

What are User Templates?

- User Templates are faux Project Members that are created within an Organization's Project Template(s) and are set with project Specific project permission and folder access to that Project Template.
- Template Users provide a means to control Project Permission to Project Members more easily.

What is the purpose of a User Template?

- The purpose of a User Template is to have a quick and easy way to manage Project Member permission and Folder Access among your Project Members within your project.

What are some important things to know about Template Users?


- Template Users will only carry Project Permission and Folder Access into new projects created from the project template where the Template Users exist.
- **Template Users cannot be added to a project after a project has been created and keep their Project Permissions and folder access.**
 - **Remember: Project Permission and Folder Access are PROJECT SPECIFIC.** Every time a Project Member is added to a project, their Project Permission and Folder access are reset; they are added with a clean slate. This is because Project Permission and Folder access are project specific.
- You copy permissions FROM your Template User to your other Project Members.
- There is no "reset to template permission and folder access" on a User Template what permission and folder that are set to the Template User at the time the Project was created from the Project Template will be the Permission and Folder Access that Template User has in the newly created Project

How do you I copy Permission and Folder Access from a Template User to my Project Members?


1. Select the Project Member(s) from your Project Member List that you will be copying Permissions TO

You are here: [Home](#) \ [Project Setup](#)


Home




Add Project Members



New User




New Contact




Remove


User Options




Edit



Role Change




Toggle QR




Copy Permissions

Edit Options



Reports



Mass Mail

Reports

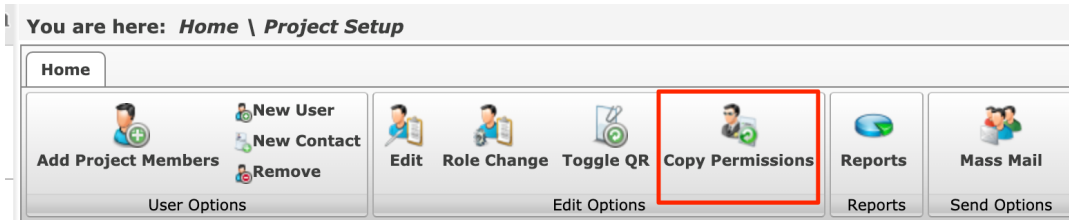
Send Options

Project Members

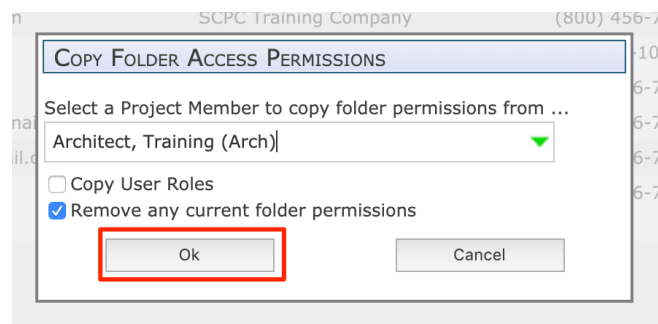
<input type="checkbox"/> User Full Name	User Email	Company/Org	Phone Number	User Role	Is Active	Quick Reply
<input type="checkbox"/> Accountant, Training	sadamsacctnt@gmail.com	SCPC Training Company	(800) 456-7890	Accountant	Yes	Yes
<input type="checkbox"/> Architect, Training	sadamsarchitect@gmail.com	SCPC Training Company	(800) 456-7890	Architect	Yes	Yes
<input checked="" type="checkbox"/> Org Admin, SAdams	sadamsorgadm@gmail.com	StratusVue	847-876-1003	Project Admin	Yes	Yes
<input checked="" type="checkbox"/> Owner, Training	sadamsowner@gmail.com	SCPC Training Company	(800) 456-7890	Owner	Yes	Yes
<input checked="" type="checkbox"/> PM, Training	sadamsprojectmanager@gmail.com	SCPC Training Company	(800) 456-7890	Project Admin	Yes	Yes
<input type="checkbox"/> Subcontractor, Training	sadamssubcontractor@gmail.com	SCPC Training Company	(800) 456-7890	Sub-Contractor	Yes	Yes
<input type="checkbox"/> Superintendent, Training	sadamssuper@gmail.com	SCPC Training Company	(800) 456-7890	Superintendent	Yes	Yes

Refresh

2. Select the Copy Permissions Button in the Top Ribbon of the Project Members Section



3. You will then get a Pop-Up asking you to select a Project Member to copy Permission and Folder Access FROM. You will choose the User Template that houses the Project Permission and Folder Access for the Project Members that you are copying permissions to. Click Save when you have selected the Project Member of your choice.



- If your User Templates have Customized Org Role - the suggestion is to not select the Copy User Roles checkbox
- Remove any current folder permissions will default to be selected. This is an optional function for you to remove any permission/folder access to the Project Member(s) that you are copying permissions TO

Template User Guideline

- When creating template user profiles you want to create the profile on the project template(s). By doing this the profile will be present upon the creation of a new project. You can then use the button on the top ribbon bar of project members to copy those permissions to your project members. If you will be creating new templates for projects it is best to create the project templates before creating template users.
 - **Format to use when creating template profiles:**
 - **First Name:** Project Manager Template
 - **Last Name:** ZCompanyName
 - **Email:** projectmanagertemplate@companyname.com
 - **Password:** CompanyName1!

- **Example:**
 - **First Name:** Project Manager Template
 - **Last Name:** ZSageCPC
 - **Email:** projectmanagertemplate@sagecpc.com
 - **Password:** Sagecpc1!
- By putting the letter “Z” at the start of the last name the template will be at the bottom of your project member list and not get in the way of your actual project members. You want to use the same password for each template, and use a faux email address that represents the profile