



## Working with Users

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You can use BAT to add a group of new users and to associate users to phones and other IP Telephony devices. You can update or delete a group of existing users in the Cisco CallManager Lightweight Directory Access Protocol (LDAP) Directory on a Cisco CallManager server

This chapter describes working with users.

Use the following topics to manage user records and to work with user combinations, such as phones and users or CTI ports and user records in the Cisco CallManager LDAP directory:

- [Adding Users, page 4-2](#)
- [Updating Users, page 4-10](#)
- [Deleting Users from Cisco CallManager, page 4-16](#)
- [Exporting User Records, page 10-11](#)
- [Resetting Passwords and PINs, page 4-19](#)
- [Adding New Phones with Users, page 4-22](#)
- [Generating Reports for Users, page 11-6](#)

# Adding Users

To add users to the Cisco CallManager LDAP Directory in bulk, you must perform these steps:

1. Create a comma separated values (CSV) data file to define individual values for each user that you want to add.
  - See the [“Using the BAT Spreadsheet to Create the CSV Data File for Users”](#) section on page 4-2.
  - For information about creating a text-based CSV data file for users, see the [“Creating a Text-Based CSV File for Users”](#) section on page A-11.
2. Use BAT to insert the users to the Cisco CallManager directory. See the [“Inserting Users to Cisco CallManager”](#) section on page 4-6.



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**Note**

When you are adding users who have applications that require a CTI port, such as Cisco IP SoftPhone, BAT can associate CTI ports to existing users.

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**Additional Information**

See the [“Related Topics”](#) section on page 4-28.

## Using the BAT Spreadsheet to Create the CSV Data File for Users

You can provide details for adding new users to the Cisco CallManager directory in the BAT spreadsheet and convert it a CSV data file.

For information about installing 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 for adding new users in bulk, use the following procedure.

**Procedure**

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- Step 1** To open the BAT spreadsheet, locate and double-click **BAT.xls** file.
  - Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.

- Step 3** To add users, click the **Users** tab at the bottom of the spreadsheet.
- Step 4** 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.
- In each row, provide the information as described in [Table 4-1](#). If a user has multiple devices, the device name field should be repeated, once for each device.

**Table 4-1** *Field Descriptions in BAT Spreadsheet for Adding Users*

<b>Field</b>	<b>Description</b>
First Name	Enter the first name, up to 50 characters, of the phone user.
Last Name	Enter the last name, up to 50 characters, of the phone user.
User ID	Enter the user ID , from 1 to 30 characters, for the user of this phone.
Password	Enter the password, up to 20 characters, that the user needs to access the Cisco IP Phone Configuration window.  You must specify the Password either in the CSV data file or by using the BAT user interface during file insertion. If you want to apply individual passwords for each user or groups of users, specify the password information in the CSV data file. If you want to use a default password for all users, provide the default password when you insert the users in BAT.
Manager	Enter manager user ID, up to 30 characters, for the user of this phone.
Department	Enter the department number, up to 30 characters, for the user of this phone.

**Table 4-1** Field Descriptions in BAT Spreadsheet for Adding Users (continued)

Field	Description
PIN	Enter the personal identification number (PIN) , up to 20 numerals, to be used for extension mobility.  You must enter a PIN either in the CSV data file or by using the BAT user interface during file insertion. If you want to apply individual PINs for each user or groups of users, specify the PIN in the CSV data file. To use a default PIN that all users can use, provide default PIN when you insert the users in BAT.
User Device Profile	Enter the user device profile for this user and device, up to 50 characters. You can choose the user device profile from the list of existing UDPs in Cisco CallManager Administration that appears in BAT.
User Locale	Enter the language and country set that you want to associate with this user. Your choice determines which cultural-dependent attributes exist for this user and which language displays in the Cisco CallManager user windows and phones.
Controlled Device Name1	Enter the name, up to 50 characters, for the phone or device that you want to associate with this user.
Directory Number	Enter the directory number, up to 50 numerals for the primary extension (usually Line 1) for the phone.
Controlled Device Name 2	Enter the name, up to 50 characters, for any additional phones that you want to associate with this user.  <b>Note</b> You must complete the Controlled Device Name1 field first and then add more Controlled Device Name entries.

**Step 5** To enter additional device names that will be associated to a new user, click the **Add More Devices** button .



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**Note** You can associate all devices, including CTI ports, ATA ports, and H.323 clients, with a user.

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**Note** To associate auto-generated device profiles to new users using BAT, BAT administrators can enter the ADP name in the xlt, in User Device Profile column.

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**Step 6** Click **Export to BAT Format** to transfer the data from the BAT Excel spreadsheet into a CSV formatted data file.

The system saves the file to C:\XLSDataFiles\ or use Browse to save the file to another existing folder. 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.



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**Note** If you enter a comma in one of the fields, BAT.xlt encloses that field entry in double quotes when you export to BAT format.

If you enter a blank row in the spreadsheet, the system treats the empty row as the end of the file. Data that is entered after a blank line does not get converted to the BAT format.

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

C:\BATFiles\Users\Insert Users\  

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

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**Additional Information**

See the “[Related Topics](#)” section on page 4-28.

## Inserting Users to Cisco CallManager

To add a group of users to the Cisco CallManager directory, use the following procedure.

**Before You Begin**

You must have a CSV data file that contains the user names, controlled device names, and directory numbers. You can create the CSV data file by using one of these methods:

- BAT spreadsheet that is converted to CSV format
- Export utility that produces an export file of user data

**Caution**

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BAT does not check whether the device name that is included in the CSV data file exists in the Cisco CallManager database. By not performing this validation, BAT can associate non-CTI controlled devices to users which results in an incorrect association.

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If you are inserting files that are generated with the export utility, insert the files in descending order based on the `_MgrLevel#` suffix, where # is 1 through 20. Insert the file with the `_user` suffix last to ensure that the user record for a manager exists prior to use of the User ID for a manager in the Manager User ID field.

**Note**

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Do not insert exported CSV data files from a Cisco CallManager server that is using a directory type that differs from the directory type that the new Cisco CallManager server uses.

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**Procedure**

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- Step 1** Choose **Configure > Users**. The User Options window appears.
  - Step 2** Choose **Insert Users** and click **Next**. The Insert Users page displays.

- Step 3** In the File Name field, choose the CSV data file that you created for this bulk transaction.
- Step 4** If the CSV data file was created by using the export utility, check the **File created with Export Users** check box.



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**Note** Be aware that when you export a file of existing users from DC Directory (DCD) or Netscape Directory Service (NDS), the password and PIN fields are encrypted in the exported CSV data file. When exporting users from Active Directory, the password does not get exported and the PIN appears in cleartext.

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- Step 5** You can check the following check boxes to enable these features. BAT does not disable these features if the user has already enabled them.



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**Note** The export utility puts all users who have the same settings for the following features in the same file.

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The appended suffix for the export file identifies the settings for this group of users. Use the appended suffixes as a guide for choosing the correct settings. For information, see the [“Using User Export” section on page 10-10](#).

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- **Enable Authentication Proxy Rights**—To allow users to log on to a phone on behalf of someone else. Users who have authentication proxy rights enabled act as the single point of authentication through which all users connect for extension mobility. You must perform further configuration in Application Administration on the Cisco CRS server.
  - **Enable CTI Application Use**—To enable applications such as the Cisco IP SoftPhone for all users (applies to CTI ports).
  - **Call Park Retrieval Allowed**—To enable Call Park Retrieval for all users.
  - **Enable Calling Party Number Modification**—To allow an application such as Cisco Emergency Responder (CER) to change the calling number when initiating a feature request.
- Step 6** In the User Default Values area, provide the following information if it is not included in the CSV data file.

- **Password**—Enter the password, up to 20 characters, that users should provide when they log on to the Cisco IP Phone User Options window. You should only specify a value here when you want to specify the default password for access to the Cisco IP Phone User Options window and when you have not already specified individual passwords for each user in the CSV data file.




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**Note** You must specify Password and PIN values, either in the CSV data file or during the file insertion process.

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**Note** Password values that are specified in the CSV data file take precedence over any values that you enter here.

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- **Confirm Password**—Reenter the password.
- **PIN**—Enter the PIN, up to 20 characters, that users should provide when they log in to a Cisco IP Phone for extension mobility. Use this field to specify the default PIN for extension mobility and the PIN for when you have not specified individual PINs for each user in the CSV data file. PIN values in the CSV data file take precedence over values that you enter here.




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**Note** For users that were configured in Cisco CallManager prior to release 3.1, exported user records have a blank PIN. When inserting these users, enter a default PIN.

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- **Confirm PIN**—Reenter the PIN.
- **User Locale**—Choose the language and country set that you want to associate with this user. Your choice determines which cultural-dependent attributes exist for this user and which language displays in the Cisco CallManager user windows and phones.
- **User Device Profile**—Enter the user device profile for this user and device.



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**Note** The User Device Profile, Controlled Device Name, and Directory Number should already exist in the Cisco CallManager database.

BAT does not check whether the device name that is included in the CSV data file exists in the Cisco CallManager database. By not performing this validation, BAT can associate non-CTI controlled devices to users which results in an incorrect association.

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**Step 7** Click **Insert**.

A message displays that advises you of approximately how long it will take to insert the records to the Cisco CallManager directory. You can cancel the transaction if you feel it may cause performance degradation.

**Step 8** To insert users, click **OK** or click **Cancel** to cancel the transaction.

If you clicked OK, a Transaction Status window displays. To see the transaction in progress, you can click the **Show Latest Status** button.

When the transaction completes, check the Status message. BAT displays a status completed or failed message.

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



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**Note** To insert users who are their own managers, insert the user in BAT and then from CCMAAdmin page set the manager as himself or herself.

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**Note** BAT enables CTI Super Provider by default for all new users.

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**Note** When you are inserting users by using an exported BAT file, you might get errors stating “User ID already exists” for some users that were exported in more than one file. For example, a list of first line managers and a list of users might both include the same manager user ID.

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#### Additional Information

See the [“Related Topics”](#) section on page 4-28.

## Updating Users

To update existing user information that is in the Cisco CallManager LDAP Directory, in a bulk transaction, you must perform these steps:

1. Create a comma separated values (CSV) data file to define individual values for each user that you want to update.
  - See the [“Using the BAT Spreadsheet to Create a CSV Data File for Updating Users”](#) section on page 4-11.
  - For a text-based CSV file, see the [“Updating Users File Format”](#) section on page A-13.



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**Note** To keep values or settings that were previously stored in the Cisco CallManager directory, see the [“Retaining Stored Values”](#) section on page 4-11.

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2. Use BAT to insert the updated user records that are in the Cisco CallManager directory. See the [Updating Users in Cisco CallManager, page 4-13](#).

#### Additional Information

See the [“Related Topics”](#) section on page 4-28.

## Retaining Stored Values

When you are updating user records, you might want to keep values or settings for a user that were previously stored in the Cisco CallManager directory. You can use a symbol such as “#” for fields where the value must be retained. In following example CSV data file, the # tells BAT to keep the Manager field the same as the one that was previously entered in the DC directory.

```
userid,#,department,,123456789012,
```

To identify the value to use to retain a stored value, use the following procedure.

### Procedure

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- Step 1** Choose **Configure > Users**. The User Options window appears.
  - Step 2** Choose **Update Users** and click **Next**. The Update Users page displays.
  - Step 3** Notice the **Value for fields to be ignored** box. When you insert the CSV data file with the updated user values, you must enter the symbol that you used to retain values in this box.
  - Step 4** Decide what symbol you want to use for retaining values.
  - Step 5** Enter this value that is in the **Value for fields to be ignored** box into the BAT spreadsheet box.
  - Step 6** Use this symbol in BAT spreadsheet fields for any values that you want to retain.
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### Additional Information

See the [“Related Topics”](#) section on page 4-28.

## Using the BAT Spreadsheet to Create a CSV Data File for Updating Users

To create the CSV data file for updating a group of existing users, use the following procedure.

### Procedure

- Step 1** Locate and Double-click **BAT.xlt** file to open the BAT spreadsheet.
- Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
- Step 3** To add user information, click the **Update Users** tab at the bottom of the spreadsheet .
- Step 4** 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. Use [Table 4-2](#) for descriptions of the BAT spreadsheet fields.

**Table 4-2** *Field Descriptions in the BAT Spreadsheet for Updating Users*

Field	Description
User ID	Enter the user ID, from 1 to 30 characters, for the user of this phone.
Manager	Enter manager user ID, up to 30 characters, for the user of this phone.
Department	Enter the department number, up to 50 characters, for the user of this phone.
User Device Profile	Enter the user device profile, up to 50 characters, for this user and device. You can choose the user device profile from the list of existing UDPs in Cisco CallManager Administration that appears in BAT.
User Locale	Enter the language and country, up to 50 characters, set that you want to associate with this user. Your choice determines which cultural-dependent attributes exist for this user and which language displays in the Cisco CallManager user windows and phones.
Controlled Device MAC Address	Enter the MAC address, 12 characters, for the phone that you want to associate with this user.
Directory Number	Enter the directory number, up to 24 numerals, for the primary extension (usually Line 1) for the phone.

**Step 5** In the “Value for fields to be ignored” box, enter the symbol that you will use to tell BAT that you want to keep the value that was previously stored in the DC directory.

**Step 6** To transfer the data from the BAT Excel spreadsheet into a CSV file, click the **Export to BAT format** button.

The system saves the file to c:\XlsDataFiles\ (or to your choice of another existing folder). The filename is

Update\_Users#timestamp.txt (or to your choice of filename)



**Note** If you enter a comma in one of the fields, BAT.xlt encloses that field entry in double quotes when you export to BAT format.

If you enter a blank row in the spreadsheet, the system treats the empty row as the end of the file. Data that is entered after a blank line does not get converted to the BAT format.

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 this folder on the publisher database server: C:\BATFiles\Users\Update Users\



**Note** For information on how to read the CSV data file, click the link to **View Sample File** in the Update Users window in BAT.

#### Additional Information

See the [“Related Topics”](#) section on page 4-28.

## Updating Users in Cisco CallManager

To update a group of user records in the to Cisco CallManager directory, use this procedure.

**Before You Begin**

You must have a CSV data file with updated user information. See the [“Using the BAT Spreadsheet to Create a CSV Data File for Updating Users”](#) section on page 4-11 for instructions.

**Procedure**

- 
- Step 1** Choose **Configure > Users**. The User Options window displays.
  - Step 2** Choose **Update Users** and click **Next**. The Update Users page displays.
  - Step 3** From File Name drop-down list box, choose the CSV data file that you created for this bulk transaction.
  - Step 4** In the **Value for fields to be ignored** box, enter the symbol that you used to tell BAT that you want to keep the value that was previously stored in the DC directory. See the [“Retaining Stored Values”](#) section on page 4-11 for more information.
  - Step 5** You can check the following check boxes to enable these features. BAT does not disable these features if the user has already enabled them.



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**Note** The export utility puts all users who have the same settings for the following features in the same file.

The appended suffix for the export file identifies the settings for this group of users. Use the appended suffixes as a guide for choosing the correct settings. For information, see the [“Using User Export”](#) section on page 10-10.

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- **Enable Authentication Proxy Rights**—To allow users to log on to a phone on behalf of someone else. Users who have authentication proxy rights enabled act as the single point of authentication through which all users connect for extension mobility. You must perform further configuration in Application Administration on the Cisco CRA server.
- **Enable CTI Application Use**—To enable applications such as the Cisco IP SoftPhone for all users.
- **Call Park Retrieval Allowed**—To enable Call Park Retrieval for all users.

- **Enable Calling Party Number Modification**—To allow an application such as Cisco Emergency Responder (CER) to change the calling number when initiating a feature request.
- **Set User Device Profile as Default Device Profile**—To set the user device profile as the default profile when logged off the phone.
- **Reset Password**—To reset the password for all users.
- **Password**—Enter the default password that users use when they log on to the Cisco IP Phone User Options window. You should only specify a value here when you want to set the default password for user.
- **Confirm Password**— Reenter the password.
- **Reset PIN**—To reset the PIN for all users.
- **PIN**—Enter the default PIN for the extension mobility feature that users should use when they log in to any Cisco IP Phone model that supports extension mobility.
- **Confirm PIN**—Reenter the PIN.

**Step 6** In the User Default Values area, in the **User Locale** drop-down list box, choose the language and country set that you want to associate with this user. Your choice determines which cultural-dependent attributes exist for this user and which language displays in the Cisco CallManager user windows and phones.



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**Note** The values that you entered for User Locale and User Device Profile in the CSV data file will override the values that you specify in the User Default Values area of the Update User window.

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**Step 7** In the **User Device Profile** drop-down list box, choose the user information that you want to associate with this user.

**Step 8** Click **Update**. A message displays that advises you of approximately how long it will take to update the records in Cisco CallManager. You can cancel the transaction or click **OK** to continue.

**Step 9** When the transaction completes, check the Status message. BAT displays a status completed or failed message.

You can click **View Latest Log File** to see a log file that indicates the number of records that were updated 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](#).

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#### Additional Information

See the “[Related Topics](#)” section on [page 4-28](#).

## Deleting Users from Cisco CallManager

You can delete a group of users from the Cisco CallManager directory. To access the Delete Users option, choose **Configure > Users**. In the User Options window, choose **Delete Users** and click **Next**. You can locate existing user records by using one of these two methods:

- [Using Query to Delete Users, page 4-16](#)
- [Using a Custom File to Delete Users, page 4-18](#)

## Using Query to Delete Users

To delete users when you want to create a query filter to locate the user records, use the following procedure.

### Procedure

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**Step 1** In the Delete Users Options window, click **Use Query** and click **Next**. The Delete Users window displays.

**Step 2** To locate the users that you want to delete, define the query filter.



**Caution** If you do not define a filter, BAT deletes all users.

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**Step 3** In the first drop-down list box, choose a field to query such as User ID, Department, First Name, or Last Name.

- Step 4** In the second drop-down list box, choose **contains** or **is exactly**.
- Step 5** In the third box, which is the search field, enter the value that you want to locate, such as a specific user.



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**Note** To choose users from more than one department, enter multiple departments in this field. For example, to choose users from departments 12 and 24, enter **12, 24** in the third box instead of performing two operations.

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- Step 6** 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 7** To display the records that are going to be affected, click **View Query Result** .



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**Note** Ensure that you have located the correct records to delete. Because the delete action is final, you cannot retrieve deleted records.

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- Step 8** To delete the chosen users, click **Delete**.



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**Caution** If no information is entered into the query text box, the system deletes all records. Because the delete action is final, you cannot retrieve deleted records.

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A message displays that advises you of approximately how long it will take to delete the records in the Cisco CallManager directory. You can cancel the transaction or click **OK** to continue.

- Step 9** When the transaction completes, check the Status message. BAT displays a status completed or failed message.
- Step 10** To see a log file that indicates the number of records that were deleted and the number of records that failed, including an error code, you can click **View Latest Log File**. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).
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**Additional Information**

See the “[Related Topics](#)” section on page 4-28.

## Using a Custom File to Delete Users


To locate and delete users, you can create a custom file of user IDs by using a text editor.

**Before You Begin**

1. Create a text file that lists each user ID that you want to delete on a separate line.
2. Save the custom file with a <filename.txt> to this folder:  
C:\BATfiles\Users\Query\Delete\

To delete phones by using a custom file, use the following procedure .

**Procedure**

- 
- Step 1** In the Delete Users Options window, choose **Use Custom File** and click **Next**. The Delete Users window displays.
- Step 2** In Select Users where drop-down list box, choose the field that you used in the custom file, **User ID**.
- Step 3** In the Custom file where drop-down list box, choose the filename for the custom file.
- Step 4** To check that the query includes the information that you need, click **View Query Results**.
- 
-  **Caution** If no information is entered into the query text box, the system deletes all users records.
- 
- Step 5** To delete the records, click **Delete**.
- Step 6** A message displays that advises you of approximately how long it will take to delete the records from the Cisco CallManager directory. You can cancel the transaction or click **OK** to continue.

- Step 7** To display the log file that BAT generated, you can click the **View Latest Log File** link. The log file displays the number of users that were deleted and the number of records that failed, including an error code. For more information on log files, see [“BAT Log Files” section on page 13-1](#).
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#### Additional Information

See the [“Related Topics” section on page 4-28](#).

## Resetting Passwords and PINs

You can reset the password that users use when they log on to the Cisco IP Phone User Options window. You can also reset the PINs for the extension mobility feature that users use when they log in to Cisco IP Phones. Use this action when you must reset a group of users to a default password or to a default PIN without updating any other attributes.

To access the Reset User Password/PIN option, choose **Configure > Users**. In the User Options window, choose **Reset Password/PIN** and click **Next**. You have two ways to choose users for resetting passwords and PINs:

- [Using Query to Reset User Password and PIN, page 4-19](#)
- [Using a Custom File to Reset User Password and PIN, page 4-21](#)

## Using Query to Reset User Password and PIN

To use a query to locate users and reset passwords and PINs to a default value, use the following procedure.

#### Procedure

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- Step 1** In the Reset Password/PIN Options, choose **Use Query** and click **Next**. The Reset Password/PIN window displays.
- Step 2** To locate the users that you want to reset, define the query filter.



**Caution** If you do not define a filter, the system resets the passwords or PINS for all users.

**Step 3** In the first drop-down list box, choose a field to query such as User ID, Department, First Name, or Last Name.

**Step 4** In the second drop-down list box, choose **contains** or **is exactly**.

**Step 5** In the third box, which is the search field, enter the value that you want to locate, such as a specific user or department number.



**Note** To choose users from more than one department, enter multiple departments separated with a comma in this field. For example, to choose users from departments 12 and 14, enter **12, 14** in the third box instead of performing two operations.

**Step 6** To add the defined filter to the query, click **Add To Query** .

If you make a mistake, click the **Clear Query** button to remove the query; then, return to [Step 3](#) and start over.

**Step 7** To display the records that are going to be affected, click **View Query Result** .

**Step 8** Enter the values that you want to update for all the records that you defined in your query.

- **Password**—Enter the default password that users use when they log on to the Cisco IP Phone User Options window.
- **Confirm Password**—Reenter the password.
- **PIN**—Enter the default PIN for the extension mobility feature that users should use when they log in to a Cisco IP Phone.
- **Confirm PIN**—Reenter the PIN.

**Step 9** To change passwords or PINs for the chosen users, click **Reset** .

A message displays that advises you of approximately how long it will take to update the records in the Cisco CallManager directory. You can cancel the transaction or click **OK** to continue.

**Step 10** When the transaction completes, check the Status message. BAT displays a status completed or failed message.

- Step 11** To see a log file that indicates the number of records that were reset and the number of records that failed, including an error code, you can click **View Latest Log File**. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).
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#### Additional Information

See the [“Related Topics” section on page 4-28](#).

## Using a Custom File to Reset User Password and PIN

To locate users and to reset passwords and PINs to default values, you can create a custom file of user IDs by using a text editor.

#### Before You Begin

1. Create a text file that lists each user ID that you want to delete on a separate line.
2. Save the custom file with a <filename.txt> to this folder:  
C:\BATfiles\Users\Query\Update\

To reset user passwords and PINS by using a custom file, use the following procedure.

#### Procedure

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- Step 1** Choose **Configure > Users**. The User Options window appears.
- Step 2** Choose **Reset Password/PIN** and click **Next**. The Reset Password/PIN Options window displays.
- Step 3** Click **Use Custom File** and click **Next**. The Reset Password/PIN window displays.
- Step 4** In Select Users where drop-down list box, choose the field that you used in the custom file, **User ID**.
- Step 5** In the Custom file where drop-down list box, choose the filename for the custom file.

**Step 6** To check that the query includes the information that you need, click **View Query Results**.

**Caution**

If no information is entered into the query text box, the system updates all users records.

**Step 7** To change the records, click **Reset** .

**Step 8** A message displays that advises you of approximately how long it will take to update the records in the Cisco CallManager directory. You can cancel the transaction or click **OK** to continue.

**Step 9** To display the log file that BAT generated, you can click the **View Latest Log File** link. The log file displays the number of users that were updated and the number of records that failed, including an error code. For more information on log files, see [“BAT Log Files” section on page 13-1](#)

**Additional Information**

See the [“Related Topics” section on page 4-28](#).

## Adding New Phones with Users

You can use BAT to add a group of users and their phones on a Cisco CallManager server in one bulk transaction. You have two options for creating a CSV data file for the phones:

- 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).

You can access the Insert Phones with Users option by choosing **Configure > Phones** or **Configure > Users** from the BAT main menu.

To add a group of phones with users to the Cisco CallManager database, you must perform these steps:

**Step 1** Choose **Insert Phones with Users**. The Steps to Insert Phones/Users window displays.

- Step 2** Choose **Add, view, or modify phone templates** and click **Next**.  
The Phone Template Configuration window displays. See the [“Using BAT Phone Templates” section on page 3-3](#) for information about configuring phone templates.
- Step 3** Choose **Create the CSV data file** and click **Next**.
- Step 4** Choose the option that you will use to create the CSV data file and use the steps for that option.

### **BAT Spreadsheet for Phones, CTI Ports and H.323 Clients**

Open the BAT spreadsheet and create the CSV data file. See [“Using the BAT Spreadsheet to Add Phones with Users” section on page 4-24](#)

### **Text Editor to Create the CSV Data File**

- 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 CSV Data File for Phones” section on page 3-50](#) for information about configuring file formats for CSV data file.
- b.** Use a text editor and create the CSV data file for phones with users that follows the appropriate file format. For more information about creating a text-based CSV file, see [“Phones With Users Combinations File Format” section on page A-5](#)
- 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 3-54](#) for information about associating file formats.
- Step 5** Choose **Validate Phones with users records** and click **Next**.  
The Validate Phones/Users window displays. See the [“Validating Phones and Users Records” section on page 4-24](#) for information.
- Step 6** Choose **Insert Phones with users records** and click **Next**.  
The Insert Phones/Users window displays. See the [“Inserting Phones with Users to Cisco CallManager” section on page 4-25](#) for information.

### **Additional Information**

See the [“Related Topics” section on page 4-28](#).

## Using the BAT Spreadsheet to Add Phones with Users

To create the CSV data file for adding phones and users in bulk, use the following procedure.

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

### Procedure

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- Step 1** Locate and double-click **BAT.xlt** file to open the BAT spreadsheet.
- Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
- Step 3** Click the **Phones-Users** tab at the bottom of the spreadsheet.
- Step 4** Follow steps 4 through 14 in the [Using the BAT Spreadsheet to Create a CSV Data File for Phones](#), page 3-39.

When entering values in the user information fields, see [Table 4-1 on page 4-3](#).

After exporting the file to the CSV data format, copy the Phone-User CSV data file to C:\BATFiles\PhonesUsers\ on the publisher server.

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### Additional Information

See the [“Related Topics”](#) section on page 4-28.

## Validating Phones and Users Records

When you choose Validate Phones/Users, the system runs a validation routine to check that the CSV data file and BAT phone template have populated all required fields, such as device pool and locations. The validation checks only the device fields and their dependencies. Users fields are not validated.

### Before You Begin

- You must have a BAT phone template for the devices that you are adding. You can use a master phone template with multiple lines to add phones that have a single line or several lines. See the [“Master Phone Templates”](#) section on page 1-5 for more information.

- You must have a CSV data file that you created by using one of these options:
  - [Using the BAT Spreadsheet to Add Phones with Users, page 4-24](#)
  - Creating a text-based CSV file in the [Phones With Users Combinations File Format, page A-5](#).

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

### Procedure

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- Step 1** Choose **Insert Phones with Users**. The Steps to Insert Phones/Users window displays.
  - Step 2** Choose **Validate Phones with users records** and click **Next**. The Validate Phones/Users window displays.
  - Step 3** In the File Name field, choose the CSV data file that you created for this specific bulk transaction.
  - Step 4** In the Phone Template Name field, choose the BAT phone template that you created for this bulk transaction.
  - Step 5** To verify the chosen CSV data file with the publisher database, click **Validate**. The validation routine records errors in a log file.
  - Step 6** When validation completes, click **View Latest Log File** to see a log file that lists the devices with discrepancies and the error code. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).
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### Additional Information

See the [“Related Topics” section on page 4-28](#).

## Inserting Phones with Users to Cisco CallManager

To add a group of phones and users to the Cisco CallManager database and directory, from the BAT main menu, you can choose **Configure > Phones** or **Configure > Users**.

### Before You Begin

- You must have a BAT phone template for the phones.

- You must have a CSV data file that you created by using one of these options:
  - [Using the BAT Spreadsheet to Add Phones with Users, page 4-24](#)
  - Creating a text-based CSV file in the [Phones With Users Combinations File Format, page A-5](#).
- Prior to inserting the records, validate the phones and users records so you can identify and eliminate errors.

To add a group of phones and users to the Cisco CallManager database and directory, use the following procedure.

### Procedure

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- Step 1** Choose **Insert Phones with Users** and click **Next**. The Insert Phones/Users 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 Phone Template field, choose the BAT phone template that you used for this transaction.

If you did not enter individual MAC addresses in the CSV data file, you must check the **Create Dummy MAC Address** check box. If you are adding CTI ports, the dummy MAC address option provides a unique device name for each CTI port in the form of dummy MAC addresses.

This field automatically generates dummy MAC addresses in the following format: BATXXXXXXXXXXXX  
where X represents any 12-character, hexadecimal (0-9 and A-F) number.

- If you do not know the MAC address of the phone that will be assigned to the user, chose this option. When the phone is plugged in, a MAC address registers for that device.
- If you supplied MAC addresses or device names in the data input file, do not choose this option .

You can update the phones or devices later with the correct MAC address by manually entering this information into Cisco CallManager Administration or by using TAPS. See the [“Introducing TAPS” section on page 12-2](#) for more information about TAPS.

- Step 4** You can check the following check boxes to enable these features. BAT does not disable these features if the user has already enabled them.

- **Enable Authentication Proxy Rights**—To allow users to log on to a phone on behalf of someone else. Users who have authentication proxy rights enabled act as the single point of authentication through which all users connect for extension mobility. You must perform further configuration in Application Administration on the Cisco CRA server.
- **Enable CTI Application Use**—To enable applications such as the Cisco IP SoftPhone for all users (for CTI ports).
- **Call Park Retrieval Allowed**—To enable Call Park Retrieval for all users.
- **Enable Calling Party Number Modification**—To allow an application such as Cisco Emergency Responder (CER) to change the calling number when initiating a feature request.

**Step 5** In the User Default Values area, provide the following information if it is not included in the CSV data file.

- **Password**—Enter the password, up to 20 characters, that users should provide when they log on to the Cisco IP Phone User Options window. You should only specify a value here when you want to specify the default password for access to the Cisco IP Phone User Options window and when you have not already specified individual passwords for each user in the CSV data file.



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**Note** Password values that are specified in the CSV data file take precedence over any values that you enter here.

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- **Confirm Password**—Reenter the password.
- **PIN**—Enter the PIN, up to 20 characters, that users should provide when they log in to a Cisco IP Phone for extension mobility. Use this field to specify the default PIN for extension mobility and when you have not specified individual PINs for each user in the CSV data file. PIN values in the CSV data file take precedence over values that you enter here.
- **Confirm PIN**—Reenter the PIN.



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**Note** You must specify PIN and Password values, either in the CSV data file or during the file insertion process.

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- **User Locale**—Choose the language and country set that you want to associate with this user. Your choice determines which cultural-dependent attributes exist for this user and which language displays in the Cisco CallManager user windows and phones.
  - **User Device Profile**—Enter the user device profile for this user and device. The User Device Profile must exist in Cisco CallManager Administration for the Cisco CallManager database to accept this record.
- Step 6** Click **Insert**. A message displays that advises you of approximately how long it will take to insert the records to the Cisco CallManager directory. You can cancel the transaction if you feel it may cause performance degradation.
- Step 7** To insert users, click **OK** or click **Cancel** to cancel the transaction.
- If you clicked OK, a Transaction Status window displays. To see the transaction in progress, you can click the **Show Latest Status** button.
- When the transaction completes, check the Status message. BAT displays a status completed or failed message.
- Step 8** To see a log file that indicates the number of records that are added and the number of records that failed, including an error code and description of the error, you can click **View Latest Log File**. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).
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#### Additional Information

See the [“Related Topics” section on page 4-28](#).

## Related Topics

- [Adding Users, page 4-2](#)
- [Updating Users, page 4-10](#)
- [Deleting Users from Cisco CallManager, page 4-16](#)
- [Resetting Passwords and PINs, page 4-19](#)
- [Adding New Phones with Users, page 4-22](#)
- [Exporting User Records, page 10-11](#)
- [Generating Reports for Users, page 11-6](#)

- [BAT Log Files, page 13-1](#)
- [Creating a Text-Based CSV File for Users, page A-11](#)
- [Users File Format, page A-12](#)
- [Updating Users File Format, page A-13](#)

■ Related Topics