Unity Admin Portal

learn.uc.spectrumenterprise.net/unity-admin-portal

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Unity Admin Portal Overview

The Unity admin portal is organized into two key areas:

- **Group**: This section houses all the information needed for your unity products and allows you to configure user template assignments, branding, user management and access to a history log for actions performed within the specific group.
- **User**: This section allows you to view all users that have been set up within the portal.

Sign In

When you launch Unity for the first time, it will guide you through setting up your connection. This includes entering your login information, which will be provided by your Service Provider. Once configured, Unity can remember these details for your convenience, saving you from re-entering them in the future.

To login to the Unity Admin Portal

From your browser, enter the following URL: https://spectrumportal.unityclient.com/. Then, enter your login ID and your password.

Once entered, click **Login**.

Details Overview

This section allows you to configure the initial settings for the System Provider, Reseller, and Group, including their names, account references, and trial period duration. When you have finished entering the necessary information, click update to secure changes,

Automatic Assignment

User templates streamline user environment setup by automatically configuring settings based on user type. This ensures consistency across similar roles, such as applying identical settings to all call center agents. Templates are created within the Unity client and can be assigned to users through either the portal or the client, depending on configurations. However, assignment through the client requires administrator privileges.

To automatically assign licenses to users simply select the license type from the drop-down menu and once the trial license expires for that application, Unity will automatically assign one to the user.

Note: Automatic license assignment works for Resellers and Groups but avoid System Provider to prevent unintended overflow.

Branding

In the Branding tab, most settings are typically configured during initial setup. It lets you upload a logo and icon for your System Provider, Reseller, or Group. The logo appears in the top right corner of the Unity interface, while the icon shows up in the top left corner and taskbar.

- **Logo** - To upload a logo, click the **Browse** button. Locate and select the logo you wish to use and click Open. You can also paste a URL (if applicable) directly to the logo source.
- **Icon** - To upload an icon, click the **Browse** button. Locate and select the icon you wish to use and click Open. You can also use a URL (if applicable) and paste directly to the logo source.

The Branding tab allows you to customize the Unity interface by:

- Replacing "BroadWorks" with any text you enter in the "Replacement BroadWorks Phrase" box.

- Replacing "Unity" with any text you enter in the "Replacement Client Name" box.

Security

The Branding tab offers several options for customization. While these can be enabled or disabled based on the System Provider's preference, selecting all options might increase the risk of users unintentionally creating errors within Unity. You can enable or disable the following:

- Users Can Change Settings Tab
- Users Can Change Call Center
- Users Can Change Network
- Users Can Change Authentication
- Users Can Change Their Password

Privacy

Disabling Call Details Available restricts users from viewing specific call details like who someone is talking to, though they can still see if someone is on a call. Additionally, enabling "Enterprise View" allows Groups to see other Groups within the same overarching organization which can be useful if your company has multiple locations.

Portal User Accounts

The Unity Admin Portal lets you manage user accounts entirely, including creating new ones, deleting existing ones, and configuring details like permissions and notification settings.

History Log

You can view a complete history of all actions taken within the system, categorized by who performed them (System Provider, Reseller, Group, or User).