



Management Overview

In the Cisco Voice Provisioning Tool, you can find, view, add, update or delete users for Cisco CallManager and Cisco Unity; likewise, you can find, view, add, update or delete phones or device profiles for Cisco CallManager. Review the information in this chapter if you need to find, view, add, update, or delete a single user, phone, or device profile. This chapter also applies if you need to find, view, update, or delete multiple users, phones, or device profiles at the same time.



Tip

This chapter does not provide procedures for finding, adding, updating, deleting, and applying users, phones, and device profiles. For information on these topics, see the [“Where to Find More Information on User, Phone, and Device Profile Management”](#) section on page 2-11.

This chapter, which provides a basic overview of user, phone, and device management, contains information on the following topics:

- [Overview for Management Provisioning Privileges, page 2-2](#)
- [Overview for Finding a User, Phone, or Device Profile, page 2-3](#)
 - [For Finding Users, Phones, and Device Profiles, page 2-3](#)
 - [For Finding Users Only, page 2-4](#)
 - [For Finding Phones/Device Profiles Only, page 2-4](#)
- [Overview for Adding a User, Phone, or Device Profile, page 2-4](#)
 - [For Adding a User, Phone, or Device Profile, page 2-5](#)
 - [For Adding a User Only, page 2-5](#)
 - [For Adding a Phone Only, page 2-6](#)
 - [For Adding a Device Profile Only, page 2-6](#)
- [Overview for Updating a Single User, Phone, or Device Profile, page 2-6](#)
 - [For Updating a Single User, Phone, or Device Profile, page 2-7](#)
 - [For Updating a Single User Only, page 2-7](#)
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- [Overview for Updating Multiple Users, Phones, or Device Profiles, page 2-8](#)
 - [For Updating Multiple Users, Phones, or Device Profiles, page 2-8](#)
 - [For Updating Multiple Users Only, page 2-9](#)
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- [Overview for Deleting a Single User, Phone, or Device Profile from a Specific Configuration Page, page 2-10](#)
- [Overview for Deleting Users, Phones, or Device Profiles from a Search Results Page, page 2-10](#)
- [Overview for Applying a Template to a User, Phone, or Device Profile, page 2-11](#)
- [Overview for Applying IP Phone Services to Phones and Device Profiles, page 2-11](#)
- [Overview for Configuring Lines for Phones and Device Profiles, page 2-11](#)
- [Where to Find More Information on User, Phone, and Device Profile Management, page 2-11](#)

Overview for Management Provisioning Privileges

To perform the management tasks that are described in this chapter, a role or administrator must have the provisioning privilege for the product system; the Full Provisioning and superadmin roles by default are set up to have all provisioning privileges.

[Table 2-1](#) describes the provisioning privileges that you must have to perform management tasks for the product system.



Tip

Having a privilege for a phone/profile does not mean that you have the privilege for the user.



Tip

The View privilege, which includes View Phone/Device Profile, View User, View User Template, or View Phone/Device Profile Template, is required for searching for and viewing specific configuration pages. If you have the View privilege but do not have the Modify privilege, which includes Modify Phone/Device Profile, Modify User, Modify User Template, or Modify Phone Template, you can view the specific configuration page but you cannot save any updates for the configuration.

Table 2-1 Provisioning Privileges for Tasks

Task	Provisioning Privilege
Phone/Device Profile Management	
Finding a Phone/Device Profile	View Phone/Device Profile
Adding a Phone/Device Profile	Add Phone/Device Profile
Updating a Phone/Device Profile	Modify Phone/Device Profile
Deleting a Phone/Device Profile	Delete Phone/Device Profile
User Management	
Finding a User	View User
Adding a User	Add User

Table 2-1 Provisioning Privileges for Tasks (continued)

Task	Provisioning Privilege
Updating a User	Modify User
Deleting a User	Delete User

**Note**

For information on roles and administrators, see the *Cisco Voice Provisioning Tool System Management and Security Guide*.

Overview for Finding a User, Phone, or Device Profile

For an overview for finding users or phones/device profiles, see the following sections:

- [For Finding Users, Phones, and Device Profiles, page 2-3](#)
- [For Finding Users Only, page 2-4](#)
- [For Finding Phones/Device Profiles Only, page 2-4](#)

For Finding Users, Phones, and Device Profiles

**Tip**

The following information applies when you search for users, phones, or device profiles.

The Cisco Voice Provisioning Tool allows you to either search for users or phones/device profiles, but it does not allow you to search for users and phones/device profiles at the same time. After a search results page displays, you can access specific configuration records for users or phone/device profiles, immediately view some information about records, reset multiple phones for phone records, or update several configuration records at the same time.

By default, when you perform a search for a user or phone/device profile, the system searches across all product systems for which you have privileges. Searching across several product systems may cause performance degradation. We recommend that you narrow your search when you search for multiple users/phones/device profiles or if you search for a single user/phone/device profile across several product systems; for example, we recommend that you specify the product systems where you want the tool to search.

Search results depend on the following factors:

- The plug-in that is installed on the Cisco Voice Provisioning Tool; the plug-in defines the possible types of data that display for the columns.
- The presence of the user/phone/device profile on the product system; for example, if the user is not configured for the product system, the user does not display in the search results.
- The search criteria that you specified.

Depending on the type of search you perform and the type of Cisco Voice Provisioning Tool plug-in installed on the server, different columns display in the search results. For example, if you search for a Cisco Unity user on a server that contains Cisco CallManager and Cisco Unity plug-ins, columns display for Cisco CallManager and Cisco Unity, but search results display only in the columns that are defined by the Cisco Unity plug-in.

If you perform an advanced search and then switch back to a basic search, the system searches based on the basic search criteria that you configure.

The tool only displays results that are returned by responding product systems. If one or more servers do not respond, a specific error message for each server that did not respond displays in the GUI.

Depending on your browser settings, the browser may cache the search results. If you click the Back button to go to a previous search results page, the tool may present outdated search results because the data was cached by the browser. For example, if you navigate to the Manage Users page after clicking the Back button, the following message displays: “Cached Results: <number of records> records,” to indicate that the search results may be outdated. To see the latest search results available, click the Go button.

After the results display, you can sort the information in the columns by clicking the column headers in the table.

For Finding Users Only



Tip

The following information applies only for user configuration.

When you search by user ID, you must enter the entire user ID because Is Exactly is the only option for user IDs; the tool may display no results or incorrect results if you enter partial information.

When searching for Cisco Unity users, the tool only displays results for users that use Internet or Exchange subscriber types.

If a primary extension is configured for the user, it displays in the search results.

For Finding Phones/Device Profiles Only



Tip

The following information applies only for phone/device profile configuration.

You can search for a phone or device profile by using the search criteria that the GUI displays, for example, phone name, phone description, device type, and so on. If you do not specify search criteria, the tool searches all product systems, all phones, and all device profiles.

The tool can display all device types when you perform a search, but the device name does not display as a hyperlink if the tool does not support the device type. You can delete phones or device profiles that the tool does not support, but you cannot modify the records.

If you want to do so, you can reset phones from the Manage Phones/Profiles page.

Overview for Adding a User, Phone, or Device Profile

The Cisco Voice Provisioning Tool allows you to add a single user, phone, or device profile. For overview information on these tasks, see the following sections:

- [For Adding a User, Phone, or Device Profile, page 2-5](#)
- [For Adding a Phone Only, page 2-6](#)
- [For Adding a Device Profile Only, page 2-6](#)

For Adding a User, Phone, or Device Profile



Tip

The following information applies if you are adding a user, phone or device profile.

Initial parameters, which includes the product system and template name drop-down list boxes, display when you open a specific user, phone, or device profile configuration page. After you enter the data for the initial parameters, the page refreshes and displays more settings for you to complete.

After you save the information, the tool validates that you completed all mandatory settings and that you entered the data correctly. If the information is correct, the tool sends the information to the Cisco CallManager and/or Cisco Unity server that you specified for the product system.

Mandatory settings are marked with an asterisk (*). If you save the page before you configure all mandatory settings, the GUI displays an error message.

For information on applying a template to a user, phone, or device profile record, see the [“Overview for Applying a Template to a Specific Configuration Page”](#) section on page 5-4.

Clicking the Cancel button before you save the configuration automatically changes the configured settings to the default.

If an error occurs, the tool displays which portion of the operation failed, for example, specifying that the line configuration failed. If part of the operation succeeds and part of it fails, the GUI displays the portion that succeeded and the portion that failed, for example, specifying that you successfully added the phone to the database, but the line configuration failed. Even if one part of the configuration fails, the tool attempts to add the other configuration settings to the product system database.

If the product system goes down when the tool attempts to save the data, the tool cannot determine whether the information was stored in the product system database. If the operation times out, the tool assumes that the operation failed; an error message displays in the GUI and the Add New page continues to display.

For Adding a User Only



Tip

The following information applies only for user configuration.

When you add a user through the Cisco Voice Provisioning Tool, you can perform the following sets of tasks if both the Cisco CallManager and Cisco Unity plug-ins exist on the Cisco Voice Provisioning Tool server:

- Add data for a user to single or multiple product systems
- Add data for a user to the product system(s) and associate existing phones with the user
- Add data for a user to the product system(s), create new phones, and then associate the new phones with the user

The Cisco Voice Provisioning Tool does not support importing of existing Microsoft Exchange users. When you use a Cisco Unity server to add a user, the Cisco Unity server creates the Unity PIN and password and allocates it to the user. The Cisco Voice Provisioning Tool does not allow you to specify a Cisco Unity password when you add or modify a user record, although you may set the Unity PIN.

If you specify Cisco Unity for your Message System, you must configure a user; if you do not want to configure a user, choose Not Selected from the Message System drop-down list box.

For Cisco CallManager product systems, you can add the user data, add phones, associate the user with the phones, and specify a primary extension and default profile, if you want to do so. Although Cisco CallManager requires that you configure the mandatory settings for the user, it does not require that you add the phone, associate the user to the phone, or specify a primary extension and default profile.

If the user ID that you enter already exists for the Cisco CallManager and/or Cisco Unity product system, the operation fails.

If you exceed the licensing limits for the Cisco Unity servers, the operation fails for Cisco Unity.

For Adding a Phone Only



Tip

The following information applies only for phone configurations.

When you add a phone, you configure basic phone settings, such as the MAC address and the phone button template. On the Add a Phone/Profile page, you can also subscribe to IP phone services that you installed, configure lines (directory numbers), and set advanced settings, such as security, locales, and music on hold audio sources.

The configuration that you specify for the Cisco Voice Provisioning Tool phone template, phone system, device class, and device type affect the settings that display when you add a phone. The features and phones that are supported for a particular Cisco CallManager version affect which settings display in the GUI. Likewise, the option that you choose for the Cisco Voice Provisioning Tool phone template affects the options that display for the phone system, device class, and device type drop-down list boxes. The phone system selection affects the device class, and the device class affects the options that display in the Device Type drop-down list box.

If the tool cannot add the phone to the database, the tool does not attempt to add the line configuration. If all line information for the phone is not added, the GUI highlights the settings that you must reconfigure.

After you add the phone, reset the phone for the changes to take effect.

For Adding a Device Profile Only

When you add a device profile, you configure basic device profiles settings, such as the device profile name and the phone button template. On the Add New Phone/Profile page, you can also subscribe to IP phone services that you configured in Cisco CallManager Administration, configure lines (directory numbers), and set advanced settings, such as security, locales, and music on hold audio sources.

Overview for Updating a Single User, Phone, or Device Profile

When you update a single user, phone, or device profile record, the Cisco Voice Provisioning Tool retrieves the data from the product system database(s) and automatically populates the settings with the data.

Use the information in the [“Overview for Finding a User, Phone, or Device Profile”](#) section on page 2-3 in conjunction with the information in this section. All information in the [“Overview for Finding a User, Phone, or Device Profile”](#) section on page 2-3 applies.

For overview information on updating a single user, phone, or device profile, see the following sections:

- [For Updating a Single User, Phone, or Device Profile, page 2-7](#)
- [For Updating a Single User Only, page 2-7](#)

- [For Updating a Single Phone or Device Profile Only, page 2-7](#)

For Updating a Single User, Phone, or Device Profile



Tip

The following information applies for users, phone, and device profile configuration.

When errors occur, the modification fails, and the GUI displays an error message.

Some settings display as read only and therefore cannot be modified; for example, you cannot modify the user ID, and you cannot modify the product system if it was previously chosen.

For information on applying templates when you update a single configuration record, see the [“Overview for Applying a Template to a Specific Configuration Page”](#) section on page 5-4.

For Updating a Single User Only



Tip

The following information applies only for user configuration.

If you did not choose a product system when you added the user, those product system settings do not display when you update the record; for example, Cisco Unity settings do not display if a Message system was not chosen when you added the user.

You cannot update information for a user that exists on more than one product system if the first and last name of the user do not match on all systems. For example, if the user ID jsmith displays for CCM 1 and Unity 1 but the first name on the two systems is Jon and John respectively, you cannot modify the record unless you specify the product system type. If the discrepancy displays for two servers of the same product system type, for example, Jon and John display for CCM 1 and CCM 2 respectively, you must update the user for one server at a time. In this example, when you update the user information, you must choose CCM 1, update the information, click Save, and then you must choose CCM 2, update the information, and click Save. The tool does not update the information simultaneously for both systems.

You cannot apply a Cisco Unity subscriber template when you update a user record. If you configured Cisco CallManager settings for the user but no Cisco Unity settings when you initially added the user record, the Cisco Unity settings display on the Add New User page. If you configured Cisco CallManager and Cisco Unity settings for the user when you initially added the user record, a subset of settings display.

When you update a user record, the CCM password, CCM PIN, and Unity PIN fields display as encrypted text. To change these settings on this page, you must click the Reset button.

If you did not choose a product system when you added the user, you can choose the product system when you modify the user record.

After you choose a Phone System, Message system, and user ID for a user, you cannot update the information or move the user from one server to another server.

For Updating a Single Phone or Device Profile Only



Tip

The following information applies only for phone and device profile configuration.

When you update a phone or device profile, the settings in the Phone System, Device Class, and Device Type drop-down list boxes display as read only, and therefore cannot be modified.

Clicking Cancel before you save the data automatically displays the data that the tool retrieved from Cisco CallManager. If you modified line information and clicked Cancel before you saved the information, the tool displays the default settings.

For phones only, always reset/restart the phone for the updates to take effect.

Overview for Updating Multiple Users, Phones, or Device Profiles

The Cisco Voice Provisioning Tool allows you to update multiple users, phones, or device profiles at the same time; by using this functionality, you can update multiple phones, users, or device profiles, but not all three types at the same time.

Use the information in the [“Overview for Finding a User, Phone, or Device Profile” section on page 2-3](#) in conjunction with the information in this section. All information in the [“Overview for Finding a User, Phone, or Device Profile” section on page 2-3](#) applies.

For overview information on updating multiple users, phones, or device profiles, see the following sections:

- [For Updating Multiple Users, Phones, or Device Profiles, page 2-8](#)
- [For Updating Multiple Users Only, page 2-9](#)
- [For Updating Multiple Phones Only, page 2-9](#)
- [For Updating Multiple Device Profiles Only, page 2-10](#)

For Updating Multiple Users, Phones, or Device Profiles



Tip

The following information applies for user, phone, and device profile configuration.

The Cisco Voice Provisioning Tool allows you to update multiple users, phones, or device profiles at the same time; by using this functionality, you can update multiple phones, users, or device profiles, but not all three types at the same time.

When you modify multiple users, phones, or device profiles at the same time, the tool provides a wizard so that you can choose several records, choose one or more settings/attributes to update, update the settings, and then apply the settings to the chosen records.

In the wizard, the Multi-Modify button appears disabled until you check the check box for the users, phones, or device profiles. If you fail to choose any settings for modification, the tool disables the Next button, and you cannot proceed with the modification.

Clicking the Cancel button during the configuration causes a confirmation dialog box to display in the wizard. Clicking Yes in the dialog box automatically deletes the data and displays the first page of the wizard; that is, the search results page where you choose the records that you want to modify.

All settings do not display in the wizard, but the settings that you update apply to all users (or phones or device profiles) in the list. You cannot update individual records by using the wizard. If the setting does not display in the wizard, you must go to the individual configuration record to modify the attribute.

If the tool fails to save the information for a single user, phone, or device profile in the list, the saving operation does not stop. After the tool attempts to save the configuration information, the first page of the wizard displays and shows any errors that the tool identified.

**Tip**

Do not use the procedures for updating multiple users, phones, or device profiles if you plan to modify a large number of users, phones, or device profiles. Consider using the procedure if you want to modify 10 or fewer users, phones, or device types. For updating a large number of users, phones, or device profiles, consider using the bulk provisioning functionality in the Cisco Voice Provisioning Tool.

For Updating Multiple Users Only

**Tip**

The following information applies only for user configuration.

When the chosen users exist on one server for each product system type, for example, the users exist on CCM 1 and Unity 2, or Unity 1 and CCM 2, you can modify multiple users at the same time.

When the chosen users exist on more than one server of the same product system type, for example, the users exist on CCM 1 and CCM 2, or Unity 1 and Unity 2, the tool does not allow you to modify multiple users at the same time. Under these circumstances, an error message displays in the GUI to alert you to the restriction.

After the user list displays in the wizard, the product system settings are read only.

For Updating Multiple Phones Only

**Tip**

The following information applies only for phone configuration.

You can update multiple phone records at the same time if you specified a particular phone system when you performed a search for the phones.

The chosen phones must exist on the same Cisco CallManager system, and the Cisco Voice Provisioning Tool must support the device type. If a problem occurs, an error message displays in the GUI to alert you to the restrictions.

The Cisco Voice Provisioning Tool does not allow you to update some settings when you update multiple phones; for example, you cannot update the following settings:

- Line Settings
- Phone button template
- Extension mobility settings
- Display Internal Caller ID
- Owner User ID
- Expansion module settings
- IP Phone service settings

If you choose more than one device type to modify, the tool displays only the settings that are common amongst the phone models. For example, if you choose to modify a Cisco IP Phone 7970 and a Cisco IP Phone 7940, only common settings (for example, device security mode) display in the GUI.

The Phone System setting displays as read only because the tool does not support moving phones from one Cisco CallManager to another Cisco CallManager.

After you make the modifications, reset/restart the phones. The phones do not receive the changes until you perform this task.

For Updating Multiple Device Profiles Only**Tip**

The following information applies only for device profile configuration.

To update multiple device profiles at the same time, the chosen device profiles must exist on the same Cisco CallManager system, and the Cisco Voice Provisioning Tool must support the device type. If a problem occurs, an error message displays in the GUI to alert you to the restriction.

The Cisco Voice Provisioning Tool does not allow you to update some settings when you update multiple device profiles; for example, you cannot update the following settings:

- Line Settings
- Phone button template
- IP Phone service settings

If you choose more than one device type to modify, the tool displays only the settings that are common amongst the types. For example, if you choose to modify a device profile for a Cisco IP Phone 7970 and a Cisco IP Phone 7940, only common settings display in the GUI.

The Phone System setting displays as read only because the tool does not support moving device profiles from one Cisco CallManager to another Cisco CallManager.

Overview for Deleting a Single User, Phone, or Device Profile from a Specific Configuration Page

If you want to do so, you can delete a user, phone, or device profile on a specific configuration page. After you search for the user, phone, or device profile and display the corresponding configuration page, click the Delete button.

**Tip**

All lines that are associated with a phone/device profile are deleted when you delete the device, unless the line is configured as a shared line. If the line is shared with another phone, you can delete the chosen device, but you cannot delete the line because the other phone uses it.

For more information on deletions, see the following sections:

- [Deleting Users, page 3-10](#)
- [Deleting a Phone or Device Profile, page 4-14](#)

Overview for Deleting Users, Phones, or Device Profiles from a Search Results Page

You can delete single or multiple users, phones, or device profiles from the search results page that displays after you perform a search. Remember that searches are performed for users, phones, or device profiles, not all types at the same time. Therefore, deletions on the search results page are performed for users, phones, or device profiles, not all types at the same time.

On the search results page, the Delete button appears disabled until you check the check boxes for the users, phones, or device profiles.

**Tip**

All lines that are associated with a phone/device profile are deleted when you delete the device, unless the line is configured as a shared line. If the line is shared with another phone, you can delete the chosen device, but you cannot delete the line because the other phone uses it.

For more information on deletions, see the following sections:

- [Deleting Users, page 3-10](#)
- [Deleting a Phone or Device Profile, page 4-14](#)

Overview for Applying a Template to a User, Phone, or Device Profile

For information on applying a template, see the [“Overview for Applying a Template to a Specific Configuration Page”](#) section on page 5-4.

Overview for Applying IP Phone Services to Phones and Device Profiles

For information on applying IP Phone services to phones and device profiles, see the [“Configuring IP Phone Services and Lines”](#) section on page 4-5.

Overview for Configuring Lines for Phones and Device Profiles

After you choose the phone button template for the phone or device profile, you can configure lines for phones or device profiles. For information on configuring line settings for phones and device profiles, see the [“Configuring IP Phone Services and Lines”](#) section on page 4-5.

Where to Find More Information on User, Phone, and Device Profile Management

- [Management Overview, page 2-1](#)
- [Managing Users, page 3-1](#)
- [Managing Phones or Device Profiles, page 4-1](#)
- [User Configuration Settings, page 11-1](#)
- [Phone Configuration Settings, page 12-1](#)
- [Device Profile Configuration Settings, page 13-1](#)

