



Using and Understanding Templates

Version 1

Phonism Templates

Templates in Phonism are a powerful way to set bulk changes across many devices. Templates can be used to apply settings to devices that may be common across all devices. This is great for applying line settings, SIP server, time server settings, dial plans, contacts etc.

Notes

- You can create as many templates as you wish.
- Templates are manufacturer specific. You can create a template for Yealink devices and a different template for Polycom devices.
- Template values always override phone values. For example: Parameter A is set to 'BLF' in a template. A phone has Parameter A set to 'Speed Dial'. When the template is applied to the phone, the template value will override the phone and set Parameter A to 'BLF'.

Types of Templates

Tenant Templates

- These templates reside at the Tenant-level.
- These templates must be assigned to a Phone to have their settings applied.
 - Only one Tenant-level template may be assigned to a phone
- Assigned templates will automatically be reapplied to all affected phones when modified.

Domain Templates

While Phonism supports templates at the Domain level, it is not a best practise to use them.

Hierarchy Templates (Phonism Premium Only)

In addition to Tenant Templates, Phonism Premium accounts utilizing the hierarchy feature have the ability to create templates at any level of the hierarchy that are automatically applied to all compatible devices within the hierarchy without any user input.

This is ideal to enforce global settings that cannot be overridden by your users at the lower levels of the hierarchy.

- Hierarchy templates can be made at the Account, Service Provider, and Enterprise levels.
- Hierarchy templates are only applied to phones within the sub-hierarchy

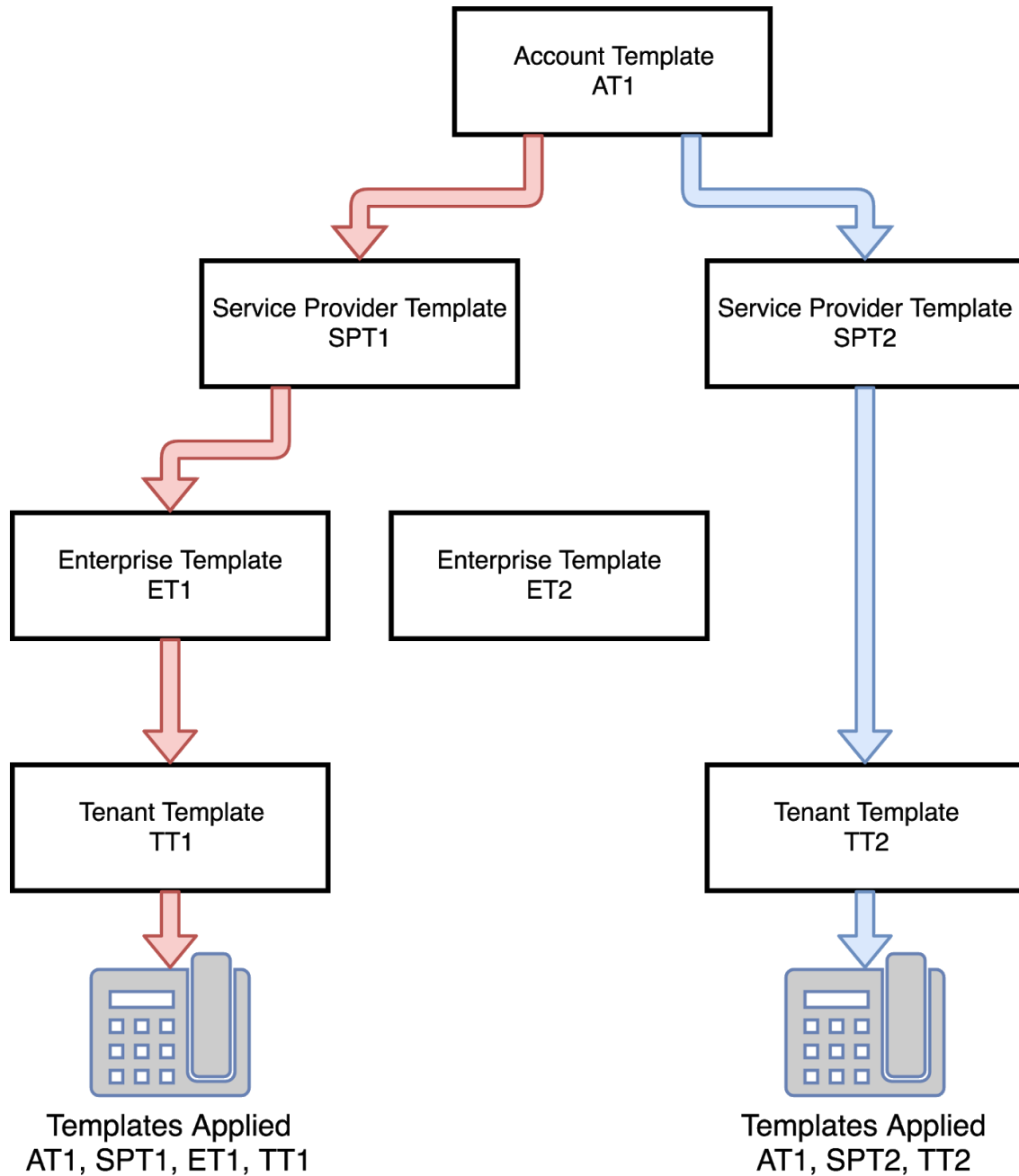


Diagram demonstrating hierarchy templates only applying to phones below that level

If you have additional questions, feel free to email info@phonism.com

- Hierarchy templates are cascading, meaning an Account-level template overrides a Service Provider template, a Service Provider template overrides an Enterprise template, and an Enterprise template overrides a Tenant template. This means that if the same setting is enabled in the service provider template and again in the tenant template, the setting in the service provider template will be the one applied to the phone.

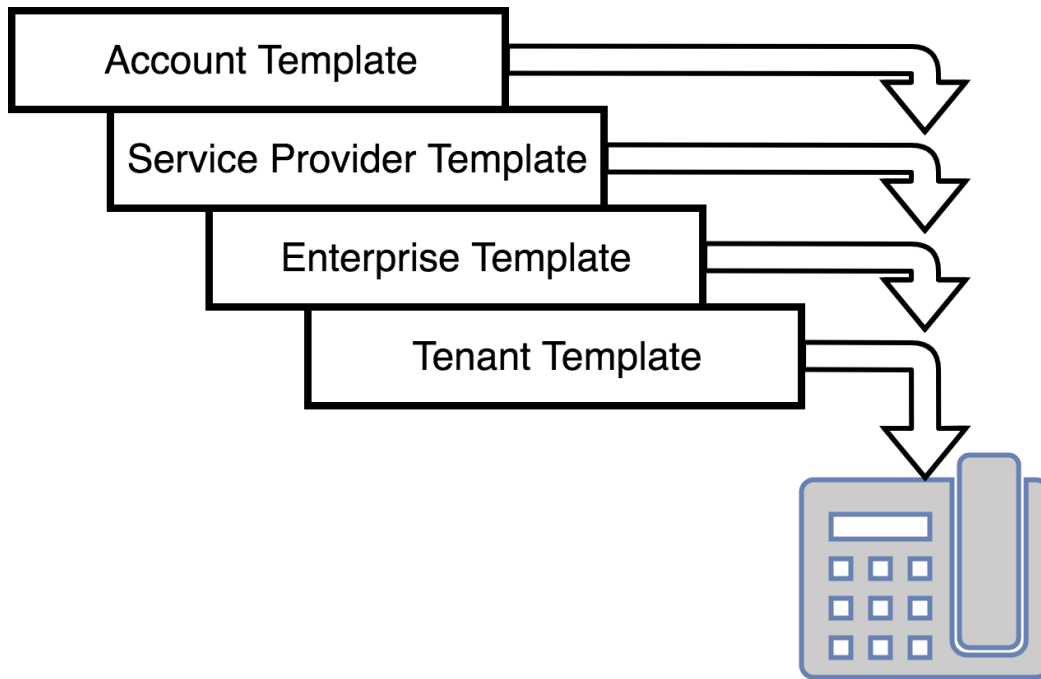


Diagram demonstrating hierarchy template application

Important Note:

- Hierarchy templates are AUTO-INHERITED to each phone in the domain that match the manufacturer. Therefore it is recommended to only have 1 template per manufacturer at each of these levels and always use the latest version of software to build the template. *Auto-Inherited means you do not have to do anything except create the template and select which fields you want to enable, if a template exists, the device will receive these settings automatically*

Creating a template

To create a template, visit the Templates page at any level in the hierarchy and select “Add”. Name your template and select a software version that the template will be based on.

- **Note:** Templates are brand-specific and its configuration applied regardless of model or software version of the target device.

The image shows two parts of the Phonism web interface. On the left is the 'Templates' page, and on the right is the 'Add new template' form.

Templates Page: The top navigation bar includes 'Dashboard', 'Tenant', 'Phones', 'Templates' (highlighted), and 'Users'. Below the navigation, there are 'Add' and 'Delete' buttons. A table lists existing templates:

<input type="checkbox"/>	Name	Brand
<input type="checkbox"/>	525g Template	Cisco
<input type="checkbox"/>	test1	Polycor

Add new template Form: This form contains the following fields:

- Template Name: SFB Template
- Template Brand: Yealink
- Software Version: 9.0.25 (Skype for Business)
- Supported phone models: T48S, T46S, T42S, T41S

At the bottom of the form are 'Cancel' and 'Continue' buttons.

If you have additional questions, feel free to email info@phonism.com

Editing Templates

Editing a template is like configuring a device with two key differences:

1. You cannot configure line-specific parameters like VoIP Credentials. Those are device-specific and not intended to be applied to multiple devices.
2. Only “Enabled” parameters will be applied to devices. You can enable a parameter by checking the box next to the field.

The screenshot shows the 'Editing Template: Internal VVX Template' interface. At the top right, there are buttons for 'Cancel', 'Disable All Values', 'Save', and 'Save & Close'. On the left, a sidebar lists configuration categories: General, Line 1, Line 2 (highlighted), Line 3, Line 4, Line 5, Line 6, Line 7, Line 8, Line 9, Line 10, Line 11, Line 12, Buttons, Security, Advanced, Custom Config, and Custom Contacts.

The main configuration area is divided into three sections:

- Line Settings (Enabled ?)**:
 - Type: Private (dropdown),
 - Ring Type: Default (dropdown),
 - Secure RTP: ON (toggle),
 - Line Keys: 1 (text input),
 - Calls Per Line: 24 (text input),
- Primary Server (Enabled ?)**:
 - Address: phonism.voip.com (text input),
 - Port: 5060 (text input),
 - Transport: UDPOnly (dropdown),
 - Expires: 3600 (text input),
- Backup Server (Enabled ?)**:
 - Address: (text input),
 - Port: 0 (text input),
 - Transport: DNSnaptr (dropdown),
 - Expires: 3600 (text input),

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Cloning a template

In the Hierarchy model, There is no real reason to clone a template at the Account, Service Provider or Enterprise level. If for instance you do want all Service Providers to have some of the same settings, You just create the template at the Account level for the brand of manufacturer. (i.e. one template for Polycom, one for Yealink, etc) and all the service providers will auto inherit it, nothing else needs to be done.

But, at the Tenant levels, cloning a template is quite useful since you can create multiple templates for the same manufacturers and selectively assign to devices that you want to inherit those settings. So you may end up with 3 Yealink templates at the Tenant level, and each one is ONLY slightly different from the other.

To clone a template, from the template dashboard at the template level, hit the icon next (to the left) to the trash can.

Applying a Template

If your template is at the Tenant-level, it must be applied to a device. Hierarchy templates will automatically be applied. At the Tenant-level in the phone dashboard, select the desired device(s) that you want to apply a template to and select “Apply Template” to reveal a dialog that will allow you to apply a template to the selected devices.

- Overwrite Phone Custom Config
 - A template will overwrite any phone custom config instead of merging. This is a one-time overwrite. Subsequent template applications with merge custom config.
- Overwrite Phone Custom Contacts
 - A template will overwrite any phone custom contacts. This is a one-time overwrite.
 - At this time we do not merge custom contacts from templates.

Select a Template

Polycom

Template	Polycom tenant level T1	x ▼
Overwrite Phone Custom Config	<input type="checkbox"/>	OFF
Overwrite Phone Custom Contacts	<input type="checkbox"/>	OFF

Yealink

Template	Yealink	x ▼
Overwrite Phone Custom Config	<input type="checkbox"/>	OFF
Overwrite Phone Custom Contacts	<input type="checkbox"/>	OFF

Apply template dialog

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