User Templates

This page contains instructions on how to configure a user account using a template.

Overview

User templates can be managed by the system administrator(s) as well as by the service provider and organization account owners. If you need to add several user accounts to the system, the easiest way to do it is with a template. This will spare you the trouble of setting permissions and roles for each an every account.

If there are parameters that do not meet your requirements, you may simply edit the template or create a whole new one.

To manage user templates, go to **Unified Communications** in the side menu and click the User Templates icon in the **Assets** area. The **User Templates** management page allows you to:

- create a new template
- see a list of all existing user templates
- search for a particular template within the list
- edit templates
- remove unused templates

Add template

To add a template:

1. Click on the Add Template icon in the **Tools** area.
2. Name the template.
3. Enable the **Shared with provider** option if you want to share the template with service providers. This will allow service providers to create users based on it.
4. Set account permissions. More details on permissions **here**.
5. Set account limits. More details on limits **here**.
6. Set up sharing policies for the account. More details on sharing policies **here**.
7. Click **OK** to add the new user template. To go back to the previous page without adding anything, click **Cancel**.

If you want to edit a template, follow the same steps described above.

Enable or disable template

All user templates are listed in the **User Templates** table. You may enable or disable a specific template with a simple click on the **S** (Status) icon, which shows the status of the template: for enabled for disabled. Once a template is disabled, you can no longer use it to create an account.

Search for a template

The same table shows the **Template ID** column, which refers to the automatically generated ID of the template. The **Users** column indicates the number of user accounts created based on this template.

To filter existing templates, enter the template name in the text box above the table and click the **Search** button. The system remembers the search criteria when a new search is performed and even after the user logs out.

Remove a template

If you remove a template from the system, the accounts created with it will not be affected.

To remove a template:

1. Select the template from the table and click the Remove selected link on top of the table.
2. Select the **Confirm removal checkbox** and click **OK**. To return to the previous page without removing the template, click **Cancel**.

Related topics
Add a user account

Set up user roles