KAKAPO
SYSTEMS

TEMPLATE USER GUIDE

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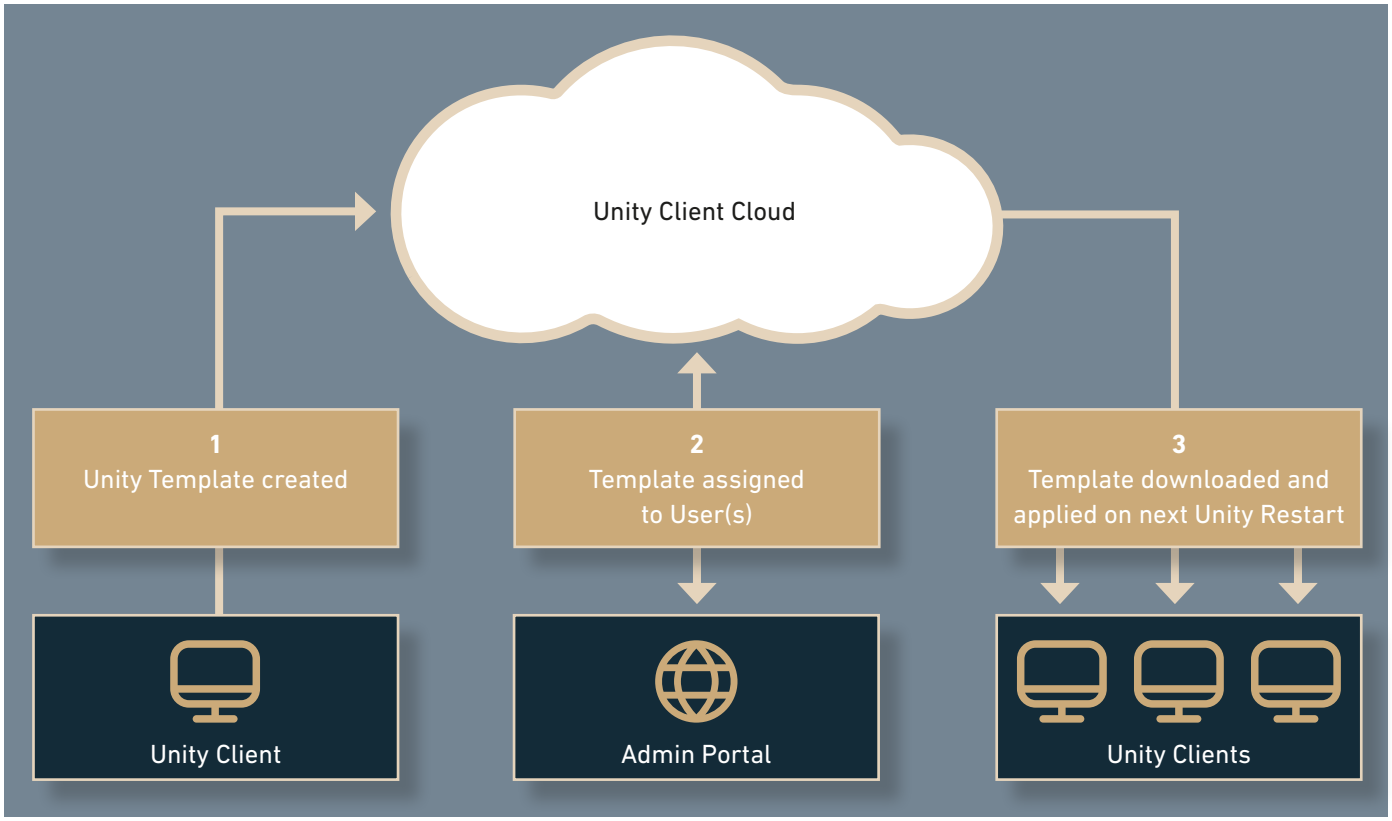
1 OVERVIEW

Unity Templates allow pre-configured settings to be applied to a user or multiple users simultaneously, reducing repetitive administrative tasks and increasing control of the end-user experience.

User templates are created through the Unity client from where they are saved in the cloud against the respective group or enterprise. Templates can then be [bulk] assigned to users within that group or enterprise per Unity application. Whenever Unity starts it checks template assignment for the currently logged in user and Unity client. If a template has been assigned or unassigned it will automatically be downloaded and applied, in that the settings will override any settings that have been saved locally. The user may or may not be able to override these settings through the Unity client, based on if the template is configured for single use or not [as outlined below].

Unity templates support versioning meaning if a template is assigned to users when it is updated, Unity will automatically download and apply the new version of the template.



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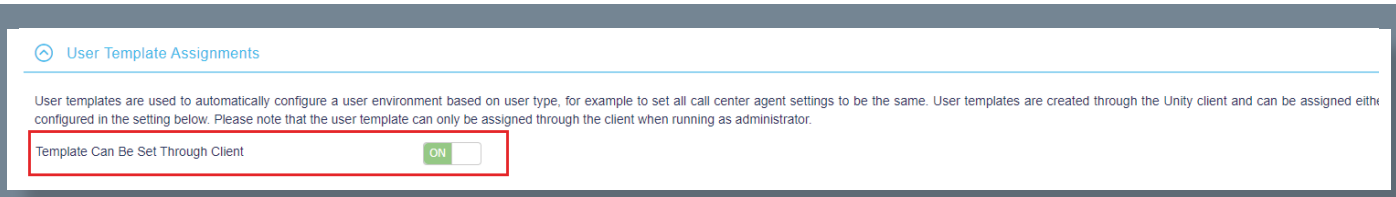
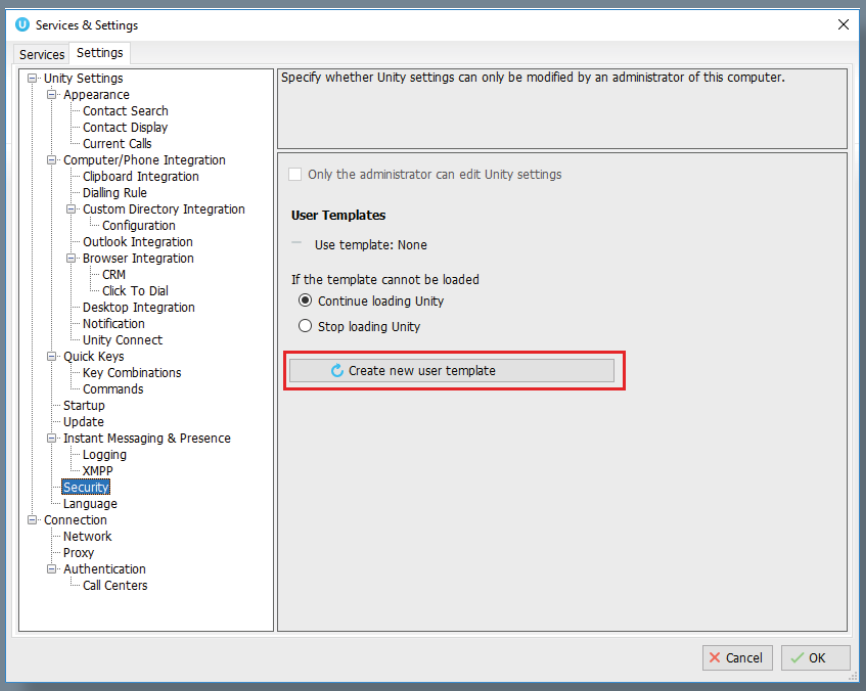
2 CREATING A USER TEMPLATE

User templates must be created through a Unity client because templates are client specific, meaning a Unity Reception template cannot be applied to Unity Call Center Agent.

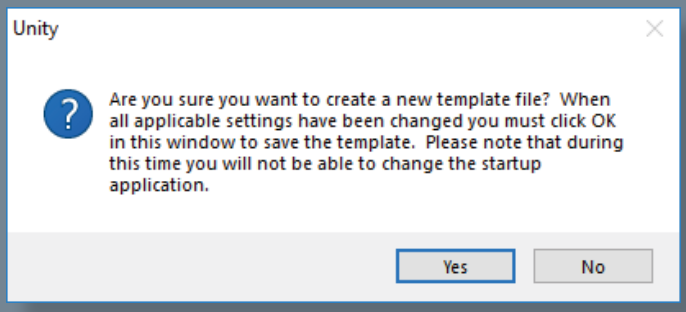
The ability for end-users to create templates is controlled through the Kakapo partner portal, as shown below. This setting is available at all levels in the portal hierarchy and cascades down the hierarchy when changed.



From within the Settings window, go to Security and select Create new user template, as shown below.



You will be prompted to confirm if you want to create a new template, click Yes. As already mentioned templates are Unity client specific, therefore you will not be able to set the startup application when creating a template.



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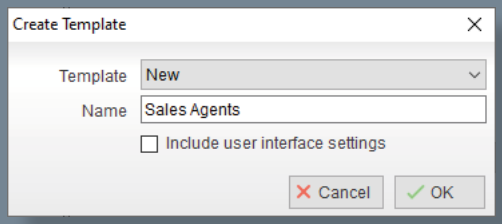
Unity will now ensure that when you click OK, all settings will be uploaded to the Unity Client cloud as well as being saved locally. If you click Cancel then the template will not be created.



If you select an existing template in the drop-down then that template will be updated/ overridden, it will then be automatically rolled out to any Unity clients currently consuming that template. Otherwise if 'New' is selected you will be prompted to name the new template.

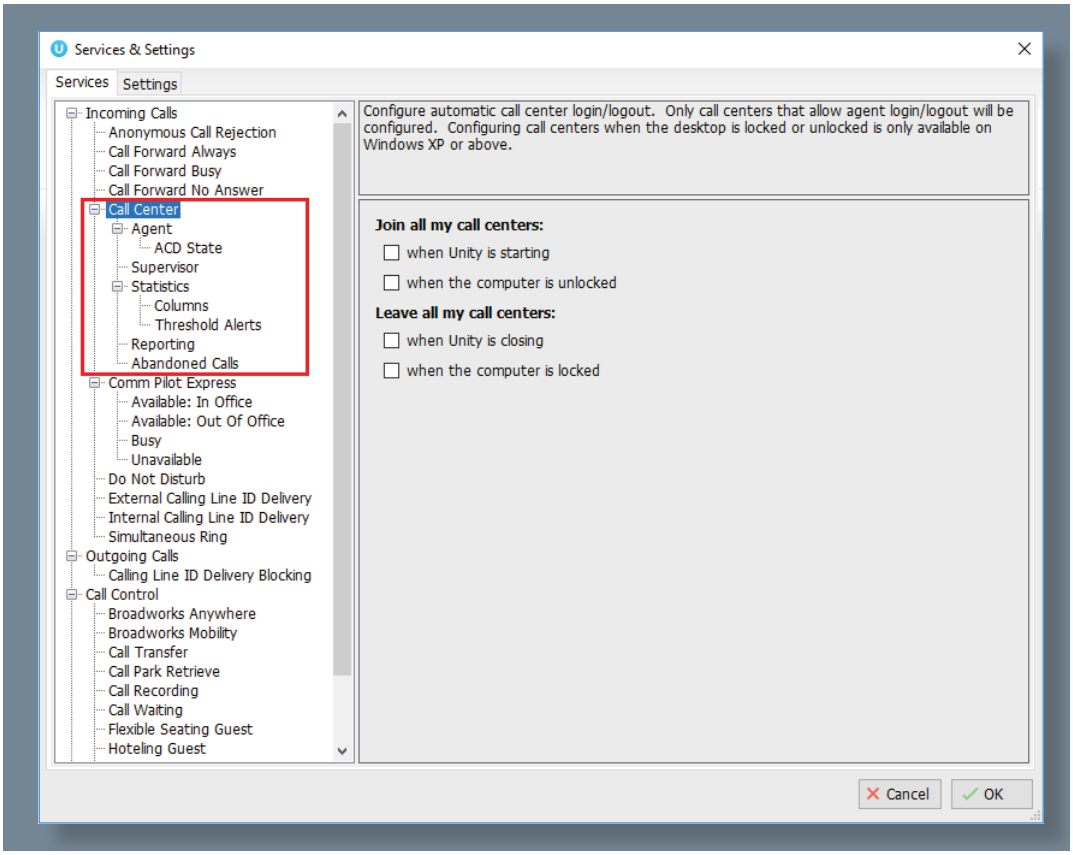
2.1 SETTINGS AND PROPERTIES INCLUDED IN A TEMPLATE

When creating a template, please note that all panels in the Settings tab will be included, with the single exception of specific Outlook contact folders because these are different per user. Specific panels in the Service tab will also be included in the template, as outlined below.

If the 'Include user interface settings' checkbox is checked [as shown above] then the columns to show in lists [such as the Contacts tab, Call Logs etc] will also be included in the user template.

2.1.1 Call Center

All relevant call center settings for the Unity Client are included in the user template, which will differ based on the Unity Client being used (Agent, Supervisor, Reception etc). For example, the startup and shutdown ACD state can be set for agents, which columns to include in the personal wallboard, or even to automatically activate Remote Office when starting. Please refer to the applicable Unity user guide for more information on these settings.



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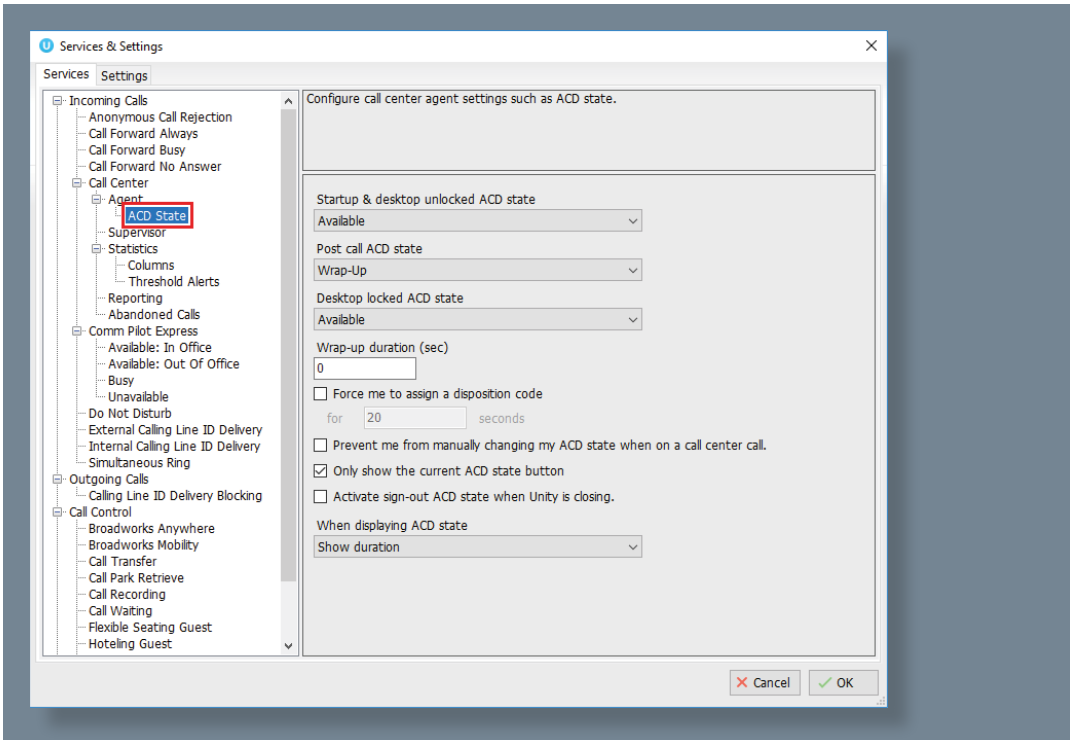
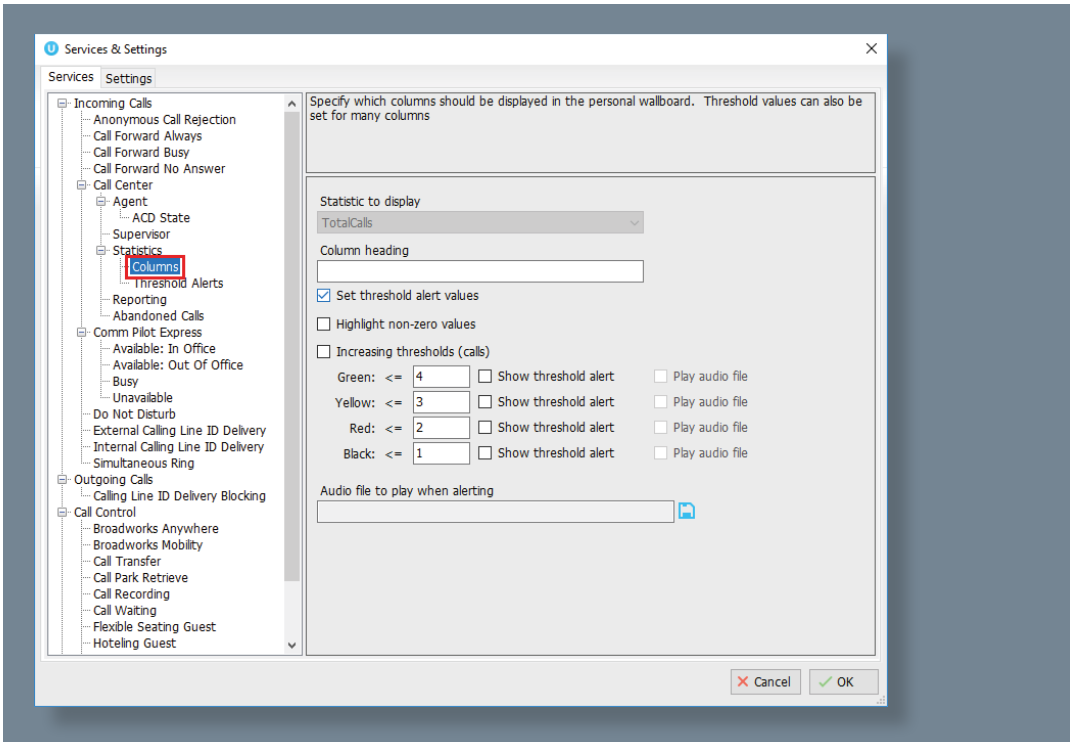
2.1.1.1 Agent ACD and Call Center Joined States

This helps to provide a user profile based on company policy, for example by setting wrap-up state duration and automatically changing ACD state in certain conditions.



2.1.1.2 Columns and Thresholds

Templates allow all Unity Agent, Supervisor and Reception clients to display the same statistics about personal and overall queue performance, as well as being able to set thresholds to alert the user of potential bottlenecks.



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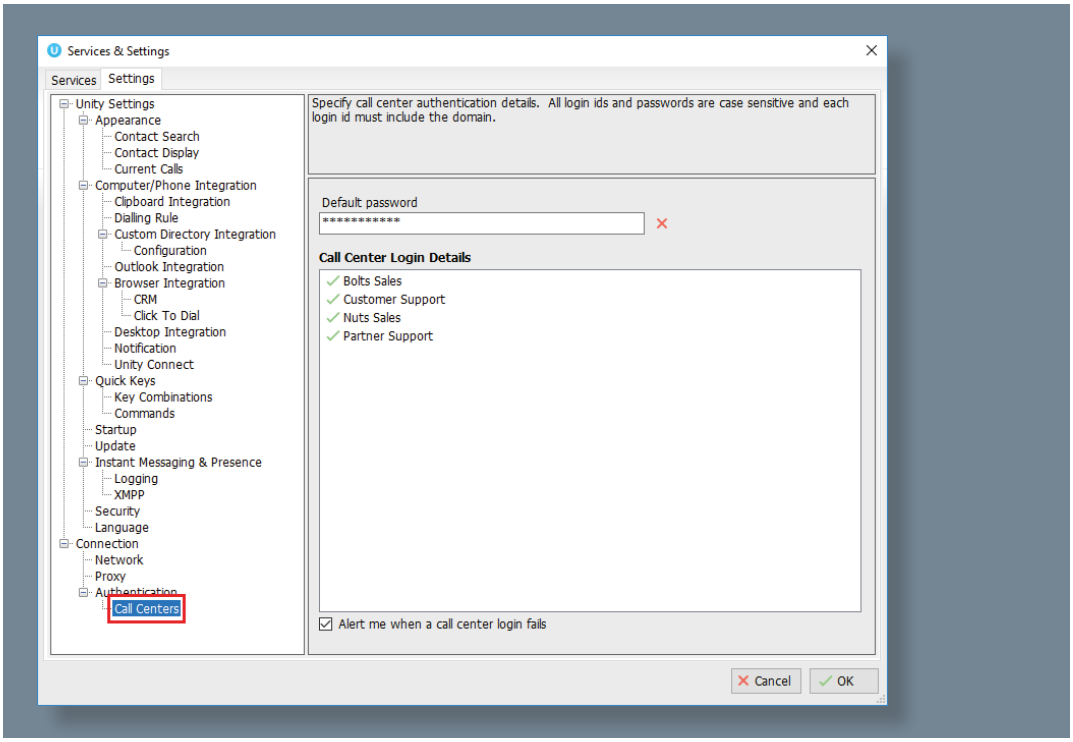
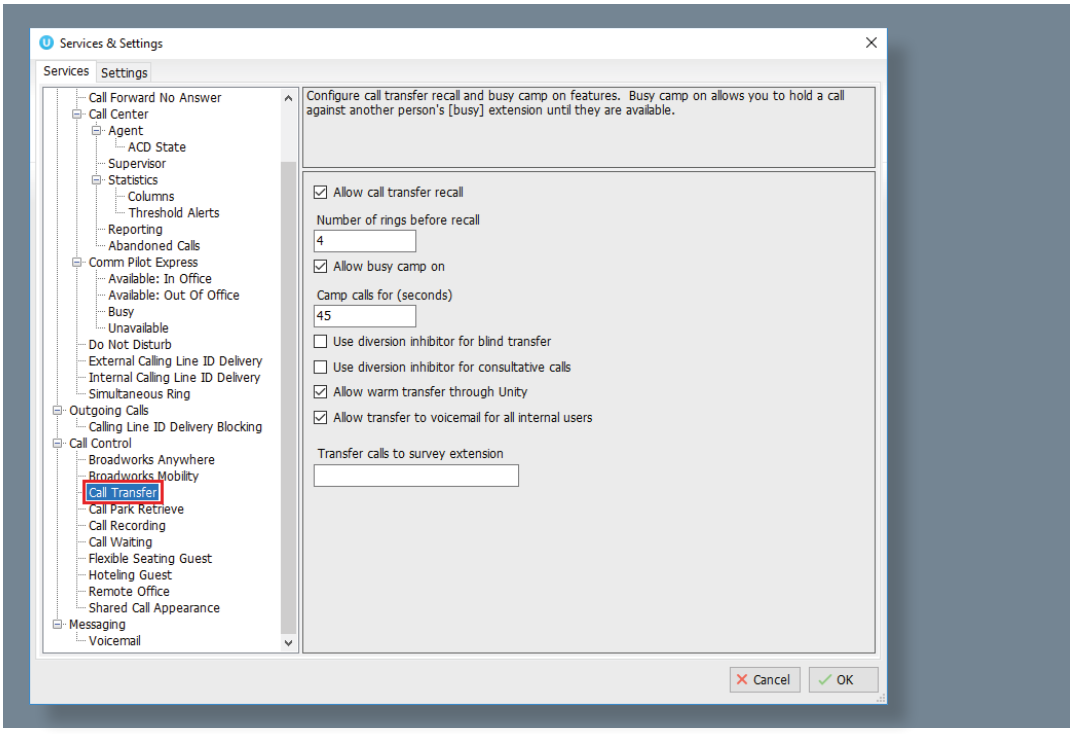
2.1.1.3 Call Center Passwords

All call center passwords can be entered, thereby removing the possibility of user input error. If the password is the same for all call centers then this can easily be set as the default call center password, which will be used when logging into any queues that the agent becomes a member of after the template has been created.



2.1.2 Call Transfer

The Call Transfer service properties are not included in the template as they are stored in the VoIP platform, however the Warm Transfer feature can be automatically activated through the template, as shown below.



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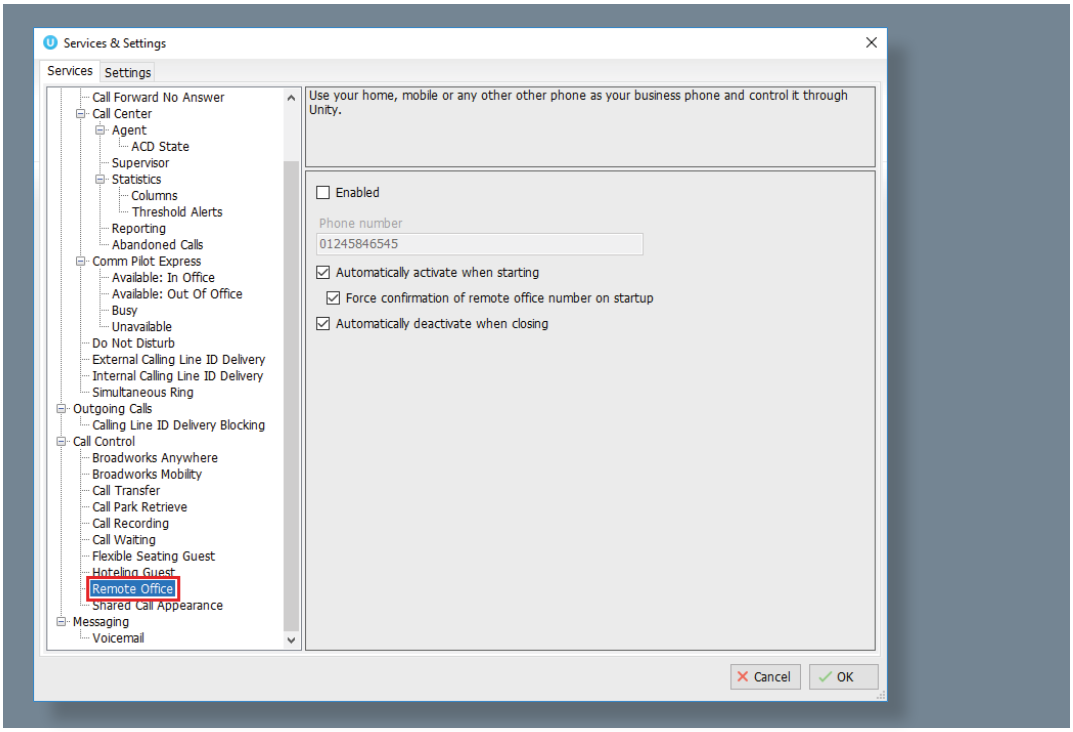
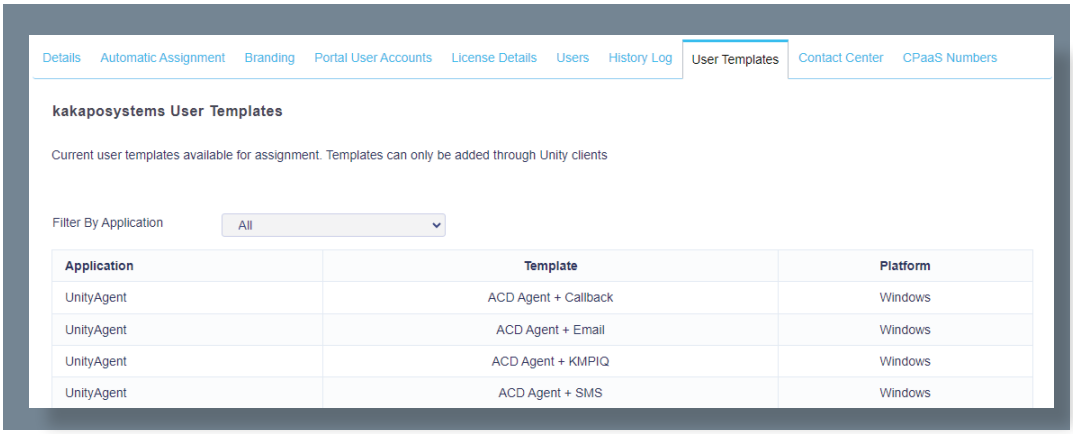
2.1.3 Remote Office

The Remote Office service configuration will not be included in the template, because the RO number will change per user. However, Unity can force the user to select a Remote Office number and activate the service whenever starting, which can be set through the template as shown below.



3 MANAGING TEMPLATES

Templates are stored and managed in the Unity Client partner portal (https://portal.unityclient.com). All templates are first stored at either group or enterprise level, depending on if the user that created the template is part of an enterprise or not. You can see all saved templates in the User Templates tab at these levels of the hierarchy, please note that both enterprises and service providers are 'Resellers' in the Unity portal.



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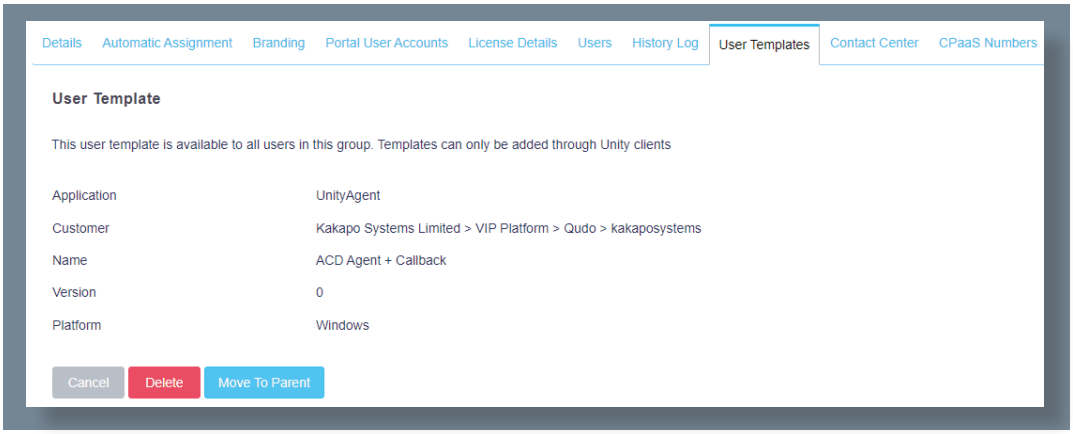
Templates can be moved up in the hierarchy, thereby becoming available to more users. For example, if a template is moved from Group level to Reseller level in the portal it will automatically become available to users in any other Group within the same Reseller.

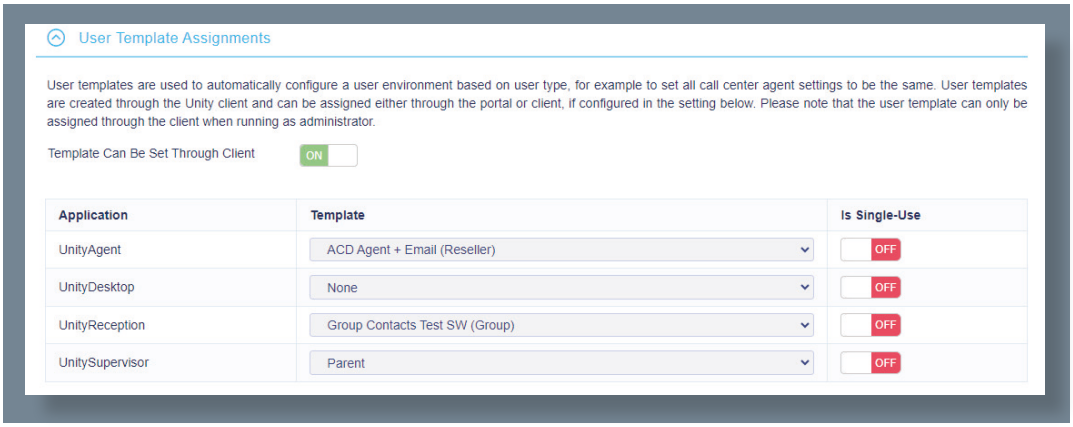


To move a template up one level, click the template in the list to see the template profile then click Move To Parent, as shown above. Templates can only be moved one level at a time and can only be moved up in the hierarchy.

4 ASSIGNING TEMPLATES

As mentioned previously, a template can be assigned to one or more users for each Unity client. This depends on the level in the Unity portal hierarchy where the assignment is made. User template assignments work differently to other Branding settings in the Kakapo partner portal, in that they do not automatically cascade down the hierarchy when set. For example if a template assignment is made at the group level then it will not override any template assignments made at the user level.

User templates are assigned in the Branding tab at the user level, or the Automatic Assignment tab for the Group, Reseller and System Provider levels, as shown below.



For each Unity client a template can be selected from the dropdown list, which will include all templates at the current level and all levels higher up in the hierarchy. The default setting is 'Parent' which means if an assignment was made at a higher level then it will be applied here, therefore providing implicit assignment. Otherwise if 'None' is selected then this explicitly

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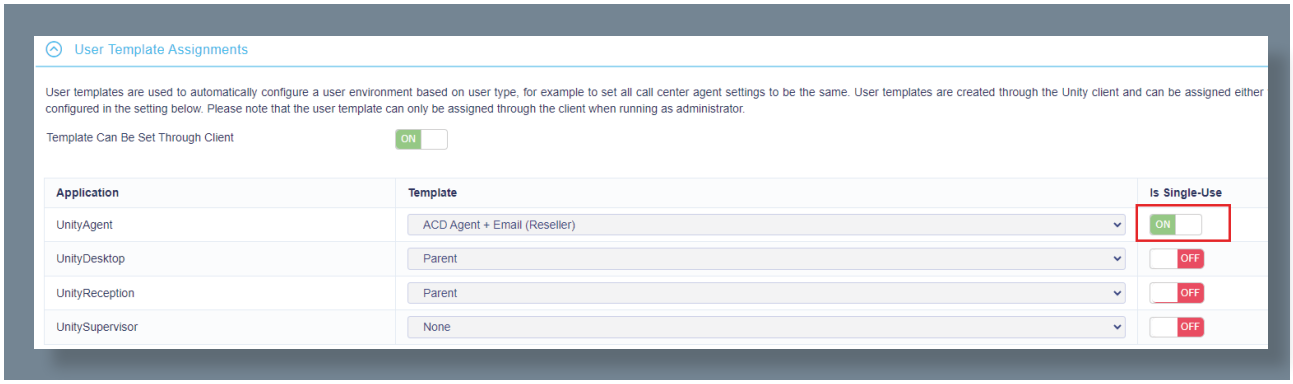
states that a template should not be used. If 'None' is set anywhere in the portal hierarchy then assignments at other levels will not be considered. For example if a user-level template assignment is 'Parent' and the group-level template assignment is 'None' but the reseller-level assignment is a specific template, then the template assignment will not apply to users under that group, although it could be used by users under another group within the same enterprise, that has 'Parent' set as the template for that Unity client.

4.1 SINGLE-USE ASSIGNMENT

A single-use template assignment is ideal for setting the initial configuration for one or more users, which can be overridden through the Unity client. This is especially beneficial for settings such as call center passwords and columns to display in the personal wallboard. Because templates can be set at the system provider level a provider could configure Unity with a default configuration for all users which can then be overridden, or a bespoke template for a specific customer could be created at a later date that builds on the default configuration.

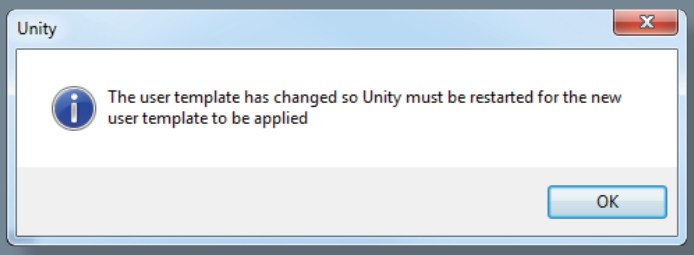
The important point to remember is that if the template assignment is single-use then the user will be able to override the settings through the client, otherwise the user will be able to see the current configuration but not change it, as all settings will be disabled.



Please note the 'Is Single Use' setting can only be activated if an actual template is assigned; if the template is 'None' or 'Parent' then this setting will be deactivated and disabled. If the template is 'Parent' then the 'Is Single-Use' setting will be applied at the parent level where the actual template assignment is made.

4.2 CONSUMING A TEMPLATE

As mentioned above Unity will automatically apply the template when next started. The user will be prompted that a new template has been applied and that Unity must be restarted in order to use the new settings, as shown here.



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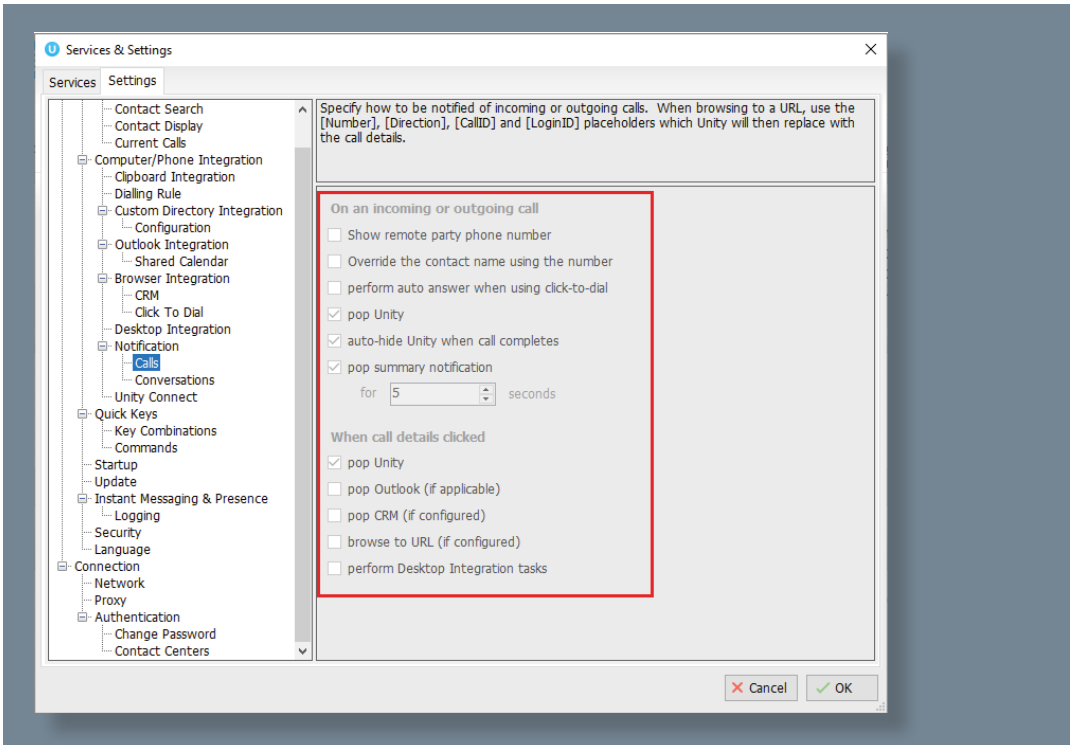
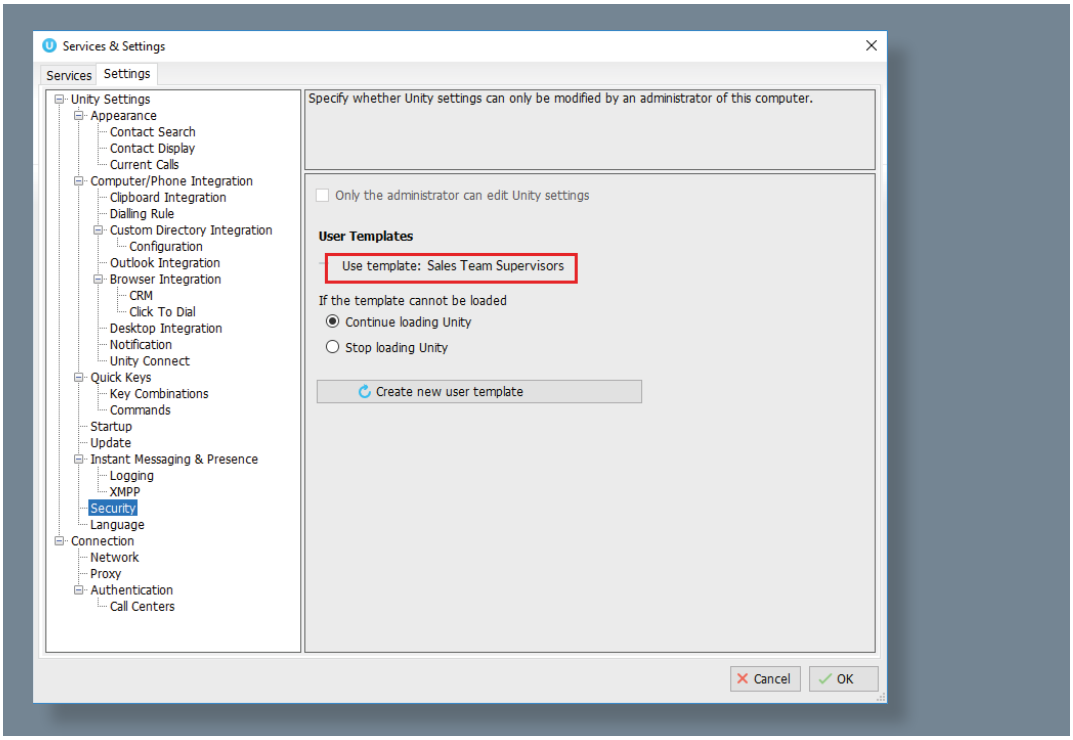
If the template assignment is not single-use then all settings will be disabled, as shown below.



You always can see the current template assignment in Settings. The green tick indicates that the template was successfully applied, a red cross would indicate that although the template is assigned to the user it could not be applied. In such cases Unity can be configured to continue loading Unity and use the locally saved settings [which will most likely have been saved from the template anyway] or to quit.



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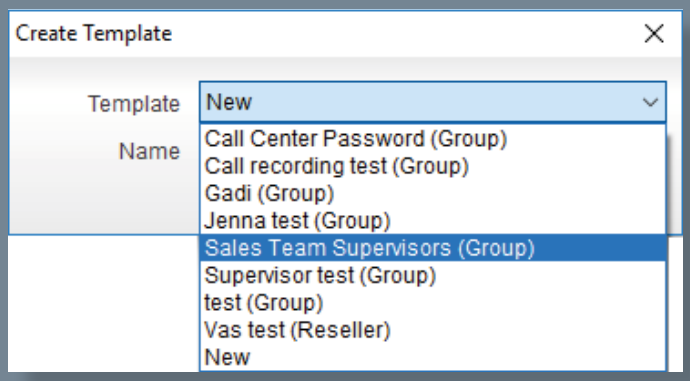
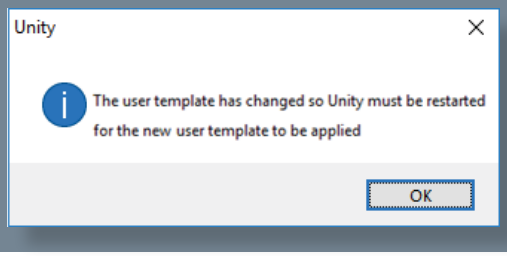
You will notice that this panel is enabled, assuming appropriate permissions are assigned. This is to modify a template or to create a new template from an existing template, which are both described below.

5 MODIFY A TEMPLATE

In order to modify a template or to create a new template from an existing one, the template must be assigned to the user and be applied in Unity. When this is the case you can create a new template in the normal way, but when you click OK you will be able to either choose to create a new template or to update the currently assigned template, as shown here.



If the template is modified then the version will be incremented, meaning when Unity is next started any user with that template assigned will automatically update to the new version, after which the user will be prompted to restart as shown here.



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