



Working with User Device Profiles

The User Device Profiles (UDP) option in BAT allows you to add or delete large numbers of user device profiles. In addition, you can add or update lines for user device profiles. The system uses UDPs in conjunction with the extension mobility feature.

The following topics explain the options for managing user device profiles in more detail:

- [Adding User Device Profiles, page 6-1](#)
- [Generating User Device Profiles for User Devices, page 6-29](#)
- [Deleting User Device Profiles, page 6-31](#)
- [Exporting User Device Profile Records, page 10-17](#)
- [Updating Lines to User Device Profiles, page 6-30](#)
- [Adding Lines to Existing Phones and UDPs, page 3-78](#)
- [Generating Reports for User Device Profiles, page 11-8](#)

Adding User Device Profiles

When you use BAT to add user device profiles to the Cisco CallManager database, you can add multiple lines and other features.

Choose from two options for creating a CSV data file for user device profiles:

- Use the BAT spreadsheet (BAT.xlt) and export the data to the CSV format.
- Use a text editor to create a text file in CSV format (for experienced users).

To add user device profiles to the Cisco CallManager database in bulk, use this procedure.

Procedure

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- Step 1** Choose **Configure > User Device Profiles**. The User Device Profiles Options window displays.
- Step 2** Choose **Insert User Device Profiles** and click **Next**. The Steps to Insert User Device Profile window displays.
- Step 3** Choose **Add, view, or modify UDP templates** and click **Next**.
The UDP Template Configuration window displays. See the [“Creating a BAT Template for User Device Profiles”](#) section on page 6-3 for information about configuring UDP templates.
- Step 4** Create the CSV data file by following the steps for one of these options.

BAT Spreadsheet option

Open the BAT spreadsheet and create the CSV data file. See the [“Using the BAT Spreadsheet to Create User Device Profile CSV Data Files”](#) section on page 6-7.

Text Editor option

- a. Choose **Add, view, or modify file formats** and click **Next**.
The File Format Configuration window displays. See the [“Using a Text Editor to Create the User Device Profile CSV File”](#) section on page 6-21 for information about configuring file formats for CSV data file.
- b. Use a text editor and create the CSV data file for user device profiles that follows the file format that you want to use. For more information about creating a text-based CSV file, see [Appendix A, “Creating a Text-Based CSV File for User Device Profile.”](#)
- c. Choose **Associate file format with the CSV data file** and click **Next**.
The Add File to Format window displays. See the [“Associating the File Format with the CSV Data File”](#) section on page 6-25 for information about file formats.

Step 5 Choose **Validate User Device Profile records** and click **Next**.

The Validate User Device Profiles window displays. See the “[Validating User Device Profiles](#)” section on page 6-26 for information about validating user device profile records.

Step 6 Choose **Insert User Device Profiles** and click **Next**.

The Insert User Device Profiles window displays. See the “[Inserting User Device Profiles](#)” section on page 6-27 for information about inserting user device profile records into the Cisco CallManager database.

Additional Information

See the “[Related Topics](#)” section on page 6-32.

Creating a BAT Template for User Device Profiles

Use this procedure to create a template to add user device profiles in bulk.

Procedure

Step 1 Choose **Add, view, or modify UDP templates** and click **Next**. The User Device Profile Template Configuration window displays.

Step 2 In the **User Device Profile Name** field, enter a unique name, which can contain up to 50 characters.

Step 3 From the **Device Type** drop-down list box, choose the model of user device profile. The window refreshes with additional fields for the user device profile model. Depending on the model of device, some of the following fields do not display.

- **User Hold Audio Source**—Choose the audio source that is played when the user puts a call on hold.
- **User Locale**—Choose the country and language set for with this profile.
- **Phone Button Template**—Choose a phone button template for this profile.



Note You can view a list of phone buttons for a template at any time by choosing the View button list link next to the phone button template field. A separate dialog box pops up and displays the phone buttons for that particular phone template.

- **Softkey Template**—Choose the appropriate softkey template for this profile.
- **MLPP Indication**—To specify whether the device can play precedence tones when placing an MLPP precedence call, choose one of the following:
 - Default—To inherit the MLPP indication from the device pool.
 - Off—Does not send MLPP indication tones.
 - On—Sends indication of an MLPP precedence call.
- **MLPP Preemption**—To specify whether the device can preempt calls in progress when placing an MLPP precedence call, choose one of the following:
 - Default—To inherit the MLPP preemption setting from the device pool.
 - Disabled—Does not preempt calls when it places an MLPP precedence call.
 - Forceful—preempts calls in progress when it places an MLPP precedence call.



Note Do not configure a device with MLPP Indication set to *Off* while MLPP Preemption is set to *Forceful*.

- **MLPP Domain**—Enter a hexadecimal value for the MLPP domain associated with this device. Must be blank or a value between 0 and FFFFFF.
- **Expansion Module Information**—Choose the type of expansion module if installed in the phone or choose <None> for Module 1 and Module 2.
- **Login User ID**—Enter the login user ID for a default profile. After the user logs out from using the user device profile, the user device profile will automatically log in to this login user ID and use the default profile.

**Tip**

You can obtain help in finding a valid login user ID by choosing the **Select Login User ID** link below the Login User ID field. A separate dialog box pops up. In the Login User ID field, enter the first few characters of the login user ID that you want to use, and all login user IDs that match the pattern that you entered will display in the Selected login user ID field. Choose the desired ID and click OK.

Step 4 Check the **Ignore Presentation Indicators (Internal Calls Only)** check box, as needed.

Step 5 Click **Insert**. The template displays in the User Device Profile Templates list in the left pane.

Step 6 A popup box displays that asks you to scroll down to insert lines. Click **OK** and scroll down.

Step 7 Depending on the phone button template that you chose, links display to add lines. Click **Add Line 1** or **Add Line 2**, as appropriate. The Line Details window displays.

Step 8 Enter or choose the appropriate values for the line settings that are described in [“Field Descriptions for Adding a Line to a BAT Template”](#) section on page 3-25.

Step 9 Click **Insert**.

For some Cisco IP Phone models, you can add Cisco IP Phone services and Speed Dials to the template. See these topics for the procedures:

- [Adding or Updating IP Services in a BAT Template](#), page 3-5
- [Adding or Updating Speed Dials in a BAT Template](#), page 3-6

Modifying a Template

You can modify the properties of a template when you want to change only a few fields for the same device.

To modify and update details in an existing BAT template, use the following procedure.

Procedure

- Step 1** In Template Configuration window, choose the template that you want to change from the Templates column. The chosen template details display in the Template Configuration window.
 - Step 2** Verify that this is the template that you want to modify.
 - Step 3** Modify the details in the template fields as needed.
 - Step 4** Click **Update** to save the changes to the existing template.
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Additional Information

See the [“Related Topics” section on page 6-32](#).

Copying a Template

You can copy the properties of a template into a new template when you want to change only a few fields.



Note

The new template that you create must be the same device type as the original template, such as Cisco IP User Device Profile model 7960.

Use the following procedure to copy an existing BAT template.

Procedure

- Step 1** In Template Configuration window, choose the template that you want to copy from the Templates column. The chosen template details display in the Template Configuration window.
- Step 2** Verify that this is the template that you want to copy and click **Copy**. The template reproduces and creates a copy. The copy duplicates all the values that were specified in the original template.
- Step 3** In the Template Name field, enter a new template name, up to 50 alphanumeric characters.
- Step 4** Update the fields as needed for the new template.

- Step 5** Click **Insert**. The template that is added to BAT displays in the Templates column on the left.
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Additional Information

See the [“Related Topics”](#) section on page 6-32.

Deleting Templates

You can delete BAT templates when you no longer require them. Use this procedure to delete a template.

Procedure

- Step 1** In the Template Configuration window, locate the name of the template that you want to delete in the list of templates in the left pane.
- Step 2** Click the template that you want to delete. The chosen template details display in the Template Configuration window.
- Step 3** Verify that this is the template that you want to delete and click **Delete**. A message displays that asks you to confirm the delete operation.
- Step 4** Click **OK** to delete the template. The template name disappears from the list of templates in the left pane.
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Additional Information

See the [“Related Topics”](#) section on page 6-32.

Using the BAT Spreadsheet to Create User Device Profile CSV Data Files

When you are adding new user device profiles, you can use the BAT spreadsheet. You can define the file format within the spreadsheet, and the spreadsheet uses the data file formats to display the fields for the CSV data file.

For information about locating and using the BAT spreadsheet, see the [“Using the BAT Spreadsheet for Gathering Data”](#) section on page 1-11.

To create the CSV data file by using the BAT spreadsheet for adding new user device profiles, use the following procedure.

Procedure

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- Step 1** Locate and double-click the **BAT.xlt** file to open the BAT spreadsheet.
 - Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
 - Step 3** To display the User Device Profiles options, click the **User Device Profile** tab at the bottom of the spreadsheet.
 - Step 4** To choose the device and line fields that you can define for each user device profile, click **Create File Format**. The Field Selection popup window displays.
 - Step 5** To choose the device fields, click a device field name in the Device Field box, and then click the arrow to move the field to the Selected Device Fields box.

A CSV data file must include Number of Lines as the first field, Device Profile Name, and Description; therefore, these fields always remain selected.



Tip You can select a range of items in the list by holding down the Shift key. To select random field names, hold down the Ctrl key and click field names.

- Step 6** Click a line field name in the Line Field box and click the arrow to move the field to the Selected Line Fields box.



Tip You can change the order of the items in the Selected Line and Device boxes. Choose an item and use the up arrow to move the field closer to the beginning of the list or chose the down arrow to move the item to the end of the list.

- Step 7** To modify the CSV data file format, click **Create**. A message asks whether you want to overwrite the existing CSV format.
- Step 8** Click **OK**. New columns for the selected fields display in the BAT spreadsheet in the order that you specified.

- Step 9** To locate the Number of Phone Lines box, scroll to the right. The number of lines that you specify here must not exceed the number of lines that are configured in the BAT template or an error will result when you insert the CSV data file and UDP template.
- Step 10** You must enter the number of speed-dial buttons in the Number of Speed Dials box. After you enter the number, columns display for each speed-dial number.



Note Do not exceed the number of speed dials that are configured in the User Device Profile template, or an error will result when you insert the CSV data file and UDP template.

- Step 11** Enter data for an individual user device profile on each line in the spreadsheet. Complete all mandatory fields and any relevant optional fields. Each column heading specifies the length of the field and whether it is required or optional. See [Table 6-1](#) for descriptions of the fields in the BAT spreadsheet.
- Step 12** To transfer the data from the BAT Excel spreadsheet into a CSV formatted data file, click **Export to BAT Format**.

The system saves the file to C:\XLSDataFiles\ or to your choice of another existing folder on your local workstation. The filename is

<tablename>#<timestamp>.txt

where <tablename> represents the type of input file that you created, such as phones, and <timestamp> represents the precise date and time that the file was created.

You must copy the CSV data file to the Cisco CallManager publisher database server so BAT can access the CSV data file. Using a floppy disk or a mapped network drive, copy the CSV data file from C:\XLSDataFiles\ (or the folder in which you chose to store the file) to the following folder in the publisher database server:

C:\BATFiles\User Device Profiles\



Note For information on how to read the exported CSV data file, click the link to **View Sample File** in the Insert User Device Profiles window in BAT.

Additional Information

See the “[Related Topics](#)” section on page 6-32.

Field Descriptions for User Device Profile Fields in the BAT Spreadsheet

Table 6-1 describes all the user device profile fields in the BAT spreadsheet.

Table 6-1 *Field Descriptions for User Device Profile in the BAT Spreadsheet*

Field	Description
Device Fields (Mandatory Fields)	
Number of Lines	Enter the number of lines for this phone. The number can be fewer than the number of lines in the BAT template, but it cannot exceed the specified number of lines.
Device Profile Name	Enter a unique identifier for the device profile name.
Description	Enter a description such as “Conference Room A” or “John Smith” to help identify the phone or device.
Device Fields (Optional Fields)	
User Locale	Enter the country and language set that you want to associate with this group of IP phones. This choice determines which cultural-dependent attributes exist for this user and which language displays for the user in the Cisco CallManager user windows and phones.
Softkey Template	Enter the softkey template to be used for all phones in this group.
User ID	Enter the user ID for the phone user.
Login User ID	Enter the login user ID for a default profile. If the user device profile is used as a logout profile, specify the login user ID that will be associated with the phone. After the user logs out from this user device profile, the phone will automatically log in to this login user ID.

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
User Hold Audio Source	Enter the user hold audio source that this group of IP phones or CTI ports should use. The user hold audio source identifies the audio source from which music is played when a user places a call on hold.
Ignore Presentation Indicators (Internal Calls Only)	Check this check box to ignore presentation indicators in an internal call.
Line Fields (Optional Fields)	
Directory Number	Enter the directory number for the phone.
Partition	Choose a route partition to which the directory number belongs. Note The directory number can appear in more than one partition.
Voice Mail Profile	Choose this parameter to make the pilot number the same as the directory number for this line. This action proves useful if you do not have a voice-messaging server configured for this phone.
Line Calling Search Space	Choose partitions that are searched for numbers that are called from this directory number. Note Changes cause an update of the call pickup names that are listed in the Call Pickup Group field. The setting applies to all devices that are using this directory number.
AAR Group	Choose the automated alternate routing (AAR) group for this device. The AAR group provides the prefix digits that are used to route calls that are otherwise blocked due to insufficient bandwidth. Set AAR Group to <None> to prevent rerouting blocked calls.
Line User Hold Audio Source	Choose the music on hold audio source to be played when the user presses Hold and places a call on hold.

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Line Network Hold Audio Source	Choose the music on hold audio source to be played when the system places a call on hold while the user transfers a call or initiates a conference or call park.
Auto Answer	Choose one of the following options to activate the Auto Answer feature for this directory number: <ul style="list-style-type: none"> • Auto Answer Off <Default> • Auto Answer with Headset • Auto Answer with Speakerphone (Intercom) <p>Note Make sure that the headset or speakerphone is not disabled when you choose Auto Answer with Headset or Auto Answer with Speakerphone.</p>
Forward All	Enter the directory number to which all calls should be forwarded. To use the BAT phone template entry, leave this field blank.
Forward Busy Internal	Enter the directory number to which internal calls should be forwarded when the phone is busy. To use the BAT phone template entry, leave this field blank.
Forward Busy External	Enter the directory number to which external calls should be forwarded when the phone is busy. To use the BAT phone template entry, leave this field blank.
Forward No Answer Internal	Enter the directory number to which internal calls should be forwarded when the phone is not answered. To use the BAT phone template entry, leave this field blank.
Forward No Answer External	Enter the directory number to which external calls should be forwarded when the phone is not answered. To use the BAT phone template entry, leave this field blank.

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Forward No Coverage Internal	Enter the directory number to which internal calls should be forwarded when the phone does not have coverage. To use the BAT phone template entry, leave this field blank.
Forward No Coverage External	Enter the directory number to which external calls should be forwarded when the phone does not have coverage. To use the BAT phone template entry, leave this field blank.
Forward Unregistered Internal Voice Mail	<p>The settings in this row specify the forwarding treatment for internal calls that are routed to a directory number with no registered devices.</p> <p>Check the Voice Mail check box to use settings in the Voice Mail Profile Configuration window.</p> <p>Note When this check box is checked, Cisco CallManager ignores the settings in the Coverage/Destination box and Calling Search Space. When this check box is checked for internal calls, the system automatically checks the Voice Mail check box for external calls. If you do not want external calls to forward to the voice-messaging system, you must uncheck the Voice Mail check box for external calls.</p>
Forward Unregistered Internal Coverage/Destination	<p>Enter any dialable phone number, including an outside destination.</p> <p>Note When you enter a coverage/destination value for internal calls, the system automatically copies this value to the Coverage/Destination field for external calls. If you want external calls to forward to a different destination, you must enter a different value in the Coverage/Destination field for external calls.</p>

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Forward Unregistered Calling Search Space	<p>Choose calling search space from the drop-down list menu. This setting applies to all devices that are using the directory number chosen above.</p> <p>Note When you choose a Calling Search Space for internal calls, the system automatically copies this setting to the Calling Search Space setting for external calls. If you want external calls to forward to a different calling search space, choose a different setting in the Calling Search Space for external calls.</p>
Forward Unregistered External Voice Mail	<p>The settings in this row specify the forwarding treatment for external calls that are routed to a directory number with no registered devices. Specify the following values:</p> <p>Check the Voice Mail check box to use settings in the Voice Mail Profile Configuration window.</p> <p>Note When this check box is checked, Cisco CallManager ignores the settings in the Coverage/Destination box and Calling Search Space. When this check box is checked for internal calls, the system automatically checks the Voice Mail check box for external calls. If you do not want external calls to forward to the voice-messaging system, you must uncheck the Voice Mail check box for external calls.</p>

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Forward Unregistered External Coverage/Destination	<p>Enter any dialable phone number, including an outside destination.</p> <p>Note When you enter a coverage/destination value for internal calls, the system automatically copies this value to the Coverage/Destination field for external calls. If you want external calls to forward to a different destination, you must enter a different value in the Coverage/Destination field for external calls.</p>
Forward Unregistered External Calling Search Space	<p>Choose calling search space from the drop-down list box. This setting applies to all devices that are using the directory number chosen above.</p> <p>Note When you choose a Calling Search Space for internal calls, the system automatically copies this setting to the Calling Search Space setting for external calls. If you want external calls to forward to a different calling search space, choose a different setting in the Calling Search Space for external calls.</p>
No Answer Ring Duration (CFNA)	<p>Enter the number of seconds to allow the call to ring before forwarding the call to the Forward No Answer Destination.</p>
Call Pickup Group	<p>Enter the Pickup Group Name to specify the call pickup group, which can answer incoming calls to this line by dialling the appropriate pickup group number.</p> <p>Note To use the BAT phone template entry, leave this field blank.</p>

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Target Destination (MLPP)	<p>Enter the number to which MLPP precedence calls should be directed if this directory number receives a precedence call and neither this number nor its call forward destination answers the precedence call.</p> <p>Values can include numeric characters, pound (#), and asterisk (*).</p>
Calling Search Space (MLPP)	From the drop-down list box, choose the calling search space to associate with the alternate party target (destination) number.
No Answer Ring Duration (MLPP)	<p>Enter the number of seconds (between 4 and 30) after which an MLPP precedence call will be directed to this directory number's alternate party if this directory number and its call forwarding destination have not answered the precedence call.</p> <p>Leave this setting blank to use the value that is set in the Cisco CallManager enterprise parameter, Precedence Alternate Party Timeout.</p>
Line Text Label	<p>Enter text that identifies this directory number for a line/phone combination.</p> <p>Note The default text specifies English</p>
External Phone Number Mask	<p>Enter the phone number (or mask) that is sent for Caller ID information when a call is placed from this line.</p> <p>You can enter a maximum of 30 numbers and "X" characters. The Xs represent the directory number and must appear at the end of the pattern. For example, if you specify a mask of 972813XXXX, an external call from extension 1234 displays a caller ID number of 9728131234.</p>

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Maximum Number of Calls	<p>You can configure up to 200 calls for a line on a device in a cluster, with the limiting factor being the device. As you configure the number of calls for one line, the calls available for another line decrease.</p> <p>The default specifies 4. If the phone does not allow multiple calls for each line, the default specifies 2.</p> <p>For CTI route points, you can configure up to 10,000 calls for each port. The default specifies 5000 calls. Use this field in conjunction with the Busy Trigger field.</p>
Busy Trigger	<p>This setting, which works in conjunction with Maximum Number of Calls and Call Forward Busy, determines the maximum number of calls to be presented at the line. If maximum number of calls is set for 50 and the busy trigger is set to 40, then incoming call 41 gets rejected with a busy cause (and will get forwarded if Call Forward Busy is set). If this line is shared, all the lines must be busy before incoming calls get rejected.</p> <p>Use this field in conjunction with Maximum Number of Calls for CTI route points. The default specifies 4500 calls.</p>

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Message Waiting Lamp Policy	<p>Use this field to configure the handset lamp illumination policy. Choose one of the following options:</p> <ul style="list-style-type: none"> • Use System Policy (The directory number refers to the service parameter “Message Waiting Lamp Policy” setting.) • Light and Prompt • Prompt Only • Light Only • None <p>Setting applies only to the current device unless you check the check box at right (called Update Shared Device Settings) and click the Propagate selected button. (The check box at right displays only if other devices share this directory number.)</p>
Ring Setting (Phone Idle)	<p>Choose the ring setting for the line appearance when an incoming call is received and no other active calls exist on that device. Choose one of the following options:</p> <ul style="list-style-type: none"> • Use system default • Disable • Flash only • Ring once • Ring

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Ring Setting (Phone Active)	<p>Choose the ring setting that is used when this phone has another active call on a different line. Choose one of the following options:</p> <ul style="list-style-type: none"> • Use system default • Disable • Flash only • Ring once • Ring • Beep only
Caller Name	<p>Check this check box to include the caller's name in the display when a forwarded call is received. Default leaves this check box checked.</p>
Caller Number	<p>Check this check box to include the caller's number in the display when receiving a forwarded call.</p>
Redirected Number	<p>Check this check box to include the redirected number in the display when receiving a forwarded call.</p>
Dialed Number	<p>Check this check box to include the dialed number in the display when a forwarded call is received. The default setting leaves this check box checked.</p>
Call Pickup Group Audio Alert Setting (Phone Idle)	<p>From the drop-down list box, choose the type of audio notification for call pickup that is provided when the phone is idle. Select one of the following options:</p> <ul style="list-style-type: none"> • Use System Default • Disable • Ring Once

Table 6-1 Field Descriptions for User Device Profile in the BAT Spreadsheet

Field	Description
Call Pickup Group Audio Alert Setting (Phone Active)	<p>From the drop-down list box, choose the type of audio notification for call pickup that is provided when the phone is in use. Select one of the following options:</p> <ul style="list-style-type: none"> • Use System Default • Disable • Beep Only
AAR Settings	
AAR Voice Mail	<p>The settings in this row of fields specify treatment of calls for which there is insufficient bandwidth to reach the destination. These calls are handled by automated alternate routing (AAR) and are routed to the AAR Destination Mask or Voice Mail.</p> <p>Check this check box to use settings in the Voice Mail Profile Configuration window.</p> <p>Note When this check box is checked, Cisco CallManager ignores the settings in the Coverage/Destination box and Calling Search Space.</p>
AAR Destination Mask	Use this setting instead of the external phone number mask to determine the AAR Destination to be dialed.
AAR Group	<p>Choose the automated alternate routing (AAR) group for this device. The AAR group provides the prefix digits that are used to route calls that are otherwise blocked due to insufficient bandwidth.</p> <p>Set AAR Group to <None> to prevent rerouting blocked calls.</p>

Additional Information

See the [“Related Topics”](#) section on page 6-32.

Additional Information

See the [“Related Topics”](#) section on page 6-32.

Using a Text Editor to Create the User Device Profile CSV File

When you use a text editor to create your CSV data file, you must use a file format to identify the device and line fields within the CSV data file. You have these options for the file format:

- **Default User Device Profile**—Contains a predetermined set of user device profile device and line fields.
- **Simple User Device Profile**—Contains basic device and line fields for user device profiles.
- **Customized**—Contains device and line fields that you choose and order yourself.

Before creating the CSV file in the text editor, you need to choose an existing file format or create a new file format. You can then enter the values as specified in the file format in the text-based CSV data file.

The following topics provide information about configuring file formats for CSV data files that are created by using a text editor.

- [Creating a File Format, page 6-21](#)
- [Copying a File Format, page 6-23](#)
- [Modifying a File Format, page 6-24](#)
- [Deleting a File Format, page 6-24](#)

Creating a File Format

To create your file format for the text-based CSV data file, use the following procedure.

Procedure

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- Step 1** From the Create CSV data file window, choose **Add, view, or modify file formats** and click **Next**. The File Format Configuration window displays.

- Step 2** Click **Add a new File Format**. The File Format Information fields display.
- Step 3** In the File Format Name field, enter a name for this customized format.
- Step 4** Under Device Fields, choose the device field names that you want to define for each user device profile. Click a device field name in the Device Field box and click the arrow to move the field to the Selected Device Fields box.

A CSV data file must include Number of Lines, Device Profile Name, and Description; therefore, these fields always remain selected.



Tip You can select several random field names in the list by holding down the Ctrl key, then clicking the arrow to select them together. You can select a range of items by using the Shift key.

- Step 5** Click line field names in the Line Field box and click the arrow to move the fields to the Selected Line Fields box.



Tip You can change the order of the items in the Selected Line Fields and Selected Device Fields boxes. Select an item and then use the up arrow to move the field closer to the beginning of the list or use the down arrow to move it to the end of the list.

- Step 6** If you want to include the fields for the speed dial details, check the **Include Speed Dials in the CSV Format** check box.
- Step 7** To save your customized file format, click **Insert**. The name of the file format displays in the File Format Names list on the left.
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Additional Information

See the [“Related Topics”](#) section on page 6-32.

Copying a File Format

To copy an existing format for the CSV data file, use the following procedure.

Procedure

- Step 1** From the Create CSV data file window, choose **Add, view, or modify file formats** and click **Next**. The File Format Configuration window displays.
- Step 2** In the File Format Name list, choose a file format that you want to copy. The file format details display in the fields.
- Step 3** To make a copy of the chosen file format, click **Copy**.
- Step 4** In the File Format Name field, enter a new name for the copied format.
- Step 5** Modify the copied format by using one of these methods:
- Add new fields by choosing them from the Device Fields or Line Fields box, and then clicking the arrow to move the chosen fields into the Selected Device Field or Selected Line Fields box.
 - Remove chosen fields by choosing them from the Selected Device Fields or Selected Line Fields box, and then clicking the arrow to move the chosen fields into the Device Field or Line Fields box.
 - Change the order of the fields by choosing a field name in the Selected Device Field or Selected Line Fields box and using the up or down arrow to change its location.
- Step 6** After making your changes, click **Insert** to save the copied file format with changes in the list.
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Additional Information

See the [“Related Topics”](#) section on page 6-32.

Modifying a File Format

To modify an existing format for the CSV data file, use the following procedure.

Procedure

- Step 1** From the Create CSV data file window, choose **Add, view, or modify file formats** and click **Next**. The File Format Configuration window displays.
- Step 2** In the File Format Name list, choose a file format that you want to modify. The file format details display in the fields.
- Step 3** Modify the copied format by using one of these methods:
- Add new fields by choosing them from the Device Fields or Line Fields box, and then clicking the arrow to move the chosen fields into the Selected Device Field or Selected Line Fields box.
 - Remove the chosen fields by choosing them from the Selected Device Fields or Selected Line Fields box, and then clicking the arrow to move the chosen fields into the Device Field or Line Fields box.
 - Change the order of the fields by choosing a field name in the Selected Device Field or Selected Line Fields box and using the up or down arrow to change its location.
- Step 4** After making your changes, click **Update** to save the changes to the file format.
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Additional Information

See the [“Related Topics”](#) section on page 6-32.

Deleting a File Format

To delete an existing file format for the CSV data file, use the following procedure.

Procedure

- Step 1** From the Create CSV data file window, choose **Add, view, or modify file formats** and click **Next**. The File Format Configuration window displays.

- Step 2** In the File Format Name list, choose a file format that you want to delete. The file format details display in the fields. Verify that you want to delete this file.
- Step 3** To remove the file format from the File Format Name list, click **Delete**. A message asks you to confirm that you want to delete the file format. Click **OK** to continue. The file format name is removed from the list.
-

Additional Information

See the [“Related Topics”](#) section on page 6-32.

Associating the File Format with the CSV Data File

After you have entered all the values into the text-based CSV data file in the order that the file format specified, you need to copy the text-based CSV data file to the folder for user device profiles on the Cisco CallManager publisher at this location: C:\BATFiles\User Device Profiles\. You must then associate the file format with the text-based CSV data file.

To associate the file format with the text-based CSV data file, use the following procedure.

Procedure

- Step 1** From the Create CSV data file window, choose **Associate file format with the CSV data file** and click **Next**. The Add File Format window displays.
- Step 2** In the File Name field, choose the CSV data file that you created for this bulk transaction.
- Step 3** In the File Format Name field, choose the file format that you created for this type of bulk transaction.
- Step 4** To associate the matching file format with the CSV data file, click **Add**.
- Step 5** To view the CSV data file with the file format as the first record, click the **View File** link. Check that the entered values correspond to the field names in your CSV data file.

- Step 6** To return to the Steps to Insert User Device Profiles window, click **Back** two times.
-

Additional Information

See the [“Related Topics”](#) section on page 6-32.

Validating User Device Profiles

When you choose Validate User Device Profiles, the system runs a validation routine to check that the CSV data file has all required fields, such as device profile name and directory number, populated and checks for discrepancies with the publisher database.

Before You Begin

- You must have a user device profile template for the devices that you are adding. You can use a user device profile template with multiple lines to add user device profiles that have a single line. See the [“Creating a BAT Template for User Device Profiles”](#) section on page 6-3.
- You must have a CSV data file that contains the unique details for the user device profiles. See these options:
 - [“Using the BAT Spreadsheet to Create User Device Profile CSV Data Files”](#) section on page 6-7.
 - [“Using a Text Editor to Create the User Device Profile CSV File”](#) section on page 6-21.

To validate your CSV data file user device profile records, use the following procedure.

Procedure

- Step 1** From the Steps to Insert User Device Profiles window, choose **Validate user device profiles records** and click **Next**. The Validate User Device Profiles window displays.
- Step 2** In the File Name field, choose the CSV data file that you created for this specific bulk transaction.

- Step 3** Choose the Insert option that corresponds to your CSV data file:
- **Specific Details**—If you are validating User Device Profile records that use a file format.
 - **All Details**—If you are validating user device profile records from an export file that was generated by using the All Details option. Skip to [Step 5](#).
- Step 4** In the User Device Profile Template Name field, choose the BAT User Device Profile template that you created for this type of bulk transaction.
- Step 5** For the All Details option, you must choose the Model of IP telephony device. BAT displays only the models that are currently in the Cisco CallManager database.
- Step 6** To verify the selected CSV data file with the publisher database, click **Validate**. The validation routine records errors in a log file.
- Step 7** When validation completes, Click **View Latest Log File** to see a log file that lists the records with discrepancies and the error code. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).
-

Additional Information

See the [“Related Topics” section on page 6-32](#).

Inserting User Device Profiles

Use the following procedure to insert new user device profile records in bulk. These User Device Profiles are not associated with a user. You must update users to associate these new profiles with the user. See the [“Updating Users in Cisco CallManager” section on page 4-13](#) for this procedure.

Before You Begin

- You must have a BAT User Device Profile template for the devices.
- You must have a CSV data file that contains the unique details for the User Device Profiles.
- Before you insert the user device profiles, validate the records.

Procedure

-
- Step 1** From the Steps to Insert User Device Profiles window, choose **Insert User Device Profiles** and click **Next**. The Insert User Device Profiles window displays.
- Step 2** In the File Name field, choose the CSV data file that you created for this specific bulk transaction.
- Step 3** Choose the Insert option that corresponds to your requirements:
- **Specific Details**—If you are inserting user device profile records that use a file format and template. A Specific Details CSV file format does not contain user information. You must associate the user device profiles to the users in another BAT transaction.
 - **All Details**—If you are inserting user device profile records from a file that was generated with the export utility by using the All Details option. The file that is generated with the export All Details option includes information that BAT will use to associate a user with a user device profile during the insert operation. Skip to [Step 5](#).
 - **Based on devices controlled by users**—If you want BAT to generate and insert a user device profile record that is based on the user’s current IP user device profile. This transaction requires no template or CSV data file. See the [“Generating User Device Profiles for User Devices” section on page 6-29](#) for this procedure.
- Step 4** In the User Device Profile Template Name field, choose the user device profile template that you created for this bulk transaction.
- Step 5** In the Model list box, choose the type of device or specific model when you have selected the All Details option.
- Step 6** If you chose the “Based on devices controlled by users” option, you can check the **Set User Device Profile as Log Out Profile for the device** check box to use the generated user device profile as the logout profile.
- Step 7** Click **Insert**.
- A message displays that tells you the approximate time required to insert the records into the Cisco CallManager database. You can cancel if the transaction might cause performance degradation.
- Step 8** To insert the phones, click **OK** or to cancel the transaction, click **Cancel**.
- If you clicked **OK**, a Transaction Status window displays. To see the transaction in progress, click the **Show Latest Status** button.



Note If any detail for a record fails, BAT does not insert that user device profile record.

Step 9 When the transaction completes, click **View Latest Log File** to see a log file that shows the number of records that were added and the number of records that failed, including an error code and description of the error. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).

Additional Information

See the [“Related Topics” section on page 6-32](#).

Generating User Device Profiles for User Devices

You can use BAT to set up extension mobility quickly by generating and inserting profiles for all IP phone users. BAT generates user device profiles for all phones, regardless of the number of devices that the user controls. For example, if a user controls two devices, BAT generates two separate user device profiles, one for each device and associates them to the same user. BAT sets one of the generated user device profiles as the default user device profile for the user. BAT generates user device profiles for all IP phones based on the phone button template for each phone model.



Note You do not use a user device profile template or a CSV data file to perform this action. When BAT generates these user device profiles, they are associated with the user.

To generate user device profiles for all users, use the following procedure.

Procedure

Step 1 Choose **Configure > User Device Profiles**. The User Device Profile Options window displays.

- Step 2** Choose **Generate User Device Profiles** and click **Next**. The Insert User Device Profiles window displays.
- Step 3** If you want BAT to generate and insert user device profile records for all phones based on the user's current IP Phone, choose **Based on devices controlled by users** radio button.
- Step 4** If you want the device to use the generated user device profile as the logout profile, check the **Set User Device Profile as Log Out Profile for the device** check box.
- Step 5** Click **Insert**.
A message displays that tells you the approximate time that is required to insert the records into the Cisco CallManager database. You can cancel if the transaction might cause performance degradation.
- Step 6** To insert the phones, click **OK** or to cancel the transaction, click **Cancel**.
If you clicked **OK**, a Transaction Status window displays. To see the transaction in progress, click the **Show Latest Status** button.



Note If any information for a record fails, BAT does not insert that user device profile record.

- Step 7** When the transaction completes, click **View Latest Log File** to see a log file that shows the number of records that were added and the number of records that failed, including an error code. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).

Additional Information

See the [“Related Topics” section on page 6-32](#).

Updating Lines to User Device Profiles

You can update line attributes for user device profiles and phones at the same time with your query results.

To update lines, use the following procedure.

Procedure

- Step 1** Choose **Configure > User Device Profiles**. The User Device Profile Options window displays.
- Step 2** Choose **Update Lines** and click **Next**. The Update Lines (Step 1 of 2) window displays. To locate the records that you want to update, you must define a query filter.
- Follow the steps in the [“Updating Lines”](#) section on page 3-69.
-

Additional Information

See the [“Related Topics”](#) section on page 6-32.

Deleting User Device Profiles

To locate the records that you want to delete, you must define a query filter. To delete user device profiles from Cisco CallManager, use the following procedure.

Procedure

- Step 1** Choose **Configure > User Device Profiles**. The User Device Profile Options window displays.
- Step 2** Choose **Delete User Device Profiles** and click **Next**. The Delete User Device Profiles window displays.
- The Delete User Device Profiles window displays. To locate the user device profiles that you want to delete, define the filter.



Caution

If you do not define a filter, BAT deletes all user device profiles.

- Step 3** In the first drop-down list box, choose a field to query such as Model, Device Name, or Description.
- Step 4** In the second drop-down list box, choose one of these limiters: contains, is exactly, not equal to, begins with, ends with, is empty, or is not empty.

- Step 5** In the third box, which is the search field/list box, either choose or enter the value that you want to locate, such as the name of a specific user.
- Step 6** You can click **AND** or **OR** to add multiple filters and repeat [Step 3](#) through [Step 6](#) to further define your query.
- Step 7** To add the defined filter to the query, click **Add To Query** button.
- If you make a mistake, click the **Clear Query** button to remove the query; then, return to [Step 3](#) and start over.

- Step 8** To display the records that are going to be affected, click **View Query Result**.

**Caution**

If no information is entered into the query text box, the system deletes all user device profile records.

- Step 9** To delete autogenerated device profiles that satisfy the query criteria, check the **Include Auto Generated Device Profiles** check box.
- Step 10** To delete the records, click **Delete**.
- Step 11** A message displays that advises you of approximately how long it will take to delete the records from the Cisco CallManager database. You can cancel the transaction or click **OK** to continue.
- Step 12** You can click the **View Latest Log File** link to display the log file that BAT generated. The log file displays the number of phones that were deleted and the number of records that failed, including an error code. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).

Additional Information

See the [“Related Topics” section on page 6-32](#).

Related Topics

- [Adding User Device Profiles, page 6-1](#)
- [Generating User Device Profiles for User Devices, page 6-29](#)
- [Updating Lines to User Device Profiles, page 6-30](#)

- [Deleting User Device Profiles, page 6-31](#)
- [Adding Lines to Existing Phones and UDPs, page 3-78](#)
- [Exporting User Device Profile Records, page 10-17](#)
- [BAT Log Files, page 13-1](#)

■ Related Topics