

TEMPLATE USER GUIDE

CONTENTS

1	Overview	1
2	Creating a User Template.....	2
2.1	Settings & Properties Included in a Template.....	3
2.1.1	Call Center	3
2.1.1.1	Agent ACD & Call Center Joined States	4
2.1.1.2	Columns & Thresholds.....	4
2.1.1.3	Call Center Passwords.....	5
2.1.2	Call Transfer.....	6
2.1.3	Remote Office	6
3	Managing Templates.....	7
4	Assigning Templates	7
4.1	Parent Assignment.....	8
4.2	Single-Use Assignment.....	8
4.3	Consuming a Template.....	9
5	Modify a Template.....	10

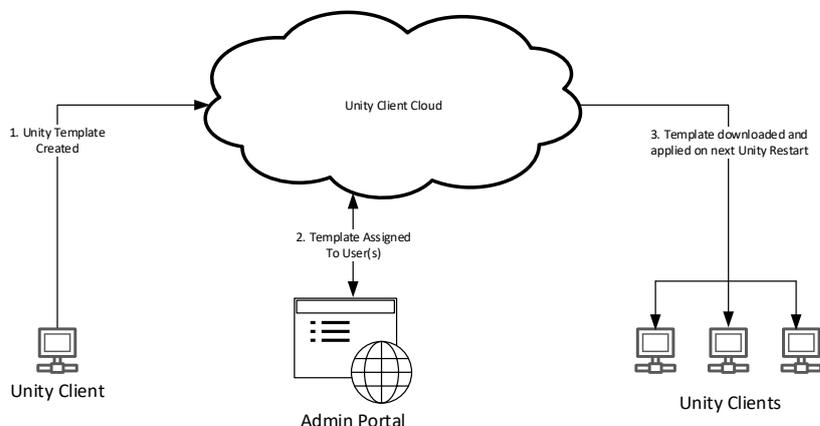
1 OVERVIEW

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].

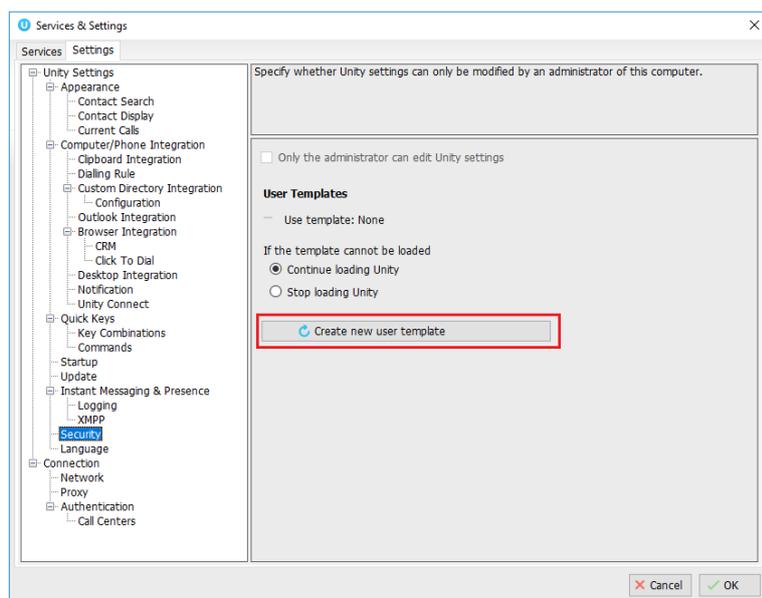
Unity templates support versioning meaning if a template is assigned to users when it is updated, Unity will automatically download and apply the new version of the template.



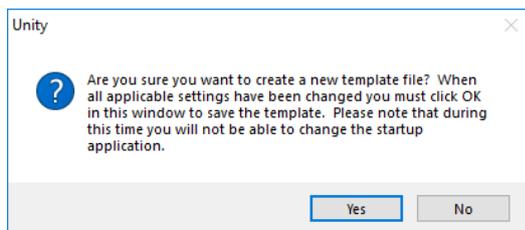
2 CREATING A USER TEMPLATE

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.

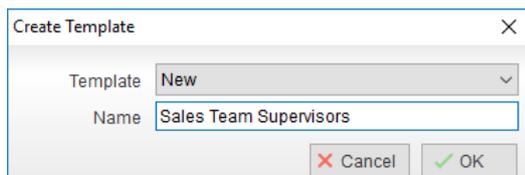
From within the Settings window, go to Security and select Create new user template, as shown below.



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.



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.



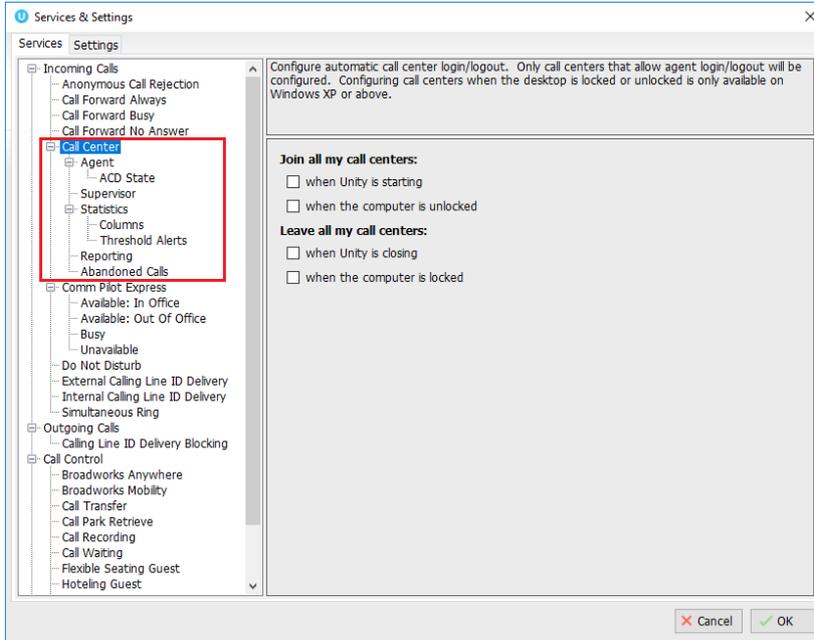
You will be prompted to name the new template, if the template already exists you choose to update it which will then be automatically rolled out to any Unity clients currently consuming that template.

2.1 SETTINGS & 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.

2.1.1 CALL CENTER

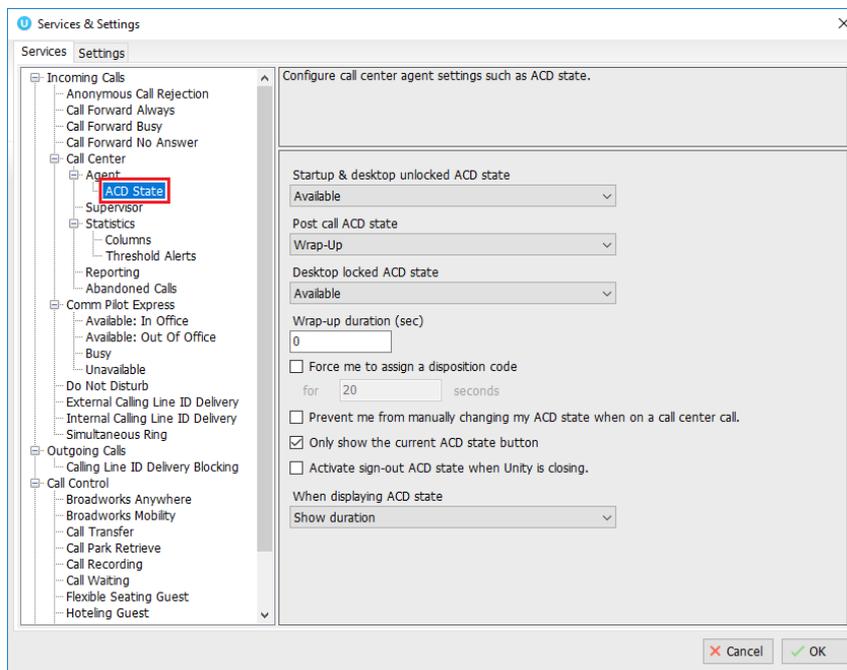
All relevant call center settings for the Unity Client are included in the user template, which will differ based on the Unity Client being used (Agent, Supervisor, Reception etc). For example, the startup and shutdown ACD state can be set for agents, which columns to include in the personal wallboard,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



When configuring services, some important sections are

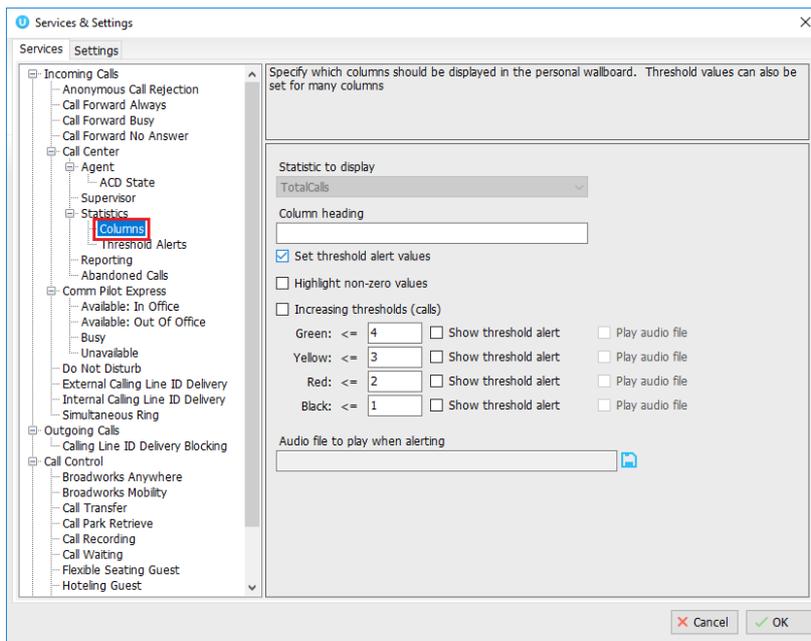
2.1.1.1 AGENT ACD & CALL CENTER JOINED STATES

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.



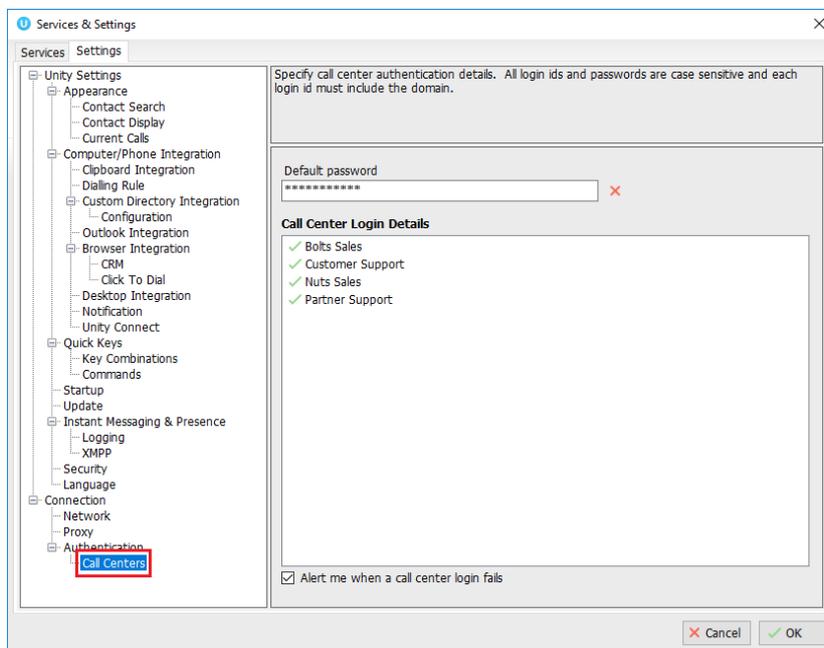
2.1.1.2 COLUMNS & THRESHOLDS

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.

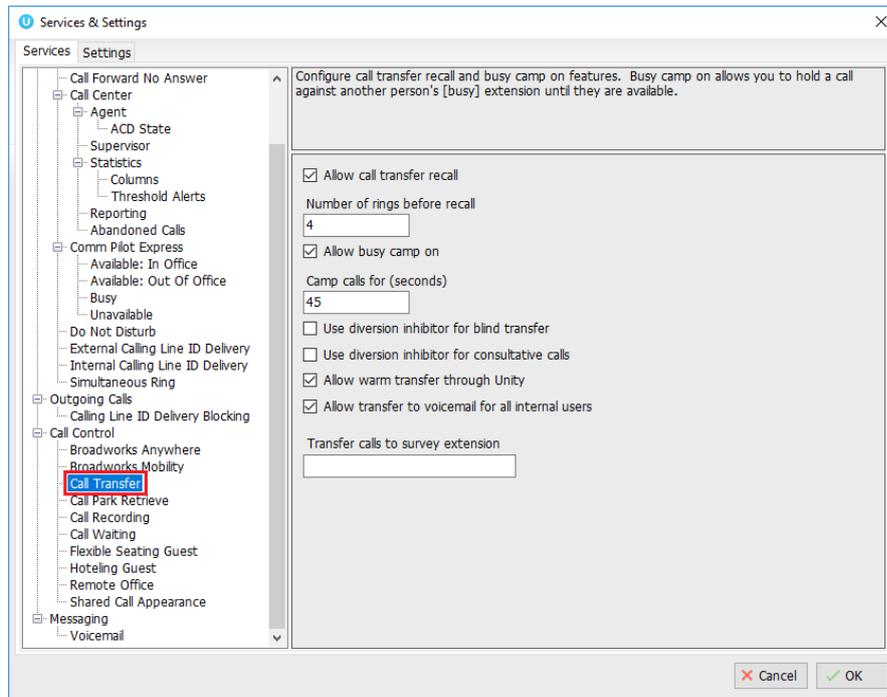


2.1.1.3 CALL CENTER PASSWORDS

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.



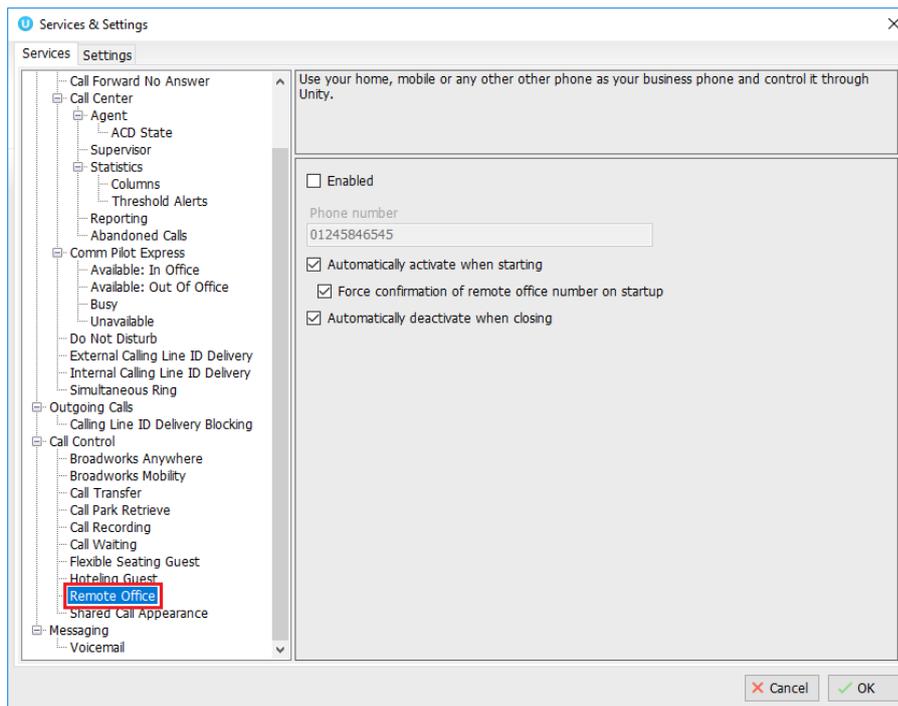
2.1.2 CALL TRANSFER



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 above.

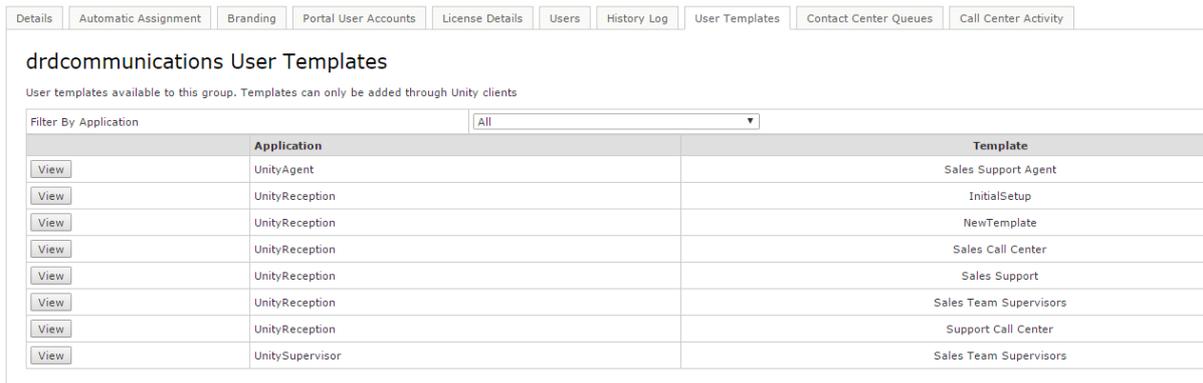
2.1.3 REMOTE OFFICE

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.



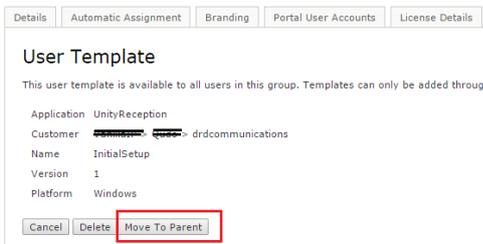
3 MANAGING TEMPLATES

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.



	Application	Template
View	UnityAgent	Sales Support Agent
View	UnityReception	InitialSetup
View	UnityReception	NewTemplate
View	UnityReception	Sales Call Center
View	UnityReception	Sales Support
View	UnityReception	Sales Team Supervisors
View	UnityReception	Support Call Center
View	UnitySupervisor	Sales Team Supervisors

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.



Application	UnityReception
Customer	XXXXXXXXXX > drdcommunications
Name	InitialSetup
Version	1
Platform	Windows

[Cancel](#) [Delete](#) [Move To Parent](#)

To move a template up one level, click in to the template [by clicking View] 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. For example, if the template is set at the Group level then it will cascade down to all users within that Group that use that Unity Client. Like all branding settings in the Unity portal this can be overridden in lower levels of the hierarchy.

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.

User Template Assignments

User templates are used to automatically configure a user environment based on user type, for example to set all call center agent settings to be the same. User templates are created through the Unity client and can be assigned either through the portal or client, if configured in the setting below. Please note that the user template can only be assigned through the client when running as administrator.

Template Can Be Set Through Client

Application	Template	Is Single-Use
UnityAgent	Sales Support Agent	<input type="checkbox"/>
UnityDashboard	None	<input type="checkbox"/>
UnityDesktop	None	<input type="checkbox"/>
UnityMobile	None	<input type="checkbox"/>
UnityReception	None	<input type="checkbox"/>
UnitySupervisor	Sales Team Supervisors	<input checked="" type="checkbox"/>
UnityWallboard	None	<input type="checkbox"/>

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.

As mentioned above, a template assignment may be made at the Group level then overridden for a particular user.

4.1 PARENT ASSIGNMENT

If you want to set the template back to what was set at the parent level but can't see what that is [most likely because of user permissions] then you can select "Parent" from the dropdown list. When setting the templates, the Unity portal will then find the template assignment at the parent level and set that as the template at this level.

4.2 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.

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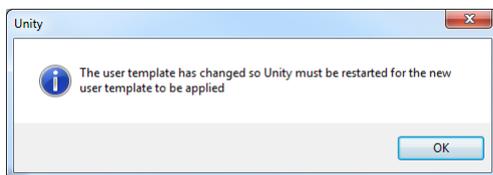
Template Can Be Set Through Client

Application	Template	Is Single-Use
UnityAgent	Sales Support Agent	<input checked="" type="checkbox"/>
UnityDashboard	Parent	<input type="checkbox"/>
UnityDesktop	None	<input type="checkbox"/>
UnityMobile	None	<input type="checkbox"/>
UnityReception	None	<input type="checkbox"/>
UnitySupervisor	None	<input type="checkbox"/>
UnityWallboard	None	<input type="checkbox"/>

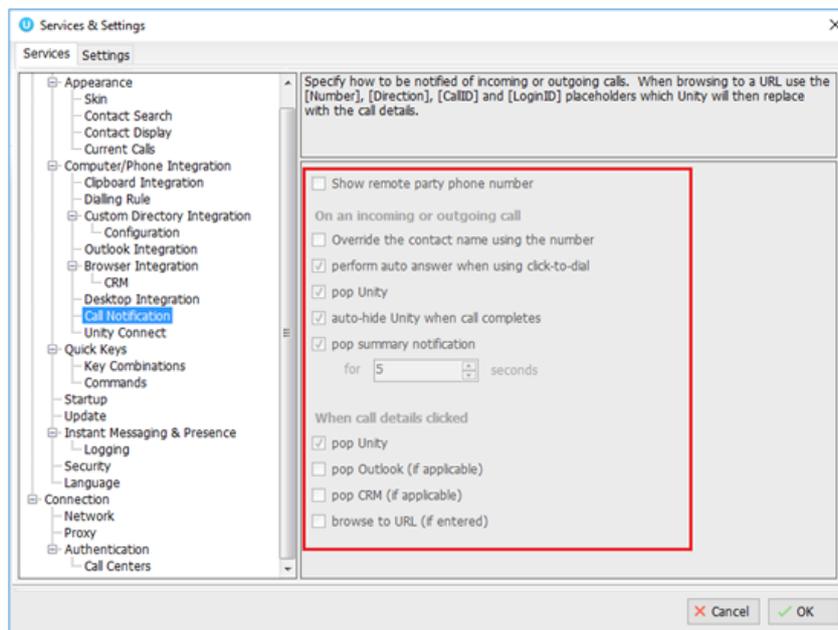
Update Brand

4.3 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 below.

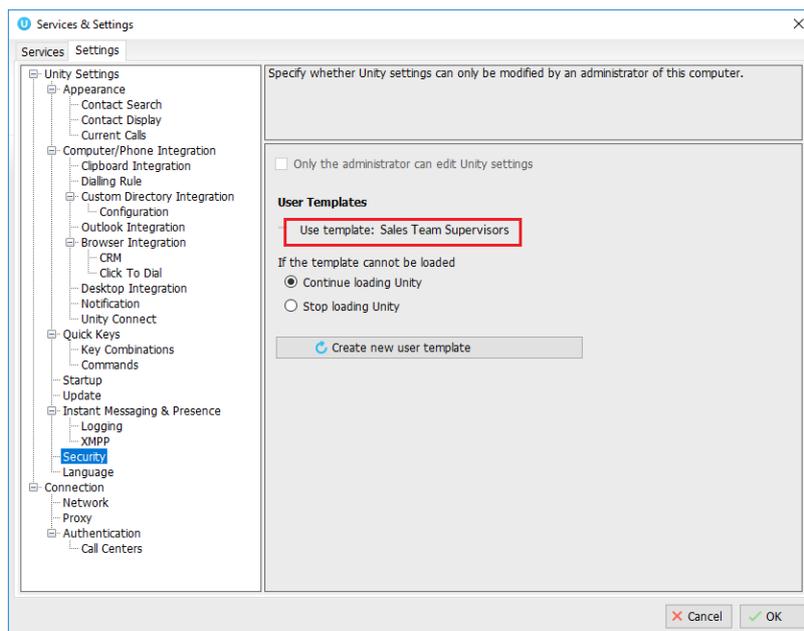


If the template assignment is not single-use then all settings will be disabled, as shown below.



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

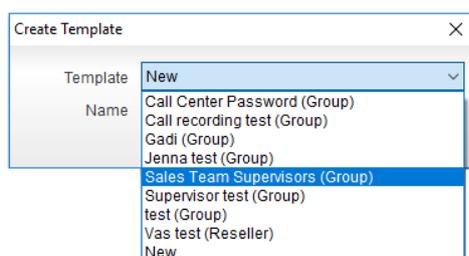
and use the locally saved settings [which will most likely have been saved from the template anyway] or to quit.



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 below.



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 below.

