



Configure Endpoints

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Endpoint Provisioning Defaults

Use the information in this part to configure endpoint devices, and how to associate users with endpoints.

Unified Communications Manager contains a set of device defaults that you can provision prior to adding endpoints. If you set these device default settings beforehand, when you provision new users and devices will be configured automatically based on the settings that are applied.

Following are the two default configurations for endpoints provisioning:

- [Configure Device Defaults](#)
- [Configure Enterprise Phone Settings](#)

Endpoint Provisioning Default Prerequisites

Confirm the ports that are configured for endpoint registrations. From Cisco Unified CM Administration, go to **System > Cisco Unified CM**, select the server and confirm the configured port settings.



Note In most cases, there is no need to change the ports from their default settings.

Endpoint Provisioning Defaults Task Flow

Complete the following task flows to configure devices for your system.

Procedure

	Command or Action	Purpose
Step 1	Configure Device Defaults, on page 2	You can change the default settings that are applied to devices that auto-register with a Unified Communications Manager node. Each type of device has a specific set of defaults.
Step 2	Configure Device Profile, on page 5	Optional. You can configure a device profile comprises the set of attributes that associate with a particular device for a user.
Step 3	Configure Default Device Profiles, on page 3	You can configure a default device profile that a phone takes whenever a user logs into a phone for which that user does not have a user device profile.
Step 4	Configure a Softkey Template on the Default Device Profile, on page 3	Optional. You can add the default device profile to a softkey template.
Step 5	Configure Enterprise Phone, on page 5	You can configure the basic enterprise phone settings that apply to all phones in the same cluster.

Configure Device Defaults

Update Device Default Settings

Use this procedure to configure Device Default settings that allow you to assign default firmware loads, default device pools, softkey templates and the registration method: auto registration or activation codes.

Before you begin

Before updating the device default settings, perform any of the following tasks that apply to your system.

- Add new firmware files for the devices to the TFTP server.
- If you use device defaults to assign a firmware load that does not exist in the directory, those devices will fail to load the assigned firmware.
- Configure new device pools. If the device is a phone, configure new phone templates.

Procedure

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- Step 1** In Cisco Unified CM Administration, select **Device > Device Settings > Device Defaults**.
- Step 2** In the **Device Defaults Configuration** window, modify the applicable settings for the type of device that you want to update, then click **Save**. For field descriptions, see the online help.
- Load Information

- Device Pool
- Phone Template

Step 3 Click the **Reset** icon that appears to the left of the device name to reset all the devices of that type and load the new defaults to all devices of that type on all nodes in the cluster.

If you do not reset all devices, then only new devices that auto-register on the node are configured with the updated default values.

Configure Default Device Profiles

The phone takes on the default device profile whenever a user logs into a phone for which that user does not have a user device profile.

A default device profile includes device type (phone), user locale, phone button template, softkey template, and multilevel precedence and preemption (MLPP) information.

Procedure

- Step 1** From the **Cisco Unified CM Administration** window, choose **Device > Device Settings > Default Device Profile**.
- Step 2** In the **Default Device Profile Configuration** window, from the **Device Profile Type** drop-down list, choose the appropriate Cisco Unified IP Phone.
- Step 3** Click **Next**.
- Step 4** From the **Device Protocol** drop-down list, choose the appropriate protocol.
- Step 5** Click **Next**.
- Step 6** Configure the fields in the **Default Device Profile Configuration** window. See the online help for more information about the fields and their configuration options.
- Step 7** Click **Save**.
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Configure a Softkey Template on the Default Device Profile

Cisco Unified Communications Manager includes standard softkey templates for call processing and applications. When creating custom softkey templates, copy the standard templates and make modifications as required.

Procedure

- Step 1** From Cisco Unified CM Administration, choose **Device > Device Settings > Softkey Template**.
- Step 2** Perform the following steps to create a new softkey template; otherwise, proceed to the next step.
- a) Click **Add New**.
 - b) Select a default template and click **Copy**.

- c) Enter a new name for the template in the **Softkey Template Name** field.
- d) Click **Save**.

Step 3 Perform the following steps to add softkeys to an existing template.

- a) Click **Find** and enter the search criteria.
- b) Select the required existing template.

Step 4 Check the **Default Softkey Template** check box to designate this softkey template as the default softkey template.

Note If you designate a softkey template as the default softkey template, you cannot delete it unless you first remove the default designation.

Step 5 Choose **Configure Softkey Layout** from the **Related Links** drop-down list in the upper right corner and click **Go**.

Step 6 From the **Select a Call State to Configure** drop-down list, choose the call state for which you want the softkey to display.

Step 7 From the **Unselected Softkeys** list, choose the softkey to add and click the right arrow to move the softkey to the **Selected Softkeys** list. Use the up and down arrows to change the position of the new softkey.

Step 8 Repeat the previous step to display the softkey in additional call states.

Step 9 Click **Save**.

Step 10 Perform one of the following tasks:

- Click **Apply Config** if you modified a template that is already associated with devices to restart the devices.
- If you created a new softkey template, associate the template with the devices and then restart them. For more information, see *Add a Softkey Template to a Common Device Configuration* and *Associate a Softkey Template with a Phone* sections.

What to do next

You can apply a customized softkey template to a device by selecting the template from the Softkey Template drop-down in one of the following configuration windows:

- Phone Configuration
- Universal Device Template
- BAT Template
- Common Device Configuration
- Device Profile
- Default Device Profile
- UDP Profile

Configure Device Profile

A device profile comprises the set of attributes that associate with a particular device. You can associate the device profile that you create to an end user in order to use the Cisco Extension Mobility feature.

Procedure

- Step 1** From the **Cisco Unified CM Administration** window, choose **Device > Device Settings > Device Profile**.
- Step 2** In the **Device Profile Configuration** window, from the **Device Profile Type** drop-down list, choose the appropriate Cisco Unified IP Phone.
- Step 3** Click **Next**.
- Step 4** From the **Device Protocol** drop-down list, choose the appropriate protocol.
- Step 5** Click **Next**.
- Step 6** From the **Phone Button Template** drop-down list, choose a template.
- Step 7** (Optional) From the **Softkey Template** drop-down list, select a softkey template.
- Step 8** Configure the fields in the **Device Profile Configuration** window. See the online help for more information about the fields and their configuration options.
- Step 9** Click **Save**.

Note For details on using Device Profiles to setup Cisco Extension Mobility, see the *Feature Configuration Guide for Cisco Unified Communications Manager, Release 12.5(1)SU1*.

Configure Enterprise Phone

Configure Enterprise Phone Settings

Use this procedure to configure default Product-Specific Configuration field settings that can be used by the phones in your network.

Parameters that you set in this window may also appear in the Common Phone Profile Configuration window and in the Phone Configuration window for various devices. If you set these same parameters in these other windows too, the following order determines the setting that takes precedence: 1) Phone Configuration window settings, 2) Common Phone Profile window settings, 3) Enterprise Phone Configuration window settings.

Procedure

- Step 1** From Cisco Unified CM Administration, choose **System > Enterprise Phone Configuration**.
- Step 2** Enter the required fields in the **Product Specific Configuration Layout** section.

To view the descriptions of all enterprise phone parameters, click the ? button in the Enterprise Phone Parameters Configuration window.

- Step 3** Complete the remaining fields in the Enterprise Phone Configuration window. For help with the fields and their settings, see the online help.
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Configure a Phone

Perform these steps to manually add the phone to the Unified Communications Manager database. You do not have to perform these steps if you are using autoregistration. If you opt for autoregistration, Unified Communications Manager automatically adds the phone and assigns the directory number.

Procedure

- Step 1** From Cisco Unified CM Administration, choose **Device > Phone**.
- Step 2** Click **Add New**.
- Step 3** From the **Phone Type** drop-down list, select the appropriate Cisco IP Phone model.
- Step 4** Click **Next**.
- Step 5** From the **Select the device protocol** drop-down list, choose one of the following:
- **SCCP**
 - **SIP**
- Step 6** Click **Next**.
- Step 7** Configure the fields in the **Phone Configuration** window. See the online help for more information about the fields and their configuration options.
- Note** The CAPF settings that are configured in the security profile relate to the Certificate Authority Proxy Function settings that display in the Phone Configuration window. You must configure CAPF settings for certificate operations that involve manufacturer-installed certificates (MICs) or locally significant certificates (LSC). See the Cisco Unified Communications Manager Security Guide for more information about how CAPF settings that you update in the phone configuration window affect security profile CAPF settings.
- Step 8** Click **Save**.
- Step 9** In the **Association** area, click **Line [1] - Add a new DN**.
- Step 10** In the **Directory Number** field, enter the directory number that you want to associate with the phone.
- Step 11** Click **Save**.
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Self Care Portal

The Self Care Portal can be used as part of the deployment process for provisioning and configuring new phones:

- End users can use the portal to customize features and settings for their phones.
- With Device Activation Code Onboarding, users have the option to use the portal to activate their phones.

- Users can also use the portal to self-provision their own Single Number Reach remote destinations.

End users need to be set up with access before they can use the portal. For details on how to set up the portal, go to the “Self Care Portal” chapter of the *Feature Configuration Guide for Cisco Unified Communications Manager*.

