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How to manage your licenses and users in Naviate for Revit 2022

Updated January 6, 2022

The process for managing licenses changes for Naviate for Revit licenses on version 2022.1.1 and later upcoming releases, here's a detailed how to guide.

Content

- License Portal overview (Admin only)
- How to invite users to your company (Admin only)
- User management (Admin only)
- My licenses

License portal overview

You have 4 different Tabs in the company overview.

- Licenses
- Expired licenses
- User Directory
- Administration

Licenses

In the Licenses tab you will see all licenses registered to your company, Single User licenses and Multi-User licenses (Network).

For each product you will see available seats, license type and expiration date. On the left side you will always see how many of the assigned user, that currently are using the product. Metrics about peak usage last 30 days. Information about the license (license keys and assigned users) and a assign licenses icon.

Solutions by **SYMETRI**
A HANNOKE GROUP

My Licenses

SY SYMLIC2 - QA Lic.
No. SYMLIC2

SY SYMLIC1 SYMLIC1

SY SYMLIC2 - QA Lic. SYMLIC2

SYMLIC2 - QA Lic.

15 single-user licenses

15 multi-user licenses

License Type	License Name	Seats	Users Assigned	Multi-user	Expiry Date	Usage	Actions
Available	Naviate HVAC & Plumbing	3 seats	7 users assigned	multi-user	expiry on 01 January 2025	0 / 3	✓ 1 +21
In Use	Naviate Electrical	3 seats	5 users assigned	multi-user	expiry on 01 January 2025	0 / 2	✓ 1 +21
Available	Naviate Accelerate	3 seats	5 users assigned	multi-user	expiry on 01 January 2025	0 / 2	✓ 1 +21
Available	Naviate AutoPath	2 seats	0 users assigned	multi-user	expiry on 01 January 2025	0 / 2	✓ 1 +21
Available	Naviate Site & Landscaping	3 seats	3 users assigned	multi-user	expiry on 01 January 2025	0 / 3	✓ 1 +21
Available	Naviate Structure	10 seats	3 users assigned	multi-user	expiry on 01 January 2025	0 / 10	✓ 1 +21
Available	Naviate Landuse	3 seats	3 users assigned	multi-user	expiry on 01 January 2025	0 / 3	✓ 1 +21
Available	Naviate Road	1 seats	5 users assigned	multi-user	expiry on 01 January 2025	0 / 1	✓ 1 +21
Available	Naviate Landscape	2 seats	6 users assigned	multi-user	expiry on 01 January 2025	0 / 2	✓ 1 +21
Available	Naviate Daylight	3 seats	5 users assigned	multi-user	expiry on 01 January 2025	0 / 3	✓ 1 +21
Available	Naviate Traffic	0 seats	1 users assigned	multi-user	expiry on 01 January 2025	0 / 0	✓ 1 +21

Expired licenses

This tab will tell you if you have any expired Naviate licenses. You will not have the possibility to activate those. Please contact your sales representative within Symetri to renew them if needed.

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A HANNOKE GROUP

My Licenses

SY SYMLIC2 - QA Lic.
No. SYMLIC2

SY SYMLIC1 SYMLIC1

SY SYMLIC2 - QA Lic. SYMLIC2

SYMLIC2 - QA Lic.

0 single-user licenses

0 multi-user licenses

Symetri License Portal v2.1.0
<https://symetri.com/> <https://naviate.com/> <https://sovelia.com/>

User Directory

This is an overview of existing users that has been added to your company. When you click here for the first time it will only be you as an Admin that will be in this overview. You can add existing Symetri ID users (SSO) into your account.

When you have a big list of users in your directory, you can filter them by using the search field next to your “Add Users” button or use "Tag" to sort them (Tag's are created in the Administration Tab)

Solutions by SYMETRI

My Licenses

SY Symlic1 SYMLIC1

SY Symlic2 - Qa Lic. SYMLIC2

SY Symlic4 - Edu Lic. SYMLIC4

SY SYMLIC2 - QA Lic. No. SYMLIC2

LICENSES EXPIRED LICENSES USER DIRECTORY ADMINISTRATION

All accounts Not verified Admin accounts Not verified Admin

Tag: Symetri Tech Symetri QA

Rows per page: 10 1-2 of 2

Name	Email	Verified	Admin	Licenses	Tags	Remove
Jan Tore Bugge	jtb@oad-q.com	✓	⊙	0	1	
Jan Tore Bugge	jbugge@gmail.com	✓	✓	0	2	

Symetri License Portal v2.1.1
<https://symetri.com/> <https://naviate.com/> <https://sovelia.com/>

Administration

Under the Administration panel you will see 4 main topics

1. Audit Logs - Capture all transactions / changes done in the portal
2. Licenses - Configure Borrow License timerange
3. Users - Possible to export a csv file on all users
4. Tags - Create tags, like department, dicipline, city etc.

Solutions by SYMETRI

My Licenses

SY Symlic1 SYMLIC1

SY Symlic2 - Qa Lic. SYMLIC2

SY Symlic4 - Edu Lic. SYMLIC4

SY SYMLIC2 - QA Lic. No. SYMLIC2

LICENSES EXPIRED LICENSES USER DIRECTORY ADMINISTRATION

Audit Logs

Licenses

Users

Tags

Symetri License Portal v2.1.1
<https://symetri.com/> <https://naviate.com/> <https://sovelia.com/>

How to invite users to your company (Admin only)

As a admin at your company you will have the possibility to add users to your company. That could be done in two ways, either one-by-one or by using the “Import File” feature.

Click the “Invite / Import ” button under Users in the Administration tab.

Solutions by SYMETRI

My Licenses

SYMLIC2 - QA Lic. No. SYMLIC2

LICENSES EXPIRED LICENSES USER DIRECTORY ADMINISTRATION

Audit Logs

Licenses

Users

Rows per page: 15 0-0 of 0 |< < 1/0 > >|

Created Date ↓ Start Date End Date Status Errors

Export existing users

Export to CSV Invite / Import

Invite users

Tags

Symetri License Portal v2.1.1
<https://symetri.com/> <https://naviate.com/> <https://novella.com/>

Add users one-by-one

When you have clicked the “Invite Users” button you will have two choices. This is the first one, adding users by typing their email addresses.

Type the email addresses on the users you would like to invite to your company and click “Invite Users”.

User email *

jan@gmail.com

User email *

jtb@gmail.com

User email *

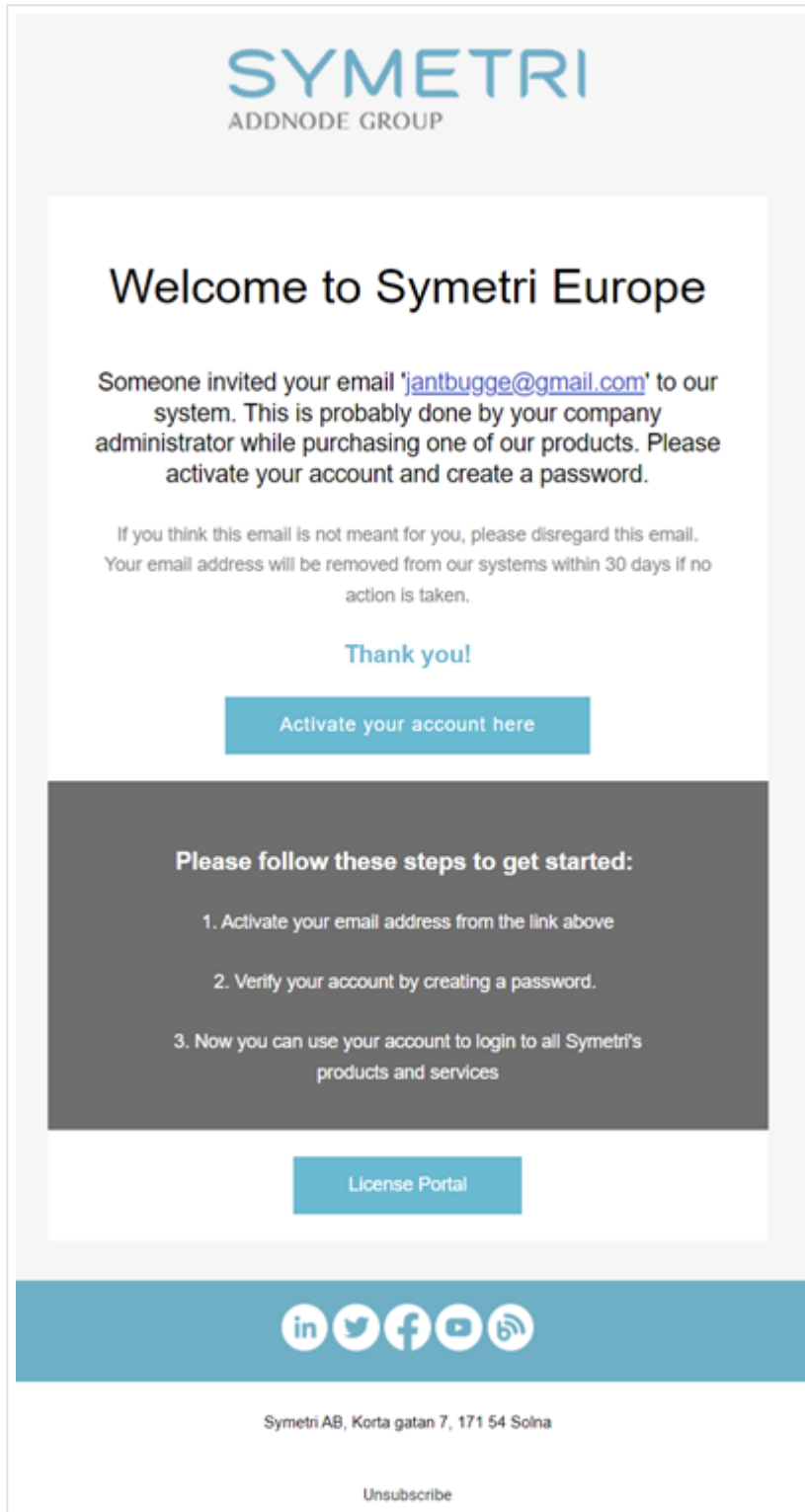
jtbugge@gmail.com

User email *

Drop CSV file here or click to import

Invite Users

The users you have invited will now get a welcome email from Symetri that would need to accept.



Add users using Import File

When you have a lot of users you would like to invite to you company, we would recommend to use the “Drop the CSV file here or click to import ” option.



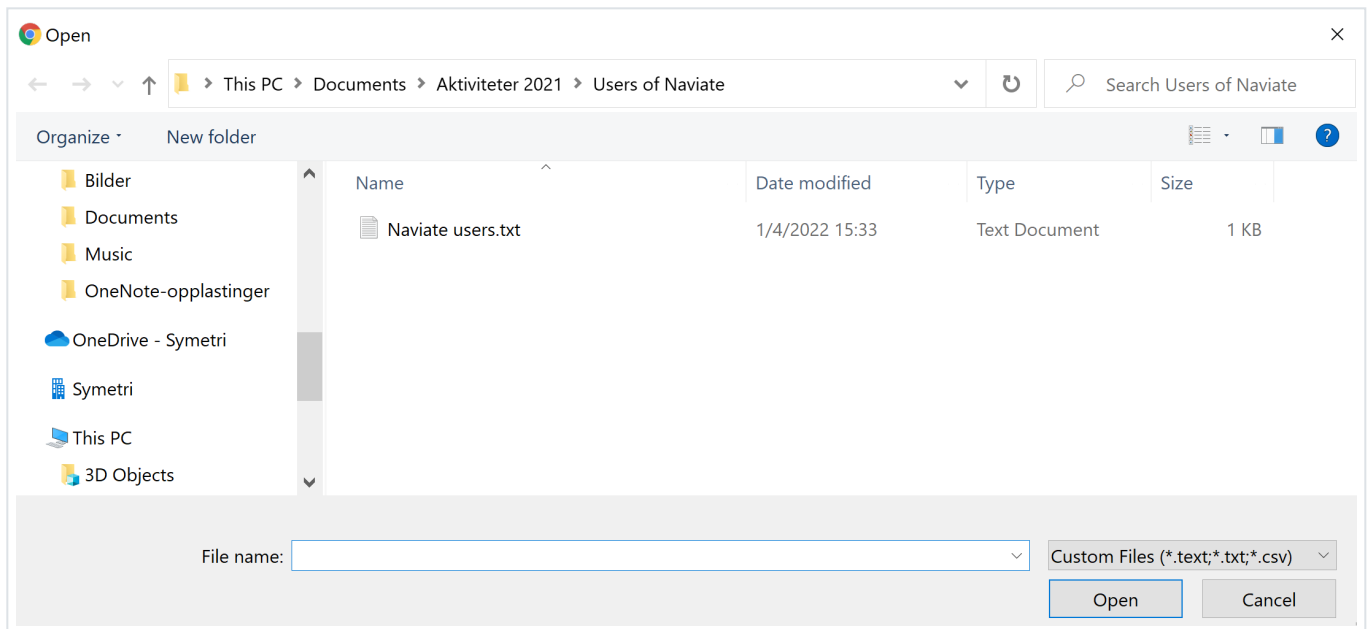
User email *

User email *

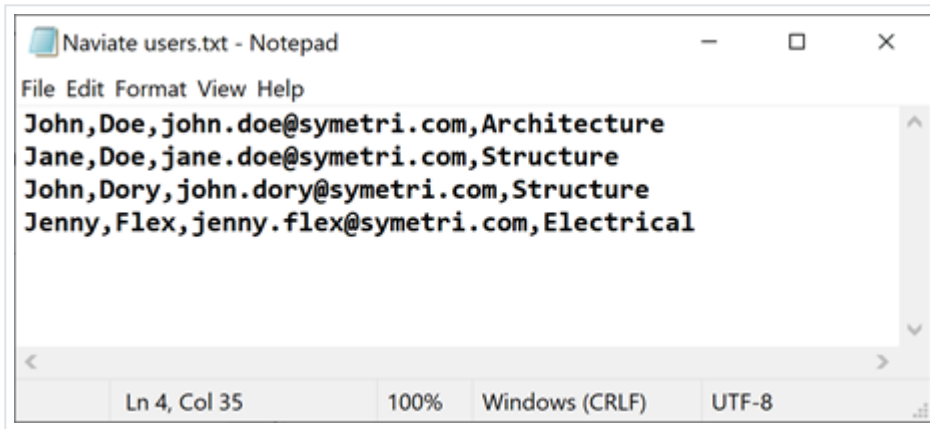
Drop CSV file here or click to import

Invite Users

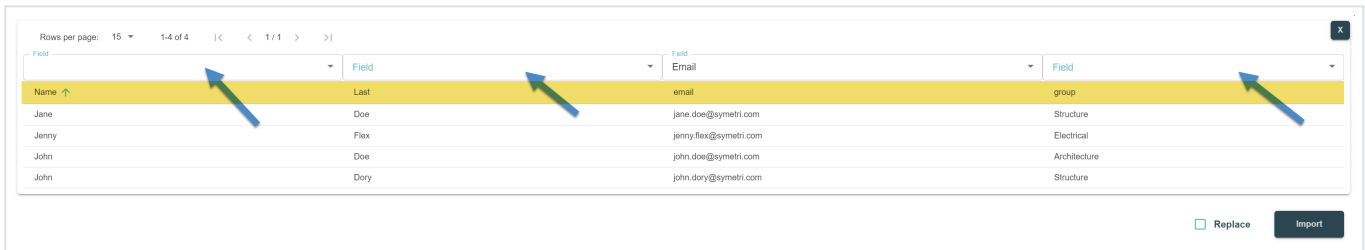
When clicking to import, you will be prompted to load a text, text or a csv file.



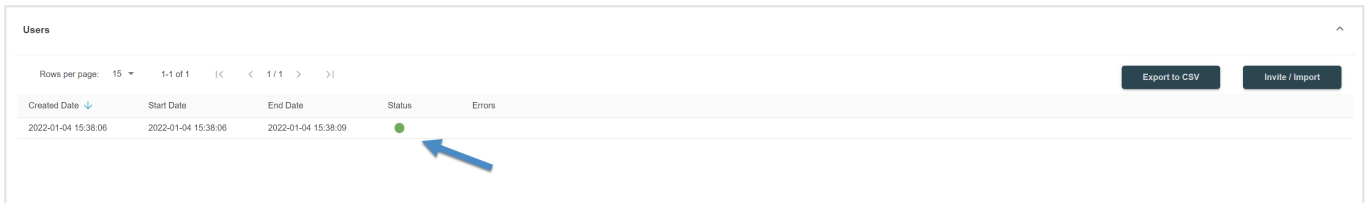
The file can have information as Name, Email, Dicipline etc. on the users you would like to import. The format is like this. All information is separated with comma.



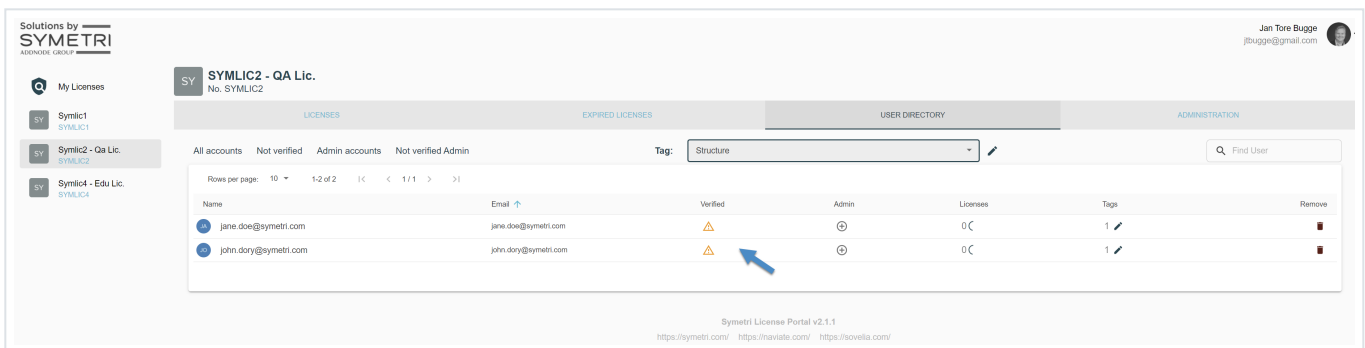
You will need to configure the fields you are importing.



The import is processed in the background and will appear as green when processed.



All invited users will appear as not verified until they have accepted the invitation.



User management (Admin only)

Company overview – Assign/unassign users to a license

Solutions by SYMETRI

SYMLIC2 - QA Lic.
No. SYMLIC2

My Licenses

- Symlic1 SYMLIC1
- Symlic2 - QA Lic. SYMLIC2
- Symlic4 - Edu Lic. SYMLIC4

LICENSES | EXPIRED LICENSES | USER DIRECTORY | ADMINISTRATION

Active 15 single-user licenses

Active 15 multi-user licenses

Status	Product	Seats	Users assigned	Multi-user	Expiry on	Progress	Assign
Available	Naviate HVAC & Plumbing	3 seats	7 users assigned	multi-user	expiry on 01 January 2025	0 / 3	Assign
In Use	Naviate Electrical	3 seats	5 users assigned	multi-user	expiry on 01 January 2025	1 / 2	Assign
Available	Naviate Accelerate	3 seats	5 users assigned	multi-user	expiry on 01 January 2025	0 / 2	Assign
Available	Naviate AutoPath	2 seats	0 users assigned	multi-user	expiry on 01 January 2025	0 / 2	Assign
In Use	Naviate Site & Landscaping	3 seats	3 users assigned	multi-user	expiry on 01 January 2025	1 / 3	Assign
Available	Naviate Structure	10 seats	3 users assigned	multi-user	expiry on 01 January 2025	0 / 10	Assign

You will now be presented for this overview. Here you can see assigned and not assigned user on that specific Naviate product. You can use Tags or the search field to filter.

Naviate Structure
Multi-user license

Tag: Structure | Find

Rows per page: 15 | 1-2 of 2 | < > 1 / 1 >

Name	Email
jane.doe@symetri.com	jane.doe@symetri.com
john.dory@symetri.com	john.dory@symetri.com

Not assigned

Tag: Structure | Find

Rows per page: 15 | 1-2 of 2 | < > 1 / 1 >

Name	Email
Jan Tore Bugge	jtb@cad-q.com
Jan Tore Bugge	jtbugge@gmail.com

Assigned

Choose users to add /remove by ticking them off in the view. Move them from Not assigned to Assigned by using the arrows in the middle.

Naviate Structure
Multi-user license

Tag: Structure | Find

Rows per page: 15 | 1-2 of 2 | < > 1 / 1 >

Name	Email
jane.doe@symetri.com	jane.doe@symetri.com
john.dory@symetri.com	john.dory@symetri.com

Not assigned

Tag: Structure | Find

Rows per page: 15 | 1-2 of 2 | < > 1 / 1 >

Name	Email
Jan Tore Bugge	jtb@cad-q.com
Jan Tore Bugge	jtbugge@gmail.com

Assigned

Company Overview - Add/remove license on a user

This option could be very useful when you recently onboarded or got a new employee that you would like to assign several Naviate products to.

Go to the “User Directory” tab and pick the user you would like to manage. You do that by hovering over the License column on the user you would like to manage.

SYMETRIC2 - QA Lic. No. SYMLIC2

USER DIRECTORY

Tag: Structure

Find User

Name	Email	Verified	Admin	Licenses	Tags	Remove
jane.doe@symetri.com	jane.doe@symetri.com	⚠	⊕	0	1	⛔
john.dory@symetri.com	john.dory@symetri.com	⚠	⊕	4	1	⛔
Jan Tore Bugge	jtb@cas-q.com	✓	⊕	1	2	⛔
Jan Tore Bugge	jbugge@gmail.com	✓	✓	1	3	⛔

Symetri License Portal v2.1.1
<https://symetri.com/> <https://naviate.com/> <https://sovelia.com/>

In this view you will see all the Naviate products in you company. You can now start adding/removing Naviate products on that users. It has the same interface as “Company overview – Assigned/unassigned licenses on users”.

You can quickly get a view what type of licenses “John Dory” have been assigned. In this example he has access to Naviate Structure and Naviate Architecture, both Multi-User licenses.

Next you can use the same process ticking on / off products on this user and use the arrows to assign/unassign Naviate products.

john.dory@symetri.com

All Single Multi

Find

Rows per page: 15 1-15 of 24

Product name	Type	Qty	Assigned	Usage
<input type="checkbox"/> Naviate HVAC & Plumbing	👤	3	0	
<input type="checkbox"/> Naviate Electrical	👤	3	0	
<input type="checkbox"/> Naviate Accelerate	👤	3	1	
<input type="checkbox"/> Naviate AutoPath	👤	1	0	
<input type="checkbox"/> Naviate Site & Landscaping	👤	3	0	
<input type="checkbox"/> Naviate Structure	👤	10	1	
<input type="checkbox"/> Naviate Landuse	👤	3	0	
<input type="checkbox"/> Naviate Road	👤	1	0	
<input type="checkbox"/> Naviate Daylight	👤	3	0	
<input type="checkbox"/> Naviate Simple BIM	👤	3	0	
<input type="checkbox"/> Naviate Architecture	👤	10	0	
<input type="checkbox"/> Naviate HVAC & Plumbing	👤	3	7	0 / 3
<input type="checkbox"/> Naviate Electrical	👤	3	5	2 / 2
<input type="checkbox"/> Naviate Accelerate	👤	3	5	0 / 2
<input type="checkbox"/> Naviate AutoPath	👤	2	0	0 / 2

Not assigned

Assigned

Navigation arrows: ➡, ⬅, ⬆, ⬇

My licenses

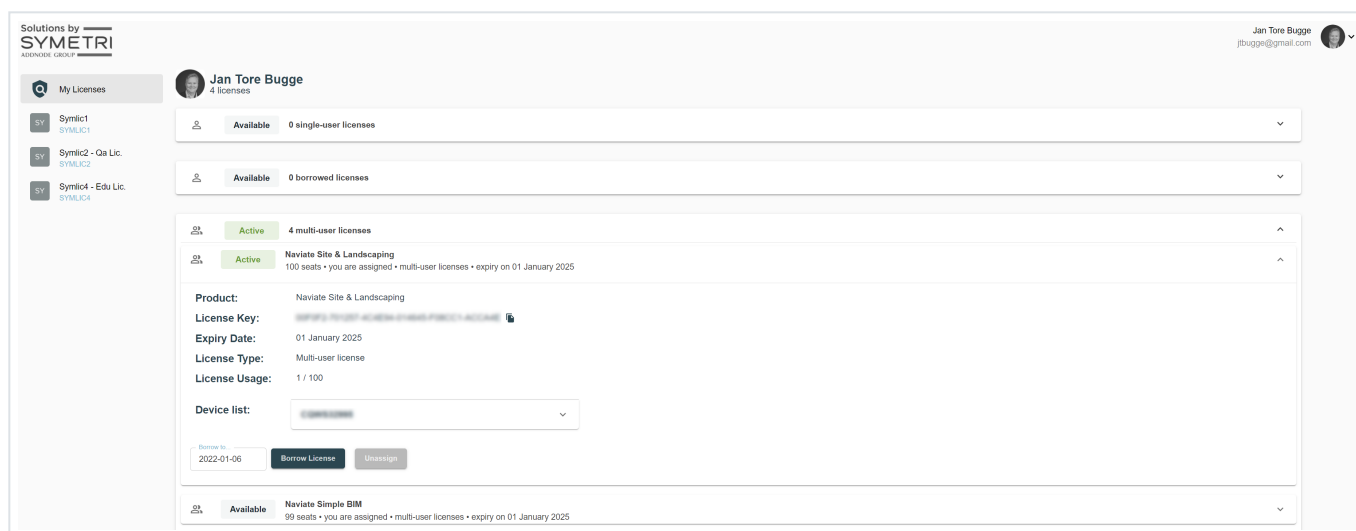
Every user has their own area named “My Licenses”.

This is the page where every user can have a quick overview what type of licenses they have been assigned. It could be either a Single-User, Multi-User, Borrowed license or I can even be running some Trial licenses. All that information is presented in one single view.



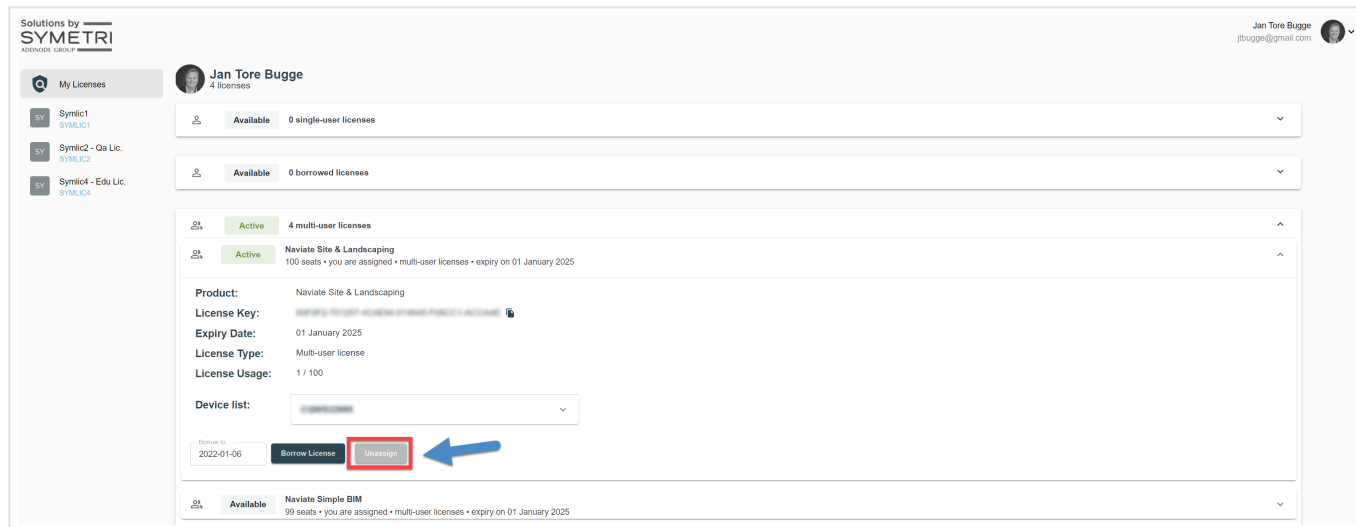
You can use the arrows on the right side to investigate more on what license you have been assigned to.

When you click the arrows on the right side on one of the assigned products you will get this view. You will see the Product, License Key, Expiry date, License Type and if any licenses are used in the company.

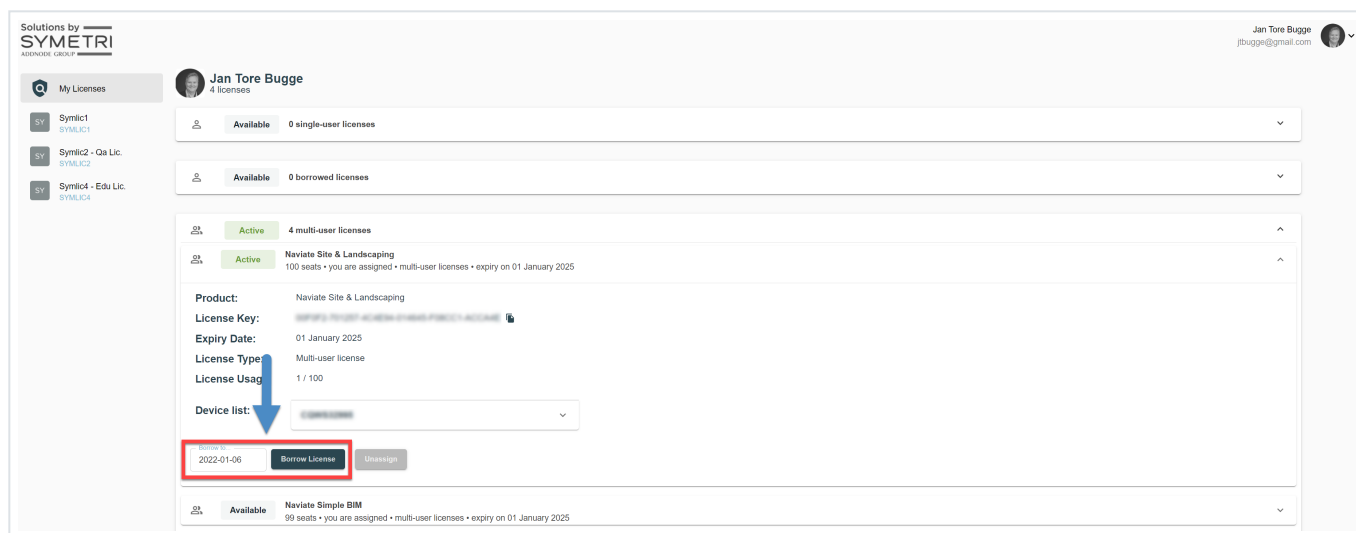


Unassign myself from a license

You will also have the possibility to unassign yourself from this license if it's not needed or it's assigned you by a mistake.



If your company administrator has activated the borrow license feature. You will also be able to borrow the Multi-user license assigned to you. Number of days allowed is set by your company admin in the "Administration" tab. Use the calendar to choose number of days you would like to have the license borrowed.



Resources

- [Download the guide here \(PDF\)](#)

Did this answer your question?



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