



# CHAPTER 10

## Configuring Customers

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**Revised July 3, 2012**

The following sections describe how to configure service providers and their customer settings:

- [Configuring Service Providers, page 10-1](#)
- [Configuring Regions, page 10-5](#)
- [Configuring Organizations, page 10-7](#)
- [Configuring Resource Groups, page 10-12](#)
- [Configuring Whitelist Groups, page 10-16](#)

## Configuring Service Providers

A service provider offers telepresence services to a set of enterprise customers (organizations) by using media resources that are provisioned in one or more regions in the service provider network. Optionally, a service provider can use custom service numbers and Integrated Voice Response (IVR) prompts.

The following sections describe how to configure service providers:

- [Adding Service Providers, page 10-1](#)
- [Editing Service Providers, page 10-2](#)
- [Deleting Service Providers, page 10-2](#)
- [Service Provider Fields, page 10-3](#)

## Adding Service Providers

### **Before You Begin**

Configure the help desk route and the corresponding SIP resource.

### **Procedure**

To add a new service provider, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Service Providers**.  
The Service Providers window is displayed.

- Step 2** From the toolbar, click **Add A New Service Provider**.
- Step 3** Enter the fields as appropriate.  
[Table 10-1](#) describes the fields.
- Step 4** To save your changes, click **Save**.
- 

## Editing Service Providers

### Procedure

To edit a service provider entry, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Service Providers**.  
The Service Providers window is displayed.
- Step 2** In the item table, click the applicable entry.  
A summary window for the service provider is displayed.
- Step 3** From the toolbar, click **Edit This Service Provider**.  
The Edit Service Provider window is displayed. Fields contain the currently-configured values.
- Step 4** Modify field entries as appropriate.  
[Table 10-1](#) describes the fields.
- Step 5** To save your changes, click **Save**.
- 

## Deleting Service Providers

### Before You Begin

To delete a service provider, you need to remove all of the configuration items that are dependencies of this service provider. The following items might depend on a specific service provider: organizations, service numbers, and resource groups. Other items (such as media resources) might indirectly depend on a specific service provider because they are associated with a resource group.



**Note** You cannot delete the service provider if a meeting has ever been scheduled for any customer of this service provider.

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### Procedure

To delete a service provider, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Service Providers**.  
The Service Providers window is displayed.
- Step 2** In the item table, check the check box next to the entry that you want to delete. You can delete multiple service providers at one time by checking the check box next to each entry that you want to delete.

**Step 3** Click **Delete**.

**Step 4** In the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



**Tip**

If you prefer to view the details of a service provider prior to deleting it, in the Service Provider window, you can click the applicable **Service Provider** to go to the Service Provider page. After verifying that you have chosen the correct service provider to delete, click **Delete This Service Provider**, and then in the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



**Note**

When a dependency exists, the delete operation aborts and an error message is displayed that describes the dependent configuration item.

## Service Provider Fields

**Table 10-1**      *Service Provider Field Descriptions*

Field	Description
Name	Text string identifying this service provider. See the <a href="#">“Common Field Properties”</a> section on page 2-4.
Description	Text string describing this service provider. See the <a href="#">“Common Field Properties”</a> section on page 2-4.
Help Desk Number	Digit string. The number to dial to reach the help desk for this service provider. The digit string must be numbers only, and cannot include any spaces, dashes, or characters.
Help Desk Routes	Click <b>Add Route</b> to view a drop-down list of available routes. Choose the appropriate route. You can click <b>Add Route</b> again to add an alternate route.  The route specifies the Session Initiation Protocol (SIP) resource for routing calls to the Help Desk.  For more information about routes, see the <a href="#">“Configuring Routes”</a> section on page 12-1.
Default Routes	Click <b>Add Default Route</b> to view a drop-down list of available routes. Choose the appropriate route. You can click <b>Add Default Route</b> again to add an alternate route.  For more information about routes, see the <a href="#">“Configuring Routes”</a> section on page 12-1.
Maximum IVR Queue Time	Maximum length of time in minutes that each guest participant is held in the queue waiting for a host to join. Applicable only when the host and guest roles are enabled for a Meet-Me or Rendezvous meeting. Default time is 10 minutes.

**Table 10-1**      **Service Provider Field Descriptions (continued)**

Field	Description
Meeting Extension Enabled By Default	<p>Check box. Check this box to configure the system to automatically extend Meet-Me meetings if resources are available near the end of the meeting. If sufficient resources are available, the meeting continues for a specified length of time. If the extension fails, the system displays the two minute end-of-meeting warning to participants, and ends the meeting after two minutes.</p> <p><b>Note</b> You can configure the Meeting Extension policy at the service provider level, organization level, or meeting level. The policy is hierarchical, so you can configure a meeting to inherit its settings from the meeting scheduler organization. In addition, you can configure an organization to inherit its settings from the service provider. If you want a meeting to inherit organization settings, you must enable the inheritance option at the meeting level. Similarly, if you want an organization to inherit service provider settings, you must enable the inheritance option at the organization level.</p>
Meeting Extension Period (minutes)	<p><i>Available only if Meeting Extension Enabled By Default is checked.</i></p> <p>Specify the length by which to automatically extend the meeting if resources are available when the meeting nears its configured duration.</p>
Max Meeting Extensions Allowed	<p><i>Available only if Meeting Extension Enabled By Default is checked.</i></p> <p>Specify the maximum number of times the meeting can be extended if resources are available.</p> <p><b>Note</b> If an administrator or service desk user extends the meeting duration while the meeting is active, the extension counter is reset, and the next extension after the change is counted as the first extension.</p>
Drop Participants on Host Exit in PIN-Enabled Meeting By Default	<p>Check box. Check this check box to configure the system to drop all participants when the host leaves the meeting. If the meeting has more than one host, participants will be dropped when all hosts have left the meeting. This condition is applied to meetings that are configured to inherit host settings from this service provider.</p> <p><b>Note</b> You can configure the host settings at the service provider level, organization level, or meeting level. The policy is hierarchical, so you can configure a Meet-Me or Rendezvous meeting to inherit its settings from the meeting scheduler organization. In addition, you can configure an organization to inherit its settings from the service provider. If you want a meeting to inherit organization settings, you must enable the inheritance option at the meeting level. Similarly, if you want an organization to inherit service provider settings, you must enable the inheritance option at the organization level.</p>

# Configuring Regions

A region represents a major geographic region in which a service provider operates. The region contains one or more resource clusters of Cisco TelePresence Multipoint Switches, Cisco TelePresence MSE 8000 Series, Cisco routers with IVR, and session border controllers (SBCs). A resource cluster connects a set of resources within one physical data center. This cluster of resources is also known as a point of presence (POP).

A service provider can configure multiple regions on a Cisco TelePresence Exchange System.

The following sections describe how to configure regions:

- [Adding Regions, page 10-5](#)
- [Editing Regions, page 10-5](#)
- [Deleting Regions, page 10-6](#)
- [Region Fields, page 10-7](#)

## Adding Regions

### Procedure

To add a new region, do the following procedure:

- 
- |               |  |
|---------------|--|
| <b>Step 1</b> | From the navigation pane, choose <b>Customers &gt; Regions</b> .<br>The Regions window is displayed.           |
| <b>Step 2</b> | From the toolbar, click <b>Add A New Region</b> .<br>An entry window is displayed.                             |
| <b>Step 3</b> | Enter the appropriate information to configure the region.<br><a href="#">Table 10-2</a> describes the fields. |
| <b>Step 4</b> | To save your changes, click <b>Save</b> .  |
- 

## Editing Regions

### Procedure

To edit a region entry, do the following procedure:

- 
- |               |   |
|---------------|---|
| <b>Step 1</b> | From the navigation pane, choose <b>Customers &gt; Regions</b> .<br>The Regions window is displayed.                                      |
| <b>Step 2</b> | In the item table, click the applicable entry.<br>The Region Details window is displayed.   |
| <b>Step 3</b> | From the toolbar, click <b>Edit This Region</b> .<br>The Edit Region window is displayed. Fields contain the currently-configured values. |
| <b>Step 4</b> | Modify field entries as appropriate.  |

Table 10-2 describes the fields.

**Step 5** To save your changes, click **Save**.

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## Deleting Regions

### Before You Begin

To delete a region, you need to remove all of the configuration items (such as resource groups) that are dependencies of this region. For example, remove the region that you want to delete from any associated resource groups.



**Note** You cannot delete the region if a meeting has ever been scheduled in this region.

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### Procedure

To delete a region, do the following procedure:

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- Step 1** From the navigation pane, choose **Customers > Regions**.  
The Regions window is displayed.
- Step 2** In the item table, check the check box next to the entry that you want to delete. You can delete multiple regions at one time by checking the check box next to each entry that you want to delete.
- Step 3** Click **Delete**.
- Step 4** In the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



**Tip** If you prefer to view the details of a region prior to deleting it, in the Regions window, you can click the applicable **Region** to go to the Region page. After verifying that you have chosen the correct region to delete, click **Delete This Region**, and then in the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.

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**Note** When a dependency exists, the delete operation aborts, and an error message is displayed that describes the dependent configuration item.

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## Region Fields

**Table 10-2**      *Region Field Descriptions*

Field	Description
Name	Text string identifying this region. See the “Common Field Properties” section on page 2-4.
Description	Text string describing this region. See the “Common Field Properties” section on page 2-4.

## Configuring Organizations

An organization is an enterprise customer to which a service provider provides services. An organization controls one or more telepresence endpoints that might be active within a meeting.

The following sections describe how to configure organizations:

- [Adding Organizations, page 10-7](#)
- [Editing Organizations, page 10-8](#)
- [Deleting Organizations, page 10-8](#)
- [Organization Fields, page 10-9](#)

## Adding Organizations

### Before You Begin

Configure the service provider that you want to associate with the organization.

When this organization employs the direct-dial feature, configure the direct dial routes and the corresponding SIP resource.

### Procedure

To add a new organization, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Organizations**.  
The Organizations window is displayed.
- Step 2** From the toolbar, click **Add A New Organization**.
- Step 3** Enter the settings as appropriate.  
[Table 10-3](#) describes the fields.
- Step 4** To save your changes, click **Save**.
-

## Editing Organizations

### Procedure

To edit an organization, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Organizations**.  
The Organizations window is displayed.
- Step 2** In the item table, click the applicable entry.  
The Organization Details window is displayed.
- Step 3** Click **Edit This Organization**.  
The Edit Organization window is displayed. Fields contain the currently-configured values.
- Step 4** Modify field entries as appropriate.  
[Table 10-3](#) describes the fields.
- Step 5** To save your changes, click **Save**.
- 

## Deleting Organizations

### Procedure

To delete an organization, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Organizations**.  
The Organizations window is displayed.
- Step 2** In the item table, check the check box next to the entry that you want to delete. You can delete multiple organizations at one time by checking the check box next to each entry that you want to delete.
- Step 3** Click **Delete**.
- Step 4** In the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



### Tip

If you prefer to view the details of an organization prior to deleting it, in the Organizations window, you can click the applicable **Organization** to go to the Organizations page. After verifying that you have chosen the correct organization to delete, click **Delete This Organization**, and then in the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



### Note

When a dependency exists, the delete operation aborts, and an error message is displayed that describes the dependent configuration item.

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## Organization Fields

**Table 10-3**      **Organization Field Descriptions**

Field	Description
Name	Text string identifying this organization. See the <a href="#">“Common Field Properties”</a> section on page 2-4.
Description	Text string describing this organization. See the <a href="#">“Common Field Properties”</a> section on page 2-4.
Service Provider	Drop-down list of the available service providers.
Max Ports	Maximum number of ports available to this organization for all concurrent telepresence sessions.
Minimize Capacity	Check the check box to reserve the smallest amount of capacity necessary for an endpoint to attend a meeting.  When the check box is not checked, the maximum capacity per endpoint is reserved.
Dial Patterns	Button and drop-down list.  Click <b>Add A Dial Pattern</b> to display a drop-down list of available dial pattern names.  To associate a dial pattern with the organization, choose a dial pattern from the drop-down list.  For information on how to configure dial patterns, see the <a href="#">“Configuring Dial Patterns”</a> section on page 12-4 in the <a href="#">“Configuring Call Routing”</a> chapter.
SIP Routes	Button and drop-down list.  Click <b>Add A Route</b> to display a drop-down list of available SIP routes.  For information on how to configure SIP routes, see the <a href="#">“Configuring Routes”</a> section on page 12-1 in the <a href="#">“Configuring Call Routing”</a> chapter.  <b>Note</b> To route calls, the Cisco TelePresence Exchange System system chooses the first active route configured in this field. If you configure more than one active route, direct dial calls may fail because the first active route may not be the correct route for the call. In this case, the system generates an alarm and does not try to reroute the call. To avoid this type of call failure, we recommend that you make sure the destination endpoint is reachable over all of the configured routes.

**Table 10-3**      **Organization Field Descriptions (continued)**

Field	Description
Meeting Extension	<p>Radio buttons provide a choice of the following conditions. The condition is applied to meetings that are configured to inherit Meeting Extension settings from this organization.</p> <ul style="list-style-type: none"> <li>Disabled By Default—The system does not automatically extend Meet-Me meetings.</li> <li>Enabled By Default—The system automatically extends Meet-Me meetings if resources are available near the end of the meeting. If sufficient resources are available, the meeting continues for a specified length of time. If the extension fails, the system displays the two minute end-of-meeting warning to participants, and ends the meeting after two minutes.</li> <li>Inherit from Service Provider—Use the Meeting Extension settings configured for the service provider.</li> </ul> <p><b>Note</b> You can configure the Meeting Extension policy at the service provider level, organization level, or meeting level. The policy is hierarchical, so you can configure a meeting to inherit its settings from the meeting scheduler organization. In addition, you can configure an organization to inherit its settings from the service provider. If you want a meeting to inherit organization settings, you must enable the inheritance option at the meeting level. Similarly, if you want an organization to inherit service provider settings, you must enable the inheritance option at the organization level.</p>
Meeting Extension Period (minutes)	<p><i>Available only if Meeting Extension is set to Enabled By Default.</i></p> <p>Specify the length by which to automatically extend the meeting if resources are available when the meeting nears its configured duration.</p>
Max Meeting Extensions Allowed	<p><i>Available only if Meeting Extension is set to Enabled By Default.</i></p> <p>Specify the maximum number of times the meeting can be extended if resources are available.</p> <p><b>Note</b> If an administrator or service desk user extends the meeting duration while the meeting is active, the extension counter is reset, and the next extension after the change is counted as the first extension.</p>

**Table 10-3**      **Organization Field Descriptions (continued)**

Field	Description
Drop Participants on Host Exit	<p>Radio buttons provide a choice of the following conditions. The condition is applied to meetings that are configured to inherit host settings from this organization.</p> <ul style="list-style-type: none"> <li>• Disabled By Default—The system does not drop any participants when the host leaves the meeting.</li> <li>• Enabled By Default—The system drops all participants from the meeting when the host leaves. If the meeting has more than one host, participants will be dropped when all hosts have left the meeting.</li> <li>• Inherit from Service Provider—Use the host settings configured for the service provider.</li> </ul> <p><b>Note</b> You can configure the host settings at the service provider level, organization level, or meeting level. The policy is hierarchical, so you can configure a Meet-Me or Rendezvous meeting to inherit its settings from the meeting scheduler organization. In addition, you can configure an organization to inherit its settings from the service provider. If you want a meeting to inherit organization settings, you must enable the inheritance option at the meeting level. Similarly, if you want an organization to inherit service provider settings, you must enable the inheritance option at the organization level.</p>
Allow Inter SP Outgoing Calls	<p>Check box. Check the check box to allow outgoing calls from this organization to other service providers. (This includes calls for Meet-Me and Rendezvous meetings as well as direct-dial calls, because the Cisco TelePresence Exchange System cannot determine the type of an outgoing call.)</p> <p>For Meet-Me and Rendezvous meetings, the policy is enforced between the scheduler organization and the endpoint organization. For direct-dial calls, the policy is enforced between the two endpoints.</p> <p><b>Note</b> If you provide hosted endpoint service and support unprovisioned endpoints, the service provider Cisco Unified Communications Manager must be configured such that each organization uses a single Carrier Information Code (CIC) in order for calls from unprovisioned endpoints to be mapped to the correct organization.</p>
Allow Inter SP Incoming Direct Calls	<p>Check box. Check the check box to allow incoming direct-dial calls to this organization from other service providers.</p> <p><b>Note</b> For unprovisioned endpoints, the Cisco TelePresence Exchange System detects the organization of the endpoint by using the Carrier Identification Code (CIC) code in an incoming INVITE message. The CIC code may be inserted by the Cisco Aggregation Services Router that serves as the Session Border Controller, based on the IP address of the Cisco Unified Communications Manager used by the organization.</p>

**Table 10-3**      **Organization Field Descriptions (continued)**

Field	Description
Allow Inter SP Incoming Meet-Me Calls	<p>Check box. Check the check box to allow incoming Meet-Me and Rendezvous meeting calls to this organization from other service providers.</p> <p><b>Note</b> For unprovisioned endpoints, the Cisco TelePresence Exchange System detects the organization of the endpoint by using the Carrier Identification Code (CIC) code in an incoming INVITE message. The CIC code may be inserted by the Cisco Aggregation Services Router that serves as the Session Border Controller, based on the IP address of the Cisco Unified Communications Manager used by the organization.</p>
Enforce Whitelisting	<p>Check box. Check the check box to enforce restrictions on direct-dial calls between this organization and other organizations under the same service provider (also known as intra-SP direct calls).</p> <p>See the <a href="#">“Configuring Whitelist Groups” section on page 10-16</a> for information on setting up whitelist groups that determine which organizations under the same service provider can dial each other directly. (Meet-Me and Rendezvous meeting calls are always allowed between organizations that belong to the same service provider.)</p>

## Configuring Resource Groups

Resource groups provide greater flexibility and control of how media bridge resources are allocated for Meet-Me and Rendezvous meetings. When configuring a resource group, you choose a specific service provider and region and one or more reservation types to be associated with the group. After the resource group has been created, you configure specific media bridge resources to be associated with the group. Based on the set of requirements configured for a meeting (such as service provider, region, reservation type, and endpoint requirements), the system selects the best-fit resource group and associated media bridge resources to use for the meeting.

For information on how to configure reservation types, see the [“Configuring Reservation Types” section on page 13-46](#).

The following sections describe how to configure resource groups:

- [Adding Resource Groups, page 10-12](#)
- [Editing Resource Groups, page 10-13](#)
- [Viewing Resource Group Details, page 10-13](#)
- [Deleting Resource Groups, page 10-14](#)
- [Resource Group Fields, page 10-15](#)

## Adding Resource Groups

### Before You Begin

Configure the service provider, region, and reservation types that you want to associate with the resource group.

**Procedure**

To add a new resource group, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Resource Groups**.  
The Resource Groups window is displayed.
- Step 2** From the toolbar, click **Add A New Resource Group**.
- Step 3** Enter the fields as appropriate.  
[Table 10-4](#) describes the fields.
- Step 4** To save your changes, click **Save**.
- 

## Editing Resource Groups

**Procedure**

To edit a resource group, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Resource Groups**.  
The Resource Groups window is displayed.
- Step 2** In the item table, click the applicable entry.  
A summary window for the resource group is displayed.
- Step 3** From the toolbar, click **Edit This Resource Group**.  
The Edit Resource Group window is displayed. Fields contain the currently-configured values.
- Step 4** Modify field entries as appropriate.  
[Table 10-4](#) describes the fields.
- Step 5** To save your changes, click **Save**.
- 

## Viewing Resource Group Details

**Procedure**

To view a summary of the reservation types or media resources assigned to a resource group, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Resource Groups**.  
The Resource Groups window is displayed.
- Step 2** In the item table, click the applicable entry.  
A summary window for the resource group is displayed.

- Step 3** To view a summary of the reservation types, Cisco TelePresence Multipoint Switch (CTMS) resources, Cisco TelePresence MCU MSE 8510 (MSE 8510) resources, or Cisco TelePresence Server MSE 8710 (TPS) Resources assigned to this resource group, click **Reservation Types**, **CTMS Resources**, **MSE 8510 Resources**, or **TPS Resources**.

A summary window is displayed.



**Note** In the summary window for the reservation types, the Total Ports column represents the total ports available for meeting reservations across all media resources (CTMS, MSE 8510, and TPS resources assigned to large or regular meetings) within this resource group.

## Deleting Resource Groups

### Before You Begin

To delete a resource group, you need to remove all of the configuration items (such as media resources) that are dependencies of this resource group. For example, remove the resource group that you want to delete from any associated media resources.

### Procedure

To delete a resource group, do the following procedure:

- Step 1** From the navigation pane, choose **Customers > Resource Groups**.  
The Resource Groups window is displayed.
- Step 2** In the item table, check the check box next to the entry that you want to delete. You can delete multiple resource groups at one time by checking the check box next to each entry that you want to delete.
- Step 3** Click **Delete**.
- Step 4** In the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



**Tip** If you prefer to view the details of a resource group prior to deleting it, in the Resource Group window, you can click the applicable resource group to go to the Resource Group page. After verifying that you have chosen the correct resource group to delete, click **Delete This Resource Group** in the toolbar, and then in the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



**Note** When a dependency exists, the delete operation aborts and an error message is displayed that describes the dependent configuration item.

## Resource Group Fields

**Table 10-4**      *Resource Group Field Descriptions*

Field	Description
Name	Text string identifying this resource group. See the <a href="#">“Common Field Properties”</a> section on page 2-4.
Description	Text string describing this resource group. See the <a href="#">“Common Field Properties”</a> section on page 2-4.
Region	Drop-down list of the available regions.
Service Provider	Drop-down list of the available service providers.
Overflow	Calculated value (percentage):  $100\% - (\text{Sum of the Dedication Percentages for all specified reservation type names within the resource group}) = \text{Overflow}$ <p>The overflow percentage represents the percentage of the total media bridge resources within the resource group that is not assigned to a specific reservation type. When a resource group runs out of dedicated resources, the system will use the overflow to allocate a resource for a guaranteed meeting only, not a best-effort meeting. The system restricts the use of overflow to only the time when a resource is actually being allocated for a meeting. The system will not use the overflow at the time when you create a meeting.</p> <p><b>Note</b> Cisco recommends an overflow value of 20%.</p>
Reservation Type Name	Click <b>Add Reservation Type</b> to view a drop-down list of available reservation types. Choose the appropriate reservation type name.  You can click <b>Add Reservation Type</b> again to add more reservation types.

**Table 10-4**      **Resource Group Field Descriptions (continued)**

Field	Description
Dedication Percentage	<p>Percentage of the total media bridge resources within a resource group that is reserved for the specified reservation type name.</p> <p>The dedication percentage can be distributed over two or more reservation types. A warning message will be displayed if the sum of the dedication percentages for all specified reservation types within the resource group exceeds 100%. If this sum is less than 100%, the remaining percentage is assigned as overflow resources.</p> <p><b>Note</b> Cisco recommends that you avoid decreasing dedication percentage values after any resources contained within the resource group have been reserved for meetings. Decreasing the dedication percentage may cause these meetings to fail.</p>
Booking Percentage	<p>Percentage of the dedicated media bridge resources within a resource group that you can use to create meetings for the specified reservation type name. If you try to set the booking percentage less than 100%, a warning message will be displayed.</p> <p>For guaranteed meetings, the system sets the booking percentage to 100% to ensure that enough media bridge resources are reserved for the meeting.</p> <p>For best-effort meetings, set the booking percentage greater than 100% to allow for overbooking of the media bridge resources. For example, a booking percentage of 150% allows you to reserve 50% more media bridge resources than the dedicated amount. Overbooking assumes that all Meet-Me and Rendezvous meetings associated with a specific reservation type will not be active at the same time.</p>

## Configuring Whitelist Groups

Whitelist groups enable you to define policies that control direct-dialed calls between organizations associated with a single service provider (also known as intra-service provider calls). The policies apply to both provisioned and unprovisioned endpoints.

A whitelist group can contain more than one organization, and an organization can belong to more than one whitelist group. If two organizations are members of the same whitelist group, direct-dial calls between the organizations are allowed. If the organizations are not members of the same whitelist group, direct-dial calls between the organizations are rejected. The Cisco TelePresence Exchange System call detail records (CDRs) identify calls that are rejected due to a whitelist policy restriction.



### Note

In order for whitelist groups to be applied between two organizations, the Enforce Whitelisting check box must be checked on at least one of the organizations.

The following sections describe how to configure whitelists:

- [Adding Whitelist Groups, page 10-17](#)
- [Editing Whitelist Groups, page 10-17](#)
- [Deleting Whitelist Groups, page 10-18](#)



- [Whitelist Group Fields, page 10-18](#)

## Adding Whitelist Groups

### Before You Begin

Configure the organizations that you want to associate with the whitelist group. Check the Enforce Whitelisting check box for each organization for which you want to restrict outgoing and incoming intra-service provider calls.



#### Note

If you provide hosted endpoint service and support unprovisioned endpoints, the service provider Cisco Unified Communications Manager must be configured such that each organization uses a single Carrier Information Code (CIC) in order for calls from unprovisioned endpoints to be mapped to the correct organization.

### Procedure

To add a new whitelist, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Whitelist Groups**.  
The Whitelist Groups window is displayed.
- Step 2** From the toolbar, click **Add A New Whitelist Group**.
- Step 3** Enter the settings as appropriate.  
[Table 10-5](#) describes the fields.
- Step 4** To save your changes, click **Save**.
- 

## Editing Whitelist Groups

### Procedure

To edit a whitelist group, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Whitelist Groups**.  
The Whitelist Groups window is displayed.
- Step 2** In the item table, click the applicable entry.  
The Whitelist Group Details window is displayed.
- Step 3** Click **Edit This Whitelist Group**.  
The Edit Whitelist Group window is displayed. Fields contain the currently-configured values.
- Step 4** Modify field entries as appropriate.  
[Table 10-5](#) describes the fields.
- Step 5** To save your changes, click **Save**.
-

## Deleting Whitelist Groups

### Procedure

To delete a whitelist group, do the following procedure:

- 
- Step 1** From the navigation pane, choose **Customers > Whitelist Groups**.  
The Whitelist Groups window is displayed.
- Step 2** In the item table, check the check box next to the entry that you want to delete. You can delete multiple whitelist groups at one time by checking the check box next to each entry that you want to delete.
- Step 3** Click **Delete**.
- Step 4** In the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.



### Tip

If you prefer to view the details of a whitelist group prior to deleting it, in the Whitelist Groups window, you can click the applicable **Whitelist Group** to go to the Whitelist Group page. After verifying that you have chosen the correct group to delete, click **Delete This Whitelist Group**, and then in the Deletion Confirmation dialog box, click **Delete** to confirm the deletion.

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## Whitelist Group Fields

**Table 10-5**      *Whitelist Group Field Descriptions*

Field	Description
Name	Text string identifying this whitelist group. See the <a href="#">“Common Field Properties” section on page 2-4</a> .
Service Provider	Drop-down list of the available service providers. Choose the service provider to which this whitelist group applies. For more information about service providers, see the <a href="#">“Configuring Service Providers” section on page 10-1</a> .
Organizations	Organizations that belong to the same whitelist group can dial each other directly. (Meet-Me and Rendezvous meeting calls are always allowed between organizations that belong to the same service provider.) Direct-dial calls are blocked between organizations that do not appear together in any whitelist group, as long as the Enforce Whitelisting check box is checked for either organization. Click <b>Add An Organization</b> to display a drop-down list of organizations that are associated with the selected service provider, and choose an organization to add to the whitelist group. For more information about organizations, see the <a href="#">“Configuring Organizations” section on page 10-7</a> .