



# Configuring Features, Templates, Services, and Users

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After you install Cisco IP Phones in your network, configure their network settings, and add them to Cisco CallManager, you must use the Cisco CallManager Administration application to configure telephony features, optionally modify phone templates, set up services, and assign users.

This chapter provides an overview of these configuration and setup procedures. Cisco CallManager documentation provides detailed instructions for these procedures.

For suggestions about how to provide users with information about features, and what information to provide, see [Appendix A, “Providing Information to Users Via a Website.”](#)

For information about setting up phones in non-English environments, see [Appendix B, “Supporting International Users.”](#)

This chapter includes following topics:

- [Telephony Features Available for the Phone, page 5-2](#)
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# Telephony Features Available for the Phone

After you add Cisco IP Phones to Cisco CallManager, you can add functionality to the phones. [Table 5-1](#) includes a list of supported telephony features, many of which you can configure using Cisco CallManager Administration. The Configuration Reference column lists Cisco CallManager documentation that contains configuration procedures and related information.

**Table 5-1** *Telephony Features for the Cisco IP Phone*

Feature	Description	Configuration Reference
Auto answer	Causes the speakerphone or headset to go off hook automatically when an incoming call is received	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager Features and Services Guide</i></li> </ul>
Barge	Allows a user to join an in-progress call on a shared line	Refer to <i>Cisco CallManager Features and Services Guide</i>
Call park	Places the call on hold so that anyone connected to the Cisco CallManager system can retrieve the call	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager Features and Services Guide</i></li> </ul>
Call pickup	Picks up incoming calls within a group	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager System Guide</i></li> </ul>
Call waiting	Receives a second incoming call on the same line without disconnecting the first call	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager Features and Services Guide</i></li> <li>Refer to <i>Cisco CallManager System Guide</i></li> </ul>
Caller ID	Displays the telephone number and name of the caller	Refer to <i>Cisco CallManager Administration Guide</i>

Table 5-1 Telephony Features for the Cisco IP Phone (continued)

Feature	Description	Configuration Reference
Conference	Initiates an ad hoc conference and then conferences in other participants one at a time	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager Features and Services Guide</i></li> <li>Refer to <i>Cisco CallManager System Guide</i></li> </ul>
Consecutive Ring	Identifies ring type used for a line when a phone has another active call	<p>Refer to <i>Cisco CallManager Administration Guide</i> for information about adjusting ring settings in the Directory Number Configuration page.</p> <p>Users can adjust their ring settings from the User Options web pages by clicking <b>Change the Ring Settings for your phone</b>.</p>
Forward	Forwards all calls to the designated directory number	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager Features and Services Guide</i></li> </ul>
Group call pickup	Allows users to pick up incoming calls within their own group or in other groups	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager System Guide</i></li> </ul>
Hold	Places an active call on hold	Requires no configuration, unless you want to use music on hold; see “Music-on-Hold” in this table for information
Meet-Me conference	Enables other callers to join in a conference	Refer to <i>Cisco CallManager Administration Guide</i>
Message waiting	Indicates that one or more voice messages are waiting for a user	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager System Guide</i></li> </ul>
Music-on-hold	Plays music while callers are on hold	Refer to <i>Cisco CallManager Features and Services Guide</i>

**Table 5-1** *Telephony Features for the Cisco IP Phone (continued)*

Feature	Description	Configuration Reference
Quality Reporting Tool	Allows users to use the <b>QRT</b> softkey on a phone to submit information about problem phone calls	Refer to <i>Cisco CallManager Administration Guide</i>
Redial	Redials the last number dialed on the Cisco IP Phone	Requires no configuration
Speed-dial	Dials a specified number that has been previously stored	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager Features and Services Guide</i></li> </ul>
Transfer	Transfers an active call to another directory number	Requires no configuration
Voice messaging system	Enables callers to leave voice messages if calls are unanswered	<ul style="list-style-type: none"> <li>Refer to <i>Cisco CallManager Administration Guide</i></li> <li>Refer to <i>Cisco CallManager System Guide</i></li> </ul>

## Configuring Corporate and Personal Directories

The **Directories** button on the Cisco IP Phone 7970 gives users access to several directories. These directories can include:

- Corporate Directory—Allows a user to look up phone numbers for co-workers.

To support this feature, you must configure corporate directories. See the [“Configuring Corporate Directories” section on page 5-5](#) for more information.

- Personal Directory—Allows a user to store a set of personal numbers.

To support this feature, you must provide the user with software to configure the personal directory. See the [“Configuring Personal Directory” section on page 5-5](#) for more information.

## Configuring Corporate Directories

Cisco CallManager uses a Lightweight Directory Access Protocol (LDAP) directory to store authentication and authorization information about users of Cisco CallManager applications that interface with Cisco CallManager. Authentication establishes a user's right to access the system. Authorization identifies the telephony resources that a user is permitted to use, such as a specific telephone extension.

To install and set up these features, refer to *Installing and Configuring the Cisco Customer Directory Configuration Plugin*. That manual guides you through the configuration process for integrating Cisco CallManager with Microsoft Active Directory and Netscape Directory Server.

After the LDAP directory configuration completes, users can use the Corporate Directory service on your Cisco IP Phone to look up users in the corporate directory.

## Configuring Personal Directory

Personal Directory provides a personal address book stored in the Cisco CallManager Lightweight Directory Access Protocol (LDAP) directory. It also provides a Cisco IP phone synchronizer and the Personal Address Book service. The Cisco IP Phone Address Book Synchronizer allows users to synchronize Microsoft Outlook and Outlook Express address book entries with the directory in Cisco CallManager. From a Cisco IP Phone, a user can use the Personal Address Book service to look up entries, make a selection, and press a softkey to dial the selected number.

To configure Personal Directory, users must access their User Options web pages. If they want to synchronize with Microsoft Outlook, they must also install the Cisco IP Phone Address Book Synchronizer utility, provided by you.

To obtain this software, choose **Application > Install Plugins** from Cisco CallManager Administration and click **Cisco IP Phone Address Book Synchronizer**.

# Modifying Phone Button Templates

Phone button templates let you assign features to line/speed dial buttons.

Ideally, you modify templates before registering phones on the network. In this way, you can access customized phone button template options from Cisco CallManager during registration.

To modify a phone button template, choose **Device > Device Settings > Phone Button Template** from Cisco CallManager Administration. To assign a phone button template to a phone, use the Phone Button Template field in the Cisco CallManager Administration Phone Configuration page. Refer to *Cisco CallManager Administration Guide* and *Cisco CallManager System Guide* for more information.

The default Cisco IP Phone 7970 template uses buttons 1 and 2 for lines and assigns buttons 3 through 8 as speed dial. Access other phone features, such as call park, call forward, redial, hold, resume, voice messaging system, conferencing, and so on using softkeys on the phone.

# Configuring Softkey Templates

Using Cisco CallManager Administration, you can manage softkeys associated with applications that are supported by the Cisco IP Phone 7970.

Cisco CallManager supports two types of softkey templates: standard and nonstandard. Standard softkey templates include Standard User, Standard IPMA Assistant, and Standard IPMA Manager. An application that supports softkeys can have one or more standard softkey templates associated with it. You cannot modify standard softkey templates, but you can modify nonstandard templates.

To configure softkey templates, select **Device > Device Settings > Softkey Template** from Cisco CallManager Administration. To assign a softkey template to a phone, use the Softkey Template field in the Cisco CallManager Administration Phone Configuration page. Refer to *Cisco CallManager Administration Guide*, *Cisco CallManager System Guide* for more information.

# Setting Up Services

The **Services** button on the Cisco IP Phone 7970 gives users access to Cisco IP Phone Services. These services comprise XML applications that enable the display of interactive content with text and graphics on the phone. Examples of services include local movie times, stock quotes, and weather reports.

Before a user can access any service,

- You must use Cisco CallManager Administration to configure available services.
- The user must subscribe to services using the Cisco IP Phone User Options application. This web-based application provides a graphical user interface (GUI) for limited, end-user configuration of IP Phone applications.

Before you set up services, gather the URLs for the sites you want to set up and verify that users can access those sites from your corporate IP telephony network.

To set up these services, choose **Feature > Cisco IP Phone Services** from Cisco CallManager Administration. Refer to *Cisco CallManager Administration Guide* and *Cisco CallManager System Guide* for more information.

After you configure these services, verify that your users have access to the Cisco CallManager IP Phone Options web-based application, from which they can select and subscribe to configured services. See the [“How Users Subscribe to Services and Configure Phone Features” section on page A-3](#) for a summary of the information that you must provide to end users.

# Adding Users to Cisco CallManager

Adding users to Cisco CallManager allows you to display and maintain information about users and allows each user to perform the following actions:

- Access the corporate directory and other customized directories from a Cisco IP Phone
- Create a personal directory
- Set up speed dial and call forwarding numbers
- Subscribe to services that are accessible from a Cisco IP Phone

You can add users to Cisco CallManager using either of these methods:

- To add users individually, choose **User >Add a New User** from Cisco CallManager Administration.

Refer to *Cisco CallManager Administration Guide* for more information about adding users. Refer to *Cisco CallManager System Guide* for details about user information.

- To add users in batches, use the Bulk Administration Tool. This method also enables you to set an identical default password for all users.

Refer to *Bulk Administration Tool User Guide for Cisco CallManager* for details.