Using Prime Collaboration Self-Care

Prime Collaboration Self-Care Overview

Prime Collaboration provides a Self-Care portal, which allows you to control preference settings such as user name, password, and so on. You can update your own account and services by using the Self-Care portal. The Self-Care feature enables you to modify line settings, manage services, add reset Voicemail Box, Voicemail PIN, and configure phone options. The Self-Care portal covers user services across multiple Cisco Unified CM clusters, Unity Connection clusters and IM&P clusters.

Note When Cisco Unified Communications Manager is shared between two or more users, and if one or more users are using LDAP, Prime Self-Care will be used regardless of the version of Cisco Unified Communications Manager.

To enable Prime Collaboration Self-Care, see Creating a Self-Care Account, on page 1.

Creating a Self-Care Account

You can create a Self-Care account in Cisco Prime Collaboration Provisioning. You can choose to enable or disable Self-Care for each user you create.

Note

- To assign Self-Care roles, you must enable the CreateSelfCareAccounts rule while creating a new domain. The CreateSelfCareAccounts rule is disabled by default.

- You can also assign Self-Care roles in an already existing domain by running the Self-Care Migration Utility. This will enable Self-Care role for already existing users. See Self-Care User Migration Script for details.

- The SelfCareUser check box is available only if the CreateSelfCareAccounts rule is enabled.

- After creating users, the users can login to Self-Care only after the globaladmin or domain-admin changes their account password. By default, the user password is empty. You must specify a default password in the DefaultCUPMPassword Data field and set Enabled to true to set the default password.

- If the users domain is authenticated with Active Directory, the self-care login will use the AD server defined for the users domain.

To create a Self-Care account for a user:

Step 1 Choose **User Provisioning**.

Step 2 Click **Add User** and check the **Enable Prime Collaboration Self-Care** check box.

Step 3 Enter the necessary user information and save.

Enabling or Disabling Self-Care Using Batch Provisioning

You can enable Self-Care while creating new users using Batch Provisioning. To enable Self-Care for a user, provide the authorization role as SelfCareUser in the batch action file.

Batch Provisioning can also be used to enable or disable Self-Care role for an existing user. To enable provide the authorization role as SelfCareUser, and to disable provide none in the batch action file.

Note The CreateSelfCareAccounts rule must be enabled for the domain to create a Self-Care account.

For information on Batch Provisioning see Managing Batch Projects.

Launching Prime Collaboration Self-care

Based on your user role, you can launch Self-Care.

Note If you are using IE 10, you must select the Standards mode for the Self-Care portal to work properly.

Note **For Cisco Prime Collaboration Provisioning release 12.5 and later**

When you log in to the Self-care/Non-Selfcare User login page for the second time, it displays the successful date and time of the previous login.

A user with only Self-Care role will be directed to the self-care portal after login:

Step 1 In a browser enter, http://<provisioning-ip>/cupm/selfcareuser/Login.

Step 2 Use Self-Care credentials to log in.

Since the user has only Self-Care role, he will be able to access only the Self-Care menu. Provisioning menus will not be available for such a user.

Customizing Your Personal Settings

Self-Care enables you to set individual attributes and personal preferences for the following aspects of phone use:

- Phone options include configuring speed dial numbers, do not disturb options, and music when a call is placed on hold.

- Profile options allow you to configure options for extension mobility and single number reach.

- Line options for a specific line on the phone, such as call forwarding, caller identification, and notifications.

- User options for the phone user, such as passwords and personal identification numbers (PINs).

You can update the /opt/cupm/sep/ipt.properties file to hide or display the features displayed in the Phone Settings, Line Settings, and User Settings page of Self-Care portal. For example, if you want to configure the features in the Phone settings, your entries would be:

In Cisco Prime Collaboration Provisioning UI, choose **Administration** > **Settings** to view the following Endpoint Features.

```
enabled features for Phone Settings should be provided as follows:
General,SpeedDials,DoNotDisturb,Locale,MusicOnHold,Others
dfc.ipt.selfcare.phone.features=General,SpeedDials,DoNotDisturb,Locale,MusicOnHold,Others#
```

Note You must log in as root user to update the ipt.properties file. You must restart the cupm services for the changes to take effect.

To configure Self-Care options:

Step 1 In a browser, enter http://<provisioning-ip>/cupm/ipt/selfcare/home.html.

Step 2 Enter your username and password.

The Self-Care portal screen appears. The Self-Care portal screen contains the following elements:

- Phone carousel—The phone carousel (positioned in the lower left side of the screen) contains icons for the phones and service profiles that you can configure. Click the icons at either side of the visible icons to view the additional phones or profiles.

- Main menu—The main menu options (to the right of the phone carousel) are Phone Settings, Line Settings, and User Settings. Depending on your selection in the phone carousel, the Phone Settings option might be replaced by Extension Mobility Settings or Single Number Reach Settings.

- Configuration area—The configurable categories for the selected main menu option appear next. When you click a category, such as Speed Dials, the right side of the screen displays the configurable options.

Step 3   In the phone carousel, select the phone or profile you want to configure.

Step 4   In the Line Settings menu, ensure that you select the correct line for the options you are configuring.

The following options are available for you to configure in the Self-Care portal:

- Configuring Phone or Extension Mobility Settings

- Configuring Single Number Reach Settings

- Configuring Line Settings

- Configuring User Settings

Configuring Phone and Extension Mobility Setting

The following table lists the Phone and Extension Mobility settings you can perform using Self-Care.

Table 1: Configuring Phone and Extension Mobility Setting

Settings	Description	Procedure
General	Update your phone MAC address and unlock Voicemail Box.	Choose Phone Settings > MAC Address, enter a valid MAC address for your phone, then click Save.
Speed Dials	Add phone numbers for speed dialing. Add a comma between the numbers to pause speed dialing. You can add any number of commas. Default delay for a comma is two seconds.	Choose Phone Settings > Speed Dials , then click Add. Enter the necessary information and click Save.
Do Not Disturb	Enable or disable the Do Not Disturb feature. Select the action to be taken if an incoming call arrives while the Do No Disturb feature is enabled.	Choose Phone Settings > Do Not Disturb, then check the Enable Do Not Disturb check box.

Settings	Description	Procedure
Locale	Select your work and network locales for time and language support.	Choose Phone Settings > Locale, then choose your location from the User Locale drop-down list, and click Save.
Music On Hold	Select the source of the music to be played when you place a user on hold.	Choose Phone Settings > Music On Hold, then choose the audio source to play when you place a call on hold from the User Hold Audio Source drop-down list, and click Save.
Others	Enable or disable the following options: • Speakerphone • Speakerphone and headset • Video • PC Port use • Extension Mobility	Choose Phone Settings > Others, then check or uncheck the check box as required for each option, then click Save .

Line Settings

The following table lists the available line settings for each line of the selected phone or profile:

Table 2: Line Settings

Settings	Description	Procedure
Call Forward	Set default call-forwarding options. Customize call-forwarding for external or internal incoming calls.	Choose Line Settings then select Call Forward, Caller ID, Notification, or Music On Hold to update and click Save.
Caller ID	Configure caller ID options.	
Notification	Set audio and visual options for incoming calls and notification of messages.	
Music On Hold	Select the source of the music to be played when a call is placed on hold.	

User Settings

The following table lists the available User Settings:

Table 3: User Settings

Settings	Description	Procedure
Information	Update your name. Enter your email address.	Choose **User Settings**, then select **Information, Password, PIN,** or **Conference** to update and click **Save**.
Password	Update your password.	
PIN	Update your personal identification number.	
Conference	Update attendees access code. **Note** You can update attendees code, only if Conference Now service is enabled for the user.	

Common Self-Care Tasks

The following table lists all the common self-care tasks a user can perform:

Table 4: Common self-care Tasks

Task	Procedure
Change a password	Choose User Settings > Passwords.
Change a PIN	Choose User Settings > PIN. **Note** You can change your phone and voice mail PINs. Phone PIN is to reset the Cisco Unified Communications Manager (or Extension Mobility) PIN, and voice mail is to reset the Unity Connection PIN.
Disable use of a speakerphone	Choose Phone Settings > Others, then check the Disable Speakerphone check box.
Enable extension mobility	Choose Phone Settings > Others, then check the Cisco Extension Mobility check box.
Enable video calls	Choose Phone Settings > Others, then check the Enable Video check box.
Forward calls	Choose Line Settings > Call Forward, then set the options for forwarding incoming calls.
Provide e-mail information	Choose User Settings > Information, and enter your email address.

Task	Procedure
Select a different phone as your primary device.	Choose User Settings > Information, and choose the preferred device from the Primary Device drop-down list.
Select call and message notifications	Choose Line Settings > Notification, then choose the notification options for incoming calls and messages.
Select the source for music for calls on hold	Choose Phone Settings > Music On Hold, then choose the audio source to use when you or the network places a call on hold.

Configuring Single Number Reach

The Single Number Reach feature enables you to associate a another phone number with your business IP phone number. When a call is received on the business phone number, Cisco Prime Collaboration Provisioning automatically directs the call to ring on the phone you specify as well as the business phone. In this way, the Single Number Reach feature enables callers to reach you by dialing a single number, regardless of your location.

To configure an alternate number for Single Number Reach:

Step 1   In the phone carousel, select the icon associated with the remote destination profile.

Step 2   Choose **Single Number Reach Settings > Alternate Numbers**.

Step 3   Provide the information as described in the Table 5: Field Description for Single Number Reach table, then click **Save.**

Step 4   If needed, click **Add New** to add an additional alternate number.

Table 5: Field Description for Single Number Reach

Field	Description
Alternate Number	Enter the alternate number that Cisco Prime Collaboration Provisioning is to direct calls to when calls are received on your primary phone.
Description	(Optional) Enter a description of the alternate number.
Enable Reach Me Anywhere	Check the check box to enable incoming calls to ring on multiple phones at the same time.
This is a mobile device	Check the check box if the alternate number is for a mobile device.
Allow me … seconds to answer	Enter the length of time (in tenths of seconds) that Cisco Prime Collaboration Provisioning should wait for you to answer the call on the primary phone before directing the call to the alternate number.

Field	Description
Continue ringing the alternate number for … seconds	Enter the length of time (in tenths of seconds) that Cisco Prime Collaboration Provisioning should ring at the alternate number.
If the alternate number answers within … seconds	Enter the length of time (in tenths of seconds) that Cisco Prime Collaboration Provisioning should wait after directing a call to the alternate device before connecting a call on the device. This delay prevents calls from being picked up by automated greetings, such as voice mail, on the device.
Line Association Information	Check the check box for the line to associate with this alternate number.

Self-Care User Migration Script

The SelfCareMigrationUtility can be invoked during the migration, or from the CLI, after migration. The tool processes all the users in the domains that have CreateSelfCareAccounts rule and DefaultCUPMPassword rule set.

This tool can be run through CLI from /opt/cupm/sep/ipt/bin. It can be run either globally (means for all domains) or for a single domain.

To run script:

Step 1 Go to /opt/cupm/sep/ipt/bin.

Step 2 Run:`./SelfCareMigrationUtility.sh ALL ENABLE`

- ALL—Indicates all domains.

- ENABLE—Enables selfcare for all users in the domain specified.

  Tto disable selfcare option, run:

  `./SelfCareMigraionUtility.sh ALL DISABLE`

  The script can be run at the domain level also. To do this, run:

  ./SelfCareMigrationUtility.sh *DOMAIN NAME* [ENABLE | DISABLE]

For more information on migration, see the Cisco Prime Collaboration Upgrade and Migration Guide.