



CHAPTER 3

Managing Orders

This chapter provides details on creating orders for Provisioning Manager products and services, processing orders, and changing and canceling existing products and services.

All changes to the underlying systems are made through a two-stage process of creating an order and then processing the order. You can set policies for both of these stages. For example, you can configure the system so that one group of users can only create and submit orders, while another group of users can view and perform processing-related activities.

Provisioning Manager contains an automation engine which performs the order processing, including service activation and business flow based on how Provisioning Manager is configured.

Order management is described in the following sections:

- [Viewing Orders, page 3-1](#)
- [Ordering Products and Services, page 3-4](#)
- [Processing Orders, page 3-36](#)
- [Canceling Products, page 3-38](#)

Viewing Orders

Orders for a single subscriber are displayed and initiated in the Subscriber Record for that subscriber. The Subscriber Record lists all existing products for the subscriber.

In the Subscriber Record, you can do the following:

- Order a new product; see the following sections:
 - [Ordering Products and Services, page 3-4](#)
 - [Example Order Procedure, page 3-11](#)
 - [End-User Association for Line Products, page 3-17](#)
 - [Ordering Shared Phones and Lines, page 3-18](#)
 - [Ordering Presence Services, page 3-22](#)
 - [Managing Phones Without an Associated Subscriber, page 3-24](#)
- Update or change an existing product; see the following sections:
 - [Replacing Existing Phones, page 3-25](#)
 - [Changing Phone Settings, page 3-26](#)
 - [Changing Owners of Phones, page 3-27](#)

- [Changing Line Information](#), page 3-29
- [Changing Extension Mobility Access Information](#), page 3-30
- [Changing Remote Destination Profile Information](#), page 3-31
- [Changing Remote Destination Profile Line Information](#), page 3-32
- [Unlocking Voicemail Accounts](#), page 3-33
- Cancel a product (see [Canceling Products](#), page 3-38).
- View provisioning attributes for a product (see [Viewing the Provisioning Attributes for an Ordered Product](#), page 3-2).
- View the inventory for a product (see [Viewing the Inventory for an Ordered Product](#), page 3-3).
- Add notes for a product (see [Adding Notes to an Ordered Product](#), page 3-3).

Accessing a Subscriber Record

If you are assigned the Ordering authorization role, you can access your own subscriber record, and the subscriber records of other users.

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- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
The Search Subscribers for Ordering Services page appears.
- Step 2** Enter the subscriber information to search on, then click **Search**.
The search results appear.
- Step 3** Click the desired subscriber.
The Subscriber Record Details page for the selected subscriber appears.
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Viewing the Provisioning Attributes for an Ordered Product

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- Step 1** Select **Provisioning > Manage Orders > Order Subscriber Services**.
The Search Subscribers for Ordering Services page appears.
- Step 2** Enter subscriber information to search.
- Step 3** Click **Search**
The results of your search appears.
- Step 4** Click the desired subscriber.
The Subscriber Record Details page for the subscriber appears.

- Step 5** Hover over the product name for which you want to view the provisioning attributes.
The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 6** Click **View**.
The View Product from Record pane appears, listing all of the product's provisioning attributes. This pane is read only. For information on configuring provisioning attributes, see [Configuring Provisioning Attributes, page 6-16](#).
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Viewing the Inventory for an Ordered Product

- Step 1** Select **Provisioning > Manage Orders > Order Subscriber Services**.
The Search Subscribers for Ordering Services page appears.
- Step 2** Enter subscriber information to search.
- Step 3** Click **Search**
The results of your search appears.
- Step 4** Click the desired subscriber.
The Subscriber Record Details page for the subscriber appears.
- Step 5** Hover over the product name for which you want to view the inventory.
The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 6** Click **Inventory**.
The Product Inventory Details pane appears, listing the product's inventory.
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Adding Notes to an Ordered Product

- Step 1** Select **Provisioning > Manage Orders > Order Subscriber Services**.
The Search Subscribers for Ordering Services page appears.
- Step 2** Enter subscriber information to search.
- Step 3** Click **Search**
The results of your search appears.
- Step 4** Click the desired subscriber.
The Subscriber Record Details page for the subscriber appears.
- Step 5** Hover over the product to which you want to add a note.
- Step 6** Click **Notes**.
The Subscriber Record Detail Notes page appears.
- Step 7** In the Add New Note field, enter the desired information.

Step 8 Click **Append Note**.

The new note appears in the list.

Step 9 Click **Close**.

Ordering Products and Services

Using Order Manager, you can create orders for telephone equipment and services. You can create orders for individual products, or you can order bundled products and services.

Users assigned the Ordering authorization role can add, change, or cancel their own orders or those of other subscribers.

The length of time it takes to provision an order can vary. To verify if the order has successfully completed, go to the subscriber record of the user (see [Accessing a Subscriber Record, page 3-2](#)). The products are listed in the Subscriber Record Options pane, and the View Orders section shows the order with the status as Complete. Also, you can perform an order search for the order number.

**Note**

After the system has been idle for a long period of time, the first order placed may take longer than usual.

While placing orders, remember the following:

- While placing orders for products and services on a Unified Message Processor based on Cisco Unity devices (Cisco Unity, Cisco Unity Connection, and Cisco Unity Express), not all the products and services are available. This is because the devices do not support all products and services. [Table 3-2](#) lists the orderable and nonorderable voice products and services for Cisco Unity devices.
- While placing orders for products and services on either Cisco Unified Communications Manager Express or Cisco Unity Express, be careful when entering Cisco IOS CLI commands (when configuring provisioning attributes through the Advanced Order Configuration pane). Your authorization role does not restrict what you can configure.
- Some attributes may not be supported by a particular phone type on a given protocol, so when placing phone orders, you should only set values for attributes that are supported by the chosen phone type and protocol. If you do not, failed orders can result.
- Provisioning Manager synchronizes unsupported infrastructure objects like Intercom Calling Search Space and Intercom Route Partition from Cisco Unified Communications Manager. If these unsupported objects are used in Provisioning Manager orders, it will result in error.
- If the Enable Voice Gateway feature property is set to N, the Order Entry screen will display analog phones. If the property is set to Y, then the analog phones are not shown in the screen.
- To order Analog phones, you must add Voice Gateway References to the service area in the Service Area Configuration screen.

Table 3-1 describes the various Provisioning Manager products and services that you can order.

Table 3-1 Provisioning Manager Products and Services

Product or Service	Description
Enable Presence	<p>Enables presence messaging updates by enabling the subscriber's Presence Server license on a Call Processor.</p> <p>Enable Presence is available for Cisco Unified Communications Manager 6.0 and higher.</p> <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Enable Presence Client	<p>Enables the use of Cisco Unified Personal Communicator by enabling the subscriber's Unified Personal Communicator license on a Call Processor. This is a bundle of Enable Presence Client and Client User Settings.</p> <p>For a Service Area that has only Cisco Prime Unified Provisioning Manager, you can see the Enable Presence product. Once that gets provisioned, you can see the Enable Presence Client product.</p> <p>Enable Presence Client is available for Cisco Unified Communications Manager 6.0 and higher. This product is available only when you order Enable Presence.</p> <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Enable Client Service	<p>Enables the subscriber to use Cisco Unified Personal Communicator by enabling/activating the subscriber's Unified Personal Communicator license on a Call Processor, and configures Unified Personal Communicator user settings on a Presence Processor.</p> <p>To configure Presence Services, do the following:</p> <ul style="list-style-type: none"> • Add the Presence Server to Provisioning Manager. Perform the Infrastructure and Subscriber synchronization. • Add the Presence Server to a Service Area that will be used for ordering. <p>For a Service Area that has Unified Presence (along with Cisco Unified Communications Manager), you can Enable Presence and Presence Service. After Enable Presence is provisioned, you can view the Enable Client Service.</p> <p>Note If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Client User Settings	<p>Enables Unified Personal Communicator user settings on a Unified Presence Processor. Client User Settings can be ordered only through bundle products such as Enable Client Service or Presence Service.</p> <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>

Table 3-1 Provisioning Manager Products and Services (continued)

Product or Service	Description
Presence Services	<p>Enable Cisco Unified Presence, Client Service, and Cisco Unified Presence User Settings.</p> <p>To configure Presence Services, do the following:</p> <ul style="list-style-type: none"> • Add the Presence Server to Provisioning Manager. Perform the Infrastructure and Subscriber synchronization. • Add the Presence Server to a Service Area that will be used for ordering. <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Enable Mobility Support	<p>Enables Mobility for the selected subscriber on the currently selected Call Processor.</p> <p>When ordering using default parameters, the following provisioning attributes are used:</p> <ul style="list-style-type: none"> • Enable Mobility: True • Enable Mobile Voice Access: True • Max Desk Pickup Wait Time: 1000 ms • Remote Destination Limit: 4 • Primary User Device <p>This product is available only for Cisco Unified Communications Manager 6.0.x and later.</p> <p>In this release, ordering this product will not result in provisioning any Remote Destination Profiles. Since Remote Destination Profile and Remote Destination Profile Line are two separate products, you can order and configure them.</p>
Enable SoftPhone Support	<p>SoftPhone support enables users to use their PCs either in conjunction with a physical phone (both would ring at the same time), or to run a CTI port, which is a virtual phone (one that is defined on the Cisco Unified Communications Manager but does not physically exist).</p> <p>Cisco Unified Communications Manager Express does not support SoftPhone. You will not be able to order this product when placing orders on a Call Processor based on a Cisco Unified Communications Manager Express.</p> <p>If you already have SoftPhone support on all your available Call Processors, the Enable SoftPhone Support product will not appear in your product list. If there is a Call Processor available to you, then a list of valid Service Areas appears for the specific Call Processor.</p> <p>When ordering SoftPhone support, you must specify the server name or IP address of the user's computer in the Associated PC field.</p> <p>Although you enable SoftPhone support based on Service Area, you can enable SoftPhone support only once per Cisco Unified Communications Manager, even if there are more Service Areas associated with the Cisco Unified Communications Manager.</p> <p>The SoftPhone Support product applies to a Cisco SoftPhone that uses a CTI port. Cisco IP Communicator is another type of SoftPhone application that does not use CTI ports to communicate with the Cisco Unified Communications Manager, but acts as a regular hard phone with a MAC address. To order Cisco IP Communicator, you must order a physical Phone product, and select IP Communicator as the type of phone.</p> <p>Enable SoftPhone Support is required for Cisco Unified Client Services Framework to function as a desktop phone on a Cisco Unified Client Services Framework client.</p>

Table 3-1 Provisioning Manager Products and Services (continued)


Product or Service	Description
Enhanced Phone Service	<p>Includes a phone, phone line, and voicemail. The line is automatically associated with the phone that you ordered, and the voicemail is automatically associated with the line.</p> <p>When placing an order for Enhanced Phone Service on a Cisco Unified Communications Manager Express, you must enter the call-forward provisioning attributes. When entering an order, click Advanced Order Configuration and in the Voicemail Configuration Template provisioning attribute, enter the following commands:</p> <pre>call-forward busy <voice mail port/dn> call-forward noan <voice mail port/dn> timeout <seconds></pre> <p>For a Cisco Unity Express Service Area, enter only alphabetical characters in the Voice Mail Display Name field. If you use other types of characters, orders for the subscriber will fail.</p> <p>For Cisco Unity Express Service Area, you cannot add, modify, or cancel orders when the infrastructure or subscriber synchronization is in progress.</p>
Extension Mobility Access or Access with Line	<p>Enables users to log into a specific phone type and have their phone device profile applied to it. This product is available either by itself, or bundled with a line.</p> <p>Extension Mobility is available for ordering only if the optional extension mobility details are entered for a Call Processor when it is added to Provisioning Manager.</p> <p>When placing an order for Extension Mobility Access in a Service Area that supports SIP phones, select a phone button template only for the following Cisco Unified IP Phones: 7911, 7941, 7942, 7945, 7961, 7962, 7965, 7970, 7971, or 7975. The order will fail if Extension Mobility is not supported on the selected phone button template.</p> <p>Extension Mobility is not supported on Cisco Unified Communications Manager Express or Cisco Unified Communications Manager 4.0.</p>
Extension Mobility Line	<p>The directory number/line ordered for a device profile on a Cisco Unified Communications Manager. It can be ordered as an upgrade when the user already has Extension Mobility Access.</p> <p>Extension Mobility is not supported on Cisco Unified Communications Manager Express or Cisco Unified Communications Manager 4.0.</p>
Line	<p>Create an order to add a line or directory number for a user who already has a phone. No shipping, assignment, receipt, or tracking (for returns) steps are required for provisioning a new Line product.</p> <p>The Upgrade designation next to the Line product indicates that a line is being ordered for an existing phone.</p> <p>For Call Processors, the display for a line cannot exceed 30 characters. Make sure that the combination of characters for First Name and Last Name does not exceed 30 characters. If this limit is exceeded, when you place an order, the Call Processor sends an error.</p> <p>End User Association is automatically provisioned for Line products.</p> <p>For more details, see End-User Association for Line Products, page 3-17</p>
Line on a Shared Phone	<p>Order a Line on a Shared Phone when users require their own separate lines on the same physical phone. When this product is provisioned, the phone and all lines on it are displayed in each of the user's subscriber record.</p> <p>The Shared icon () appears next to the phone that is shared in the subscriber record.</p>
Messaging Service	<p>Consists of a phone, phone line, voicemail, and email.</p>

Table 3-1 Provisioning Manager Products and Services (continued)

Product or Service	Description
Phone	<p>Order a phone that does not have a line or a directory number associated with it.</p> <p>While ordering a SIP phone, select Yes for Enable Extension Mobility for the following Cisco Unified IP Phones only: 7911, 7941, 7942, 7945, 7961, 7962, 7965, 7970, 7971, 7975. The order will fail if Extension Mobility is not supported on the selected SIP phone.</p> <p>When entering a device name, follow these guidelines:</p> <ul style="list-style-type: none"> • Cisco Unified Personal Communicator: <ul style="list-style-type: none"> – The device name must match the username. – UPC is automatically added to the device name after the order is provisioned. – The device name must consist of uppercase letters (A-Z) and numbers (0-9). All other characters are ignored. – The device name can contain twelve additional characters after UPC. <p>For example, if the username is john_jackson, for the Cisco Unified Personal Communicator device name, you must enter JOHNJACKSON.</p> • Dual Mode for iPhone: <ul style="list-style-type: none"> – It must contain the prefix TCT. If you do not enter the prefix, Provisioning Manager will automatically add it. – It can contain up to fifteen characters (including the prefix). – It can only consist of alphanumeric characters (A-Z, a-z, 0-9). Provisioning Manager converts any lowercase letters to uppercase letters before pushing the information to the device. • CTI port—Must contain 1 to 15 characters. Valid values are alphanumeric characters (A-Z, a-z, 0-9), underscore (_), hyphen (-), and period (.). • Cisco IP Communicator—Must contain 1 to 15 characters. Valid values are alphanumeric characters (A-Z, a-z, 0-9), underscore (_), hyphen (-), and period (.). • Cisco Services Framework—Must contain 1 to 15 characters. Valid values are alphanumeric characters (A-Z, a-z, 0-9).
Phone Service	<p>Consists of a phone and phone lines.</p> <p>While ordering Phone Service, the maximum number of lines is dependent on the phone button template for the phone type (if a phone button template is available). For Cisco Unified Communications Manager Express, because no phone button templates available, the maximum number of lines is defined in the product catalog for each phone type.</p> <p>When placing Phone Service orders for Cisco Unified Communications Manager Express, note the following:</p> <ul style="list-style-type: none"> • Provisioning Manager always provisions the ephone-dn with a dual-line. • During a subscriber synchronization, Provisioning Manager synchronizes all the ephone-dns with single-line, dual-line, and octo-line. • The device should not have orphan ephone-dns (those that are not used by, or associated to, an ephone).

Table 3-1 Provisioning Manager Products and Services (continued)

Product or Service	Description
Remote Destination Profile	<p>Order Remote Destination Profile for subscribers, configure their attributes, and allow selection/configuration of a Remote Destination Profile Line, which supports Single Number Reach (SNR).</p> <p>Remote Destination Profile does not support Change Owner and Replace operations.</p> <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Remote Destination Profile Line	<p>Order unlimited Remote Destination Profile Lines in a single Remote Destination Profile. Remote Destination Profile Line supports Auto-assign or Chosen types of Lines.</p> <p>Remote Destination Profile Line can be shared among subscribers and the same destination can be shared between Remote Destination Profile, Line, and Enable Mobility Access Line. In this scenario, all types of lines are displayed as shared lines.</p> <p>In Remote Destination Profile, you can order Voice Mail or Extension Mobility as they are ordered in the Line products.</p> <p>You can order Remote Destination Profile with any subscriber role but not as a pseudo user.</p> <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Remote Destination Profile Service	<p>Enable the Remote Destination Profile service for all Service Areas to shares this Call Processor and also add a Remote Destination Profile Line.</p> <p>You can order Remote Destination Profile with any subscriber role but not as a pseudo user.</p> <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>
Single Number Reach Service	<p>Configure an Enable Mobility, Remote Destination Profile, and Remote Destination Profile Line.</p> <p>For mobility to work on a desktop phone, you must do the following:</p> <ul style="list-style-type: none"> • Configure the Line on the Phone and Remote Destination Profile to be shared. • Configure the User ID that is used for the Remote Destination as an Owner. • Create a softkey template in Cisco Unified Communications Manager and assign it to a desk phone. Provisioning Manager does not support softkey customization. You must create a customized template in Cisco Unified Communications Manager. <p>If you have upgraded from Provisioning Manager 2.1, you will not be able to see this product for ordering until you associate the product to a subscriber role. (See Associating Products to a Subscriber Role Type, page 2-11.)</p>

Table 3-1 Provisioning Manager Products and Services (continued)

Product or Service	Description
Voicemail and Email (bundle)	<p>Create orders for additional Voicemail and Email products if the user already has a line.</p> <p>The Upgrade designation next to the Voicemail and Email Service product indicates that the line product is being upgraded to include voicemail and email.</p> <p>When placing an order for voicemail on Cisco Unified Communications Manager Express, you must enter the call-forward provisioning attributes. When entering an order, click Advanced Order Configuration and in the Voicemail Configuration Template provisioning attribute, enter the following commands:</p> <pre>call-forward busy <voice mail port/dn> call-forward noan <voice mail port/dn> timeout <seconds></pre>
Voicemail (individually)	<p>Create orders for additional Voicemail products if the user already has a line.</p> <p>The Upgrade designation next to the voicemail product indicates that the Line product is being upgraded to include voicemail.</p> <p>When placing an order for voicemail on a Cisco Unified Communications Manager Express, you must enter the call-forward provisioning attributes. When entering an order, click Advanced Order Configuration and in the Voicemail Configuration Template provisioning attribute, enter the following commands:</p> <pre>call-forward busy <voice mail port/dn> call-forward noan <voice mail port/dn> timeout <seconds></pre>
Email (individually) ¹	<p>Create orders for additional Email products if the user already has a line and voicemail.</p> <p>The Upgrade designation next to the Email product indicates that the Line product is being upgraded to include email.</p>
Unified Messaging	<p>You can create an order to add the Unified Messaging feature if you already have email and voicemail. The Unified Messaging feature allows the retrieval of email from your voicemail, and the retrieval of voicemail from your email.</p> <p>In Cisco Unity, you will be enabling the Text-to-Speech (TTS) capability. In Cisco Unity Connection, you will be enabling the TTS and Internet Mail Access Protocol (IMAP) capability.</p> <p>The Upgrade designation next to the Unified Messaging product indicates that the existing email and voicemail are being upgraded to include the Unified Messaging feature.</p>
Unified Messaging Service ¹	<p>A Unified Messaging Service order includes the Line, Phone, Voicemail and Email, and Unified Messaging products.</p> <p>The list of products and services that are available to users is based on user roles and Provisioning Manager system configuration. To modify this list to include the products and services you require, contact your Provisioning Manager administrator.</p>

1. After ordering Email or Unified Messaging Service on Cisco Unity, there is an initial delay in appending the full Domain information to the email address in the Subscriber Record Details page. After placing the order, you should run a subscriber synchronization and a Domain synchronization so that the complete email address appears.

Table 3-2 Supported Cisco Unity Products and Services

Cisco Unity Device	Products and Services
Cisco Unity	Orderable: <ul style="list-style-type: none"> • Voicemail and Email (bundle) • Unified Messaging • Unified Messaging Service • Messaging Service Not orderable: <ul style="list-style-type: none"> • Voicemail or Email individually • Enhanced Phone Service
Cisco Unity Connection	Orderable: <ul style="list-style-type: none"> • Voicemail and Email (bundle) • Voicemail or Email individually • Enhanced Phone Service • Unified Messaging • Unified Messaging Service • Messaging Service
Cisco Unity Express	Orderable: <ul style="list-style-type: none"> • Enhanced Phone Service • Voicemail Not orderable: <ul style="list-style-type: none"> • Unified Messaging • Unified Messaging Service • Voicemail and Email (bundle) • Email individually • Messaging Service

Example Order Procedure

Creating orders for all products and services follows the same basic procedure. This example shows the procedure for ordering Unified Messaging Service.

A user might not have access to all products and services. The list of products and services that appear in a given user's subscriber record depends on the following:

- User role assigned to the user, and the Domains and Service Areas available to the user.
- Availability of resources to support delivery within the Service Areas (for example, a Cisco Unity or Cisco Unity Connection system must be available to provide Unified Messaging).
- Provisioning Manager system configuration.

- Product dependencies:
 - Line requires an existing Phone.
 - Voicemail and Email require an existing Line.
 - Unified Messaging requires Email.
 - Extension Mobility Line requires Extension Mobility Access.

Table 3-3 describes the various fields for ordering products and services. When these fields appear during the order process, they are always required.

Table 3-3 **Order Entry Fields**


GUI Element	Description
Associated PC	The name (DNS resolvable) or IP address of the computer to be used with the SoftPhone support.
Email ID	Enter the email ID. It cannot contain spaces.
Display Name (Email)	Enter the name to be used in the From field of the email.
Enable Extension Mobility	Select Yes or No .
Extension Mobility Line	Select one of the following: Auto-assigned—System automatically assigns a directory number. Chosen Line—User specifies a directory number. The directory number cannot include dashes or spaces.
Line Type	Select one of the following: <ul style="list-style-type: none"> • Auto-assigned—System automatically assigns a directory number. • Chosen Line—You specify a directory number. The directory number cannot include dashes or spaces. After the line is configured, to save your settings, you must click the save () icon on the right side of the page. After you make a selection, the Advanced Order Configuration option appears on the page. You can then configure the provisioning attributes for the line. You can copy the provisioning attributes of a configured line on the same phone by selecting the line from the Copy Line field and clicking Done .

Table 3-3 Order Entry Fields (continued)




GUI Element	Description
Directory Number	<p>You can either enter a directory number directly into the field, or you can choose a directory number by clicking the Chooser icon ().</p> <p>If you click the Chooser icon, a Directory Number search page appears. To use the Directory Number search page, do the following:</p> <ol style="list-style-type: none"> In the Directory Number search page, choose your search criteria from the following: <ul style="list-style-type: none"> Directory Number—Enter a specific number to search for. Available DNs—When selected, all directory numbers that are available in the Provisioning Manager database are displayed. Reserved DNs—When selected, all directory numbers that are reserved for the subscriber for whom the order is being placed are displayed. DN Blocks—The directory number blocks that are configured for the Service Area on which the order is being placed are displayed. Click Find. Your search results appear. Click the desired directory number. The number is entered into the Directory Number field.
Line Position	<p>During the order process, a page appears that lists the available line positions on the phone. Next to the line position, it indicates whether or not the line position is available.</p> <p>In the line position page, you can do the following:</p> <ul style="list-style-type: none"> Configure the line type—Click Not Assigned next to the line, and in the next page, configure the line type. After the line is configured, you must click the save () icon on the right side of the page, to save your settings. Change line position—Click the up or down arrow beside the line position. <p>Line position is not supported on Cisco Unified Communications Manager Express or Extension Mobility Access Lines.</p>
Selected Phone	Select a phone from the list.
MAC Address	(Optional) Select a MAC address or enter one. In case of Analog phones, MAC address is generated based on the selected voice port.
Phone Type	Select a phone type from the list.
Target Phone	Select a target phone from the list.
Phone Button Template	List of available Phone Button Templates.

Table 3-3 Order Entry Fields (continued)

GUI Element	Description
Analog Voice Gateway Reference	<p>Select an analog voice gateway reference.</p> <p>Before executing the subscriber synchronization, the infrastructure synchronization should be executed. During subscriber synchronization, if the synced back analog phone is associated to a voice gateway reference that does not exist in IM, then the voice port instance creation and its association will be skipped. As a result, the analog phone will not be manageable through CUPM.</p> <p>Synchronization of analog phones and IM instance creation will be done only for the Call Processor versions 6.x and above. For Call Processors versions 5.x and below the analog phone instance creation will be skipped since the analog voice gateway support is provided only for Call Processor version 6.x and above.</p>
Name	Name of the Remote Destination Profile.
Description	Description of the Remote Destination Profile.
Selected Remote Destination Profile	Name of the selected Remote Destination Profile.
Service Area	<p>List of available Service Areas.</p> <p>If a Service Area has a Unity Connection configured as a Unified Messaging Processor, and the Unity Connection does not have an external email server, Provisioning Manager will not list this Service Area as an option when ordering email.</p>
Unified Messaging	List of available emails for which you can enable Unified Messaging.
Use Dummy MAC Address	<p>Used for Tool for Auto-Registered Phones Support (TAPS). If you choose <i>Y</i>, Provisioning Manager creates a phone with a dummy MAC address, which is unique in the system.</p> <p>After a TAPS phone is provisioned on the Cisco Unified Communications Manager and updated with a real MAC address, you must run a subscriber and Domain synchronization in Provisioning Manager. This updates the dummy MAC address in Provisioning Manager with the real MAC address.</p> <p>After a dummy phone is ordered, change and cancel orders do not require a subscriber or Domain synchronization.</p>
Voicemail Alias	Enter an alias for the voicemail.
Voicemail Display Name	Enter a display name for the voicemail.
Voiceport	Based on the Analog Voice Gateway Reference field, the relevant Voiceport is populated. You can view the list of occupied and available ports. Only the available port will be selected for ordering.
Advanced Order Configuration	<p>Lists the available provisioning attributes for the ordered service or product. This allows you to set provisioning attributes when placing an order (for more details on provisioning attributes, see Configuring Provisioning Attributes, page 6-16).</p> <p>Click the plus sign (+) next to the Advanced Order Configuration option to expand this pane.</p> <p>To unset the value of a provisioning attribute that has a numeric value in Cisco Unified Communications Manager, you must enter a zero for the value. If you only clear the value, the provisioning attribute is not unset in Cisco Unified Communications Manager.</p> <p>Advanced Order Configuration is available only to users who are assigned the Advanced Ordering authorization role.</p>

Table 3-3 Order Entry Fields (continued)

GUI Element	Description
Choose a reserved phone	<p>Opens a search page that lists reserved phones. A reserved phone is booked for a specific subscriber.</p> <hr/> <p> Note Reserved phones are not supported for analog phones.</p>
Copy phone	<p>Opens a search page that lists all the phones in the system that are supported by the subscriber role. Copy phone allows you to provision a new phone with the same settings of an existing phone.</p> <p>To copy settings, in the search page, select a phone and click OK to confirm that you want the phone's settings copied to the new phone.</p> <p>This feature is available only to users with the Advanced Ordering role.</p> <p>When you have Global access, you can copy all the phones that are orderable for the subscriber, including managed and unmanaged phones, as long as the phone belongs to the same Call Processor.</p> <p>When you have Domain access, you can only copy managed phones that are orderable for the subscriber and are in the user's manageable Domains, as long as the phone belongs to the same Call Processor.</p> <p>Because some settings are unique to each phone, not all settings are copied to the new phone. The following settings are not copied to the new phone:</p> <ul style="list-style-type: none"> • Directory Number • MAC Address • Device Description <p>When a phone is copied, services are not copied to the new phone. For example, if lines, voicemails or emails exist on the phone, they will not be copied to the new phone. In addition to this, the set only attributes associated with the phone are not copied.</p> <p>Through Copy phone you can only copy the provisioning attributes that are set while creating an order.</p> <p>If the Cisco Unified Communications Manager version for the copied phone does not support an attribute, or if the copied phone type does not support an attribute, the attribute is cleared on the new phone.</p> <p>You are allowed to copy only an analog phone to another analog phone. Copying an IP phone to analog phone is not allowed.</p> <p>When a phone is copied, the provisioning attributes that are set during the add order are only copied.</p> <p>Once the Order is completed, in Cisco Unified Communications Manager, the Overriding Common settings checkbox is enabled. It means that the default attributes of the new phone have been modified.</p>

Step 1 Select **Provisioning > Manage Orders > Order Subscriber Services**.

The Search Subscribers for Ordering Services page appears.



Tip

- You can start a new order from the Subscriber Record page by clicking New Order.
-

Step 2 Enter the subscriber information to search on, then click **Search**.

The results of your search appear.

Step 3 Click the desired subscriber.

The Subscriber Record Details page appears.

Step 4 In the left pane, click **New Order**.

The Order Entry wizard appears in the right pane.

Step 5 Select a Service Area and then click **Continue**.

The orderable products are displayed. Only the products that you are allowed to order will appear on this page.

Step 6 Select the product that you want to order and click **Continue**.

Step 7 Follow the Order Entry wizard, entering the required information for the product. (For explanations of the fields, see [Table 3-3](#).)

When placing orders, note the following:

- If more than one Service Area is available, the system provides a drop-down list for you to choose from.
- The Basic <Product Type> Information pane enables you to provide specifications for the selected product.
- The Advanced Order Configuration pane enables you to access provisioning attributes for the ordered service or product. Only users assigned the Advanced Order or Administrator authorization role can access the Advanced Order Configuration pane. For information on provisioning attributes, see [Configuring Provisioning Attributes, page 6-16](#).



Note

To unset the value of a provisioning attribute that has a numeric value in Cisco Unified Communications Manager, you must enter a zero for the value. If you only clear the value, the provisioning attribute is not unset in Cisco Unified Communications Manager.

Step 8 Click **Continue** to start the order process.

Step 9 Click **Confirm**.

Step 10 Click **Ok** in the confirmation order pane.

The order number appears in the View Orders section of the subscriber record.

End-User Association for Line Products

End-user association for Line products is automatically provisioned for Cisco Unified Communications Manager devices when ordering any of the following Line products for Provisioning Manager:

- Line
- Line on a Shared Phone
- Extension Mobility Line
- Remote Destination Profile Line

End user refers to the primary subscriber/ordering subscriber associated with the Phone, Extension Mobility Access, or Remote Destination Profile.

Association will be created based on the following rules:

- For ADD order for any Line product, association is automatically provisioned for all the Line products.
- For Change Order on any Line product, association is created as follows:
 - If end-user association does not exist, association is provisioned between ordering Subscriber ID and Line products.
 - If end-user association exists and if ordering Subscriber ID is already associated, association is preserved.
 - If end-user association exists and if it is not ordering Subscriber ID, a new association is provisioned for the ordering Subscriber along with already existing Subscribers.
- For Cancel Orders of any Line products, as the product itself is deprovisioned, end-user associations are also removed from Cisco Unified Communications Manager.
- While you modify or replace phone orders, you should provide supported values based on the phone type. If valid values are not provided, the order will move to an unrecoverable state. For example, Iphone and Nokia has specific set of supported values.
- For Replace Orders of phone, end-user association is preserved from the old phone.
- For Change Owner cases (applicable only for IP Phone):
 - End users associated with lines of previous owner should be replaced with new owner association.
 - When changing owner of a Phone from a registered user to a pseudo user, association is de-provisioned.
 - When changing owner from a pseudo user to a normal user, association is added.

If a line is not provisioned through Provisioning Manager, the end-user association for the line may not get created in Cisco Unified Communications Manager after it is synchronized to Provisioning Manager.

If this occurs you should run the Line to End-user Association utility. If you do not run the utility, the presence status for any lines other than the primary extensions will not be reported and the Single Number Reach Service product will not work correctly.

For information on running the Line to End-user Association utility, see http://www.cisco.com/en/US/products/ps7125/prod_installation_guides_list.html.

Subscriber Synchronization

During the Subscriber synchronization, Provisioning Manager synchronizes all end-user associations of Line objects from the device.

- Only Cisco Unified Communications Managers versions greater than 6.0.x are provisioned with this association.
- This association is not applicable for pseudo subscribers (see [Using the Pseudo Subscriber Role, page 2-10](#)).

Limitation

You cannot unset a particular end user from a list of associated end users. To work around this limitation, remove the user association manually from the device and synchronize Cisco Unified Communications Manager with Provisioning Manager.

Ordering Shared Phones and Lines

You can configure both shared phones and lines within Provisioning Manager. The following scenarios are possible:

- Common shared line—Multiple users share the same line from different phones.
- Primary shared line—Multiple users share the same line from different phones, but one user's line display is used for all users (for example, a help desk). Users can also have their own lines separate from the shared line.
- Shared phone—Multiple users share the same phone, but have separate lines from that phone.

Notes on Ordering Shared Phones and Lines

When ordering shared lines and phones, remember the following:

- If the second subscriber orders a line on a shared phone that already has a line with voicemail, email, and unified messaging, he will not see these products for the first line in his subscriber record. This also occurs when a shared line is ordered.
- If the second subscriber deletes a shared phone, it is still displayed in the subscriber record for the first subscriber, and it is still present in Cisco Unified Communications Manager. But if the second subscriber deletes any lines on the shared phone, those lines are deleted from the subscriber record for the first subscriber and from Cisco Unified Communications Manager.
- If the second subscriber deletes a shared line, it is deleted from the second subscriber's phone on Cisco Unified Communications Manager. But it is still displayed in the subscriber record for the first subscriber, and is still present in the first subscriber's phone on Cisco Unified Communications Manager.
- The first subscriber should not order a new voicemail for the second subscriber's line (which displays a voicemail in its own subscriber record). This second voicemail will fail on Cisco Unity because a voicemail already exists with the same directory number.
- Any changes made to the directory number provisioning attributes that are set on a shared line are also applied to all the lines that share the same directory number. The directory number attributes for the existing line are applied to the new shared line.
- If the first subscriber deletes a shared line or a phone, the associates of the shared line or a phone will move to the second subscriber.

The directory number attributes available for a line are:

- AAR Group
- Alerting Name
- Auto Answer
- Call Pickup Group
- Calling Search Space
- Forward All
- Forward Busy Internal
- Forward Busy External
- Forward No Answer Internal
- Forward No Answer External
- Forward No Coverage Internal
- Forward No Coverage External
- Unregistered Internal
- Unregistered External
- MLPP Calling Search Space
- MLPP No Answer Ring Duration
- MLPP Target
- Network Hold Audio Source
- No Answer Ring Duration
- Route Partition
- User Hold Audio Source
- Voicemail Profile

Setting Up a Common Shared Line

You can configure a scenario where multiple users share the same directory number by using lines on their own phones:

- Each user's name is displayed on the shared line on their own phone.
- Caller ID displays the user's name when they call other people.
- Each user's own phone and the shared line are displayed in their own subscriber record.

Example Procedure for Setting Up a Common Shared Line

Step 1 Select **Provisioning > Manage Orders > Order Subscriber Services**.

The Search Subscribers for Ordering Services page appears.

Step 2 Enter the subscriber information to search on, then click **Search**.

The results of your search appear.

- Step 3** Click the desired subscriber.
The Subscriber Record Details page for the subscriber appears.
- Step 4** In the left pane, click **New Order**.
The Order Entry wizard appears in the right pane.
- Step 5** Select a Service Area and then click **Continue**.
- Step 6** Select **Line on a Shared Phone** and then click **Continue** to start the order process.
The Configure Product page appears.
- Step 7** Do the following:
- Select **Chosen Line for the line on a shared phone type**.
 - Select the Line Position for the line.
 - Specify the Target Phone.
 - Specify the directory number for the shared line.
- Step 8** Expand the Advanced Order Configuration pane.
- Step 9** In the Directory Number Information pane, select the **Route Partition** for the directory.
- Step 10** Enter the required information in the Directory Number Settings pane.
- Step 11** Enter the required information in the AAR Settings pane.
- Step 12** Enter the required information in the Call Forward and Call Pickup Settings pane.
- Step 13** Enter the required information in the MLPP Alternate Party Settings pane.
- Step 14** Enter the required information in the Line Particular Settings pane.
- Step 15** Enter the required information in the Call Waiting Settings pane.
- Step 16** Enter the required information in the Forwarded Call Information Display pane.
- Step 17** Enter the required information in the Line Group Configuration pane.
- Step 18** Enter the required information in the Set-only Provisioning Attributes Settings pane.
- Step 19** Click **Confirm**.
- Step 20** Repeat these steps for each of the remaining users.
-

Setting Up Primary Shared Lines

You can configure a scenario where multiple subscribers share the same line from their own phones, but the primary subscriber's line display takes precedence over the others:

- One primary user, and one or more secondary users, can all share the same line.
- The primary user's line display appears on the shared line on all the subscriber's phones.
- When a secondary subscriber makes calls using the shared line, the caller ID displays the primary subscriber's line display.
- Subscriber records for secondary subscribers display the shared line as well as their own individual lines.
- Subscriber records for the primary subscriber display all three shared phones and all three lines as well as the lines of the individual subscribers.

Example Procedure for Setting Up a Primary Shared Line

In this scenario, the Help Desk is the primary user that shares a line with secondary users 1 and 2.

User	Line Display	Destination Number
Primary User	Help Desk	123
User 1	User 1	321
User 2	User 2	345

**Note**

For all phones, ensure that you choose a phone model that has capacity for the shared line.

-
- Step 1** Select **Provisioning > Manage Orders > Order Subscriber Services**.
The Search Subscribers for Ordering Services page appears.
- Step 2** Enter the subscriber information to search on, then click **Search**.
The results of your search appear.
- Step 3** Click **User 1**.
The Subscriber Record Details page for the subscriber appears.
- Step 4** In the left pane, click **New Order**.
The Order Entry wizard appears in the right pane.
- Step 5** Select a Service Area and then click **Continue**.
- Step 6** Select **Phone Service** and click **Continue**.
- Step 7** Click **Not Assigned** link to assign the line type.
- Step 8** Specify the directory number as 321 (see [Ordering Products and Services, page 3-4](#)).
- Step 9** Repeat [Step 1](#) through [Step 8](#) for User 2, but specify the directory number as 345.
- Step 10** Repeat [Step 1](#) through [Step 8](#) for Primary User (Help Desk), but specify the destination number as 123.
- Step 11** Repeat [Step 1](#).
- Step 12** Click **Primary User**.
- Step 13** Select a new Line on Shared Phone, making sure to do the following:
- Select **Chosen Line**.
 - Specify 123 for the directory number.
 - Select the MAC address for User 1's phone.
- Step 14** Repeat [Step 12](#), making sure to do the following:
- Select **Chosen Line**.
 - Specify 123 for the directory number.
 - Select the MAC address for User 2's phone.
- Step 15** Click **Confirm**.
-

Setting Up a Shared Phone

You can configure a scenario where two or more subscribers share the same phone, but have their own lines and line display information:

- Each subscriber's line display shows up on their line on the shared phone.
- Caller ID displays the appropriate subscriber's line display when they call other people.
- Each subscriber's subscriber record lists the shared phone, their own line, and the other subscriber's line.

Step 1 Select **Provisioning > Manage Orders > Order Subscriber Services**.

The Search Subscribers for Ordering Services page appears.

Step 2 Enter subscriber information and then click **Search**.

The results of your search appear.

Step 3 Click the desired subscriber.

The Subscriber Record Details page for the subscriber appears.


Step 4 Select **Phone Service** (see [Ordering Products and Services, page 3-4](#)). Make note of the MAC address of the phone.



Note You must order a phone that supports two lines.

Step 5 Repeat [Step 1](#) to [Step 3](#) for the second subscriber.

Step 6 Select **Line on Shared Phone**. In the Target Phone field, select the MAC address of the first subscriber's phone.

In the subscriber record a Shared icon () appears next to the shared phone.

Ordering Presence Services

To provision presence user settings, you must configure the profiles on the Cisco Unified Presence devices. By ordering Presence Services, you can configure:

- Voicemail Profile
- Conferencing Profile
- CTI Gateway Profile
- LDAP Profile
- Audio Profile
- CCMCIP Profile

For more information, see [Deployment Guide for Cisco Unified Presence](#).

To order a Presence Service:

-
- Step 1** Select **Provisioning > Manage Orders > Order Subscriber Services**.
The Search Subscribers for Ordering Services page appears.
- Step 2** Enter subscriber information and then click **Search**.
The results of your search appear.
- Step 3** Click the desired subscriber.
The Subscriber Record Details page for the subscriber appears.
- Step 4** In the left pane, click **New Order**.
The Order Entry wizard appears in the right pane.
- Step 5** Select a Service Area and then click **Continue**.
- Step 6** Select **Enable Presence** and then click **Continue** to configure the Enable Presence product.
- Step 7** Click **Continue** to configure the Client User Settings.

[Table 3-4](#) describes the various fields for configuring the Client User Settings.

Table 3-4 *Client User Settings Entry Fields*

Field	Description
Audio Profile	Choose from the list of Audio Profiles that the Audio Profile configuration defines.
Conferencing Profile	Choose from the list of Conferencing Profiles that the Conferencing Profile configuration defines.
LDAP Profile	Choose from the list of LDAP Profiles that the LDAP Profile configuration defines.
CIP Profile	Choose from the list of CIP Profiles that the CIP Profile configuration defines.
CTI Gateway Profile	Choose from the list of CTI Gateway Profiles that the CTI Gateway Profile configuration defines.
Voicemail Profile	Choose from the list of Voice Mail Profiles that the Voice Mail Profile configuration defines.

- Step 8** Click **Continue**.
The Order confirmation page appears.
- Step 9** Click **Confirm**.
If you first order Enable Presence, once it is provisioned, you will be able to order Enable Presence Client on a Service Area which has no Presence or Client Service on a Service Area that has a Presence. After provisioning is done, you will be able to change but not cancel the Client User Settings. You will be able to cancel the Enable Presence Client, which will disable UPC License on the Cisco Unified Communications Manager and will delete User Settings on the Presence. You will be able to cancel the Enable Presence, which will disable Cisco Unified Communications Manager's UPS License.
-

Managing Phones Without an Associated Subscriber

Provisioning Manager enables you to manage phones that are not associated to a user in Cisco Unified Communications Manager. In Provisioning Manager, these phones must be associated to a subscriber with the pseudo subscriber role.

Managing phones without an associated subscriber consists of the following:

- [Working with Existing Phones that Do Not Have an Associated Subscriber, page 3-24](#)
- [Ordering Phones Without an Associated Subscriber, page 3-24](#)

Working with Existing Phones that Do Not Have an Associated Subscriber

This section describes how to create a list of existing phones that do not have an associated subscriber, and then how to associate those phones to a subscriber.

-
- Step 1** Export all phones that do not have an associated user to a file (see [Exporting Phones Without Associated Users, page 5-42](#)).
- Step 2** Modify the exported file so that each phone can be associated to the new Pseudo subscriber or desired existing subscriber.
- Step 3** Using the modified file, create a batch project, then upload and run the file (see [Using Batch Provisioning, page 5-113](#)).
- Step 4** Upon completion of the batch project, you must run a Domain synchronization to assign a Service Area to the phone so that the phone will be displayed in the subscriber record.



Note

If a Service Area was listed in the file, the phone will be assigned to that Service Area (if an exact match is found) after a Domain synchronization is run. If Domain is configured to use the nonrestricted synchronization rule, the phone will be assigned to the first available Service Area.

Ordering Phones Without an Associated Subscriber

To order a phone without an associated subscriber, you must use a subscriber that is assigned the Pseudo subscriber role (see [Using the Pseudo Subscriber Role, page 2-10](#)). The Pseudo subscriber role allows you to provision phones without an associated user in the Call Processor.

This enables you to view or manage the phones that are not associated to a user in the Call Processor. Once the phone is added to a subscriber's record, you can execute a change owner operation to associate the phone to a regular user.



Note

Changing a subscriber's role from Pseudo to a regular role or vice versa is allowed only if the subscriber does not have any services configured.

Provisioning a phone for a Pseudo subscriber is the same as that for a regular subscriber, except that a user is not created in the Call Processor.

You can order any products that include the following base products for a Pseudo subscriber:

- Phone (including all phone types)
- Line
- Voicemail
- Email
- Unified Messaging

Replacing Existing Phones

Through the Replace feature, you can replace an existing phone for a subscriber, change the phone's MAC address, or update other phone settings.

**Note**

The Replace feature does not allow you to change the line positions of assigned lines.

You can pick the same phone type, or choose from a list of other available phone types for the subscriber. The phone types that subscribers have access to are determined by their subscriber role, and the number of lines on the phone that you are replacing. Phones that do not support the required number of lines are not available during the change order process.

When a phone is replaced, all of its lines are transferred to the new phone. The Service Area assigned to the new phone is the same as for the original phone.

Users with the ordering authorization role can replace their own phones, or those of other subscribers.

When placing a replace phone order, remember the following:


- Any attributes that are not supported by Provisioning Manager and exist on the phone before placing a replace phone order will either be reset to their default values or dropped from the phone. For a list of supported attributes in Provisioning Manager, see [Table 6-1, Provisioning Attribute Descriptions](#).
- The lines assigned to the original phone are associated to the newly added phone. But the newly selected associated phone button template must support the same number (or more) of assigned lines as the original phone.
- Only services that are configured for the Domain will be kept after a phone replace order is performed. If any other services existed on the phone, they will be dropped.
- Some attributes may not be supported by a particular phone type on a given protocol, so when placing phone orders, you should only set values for attributes that are supported by the chosen phone type and protocol. If you do not, failed orders can result.
- While replacing phone orders, you should provide a supported value for the DND Option attribute based on the phone type. Certain phone types like Nokia and Iphone accepts only one value whereas other phones supports up to 3-4 values for this attribute. If you providing wrong values for DND Option the order will not be replaced.

**Tip**

You can also use this process to change phone attributes (for example, provisioning attributes through the Advanced Order Configuration) if you select the same phone type and the same MAC address.

-
- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
The Search page appears.
- Step 2** Enter subscriber information to search on, then click **Search**.
The results of your search appear.
- Step 3** Click the desired subscriber.
The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over the phone that you want to replace.
The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Replace**.
The Order Entry pane appears.
- Step 6** From the Phone Type list, select the new phone. Depending on the type of phone, a picture and/or other phone options are displayed. Also, you change the phone's MAC address if desired.
- Step 7** Click **Continue**.
The Order Confirmation pane appears.
- Step 8** Click **Confirm**.
The Confirmation of Order message appears.
- Step 9** Click **Ok**.
The order appears in the View Orders pane.



Note In the Products column, an information icon () appears next to the product that you have changed. It indicates that the product has an order running against it. When the order has been processed, the information icon disappears.

Changing Phone Settings

You can submit an order to update a phone's settings by using the Change feature. Because the Change feature does not have the capability to replace the physical phone, you cannot replace the phone type or MAC address with this feature.

To change the phone type or MAC address, you must use the Replace feature (see [Replacing Existing Phones, page 3-25](#)).

When placing a change phone order, remember the following:

- When you change the phone button template, the newly selected associated phone button template must support the same number (or more) of assigned lines as the original phone.
- Some attributes may not be supported by a particular phone type on a given protocol, so when placing phone orders, you should only set values for attributes that are supported by the chosen phone type and protocol. If you do not, failed orders can result.

Users with the ordering authorization role can change the settings of their own phone, or those of other subscribers.

-
- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
The Search page appears.
- Step 2** Enter subscriber information and then click **Search**.
The results of your search appear.
- Step 3** Click the desired subscriber.
The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over the phone that you want to change.
The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Change**.
The Order Entry pane appears.
In this pane, you can change the basic settings for the phone. If you want to change any of the advance settings for the phone, click the plus sign (+) next to Advanced Order Configuration.
To unset the value of a provisioning attribute that has a numeric value in Cisco Unified Communications Manager, you must enter a zero for the value. If you clear the value, the provisioning attribute is not unset in Cisco Unified Communications Manager.
- Step 6** After you have made all the desired changes, click **Continue**.
The next page contains the lines for the phone, and you can configure the line position for the phone (if the phone has multiple lines).
- Step 7** Click **Continue**.
- Step 8** Click **Confirm**.
The Confirmation of Order message appears.
- Step 9** Click **Ok**.
The order appears in the View Orders pane.



Note In the Products column, an information icon (i) appears next to the product that you have changed. It indicates that the product has an order running against it. When the order has been processed, the information icon disappears.

Changing Owners of Phones

You can change the ownership of a phone from one subscriber to another subscriber in the same Domain. When you change ownership of a phone, all products associated to the phone (Line, Email, Voicemail, and Unified Messaging) are also changed.

You can enter different values for the Email ID and Display Name, if applicable. If you do not change the email ID, email display name, voicemail alias, or voicemail display name, the services on the Unified Message Processor do not change. Only the subscriber records in Provisioning Manager for the old and new owners are changed.

However, if any of these settings are changed, the voicemail and email accounts on the Unified Message Processor are deactivated and then reactivated.

The Service Area assigned to the new owner is the same as the Service Area assigned to the original owner.

**Note**

Users with the Ordering or Advanced Ordering role can make these changes, either to their own phones or to those of other subscribers.

Attributes that contain the user's login ID (first name and last name) are updated with the new user's information (depending on the Domain rules and the user's provisioning attributes).

The following attributes may contain the user's login ID:

- Phone Description
- Alerting Name (online)
- Phone Owner User ID
- ASCII Display (Internal Caller ID)
- ASCII Line Text Label
- Line Text Label ASCII Alerting Name

If the line is moved, the new user's and old user's telephone number and primary extension is updated accordingly.

**Note**

If a phone is shared, you cannot change owners of the phone. The Change Owner button is not displayed.

Step 1 Select **Provisioning > Manage Subscribers > Search Subscribers**.

The Search page for subscribers appears.

Step 2 Enter the search information. Click **Search**.

Step 3 Click the desired subscriber.

The Subscriber Record Details for the selected subscriber appears.

Step 4 In the Products pane, hover over the phone that you want to change.

The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.

Step 5 Click **Change Owner**.


The Review Products pane appears, displaying a list of the associated products.

Step 6 Click **Continue**.

The Choose a New Owner pane appears.

**Note**

If there are open orders against any of the associated products, a warning message appears, and you cannot continue.

- Step 7** In the Choose New Owner field, click the Chooser icon ()
The Choose a User dialog box appears.



Tip If there are many users, use the search fields to locate the desired user.

- Step 8** Select a user.
The user ID of the new user appears in the Choose New Owner field.
- Step 9** If the phone has voicemail or email associated with it, you can change the following:
- Voicemail alias
 - Voicemail display name
 - Email ID
 - Email display name
- Step 10** Click **Continue**.
The Change Owner Confirmation pane appears.
- Step 11** Click **Submit**.
The Confirmation of Order message appears.
- Step 12** Click **Ok**.
The order appears in the View Orders pane.
-

Changing Line Information

You can submit an order to change line details. The following line details can be changed:

- Directory number
- Line position
- Provisioning attributes

You can change details on Line, Line on Shared Phone, and Extension Mobility Line products.

There are two sets of Provisioning Attributes on line products. One set is on the directory number level and the other is on the line level. When multiple lines share the same directory number, provisioning attributes set on the directory number level are common and shared among the line. Changing the provisioning attributes on one line impacts all of the lines.

Provisioning attributes set on the line level are not shared. Changing the provisioning attributes on one line does not impact the other lines.



Note An asterisk (*) in front of an attribute display name in the Provisioning Attribute Management wizard is a directory number-level provisioning attribute that can be shared among lines.

When a new directory number is provided and the combination of the new number and the original route partition matches an existing directory number object, all the directory number-level provisioning attributes show values from the existing directory number object on the Provisioning Attribute Management wizard.

If you change the route partition, the wizard does not get refreshed automatically to show the new matched directory number values, and what is shown on the wizard will be provisioned on the device.

-
- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
The Search page for subscribers appears.
- Step 2** Enter the search information. Click **Search**.
- Step 3** Click the desired subscriber.
The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over the line that you want to change.
The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Change**.
The Change Line pane appears.
- Step 6** You can change the following:
- Directory number—To change the directory number, enter a new one. The number must be known before starting the change process.
 - Line position—Applicable only to lines that are provisioned on Cisco Unified Communications Managers.
 - Provisioning attributes—Available only to users who are assigned the Advanced Ordering authorization role. Click the plus sign (+) next to the Advanced Order Configuration option to access the provisioning attribute settings.
- Step 7** Click **Continue**.
- Step 8** Click **Confirm**.
- Step 9** Click **Ok**.
The order appears in the View Orders pane.
-

Changing Extension Mobility Access Information

You can submit an order to change Extension Mobility Access details. The following information can be changed:

- Name.
- Phone button template—The template must of the same device type.
- Provisioning attributes.
- Line position (if a line has been added).

-
- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
The Search page for subscribers appears.
- Step 2** Enter the search information. Click **Search**.
- Step 3** Click the desired subscriber.

- The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over click **Extension Mobility Access**.
- The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Change**.
- The Order Entry pane appears.
- Step 6** You can change the following:
- Name.
 - Phone button template—The template must of the same device type.
 - Provisioning attributes—Available only to users who are assigned the Advanced Ordering authorization role. Click the plus sign (+) next to the Advanced Order Configuration option to access the provisioning attribute settings.
 - Line position (if a line has been added).
- Step 7** Click **Continue**.
- Step 8** Click **Confirm**.
- Step 9** Click **Ok**.
- The order appears in the View Orders pane.
-

Changing Remote Destination Profile Information

You can submit an order to change Remote Destination Profile details. The following information can be changed:

- Name.
 - Device Description.
 - Provisioning attributes.
-

- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
- The Search page for subscribers appears.
- Step 2** Enter the search information and click **Search**.
- Step 3** Click the desired subscriber.
- The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over **Remote Destination Profile**.
- The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Change**.
- The Order Entry pane appears.

- Step 6** You can change the following:
- Name.
 - Device Description.
 - Provisioning attributes—Available only to users who are assigned the Advanced Ordering authorization role. Click the plus sign (+) next to the Advanced Order Configuration option to access the provisioning attribute settings.
- Step 7** Click **Continue**.
- Step 8** Click **Confirm**.
- Step 9** Click **Confirm**.
- Step 10** Click **Ok**.
- The order appears in the View Orders pane.
-

Changing Remote Destination Profile Line Information

You can submit an order to change Remote Destination Profile Line details. The following information can be changed:


- Name.
- Device Description.
- Provisioning attributes.

-
- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
- The Search page for subscribers appears.
- Step 2** Enter the search information. Click **Search**.
- Step 3** Click the desired subscriber.
- The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over **Remote Destination Profile Line**.
- The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Change**.
- The Order Entry pane appears.
- Step 6** You can change the following:
- Name.
 - Device Description.
 - Provisioning attributes—Available only to users who are assigned the Advanced Ordering authorization role. Click the plus sign (+) next to the Advanced Order Configuration option to access the provisioning attribute settings.
- Step 7** Click **Continue**.
- Step 8** Click **Confirm**.

- Step 9** Click **Ok**.
The order appears in the View Orders pane.
-

Changing Voicemail Details

You can submit an order to change the voicemail details for Unity and Unity Connection products. A Change button is shown under the Voicemail option. You cannot change a voicemail to a different Service Area.

-
- Step 1** Select **Provisioning > Manage Subscribers > Search Subscribers**.
The Search page for subscribers appears.
- Step 2** Enter the search information and click **Search**.
- Step 3** Click the desired subscriber.
The Subscriber Record Details for the selected subscriber appears.
- Step 4** In the Products pane, hover over voicemail that you want to change.
The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 5** Click **Change**.
- Step 6** In the Basic Voicemail Information pane, modify the voicemail alias and voicemail display name, if necessary.
-  **Note** You cannot change the voicemail alias for all Provisioning Manager versions. For Cisco Unity Connection, you can change the voicemail alias for all versions. For Cisco Unity versions earlier than 8.0, you cannot change the voicemail alias or line selected for changing voicemail; however, you can change the Display Name.
-
- Step 7** In the Advanced Order Configuration - Subscriber pane, modify the fields, if necessary.
- Step 8** Click **Continue**.
- Step 9** Click **Confirm**.
- Step 10** Click **Ok**.
The order appears in the View Orders pane.
-

Unlocking Voicemail Accounts

If a voicemail account becomes locked (due to either user or system error), you can unlock the account through Provisioning Manager.

You can unlock the following accounts:

- Voicemail account—For Cisco Unity, Cisco Unity Connection, and Cisco Unity Express devices.
- Web access account—For Cisco Unity Connection devices.

Before You Begin

To unlock voicemail accounts, you must configure the Cisco Unity or Cisco Unity Connection devices. See [Configuring Cisco Unity So That Provisioning Manager Can Unlock Voicemail Accounts, page 3-34](#) or [Configuring Cisco Unity Connection So That Provisioning Manager Can Unlock Voicemail Accounts, page 3-34](#).

Step 1 Select **Provisioning > Manage Subscribers > Search Subscribers**.

The Search page for subscribers appears.

Step 2 Enter the search information. Click **Search**.

Step 3 Click the desired subscriber.

The Subscriber Record Details for the selected subscriber appears.

Step 4 In the Products pane, hover over voicemail that you want to unlock.

The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.

Step 5 Click **Unlock**.



Note For Cisco Unity Connection, you may have a choice of either the voicemail or web access account. Select the desired account to unlock.

Step 6 Click **Confirm**.

Step 7 Click **Ok**.

The order appears in the View Orders pane.

Configuring Cisco Unity So That Provisioning Manager Can Unlock Voicemail Accounts

Step 1 Log in to the Cisco Unity Administrator page.

Step 2 In the left pane under Subscribers, click **Account Policy**.

Step 3 In the left pane, click **Phone Lockout Policies**.

Step 4 For the lockout duration, select **Forever**.

Configuring Cisco Unity Connection So That Provisioning Manager Can Unlock Voicemail Accounts

Step 1 Log in to the Cisco Unity Connection Administration page.

Step 2 In the left pane under System Settings, click **Authentication Rules**.

Step 3 Select the **Voice Mail** rule or the **Web Application** rule (both rules must be set).

Step 4 For the lockout duration, select **Administrator Must Unlock**.

Searching for an Order

You can search for orders using any of the following information:

- Order information:
 - Order number
 - Author—Person who placed the order
 - Order status
 - Extended status—The state that the order is in (for example, being provisioned, waiting for approval, or waiting to ship)
- Subscriber information:
 - Login
 - First or last name
 - Phone number
 - Email
 - Department
 - Domain
- Order date
- Requested delivery date

Step 1 Select **Provisioning > Manage Orders > Search Orders**.

The Search page for orders appears.

Step 2 Enter the search information.

Step 3 Click **Search**.

The order details are displayed.

Ordering Bulk Services

If you are deploying a large number of services, you may want to combine these activities into a single activity. The batch provisioning functionality of Provisioning Manager enables you to create a single batch that contains multiple types of orders. You can also combine multiple types of services into a single batch operation.

You can access the Batch Provisioning page through the Subscriber Dashboard (**Subscriber Dashboard > Manage Orders > Order Bulk Services**).

For detailed information on batch provisioning, see [Using Batch Provisioning, page 5-113](#).

Processing Orders

After you have submitted orders for subscribers, they are approved and then shipped. Depending on how your Provisioning Manager system has been configured, these steps may be automatic or may require processing by users.

There are four possible activities that can be assigned to users during the order processing stage. The activities are assigned based on the rules set for the Domain. For more information on rules, see [Business Rules, page 6-2](#).

The four activities are described in the following:



Note

A Provisioning Manager administrator can configure how these activities are assigned.

- **Approve orders**—Approves orders before provisioning can occur, and can also reject orders. This user must be assigned the Approval authorization role. This is controlled by the following rules:
 - IsAuthorizationRequiredForAddOrder
 - IsAuthorizationRequiredForChangeOrder
 - IsAuthorizationRequiredForCancelOrder
- **Assignment**—Assigns MAC address to a phone. This user must be assigned the Assignment role. This is controlled by the rule PhoneAssignmentDoneBy.
- **Shipping**—Ships the order. This user must be assigned the Shipping authorization role. This is controlled by the rule PhoneShippingDoneBy.
- **Receiving**—Done by the user who has the Receiver user role. Indicates that an ordered phone has been received. This is controlled by the rule PhoneReceiptDoneBy.

Approving Orders

If your administrator has enabled approval, orders must be approved. To approve orders, you must be assigned the Approval authorization role (see [Managing Authorization Roles, page 2-6](#)).

After an order is approved or rejected, an email is sent to the subscriber for whom the order was placed. The following business rules must be enabled for the email to be sent (see [Business Rules, page 6-2](#)):

- EmailSender
- MailHost
- OrderProvisionedEmailTemplate
- OrderRejectedEmailTemplate

The email is sent to the email account configured for the subscriber (see [Updating User Information, page 2-14](#)).



Note

If an order is rejected, the order status is set to Cancel in the subscriber record, and no provisioning is performed. If the order encounters a problem and the user chooses to abort the remainder of the order in the error handling workflow step, then the order status is set to Hold.

Step 1 Select **Provisioning > Manage Activities > My Activities**.

The My Activities page appears.

Step 2 Click the order that you want to process.

The Viewing Activity page appears.

Step 3 Click **Accept**.

The Viewing Activity page appears with the Add a Note field added.



Note You can also decline the order or delegate it to another user or group. If you delegate the activity, new user or group is assigned to the activity.

Step 4 Enter the **MAC Address** for the phone.

Step 5 Click **Step Complete**.

The selected order is approved and My Activities page appears.

Shipping Phones

Depending on how your Provisioning Manager system is configured, this step may not be required. If your administrator has enabled shipping, you must be assigned the Shipping authorization role to perform this procedure (see [Managing Authorization Roles, page 2-6](#)). Shipping phones consists of two parts: assigning MAC addresses and shipping.

Step 1 Select **Provisioning > Manage Activities > My Activities**.

The My Activities page appears.

Step 2 Click the order that you want to ship.

The Viewing Activity screen appears.

Step 3 Click **Accept**.

The Viewing Activity Phone Assignment page appears with the **MAC Address** field active.

Step 4 In the **MAC Address** field, type a hexadecimal value. Valid values are alphanumeric characters (A-Z, a-z, 0-9). The value must be 12 characters in length.



Note The MAC address is available on a sticker on the phone set, and on the phone setting display on the handset.

Step 5 After you have added the required information, click **Step Complete**.

The My Activities page appears.

Step 6 Click the Refresh icon (.

The order appears in the My Activities page.

Step 7 Click the same order.

The Viewing Activities Form page appears.

- Step 8** Click **Accept**.
The Viewing Activity Form page changes.
- Step 9** Click **Step Complete**. If you did not create the order, the order no longer appears on the My Activities page.
-

Receiving Phones

If your administrator has enabled receiving, you must be assigned the Receiving authorization role to perform this procedure (see [Managing Authorization Roles, page 2-6](#)).

- Step 1** Select **Provisioning > Manage Activities > My Activities**.
The My Activities page appears.
- Step 2** Click the order that you require.
The Viewing Activity Form page appears.
- Step 3** Click **Accept**.
The Viewing Activity page appears.
- Step 4** Click **Step Complete**.
The My Activities page appears with the order no longer in the list.
-

Canceling Products

To cancel products, you must submit a cancel order. When you cancel a product, all products associated with it are also canceled.



Note

For the Single Number Reach Service product, canceling the Enable Mobility product does not cancel the Remote Destination Profile or Remote Destination Profile Line products. Also, canceling the Remote Destination Profile product does not cancel the Enable Mobility product.

[Table 3-5](#) lists the individual products that are associated with an orderable product.

Table 3-5 Orderable Products

Product	Associated Products
Voicemail	Email, Unified Messaging.
Email	Voicemail, Unified Messaging. Note For Cisco Unity Connection, Voicemail remains even when Email is canceled.
Enable Presence	Enable Presence Client, Client User Settings.

Table 3-5 *Orderable Products (continued)*

Product	Associated Products
Enable Presence Client	Client User Settings.
Line	Email, Voicemail, Unified Messaging.
Phone	Line, Email, Voicemail, Unified Messaging. Note Cancelling a phone removes the associated directory numbers from the Cisco Unified Communications Manager.
Remote Destination Profile	Remote Destination Profile Line. Note Cancelling a Remote Destination Profile Line removes the associated directory numbers from the Cisco Unified Communications Manager.
Unified Messaging	None.

- Step 1** In the **Products** pane of the subscriber record (see [Accessing a Subscriber Record, page 3-2](#)), hover over the product that you want to cancel.
- The Actions list with the option buttons appears. It enables you to perform the actions for the selected product.
- Step 2** Click **Cancel**.
- The Order Cancel Form pane appears.
- Step 3** Click **Submit**.
- The Confirmation of Order message appears.
- Step 4** Click **Ok**.
- Step 5** Click **Done**.
- The canceled order appears in the View Orders pane with Completed status.



Note In the Products section, an information icon (i) appears next to the product to indicate that the product has an order running against it. When the order has finished processing, the information icon disappears.

After the order has been processed, the canceled products are no longer displayed in the Subscriber Record Details pane.

Work Order States

This section explains the states an order goes through after it is entered.

Following are the work order states:

- Initial
- Released
- Completed
- Hold

When an order is placed, a work order is created and is in the Initial state. When execution of the work flow begins, the order transitions to the Released state. After completion of the work flow, the order transitions to the Complete state if all steps were successful, or to the Hold state if any of the steps failed. For the order to change to the Hold state, you may need to acknowledge that the order failed, or the change may occur automatically, depending on the origin of the work order.

Work orders also have an extended status field. If the order is in execution, the extended status is Being Provisioned. If the order failed, the extended status is Recoverable Error or Unrecoverable Error. If the order is waiting for a user action, the extended status is set to a specific Wait status. Wait states are usually for assignment, often for shipping or receiving. Changes in the extended status can occur without the work order changing state.

When a work order fails, the transition behavior from Released to Hold depends on which of the following was used to submit the work order:

- Provisioning Manager NBIImediate transitions from Released to Hold.
- Provisioning Manager user interface remains in the Released state, waiting for you to take action on the order.
- Batch provisioning depends on the extended status. If the failure is a recoverable error, the order remains in the Released state, waiting for you to take action on it. If the failure is an unrecoverable error, the order transitions to Hold.