have at least one user managed by the UNIFI provider. The user doesn't have to have a real email address, but a user needs to be connected to the UNIFI system of SSO, just in case something happens with your SSO provider and you need to access UNIFI.

If you click on **Import Users** on the left side of the screen, you'll see that you can paste from Excel the users that you want to add.
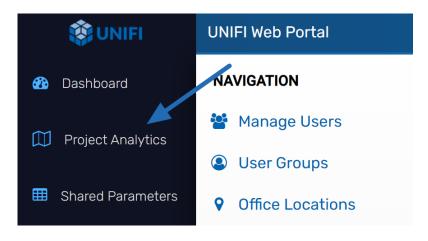
From here, you simply paste in the user information from Excel. Just like in the UNIFI app, you'll want to import regular users separately from company administrators. And if desired, you are also able to set a standard password.
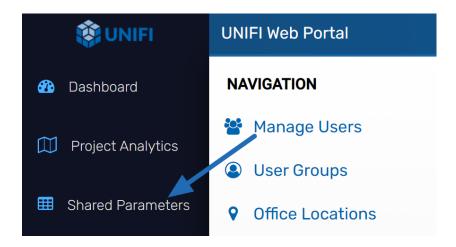
Project Analytics

The Project Analytics section in UNIFI contains a number of useful features to help you manage your projects. You can check out our article that walks you through how to set up a project in project analytics and also learn how to review project analytics in UNIFI.
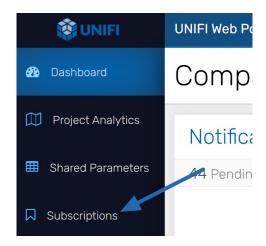
Shared Parameters

The Shared Parameters feature allows Company Admins to manage the company's shared parameters file in a single location and provides an update history. For more details on utilizing this feature, visit our article on Shared Parameters.
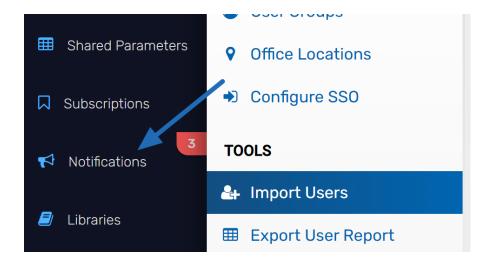
Subscriptions

The Subscriptions section of the Web Portal is where you can manage your Channel subscriptions. Remember that channels are ways for other content providers to share their libraries at no additional cost to you. UNIFI has partnered with BIMStore, along with numerous manufacturers, to provide additional value to your subscription. All Revit out-of-the-box families can be found here as well.
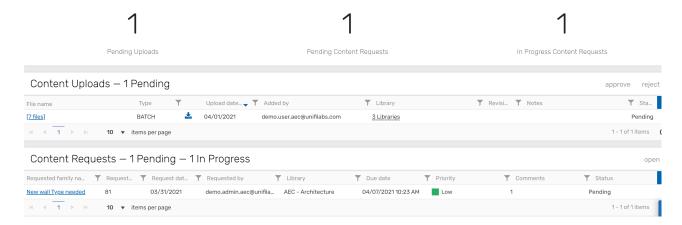
Notifications

If you select **Notifications** on the left side of the screen, you'll see information similar to what you see when you're in the notifications section of the UNIFI platform. Remember, in just the UNIFI platform, the date range defaults to the last 30 days.
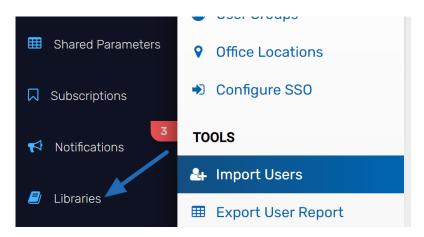
You can view pending uploads, pending content requests, and in-progress content requests.

1	1	1
Pending Uploads	Pending Content Requests	In Progress Content Requests

Content Uploads — 1 Pending

approve   reject

File name	Type		Upload date...	Added by	Library	Revisi...	Notes	Sta...
[7 files]	BATCH		04/01/2021	demo.user.aec@unifilabs.com	3 Libraries			Pending

|◄ ◄ 1 ► ►| 10 ▼ items per page   1 - 1 of 1 items

Content Requests — 1 Pending — 1 In Progress

open

Requested family na...	Request...	Request dat...	Requested by	Library	Due date	Priority	Comments	Status
New wall Type needed	81	03/31/2021	demo.admin.aec@unifila...	AEC - Architecture	04/07/2021 10:23 AM	■ Low	1	Pending

|◄ ◄ 1 ► ►| 10 ▼ items per page   1 - 1 of 1 items

Libraries

Now let's take a look at the **Libraries** section.

You can see an overview of all library downloads over the course of time. You can filter the view just above the graph to indicate which time period you want to see.

Library Downloads

View last: 7 days   30 days   6 months   **12 months**

Library Downloads

— AEC - Architecture   — Internal - Sandbox   — MEP - Electrical   — MEP - Plumbing   — MEP - Mechanical

To see data tailored to a specific library or share a library outside of our organization, you'll want to click on a library shown under the All Libraries section.

All libraries

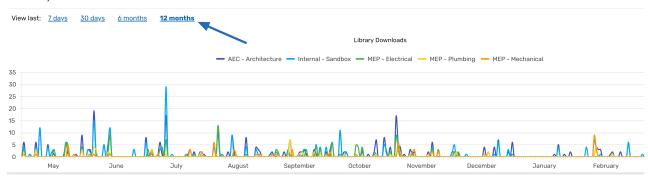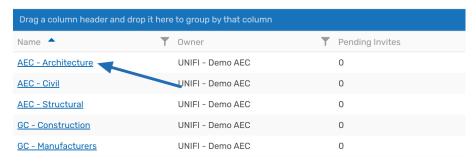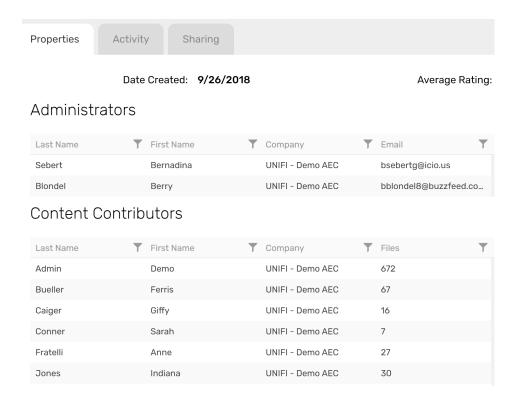| Name ▲	Owner	Pending Invites
AEC - Architecture	UNIFI – Demo AEC	0
AEC - Civil	UNIFI – Demo AEC	0
AEC - Structural	UNIFI – Demo AEC	0
GC - Construction	UNIFI – Demo AEC	0
GC - Manufacturers	UNIFI – Demo AEC	0
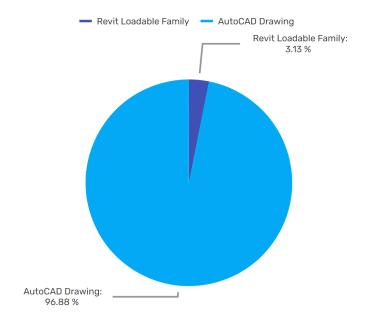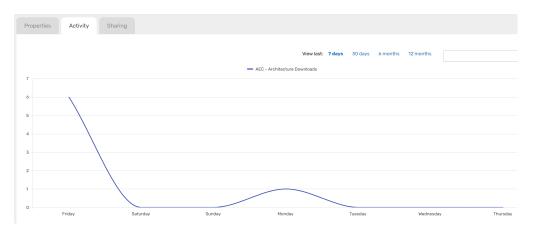
Under the **Properties** tab, data you can see specific to this library are its administrators, content contributors, and a pie graph displaying each type of content loaded to this library.

Properties	Activity	Sharing

Date Created: **9/26/2018**   Average Rating:

Administrators

Last Name	First Name	Company	Email
Sebert	Bernadina	UNIFI – Demo AEC	bsebertg@icio.us
Blondel	Berry	UNIFI – Demo AEC	bblondel8@buzzfeed.co…

Content Contributors

Last Name	First Name	Company	Files
Admin	Demo	UNIFI – Demo AEC	672
Bueller	Ferris	UNIFI – Demo AEC	67
Caiger	Giffy	UNIFI – Demo AEC	16
Conner	Sarah	UNIFI – Demo AEC	7
Fratelli	Anne	UNIFI – Demo AEC	27
Jones	Indiana	UNIFI – Demo AEC	30

Element Types — 2

The **Activity** tab will display downloads specific to the library. Like before, you can filter the view just above the graph to indicate which time period you want to see.
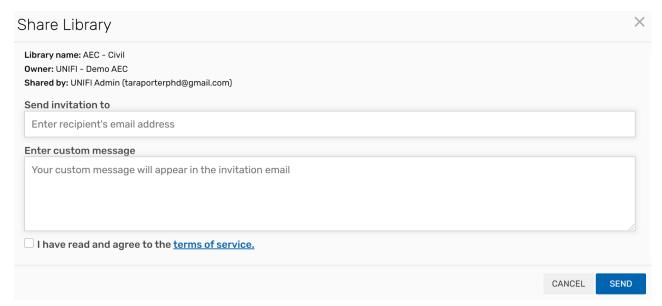
The Sharing tab will show any pending invites sent and display your shared history. To share a library, you'll want to click the Share button in the upper right corner of the web window.

When you click **Share**, a dialog will appear. Ensure that you agree with the permissions given and click **Continue**.

Share Library   ✕

Library name: AEC – Architecture
Owner: UNIFI – Demo AEC
Shared by: UNIFI Admin (taraporterphd@gmail.com)

Select the library sharing permissions

🔵 Collaborative

| Read	Write	Request content	Request update	Upload	Delete
✔	✔	✔	✔	✔	✔

⚪ Patron/Client (coming soon)

Read	Write	Request content	Request update	Upload	Delete
✔		✔	✔	✔	

CANCEL   **CONTINUE**

 A new dialog opens. Enter the email address of any Company Administrator in the company that you would like to share to and, if desired, a custom message. Read the Terms of Service, and if accepted, check the box. This box is required prior to being able to select the **Send** button.

Share Library   ✕

Library name: AEC – Civil
Owner: UNIFI – Demo AEC
Shared by: UNIFI Admin (taraporterphd@gmail.com)

Send invitation to

> Enter recipient's email address

Enter custom message

> Your custom message will appear in the invitation email

☐ **I have read and agree to the [terms of service.](#)**
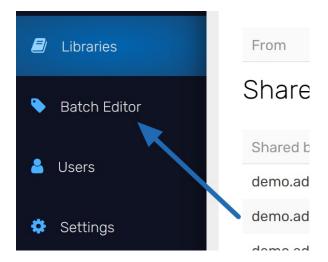
CANCEL   **SEND**

After the share is sent, any one of the company administrators in the target company will then need to go into their own app.unifilabs.com site, and then accept the share.

Once accepted, they will need to re-login to UNIFI in order to see the library in question. This process will need to be repeated for each library that you would like to share.
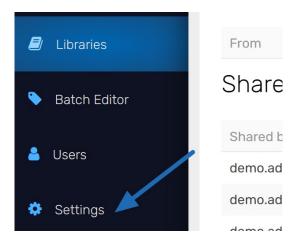
Batch Editor

The Batch Editor gives you the ability to view all your content stored within UNIFI and manage tags and libraries. For detailed steps on using this feature, check out our article on the Batch Editor.
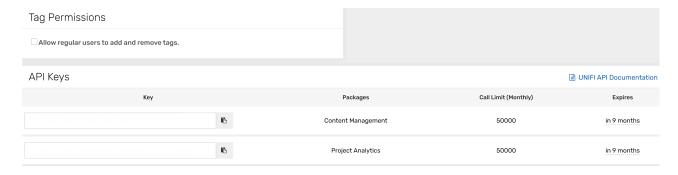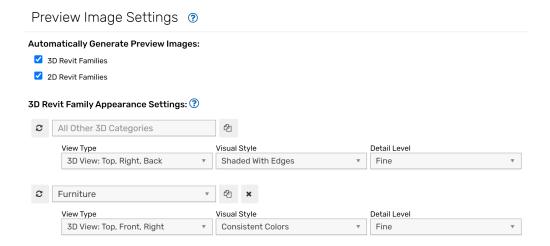
Settings

Next, let's look at the **Settings** section.

From this screen, you can check the box to allow regular users to add and remove tags. This is selected by default for all companies. You can also review your API keys if applicable.

Tag Permissions

☐ Allow regular users to add and remove tags.

API Keys				📄 UNIFI API Documentation
Key		Packages	Call Limit (Monthly)	Expires
	📋	Content Management	50000	in 9 months
	📋	Project Analytics	50000	in 9 months

From this page, you can also customize how thumbnail image previews appear in search results.

Preview Image Settings ⑦

Automatically Generate Preview Images:

☑ 3D Revit Families

☑ 2D Revit Families

3D Revit Family Appearance Settings: ⑦

| ⟳ | All Other 3D Categories | ⧉ |

View Type	Visual Style	Detail Level
3D View: Top, Right, Back ▾	Shaded With Edges ▾	Fine ▾

| ⟳ | Furniture ▾ | ⧉ | ✖ |

View Type	Visual Style	Detail Level
3D View: Top, Front, Right ▾	Consistent Colors ▾	Fine ▾

Conclusion

UNIFI's Web Portal gives you a central location to manage all projects and content. Be sure to check out our Knowledge Base articles on the Web Portal for step-by-step guides on using these tools.