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CHAPTER 1

Preparation

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• Obtain Application, page 3
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Concepts

Prime Collaboration introduces the following concepts:

User
A user with services provisioned like phone, voicemail, and Extension Mobility.

Domain
A grouping of users to be managed by an administrator. Each Domain can have one or more administrators. Though provisioning can have multiple Domains, most BE6K deployments have a single domain as part of a Standard Prime installation. Multiple domains with different domain administrators per domain are available with Prime Collaboration Advanced (available for purchase) that can be used for complex Business Edition 6000 deployments.

User Roles
Control which products and services that an IT administrator can order for a user. User roles can function across service areas.

Service Area
A logical partition that defines the class of services for the services ordered in that service area. At the time of provisioning, a Service Area choses the call processor (Unified Communications Manager), message processor (Cisco Unity Connection) and presence processor (IM and Presence Service) to provision the user's services on. User roles and Directory Number Blocks (DNB) are associated with a service area. A Service Area roughly corresponds to a site or physical location.

Example 1
A single site customer deployment with user role type executives, managers, employees, contractors and common area (such as lobby or a conference room) phones.
The following table provides a typical example of how these concepts can be defined.

<table>
<thead>
<tr>
<th>User Role</th>
<th>Phones</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>88xx, DX80</td>
<td>Phone, Line, VM, Presence, Voicemail, Extension Mobility, SNR</td>
</tr>
<tr>
<td>Managers</td>
<td>88xx, DX70</td>
<td>Phone, Line, VM, Presence, Voicemail to Email, Extension Mobility</td>
</tr>
<tr>
<td>Employees</td>
<td>78xx</td>
<td>Phone, Line, VM, Presence, Voicemail to Email</td>
</tr>
<tr>
<td>Contractors</td>
<td>7821</td>
<td>Phone, Line, VM, Presence, Voicemail to Email</td>
</tr>
<tr>
<td>Conference Room</td>
<td>7832</td>
<td>Phone, Line</td>
</tr>
<tr>
<td>Lobby</td>
<td>78xx</td>
<td>Phone, Line</td>
</tr>
</tbody>
</table>

**Domain**

**Location 1: Company1**

<table>
<thead>
<tr>
<th>Service Area</th>
<th>User Role</th>
<th>DNB</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Jose</td>
<td>Lobby</td>
<td>408555XXXX-1310</td>
</tr>
<tr>
<td>RTP</td>
<td>Lobby, Employee, Contractor, Conference Room</td>
<td>919555XXXX-1300</td>
</tr>
<tr>
<td>Richardson</td>
<td>Lobby, Executive, Manager</td>
<td>972555XXXX-1030</td>
</tr>
</tbody>
</table>

**Example 2**

A multi site customer deployment with user role type executives, managers, employees, contractors, conference room and common area (such as lobby) phones.

This example is a complex deployment with multiple administrators: one administrator who manages the east coast, one who manages the west coast along with multiple sites under each domain.

The following table provides a typical example of how these concepts can be defined.

<table>
<thead>
<tr>
<th>User Role</th>
<th>Phones</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>88xx, DX80</td>
<td>Phone, Line, VM, Presence, Email, Extension Mobility, SNR</td>
</tr>
<tr>
<td>Managers</td>
<td>88xx, DX70</td>
<td>Phone, Line, VM, Presence, Email, Extension Mobility</td>
</tr>
<tr>
<td>Employees</td>
<td>78xx</td>
<td>Phone, Line, VM, Presence, Email</td>
</tr>
<tr>
<td>Contractors</td>
<td>7821</td>
<td>Phone, Line, VM, Presence</td>
</tr>
<tr>
<td>Conference Room</td>
<td>7832</td>
<td>Phone, Line</td>
</tr>
<tr>
<td>Domain</td>
<td>Location 1: Company2, West Coast. IT administrator: Bob</td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Service Area</td>
<td>User Role</td>
<td>DNB</td>
</tr>
<tr>
<td>San Francisco</td>
<td>Lobby</td>
<td>415555XXXX-1310</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>Employee, Contractor, Conference Room</td>
<td>310555XXXX-1300</td>
</tr>
<tr>
<td>Seattle</td>
<td>Executive, Manager</td>
<td>206555XXXX-1030</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Domain</th>
<th>Location 2: Company2, East Coast. IT administrator: Bill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Area</td>
<td>User Role</td>
</tr>
<tr>
<td>New York</td>
<td>Lobby</td>
</tr>
<tr>
<td>Boston</td>
<td>Employee, Conference Room</td>
</tr>
<tr>
<td>Miami</td>
<td>Executive, Manager</td>
</tr>
</tbody>
</table>

**Obtain Application**

Prime Collaboration Provisioning is preloaded on the Cisco BE 6000 server datastore. You can also download the provisioning application and the license from the Product Upgrade Tool (PUT). You must have a valid contract to place an order through the PUT.

**Virtual Machine Requirements**

<table>
<thead>
<tr>
<th>Endpoints Managed in Prime Collaboration</th>
<th>Number of CPUs</th>
<th>CPU Reservation</th>
<th>RAM</th>
<th>Memory Reservation</th>
<th>NIC</th>
<th>Disk Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 3000 endpoints (small)</td>
<td>1</td>
<td>2 GHz</td>
<td>2 GB</td>
<td>2 GB</td>
<td>1 Gbps</td>
<td>90 GB</td>
</tr>
</tbody>
</table>
Virtual Machine Requirements
Installation

• Virtual Appliance Installation, page 5
• Activate Services, page 5
• Log In To Application, page 6

Virtual Appliance Installation

To deploy and install the Prime Collaboration Provisioning virtual machine, see the Installation Guide for Cisco Business Edition 6000:


The complete installation time for the Prime Collaboration Provisioning application is approximately 30 minutes.

Activate Services

For Cisco Prime Collaboration Provisioning to interact with Cisco Unified Communications Manager and IM and Presence Service servers, you must activate the Cisco AXL Web Service on both servers.

Procedure

Step 1
Perform the following actions to enable services on Cisco Unified Communications Manager:

a) Log on to Cisco Unified Communications Manager web interface.
b) Go to Navigation > Cisco Unified Serviceability and click Go.
c) Click Tools > Service Activation.
d) Enable the following services, as per the site requirements:

• Cisco CallManager
• Cisco CTIManager
• Cisco Extension Mobility
e) Click Save.

**Step 2** Perform the following actions to enable services on IM and Presence Service:

a) Log on to IM and Presence web interface.
b) At the top right corner, go to Navigation > Cisco Unified IM and Presence Serviceability and click Go.
c) Select Tools > Service Activation.
d) Enable the following services, as per the site requirements:
   - Cisco SIP Proxy
   - Cisco Presence Engine
   - Cisco Sync Agent
   - Cisco AXL Web Services
   - Cisco XCP Connection Manager
   - Cisco XCP Directory Service
   - Cisco XCP Authentication Service

e) Click Save.

---

**Log In To Application**

**Procedure**

**Step 1** Open a browser session on your PC.

**Step 2** Enter http://<Prime Collaboration IP Address>.
The Prime Collaboration login page appears.

**Step 3** Log in as a globaladmin, using the same the credentials that you specified during initial configuration.
Infrastructure Configuration

- Infrastructure Provisioning, page 7
- Infrastructure Provisioning States, page 7
- Add Device, page 8
- Infrastructure and User Synchronization, page 9
- Configuring LDAP Server Synchronization, page 11
- Deleting Devices Provisioning, page 15
- Enabling Cisco Jabber Services, page 15

Infrastructure Provisioning

The Infrastructure Configuration page lets you browse the infrastructure configuration settings of a Call Processor and Unified Message Processor. Through this page, you can add, edit, or delete the configuration settings.

Note

The Infrastructure Configuration feature applies to Call Processors that are based on Cisco Unified Communications Manager devices and Unified Message Processors that are based on only Cisco Unity Connection.

Infrastructure Provisioning States

An infrastructure configuration request goes through when you perform infrastructure configuration activities. Following are the infrastructure configuration process states:

- Uncommitted Add—Configuration created locally but does not exist on the device.
- Add in Progress—A pending configuration is in progress and being configured through an order. No changes are allowed in this state.
Add Failed—An operation on this object failed.

Add Scheduled—A pending configured object is scheduled in one of the tasks waiting to be executed. No changes are allowed in this state.

Uncommitted Update—An object that exists on the device has been modified locally but has not been submitted to the device.

Update in progress—Modify operation is in progress as part of an order. No changes are allowed in this state.

Updated Failed—Modify operation failed.

Update Scheduled—A pending configuration to change an object on the device is scheduled as part of a task. No changes are allowed in this state.

Uncommitted Delete—An object that exists on the device has been marked for deletion. The request to delete the object has not been made to the device.

Delete in progress—Delete operation is in progress as part of an order. No changes are allowed in this state.

Delete Failed—Delete operation failed.

Delete Scheduled—A pending configuration to delete an object from the device is scheduled as part of a task. No changes are allowed in this state.

**Add Device**

You must add devices to Prime Collaboration Provisioning to provision services for users.

Note the following points while you are adding a device to Prime Collaboration Provisioning:

- Before you add devices to Prime Collaboration Provisioning, you must ensure that Cisco Unified Communications Manager and Cisco Unity Connection devices are configured correctly.

- There are some significant differences in how a Generic IOS Router is set up in Prime Collaboration Provisioning in comparison to a Cisco Unified Communications Manager or a Cisco Unity device. Most notably, Generic IOS Routers are not synchronized and they are not associated to a Domain or a Service Area.

To add devices to Prime Collaboration Provisioning:

**Procedure**

**Step 1** Choose Device Setup.

**Step 2** In the Device Setup page, click Add to add devices to Prime Collaboration Provisioning.

**Step 3** In the Add Device window, select the required application from the drop-down list and enter the necessary information such as Name, IP address, and so on.

**Note** For the device name, valid values are space, alphanumeric characters (A-Z, a-z, 0-9), underscore (_), hyphen (-), period (.), and at sign (@).

**Step 4** Click Save.
Devices are added to Prime Collaboration Provisioning. You will see two status messages appearing at the bottom of the page. One on whether the addition of the device was successful or not, and another on the Test Connection stating whether the connectivity test was successful or not.

**Note** While adding Cisco Unity Connection 10.0 and above versions, you must configure both Unity Connection administrator and Operating System (OS) administrator credentials.

To view the details of the device, hover over Quick View. You can start synchronization, view synchronization logs, test the connectivity of the device, and cross launch Cisco Unified CM Serviceability and Cisco Unity Connection Serviceability from Quick View.

To update or change the device details, click **Edit**.

To import devices from Prime Collaboration Assurance, click **Import**. The Device Setup page lists the devices in Prime Collaboration Assurance (devices that are in managed state only appear in the list). Select the device you want to import and click **Import Selected Devices**.

You can add Prime License Manager and Deployment Manager from the Infrastructure Setup page. After you add these devices, Prime License Manager and Deployment Manager links are displayed under the Administration menu. Click on the Prime License Manager or Deployment Manager link to cross launch the Prime License Manager or Deployment Manager login page.

**Note** You can add only one Prime License Manager and Deployment Manager device to Prime Collaboration Provisioning. If you try to add another Prime License Manager or Deployment Manager device, an error message will be displayed.

### Working with Cisco Unity Connection Device

For Cisco Unity Connection clustering and failover support, be aware of the following:

- When adding a Cisco Unity Connection that includes a Cisco Unity Connection cluster server pair, add only the publisher server of the pair.

- If the primary Cisco Unity Connection fails over to a secondary Cisco Unity Connection, you can change the IP address to the secondary device, and Prime Collaboration Provisioning will communicate with the secondary device before failback occurs.

If a network has more than one location, individually add all of the locations for either the Cisco Unity Connection server or Cisco Unity Connection cluster to Prime Collaboration Provisioning.

If Cisco Unity is used in the configuration, configure the Cisco Unified Communications Manager voicemail ports.

### Infrastructure and User Synchronization

There are three types of synchronizations in Prime Collaboration Provisioning:

- **Infrastructure Synchronization**—Discovers all the objects in the device that Prime Collaboration Provisioning uses and that are not specific to individual users. The infrastructure data are the configurations that are required to exist on the device before Prime Collaboration Provisioning can configure user services.
Infrastructure and User Synchronization

- User Synchronization—Discovers all objects related to individual users.
- Domain Synchronization—Puts existing users discovered during user synchronization into the Domain.

Use the infrastructure synchronization to synchronize the infrastructure data in the devices. The infrastructure synchronization retrieves device information that is used across multiple users.

To synchronize infrastructure configuration products and users:

**Procedure**

**Step 1** Choose **Device Setup**.

**Step 2** Hover over Quick View of the device for which you want to run synchronization.

**Step 3** Do one of the following:

- To initiate Infrastructure Synchronization, click **Start Infrastructure Synchronization**
- To initiate User Synchronization, click **Start User Synchronization**

The progress of synchronization is displayed in the Quick View under Synchronization Status.

**Step 4** Click **View Detailed Logs**.

A synchronization log is created, listing the objects that could not be assigned. It also shows a warning message if an unknown element is received from the device. This log is replaced each time a synchronization occurs.

**Note** If you see the warning message “Skipped unexpected element,” you can ignore it. The message indicates that Provisioning does not support the item that was sent back from the device.

If the status of an infrastructure or user synchronization does not change for an extended period of time, verify that the Nice service is running in PCP via CLI (logged in as Root user). Run the following command to check if the Nice service is running:

```
pss -aef | grep nice
```

If the Nice service is stopped, restart the service, and then restart the infrastructure or user synchronization.

If you wish to manage the Analog Phones, you have to update the ipt.properties file. In this file, update the dfc.ipt.cisco.callmanager.analog_phone_support to Y and then do the user synchronization. You must restart Provisioning after the user synchronization is completed.

You use the infrastructure synchronization to synchronize the unified messaging infrastructure data in Provisioning with the Unified Message Processor:

- SubscriberTemplate—A Subscriber Template in Cisco Unity, Cisco Unity Connection, and the e-mail message processor.
- UnifiedMessagingFeatureSpecification—A class of service in Cisco Unity, Cisco Unity Connection, and the e-mail message processor.

You use the user synchronization to synchronize the unified messaging user data in Provisioning with the Unified Message Processor:

- UMInfo—A user in Cisco Unity, Cisco Unity Connection, and Cisco Unity Express in conjunction with their user’s voicemail and e-mail information.
• VoiceMailInfo—A user in Cisco Unity, Cisco Unity Connection, and Cisco Unity Express in conjunction with UMInfo and EmailInfo.

• EmailInfo—A user in Cisco Unity and Cisco Unity Connection in conjunction with VoiceMailInfo and UMInfo.

Note
IM and Presence 9.0 and higher versions are integrated with Cisco Unified Communications Manager. Due to this, user synchronization will be disabled for IM and Presence 9.0 and higher versions. User information will be directly synchronized from Cisco Unified Communications Manager.

For IM and Presence, use the Infrastructure synchronization to synchronize the User Settings Infrastructure data with Provisioning.

Note
After upgrading your Cisco Unified Communications Manager, you must perform User Synchronization manually to synchronize change notification settings.

Configuring LDAP Server Synchronization

Perform the following steps to configure LDAP Server Synchronization from Prime Collaboration Provisioning:

Procedure

Step 1 Choose Provisioning Setup.

Step 2 In the Domains pane, select a Domain and click Edit.

Step 3 In the Domain Configuration page, select the Directory Source you have configured on the Device Setup page.

Step 4 In the settings pane, you configure the information Prime Collaboration Provisioning gets from the servers. These settings are used to synchronize and authenticate the users from the Directory/ACS server to Prime Collaboration.

Step 5 For all the changes on the LDAP server to be synchronized to Prime Collaboration Provisioning, select the following:

• Mode—Authentication and Synchronization

• Update existing user details—All fields

• Action when LDAP users deleted—Delete user only

• User Search base—Enter a user search base:

  + Unlike Cisco Unified CM, Prime Collaboration Provisioning supports only one user search base for a domain. However, you can create multiple domains for multiple user search.

  + When adding an LDAP user in Cisco Unified CM through Provisioning UI, the user search base in Provisioning domain and CUCM must be the same.
• Filter query for synchronization—Synchronize all users. To do this, click the Edit icon under Domain LDAP Filters sub-pane and choose the necessary detail. Click Save

**Step 6** Click Save.

**Scheduling and Performing LDAP Synchronization** To schedule synchronization, set the Synchronization Interval and Synchronization Start Date in the LDAP Settings pane.

After saving the Domain Configuration page, select the Domain and hover over Quick view. Select Start LDAP Synchronization.

After an LDAP synchronization, a report is created. The report lists the operations that could not be performed during synchronization. Operation failure can be due to incorrect data entered into the LDAP server or incorrect user settings.

You cannot delete an LDAP server which is associated to a Domain. Remove the LDAP server from the Domain to delete it.

The following table provides details about the LDAP Configuration fields.

**Table 1: LDAP Settings Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mode</td>
<td>• Authentication Only—The LDAP server is used only for user authentication.</td>
</tr>
<tr>
<td></td>
<td>• Authentication and Synchronization—The LDAP server is used both to provide user authentication and to obtain user information.</td>
</tr>
<tr>
<td>Update Existing User Details</td>
<td>• All fields—If any user information is changed in the LDAP server, the same information is updated in Provisioning.</td>
</tr>
<tr>
<td></td>
<td>• Do not update—User information in Provisioning is not updated when there are changes to the user information in the LDAP server.</td>
</tr>
</tbody>
</table>
### Action for stale LDAP users

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note</strong></td>
<td>A stale LDAP user is a user account that no longer matches the user search base and/or the Domain LDAP filters.</td>
</tr>
<tr>
<td></td>
<td>- Do not make changes in Provisioning—The corresponding user in Prime Collaboration Provisioning is not deleted.</td>
</tr>
<tr>
<td></td>
<td>- Delete user, but keep services in Provisioning and CUCM—The corresponding user is deleted in Prime Collaboration Provisioning and Cisco Unified Communications Manager.</td>
</tr>
<tr>
<td></td>
<td>- Delete user and all services from Provisioning and CUCM—The corresponding users and their services are deleted in the device and in Prime Collaboration Provisioning. The user will be deleted in Prime Collaboration Provisioning and Cisco Unified Communications Manager. If the user is not an LDAP user in Cisco Unified Communications Manager, the user will not be deleted in Cisco Unified Communications Manager.</td>
</tr>
</tbody>
</table>

### User Search Base

The user search base of a domain. Provisioning searches for users under the base under Active Directory. For example, CN=Users, DC=Cisco, DC=com.

This search base is used only for LDAP synchronization.

If using Microsoft Active Directory server, you can use the command dsquery user to list the complete user search base.

| **Note** | Prime Collaboration Provisioning supports only one user search base per domain. |

### Field Mapping

Lists which user fields in Cisco Unified Communications Manager correspond to certain LDAP user fields. The only fields you can configure in Prime Collaboration Provisioning are the following:

- Contact phone number—Select either telephone number or ipPhone.
- Contact email—Select either mail or sAMAccountName.
- User ID—User ID can be mapped to the following fields in LDAP server:
  - employeeNumber
  - mail
  - sAMAccountName
  - telephoneNumber
  - userPrincipalName
- Directory URI—Select mail, msRTCSIP-primaryuseraddress, or none.
Infrastructure Configuration

Synchronize all users—All users are synchronized.

Simple query—You can configure a query by using a combination of the following fields:
- User ID
- Department
- Contact phone number
- Contact email
- You can use an asterisk (*) for a partial string search.

Advanced query—You can enter any LDAP query; for example:
(&(sAMAccountName=johndoe)(department=Cisco*)(mail=john@cisco.com)).

Using "IN" filter in Automatic Service Provisioning, you can configure multiple queries. For example:

- To fetch multiple Directory Numbers, separate the search string using semi-colon. For example: 4930;5930.
- To fetch multiple combinations of Directory Numbers, separate the search string using an asterisk and semi-colon. For example: 40105*;40116*;40127*;.
- For contact phone numbers, you can use:
  * '+' symbol in search criteria such as +44*
  * '/+' symbol in search criteria such as /+44*
- For contact phone numbers, using "IN" filter with multiple values in search criteria with comma as delimiter, you can use '/+' symbol such as /+44*, /+55*./+33*.
- Similarly, using "IN" filter you can synchronize multiple users from LDAP server with comma as delimiter. For example: User1, User2, User3.
- Wildcard character (*) is allowed in the filter, it can be used either in beginning or in the end of the field.

Likewise, you can use '=' and '!=' operators to configure queries. For example, if you provide a single userID:
- The '=' operator synchronizes only that user from LDAP server.
- The '!=' operator does not synchronize that user alone from LDAP server. All other users are synchronized.

Using * with userID such as User123* fetches all the users whose id starts with User123.
Deleting Devices Provisioning

To completely remove a device from Prime Collaboration Provisioning, you must delete it through the Infrastructure Setup page. Note the following points when you are deleting a device:

- No active released orders, including unrecoverable or recoverable errors.
- No active batch projects.
- No synchronizations in progress.

If these conditions are not met, a message appears on the page when you attempt to delete a device. Avoid performing any activities until the deletion is complete.

- Before deleting a AAA server, ensure that it is not assigned to a Domain.
- There must not be any pending orders on the device.
- Before deleting a device, ensure that you perform a domain synchronization to avoid any stale entries into the system.

To delete devices:

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Put Prime Collaboration Provisioning in maintenance mode.</td>
</tr>
<tr>
<td>Step 2</td>
<td>Choose Device Setup.</td>
</tr>
<tr>
<td>Step 3</td>
<td>In the Device Setup page, select the device you want to delete and click Delete.</td>
</tr>
<tr>
<td>Step 4</td>
<td>In the Confirmation dialog box, click OK to confirm deletion.</td>
</tr>
</tbody>
</table>

Enabling Cisco Jabber Services

You can enable Cisco Jabber services for devices in Prime Collaboration Provisioning. Cisco Jabber services allow you to interact with instant messaging and presence.

>Note

Cisco Jabber service is available for Cisco Unified Communications Manager 9.1.1 and above version, and Cisco Unified Presence only.

To enable Cisco Jabber service for a call processor:
**Procedure**

**Step 1**  Choose **Device Setup**.

**Step 2**  Hover over Quick View of the device and click the UC Services tab and click **Enable**

**Step 3**  Enter the SIP Profile, Service Profile, Softkey template fields and Service Parameter information, and click **Apply**. You can click **View Order** to see the order details in the User Record page. The date when the Jabber Service is enabled is displayed.

**Note**  Once you enable Cisco Jabber service for a call processor, you cannot edit or disable it.
Adding a Domain

Domains are groupings of users. For each grouping, one or more system users can be authorized to manage services for users within that Domain. In addition, rules or policies may be set on a Domain; those rules and policies will apply to services for users in that Domain. Common policies can also be applied on operations within a Domain.

A user can manage more than one Domain (if the user is assigned the proper authorization role). All of the user’s services are provisioned in the Service Area that you specify while adding the user (to add a user, choose User Provisioning).

After creating a Domain, you can add Service Areas and User roles that have access to your new Domain. You can also create service templates and assign them to a Service Area and User Role. A Service Template can be associated to several such combinations of Service Areas and User Roles.

To create a domain:

Procedure

1. Choose Provisioning Setup.
2. Click Add, to add new domains in the Domains page.
3. Enter the necessary fields such as Call Processors, Message Processors, synchronization rules, LDAP settings and so on, and click Save. You need to provide a Domain Name for the Name field. Valid values are space, alphanumeric characters (A-Z, a-z, 0-9), and the following special characters: _ . / ; = ? @ ^ \ { } [ ] | ~.
To edit an existing domain, expand the list of Domains in the left pane, and click a particular Domain to edit. You can also click All Domains and then select a domain from the table and click Edit.

### Adding Service Areas

When configuring a Service Area, you can do the following:

- Map the Service Area to the corresponding Call Processor objects by specifying its Call Processors and related objects (for a Cisco Unified Communications Manager, some examples are route partition, and device pool), Unified Message Processor, and Unified Presence Processor.

- Specify the user types for the Service Area (only users within a Service Area can order products from it).
  
  The Employee user role is the default based on the Domain rule DefaultUserType.

- Create directory number blocks for the Service Area users.

- Unified Presence Processor settings will list the Presence processor if the selected Call Processor has associated Presence processors.

**Note**

After a Service Area is assigned to a Domain, it cannot be moved to a different Domain. Further, after a Call Processor, Unified Message Processor, or Unified Presence Processor is assigned to a Service Area, it cannot be changed.

To add a Service Area:

**Procedure**

**Step 1** Choose Provisioning Setup.

**Step 2** In the All Domains pane, expand a specific domain, and click Service Areas.

**Step 3** Select the Domain for which you want to create a Service Area.

**Step 4** Click Add.

**Step 5** In the Service Area Configuration page, enter the necessary fields and click Save. The table below describes the necessary fields.

To edit an existing Service Area, expand the list of Service Areas in the left pane, and click a particular Service Area to edit. You can also select a Service Area from the table and click Edit.
### Table 2: Service Area Configuration Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Device Config</td>
<td>Configuration of common device settings for the Service Area. The following settings are controlled by Common Device Configuration:</td>
</tr>
<tr>
<td></td>
<td>• Softkey Template</td>
</tr>
<tr>
<td></td>
<td>• User Hold MOH Audio Source</td>
</tr>
<tr>
<td></td>
<td>• Network Hold MOH Audio Source</td>
</tr>
<tr>
<td></td>
<td>• User Locale</td>
</tr>
<tr>
<td></td>
<td>• MLPP Indication</td>
</tr>
<tr>
<td></td>
<td>• MLPP Preemption</td>
</tr>
<tr>
<td></td>
<td>• MLPP Domain</td>
</tr>
<tr>
<td>Location</td>
<td>Location to be assigned to a device. When adding a service area, this field is optional provided you have added one of the call processors associated with the domain through the Getting Started wizard.</td>
</tr>
<tr>
<td>Partition</td>
<td>Route partition for the Service Area. This is the same as a partition in Cisco Unified Communications Manager.</td>
</tr>
<tr>
<td>Device Pool</td>
<td>Device pool for the Service Area.</td>
</tr>
<tr>
<td>Voice Gateway References</td>
<td>Voice gateway references for the Service Area.</td>
</tr>
<tr>
<td>Email Processors</td>
<td>Available only for Cisco Unity Connection and integrated with an external Exchange Server for IMAP client support.</td>
</tr>
<tr>
<td></td>
<td>To configure an external Exchange Server for IMAP in Cisco Unity Connection, on the Cisco Unity Connection system, go to System Settings &gt; External Services &gt; Add New, and fill in the required fields.</td>
</tr>
<tr>
<td>Subscriber Template without TTS Enabled</td>
<td>Subscriber Template to be used to disable unified messaging for a user in the Unified Message Processor.</td>
</tr>
<tr>
<td>Subscriber CoS with TTS Enabled</td>
<td>Class of Service Template to be used to enable unified messaging for a user in the Unified Message Processor. It is used in conjunction with the Subscriber Template.</td>
</tr>
<tr>
<td></td>
<td>To enable TTS for a CoS, you must configure the following in Cisco Unity Connection:</td>
</tr>
<tr>
<td></td>
<td>• Select Allow Users to Access Voice Mail Using an IMAP Client field (under Licensed Features).</td>
</tr>
<tr>
<td></td>
<td>• Select Allow Access to Advanced Features field and Allow Access to Exchange Email by Using Text to Speech (TTS) (under Licensed Features).</td>
</tr>
</tbody>
</table>
### Adding a Directory Number Block

Numbers within a directory number block are relative to the Cisco Unified Communications Manager on which they are being created. Prime Collaboration Provisioning handles directory numbers the same way as they are handled by Cisco Unified Communications Manager.

To add a new directory number block:

**Procedure**

1. Choose **Provisioning Setup**.
2. Expand Domain and Service Area in the left selector pane, and select the required Service Area.
3. In the Directory Number Block(s) field, click the **Add Row**.
4. Complete the fields as required and click **Save**.

**Note**

The Minimum Length field indicates the minimum number of digits that a directory number can contain before the prefix is added. This is used by the system to pad numbers with zeros. For example, if prefix = 408, first number = 0, last number = 100, and minimum length = 4, then the range of the directory number block will be 4080000 through 4080100.

- To Edit, select the Directory Number Block, and click **Edit**. Make the necessary changes and click **Save**.
- To discard the changes, click **Cancel**.
- To delete a Directory Number Block, click **Delete**.

---

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscriber CoS without TTS Enabled</td>
<td>Class of Service Template to be used to disable unified messaging for a user in the Unified Message Processor. It is used in conjunction with the Subscriber Template.</td>
</tr>
<tr>
<td>Directory Number Blocks</td>
<td>Directory number block assigned for that Service Area. See Adding a Directory Number Block, on page 20.</td>
</tr>
</tbody>
</table>

• Common Device Config, Location and Partition fields apply only to Cisco Unified Communications Manager.

• Subscriber CoS with TTS Enabled, and Subscriber CoS without TTS Enabled fields apply only to Unity and Unity Connection.
Adding User Roles

Prime Collaboration Provisioning is a user-centric provisioning product and requires human users and open space locations to be defined with a userID. This provides a convenient way to identify users, and devices in shared spaces. User roles can be used for several purposes. They provide policy enforcement, controlling which products and services are allowed to be ordered for different types of users such as contractors, executives or sales persons. They are also used in a filtering process that controls what choices are presented to order administrators at order time. The User Role setup also determines what services are ordered and which service templates are applied for a given user type during the Automatic Service Provisioning process. An administrator may create many User Roles to define different levels of services.

The default user roles are:

- **Employee**—Default role assigned to new users.

  [Note] The default role is configured in the Domain Rules.

  The Employee user role should be configured to match the typical setup of employees in your organization. If you do not configure the employee user role to meet your needs, you may not see all the desired options during the service ordering process.

- **Executive**—An additional role with more service settings.

- **Pseudo**—Used to provision endpoints that cannot have an associated user in Cisco Unified CM. Pseudo users are not registered with the Call Manager and cannot be renamed or removed.

You must first add a user (see Adding Users, on page 25), then assign the user the Pseudo user role.

A pseudo user is authorized to manage phone and directory number inventory.

A pseudo user can have one or more endpoints associated with it. For example, conference rooms can be pseudo users with one or more endpoints, whereas a building can be a pseudo user with hundreds of endpoints associated with it.

These user roles exist in each Domain in Cisco Prime Collaboration Provisioning. Each set of user roles maybe customized in each Domain by adding, removing, or changing these predefined user roles.

To add a user role:

**Procedure**

1. **Step 1** Choose **Provisioning Setup**.
2. **Step 2** In the **All Domains** pane, expand a specific domain and click **User Roles**.
3. **Step 3** In the User Roles for a specific domain page, click **Add**.
4. **Step 4** In the **User Role Configuration** page, enter the required details for user role name, type, domain, lines, services, and service bundles, and click **Save**.

   [Note] For the user role name, valid values are alphanumeric (a-z, A-Z, 0-9), period (.), hyphen (-), at sign (@), and underscore (_), but it cannot include quotes ("), angle brackets (<>), backslash (\), ampersand (&), and percent (%).

5. **Step 5** Click **Save** to continue.
• To change a user role configuration, select a user role, click **Edit** in the User Role for a specific domain, and save the modifications.

• To delete a user role, select a user role, click **Delete** in the User Role for a specific domain, and click **OK**.

• The user role quick view displays the domain, number of endpoints, services and service bundles selected for that user role.

### Associating User Roles with Services

A user whose role is associated with specific endpoints can order them. You can create orders for endpoints and services, individual services, or you can order bundled services. See **Table 3: Provisioning Services**, on page 29.

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Choose <strong>Provisioning Setup</strong>.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>In the <strong>All Domains</strong> pane, expand a specific domain, click <strong>User Roles</strong>.</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>In the User Roles for the selected domain pane, click <strong>Add</strong>.</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>Specify a name for the user role and associate it with the necessary Endpoints, Lines, Services and Service Bundles. You can check or uncheck as many Endpoints, Services and Service Bundles as needed. <strong>Note</strong> To modify the user role configuration, select <strong>User Roles</strong>. In User Roles for a specific domain, select a user role and click <strong>Edit</strong>.</td>
</tr>
<tr>
<td><strong>Step 5</strong></td>
<td>Click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>

### Synchronizing Domains

Domain synchronization aggregates data from synchronizations. Devices are not accessed during a Domain synchronization.

During a Domain synchronization, Prime Collaboration Provisioning does the following:

• Synchronizes users and their services with the Provisioning inventory, creates new users, and updates the records.

• Synchronizes user accounts and updates Prime Collaboration Provisioning so that users can log in (logins are created only if the self-care rule is enabled; see **Business Rule Descriptions** section in *Cisco Prime Collaboration Provisioning Guide - Standard and Advanced, 11.x*).

• Associates services to Service Areas.

• Synchronizes the assigned voicemail directory numbers in Unity Connection or Unity Express to those in Cisco Unified Communications Manager.
To fully synchronize a Domain, you must perform an infrastructure and user synchronization for each device in the Domain, and then perform a Domain Synchronization.

Perform the following steps, to synchronize domains:

**Before You Begin**

Domain synchronization cannot be started without configuring synchronization rules.

**Procedure**

**Step 1** Choose **Provisioning Setup**.

**Step 2** From the Domains table, hover over quick view of the Domain you want to synchronize, and click **Start Domain Synchronization**.

A popup appears saying that the Domain Synchronization has started successfully. The Last Synchronization field in Quick View displays the status of synchronization along with the start and completion time.

---

**Adding an Infrastructure Configuration Instance**

To add an Infrastructure Configuration Instance:

**Procedure**

**Step 1** Choose **Infrastructure Setup > Infrastructure Configuration**. All available devices are listed in the left pane.

**Step 2** Expand each device to view the infrastructure product of that device.

**Step 3** Click the desired infrastructure product to cross launch or launch it natively:

- When you cross-launch, the **Find and List** page of the device appears. Click **Add New**, enter the necessary information, and click **Save**.

- Some of the infrastructure products (versions earlier than 10.0) are launched natively. Perform the following steps to add a product instance and configure it within Provisioning:
  1. Click **Add** and enter the necessary information in the **Infrastructure Configuration - configure Product Instance** page. An asterisk next to a field indicates a required field.
  2. Click **Apply** or **Save as Draft**.

Apply sends the configuration immediately to the device. **Save as Draft** saves the configuration locally only. At a later time, the service can be pushed to the device either by clicking Apply or by using infrastructure configuration scheduling.

Also, when you choose Save as Draft, the provisioning state of the object becomes Uncommitted Add. The operational status is inactive, meaning the object has not been pushed to the device.

**Note** Clicking Apply may cause the devices to restart, and end calls in progress unexpectedly.
To copy an Infrastructure Configuration instance a native launch, click Copy. In the Infrastructure Configuration - Configure Product Instance page, click the Draft Configuration tab and enter the necessary information. An asterisk next to a field indicates a required field. Applied Configuration tab shows the already configured instance. Click Apply or Save as Draft. The infrastructure configuration instance is saved with a "copy of" prefix.

To delete an Infrastructure Configuration instance for a native launch, you can do one of the following:

- To immediately delete the configured instance from the device, click Delete.
- If you want to push the order at a later time, click Schedule Delete.
- If your configured instance is still saved locally, click Delete Draft.

The provisioning state of the object becomes Uncommitted Delete. The operational status is active.

Delete Draft does not make that instance unavailable for selection in other infrastructure products or user services. For example, if a route partition is marked for deletion, it is still available for selection in a Line or Phone product, as well as Calling Search Space.

To edit an Infrastructure Configuration Instance for a native launch, click the instance for which you want to make changes. In the Draft configuration tab, make the desired changes. An asterisk next to a field indicates a required field. Enter the required information.

You can click Apply or Save as Draft to save your changes.

---

**Note**

To clear the value of a setting that has a numeric value in Cisco Unified Communications Manager, you must enter a zero for the value. If you just clear the value, the setting does not get unset in Cisco Unified Communications Manager.
User and User Service Configuration

- Adding Users, page 25
- Ordering Service for a User, page 27
- Processing Orders, page 41

Adding Users

To add users:

**Procedure**

**Step 1**  Choose **User Provisioning**.

**Step 2**  In the **User Provisioning** page, click **Add**.

**Step 3**  In the **Add User** window, enter the User ID, Domain, and Name. Also, enter values for other fields if required.

To launch quick view for a particular domain or user role, while selecting the domain and user role, click the drop-down menu and rest the mouse on quick view icon.

**Step 4**  In the **Save and Begin Provisioning** drop-down:

- To save the details and launch the Service Provisioning page for the user, click **Save and Begin Provisioning**.
- To save the details and add another user, click **Save and Add Another**.
- To save the details and close the Add User window, click **Save and Close**.
- To save the details and view services if you choose to Auto-Provision Parameters based on the user role, click **Save and View Services**.
Note

- If you are removing a user who has services associated, you are notified to disassociate the services before removing the user.

- To add a user, the LDAP integration field in Infrastructure Setup page must be None.

- The user ID must be unique and case sensitive. Valid values are alphanumeric characters (A-Z, a-z, 0-9), underscore (_), hyphen (-), period (.), apostrophe ('), space ( ), and at sign (@).

- To create a username for Call Processors, the combination of characters for First Name and Last Name cannot exceed 30 characters. If this limit is exceeded when you provision, the Call Processor sends an error message.

- Pseudo role allows you to provision endpoints without an associated user in the Call Processor.

- While selecting roles for user, the default or Employee user role should be configured to match the typical setup of employees in your organization. If you do not configure the default or Employee user role to meet your needs, you may not see all the desired options in the employee user record.

- The DefaultUserType rule controls which user role is set as the default. Cisco Prime Collaboration Provisioning comes with the Employee user role configured as the default user role. If you update the default user role name for a domain in Cisco Prime Collaboration Provisioning, ensure that you update the DefaultUserType rule with the new default role name for that domain.

- Changing the username does not also change the endpoint or line description field for the user (if an endpoint or line was ordered for the previous username).

- For Cisco Unified Communications Manager, the combination of characters for First Name and Last Name cannot exceed 30 characters.

- If a user does not have any associated services, you are prompted to confirm removal of the user.

- When a service is disconnected from a user, actually the service is not deleted from the device (processor); it is only disconnected from the Provisioning.

- When a subsequent Domain synchronization occurs, depending on the synchronization rules, the user could be created again, and the services could be associated with the user.

Cross-launching Related Links in CUCM and Unity Connection from User Provisioning

Prime Collaboration Provisioning allows an administrator to cross launch Manager configuration and Assistant configuration for a selected user. As an administrator, you can cross-launch Related Links Pages for Users, Endpoints and Lines from Prime Collaboration Provisioning. When you cross-launch the Manager configuration and Assistant configuration, you can access the UI and perform any operation directly on the server. Using Single Sign-On, you can cross launch to a few of the applications. See Single Sign-On for Prime Collaboration Provisioning section in Cisco Prime Collaboration Provisioning Guide - Standard and Advanced, 11.x

If the Voicemail service is provisioned for the user, the cross-launch links from the Voicemail service: Notification Devices, Alternate Extensions, Greetings, Private Lists.

Rest your mouse pointer over User Services in the Service Details page (User Provisioning select a user), and click the quick view icon to view the Manager configuration and Assistant configuration cross launch link.
Ordering Service for a User

Creating orders for all services follow the same basic procedure.

A user might not have access to all services. Cisco Prime Collaboration Provisioning implements a form of policy enforcement to allow users to get endpoints and services appropriate for the role assigned. The list of services that appear at order time 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 system configuration.

Service dependencies:

- Line requires an existing endpoint.
- Voicemail and Email require an existing Line.
- Unified Messaging requires Email.
- Extension Mobility Line requires Extension Mobility Access.

To order a service for a user:

Procedure

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Choose User Provisioning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>In the User Provisioning page, click on a specific user.</td>
</tr>
<tr>
<td>Step 3</td>
<td>In the Service Details page, click New Service.</td>
</tr>
<tr>
<td>Step 4</td>
<td>Select a Service Area from the drop down list. Rest your mouse pointer over the quick view icon for information on a Service Area in the drop-down list.</td>
</tr>
<tr>
<td>Step 5</td>
<td>Click Continue. All available services which you can provision are displayed, see Table 3: Provisioning Services, on page 29.</td>
</tr>
<tr>
<td>Step 6</td>
<td>Select the service that you want to provision and click Continue.</td>
</tr>
<tr>
<td>Note</td>
<td>If endpoints are not displayed in the list for a user, you must associate the user role of a specific user to endpoints. If you are trying to add an endpoint and endpoints are not shown, it is because the user role does not allow endpoints or endpoints cannot be provisioned for the user within this service area. To learn how to associate a user role to an endpoint, see Adding User Roles, on page 21.</td>
</tr>
<tr>
<td>Step 7</td>
<td>In the Service Provisioning page, follow the Order Entry wizard, entering the required information for the service. (For details of required fields, see Table 4: Order Entry Fields, on page 36.)</td>
</tr>
<tr>
<td></td>
<td>When placing orders, note the following:</td>
</tr>
<tr>
<td></td>
<td>- The &lt;Service Type&gt; Information and Advanced Order Configuration panes provide specifications for the selected service.</td>
</tr>
</tbody>
</table>
Users with Advanced Order or Administrator authorization role can access the Advanced Order Configuration pane. However, an order can be completed or an endpoint can be provisioned without using Advanced Order configuration.

**Note** To clear the value of a provisioning attribute that has a numeric value in the Cisco Unified Communications Manager, you must enter zero as the value. If you do not specify any value and leave the field blank, you cannot clear the value of the provisioning attribute.

**Step 8** Click **Continue** to create the order.

**Step 9** Click **Confirm**, and then click **OK**. You can view the order number in the Service Details page. Verify order status by reviewing the Provisioning History pane.

You can use the global search option (search available in the right corner of the homepage) to search User ID and Last Name, MAC address and Directory Number.

- For User ID and Last Name search, alphanumeric characters (A-Z, a-z, 0-9), hyphens (-), underscores (_), dots (.), at signs (@), space and apostrophe are allowed (for example, AASJKUser006, AAS*, AA*, *SJKUser006, 3242#@!#####&@!*@!(3), AANewRDUser00*)

- For MAC Address search, alphanumeric characters (A-Z, a-z, 0-9), dash (-), period (.), and underscore (_) are allowed (for example, 0024C44C3C6, 0024*, *24)

- For Directory Number search, alphanumeric characters, period, and underscore are not allowed. Special characters such as +, ?, (,), and - are allowed in the directory number (for example, \+0000057, /\+0000*, \+*, *0000*, *57)

**Note**

- When you search for phones using the MAC address in the global search option, use the format xxxxxxxxxxx.

- A minimum of three characters in the search string is recommended to enable faster retrieval of search results.

To view the provisioning attributes for an ordered service, in the Service Details page, hover over the desired service, and then click **View** in the Actions list.

To add user notes to an ordered service, in the Service Details page, hover over the desired service, and then click **User Notes** in the Actions list.

To create a template from an existing service, click **Create Template** from Quick View. Enter the necessary details and click **Create Template**. A template will be created for the service with all its values.

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 Cisco Prime Collaboration Provisioning 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.

To configure a batch project, choose Advanced Provisioning > Batch Provisioning.

**Note** While provisioning a service, if selecting the Security Profile Provisioning Attribute results in an error, uncheck the Protected Device option for the order to complete successfully. Ensure that the Cluster and Device Security Modes are configured appropriately for the Cisco Unified Communications Manager cluster. For information on the security parameters in Cisco Unified Communications Manager, see Cluster and Security Modes, in the Cisco Unified Communications Manager Security Guide.
The following services will not be displayed for ordering until you associate the service to a user role.

Table 3: Provisioning Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
</table>
| Enable Mobility Support          | Enables Mobility for the selected user on the selected Call Processor. When ordering using default parameters, the following provisioning attributes are used:  
• Enable Mobility: True  
• Enable Mobile Voice Access: True  
• Max Desk Pickup Wait Time: 1000 ms  
• Remote Destination Limit: 4  
• Primary User Device  
This service is available only for Cisco Unified Communications Manager 9.x and later. |
| Enable Presence                  | Enables presence messaging updates by enabling the user's Presence Server license on a Call Processor. Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
| Enable Presence Client           | Enables the use of Cisco Unified Personal Communicator by enabling the user's Unified Personal Communicator license on a Call Processor. This is a bundle of Enable Presence Client and Client User Settings.  
This service is available only when you order Enable Presence.  
Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
| Enhanced Mobility Service        | Includes an Extension Mobility device profile, line, and voicemail for the selected user on the selected Call Processor.  
This bundle enables you to create standard provisioning services such as Extension Mobility, line, and voicemail in a single order. Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
| Enhanced Mobility Service with Unified Messaging | Includes an Extension Mobility device profile, line, voicemail, e-mail and unified messaging for the selected user on the selected Call Processor.  
Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
### Client User Settings
Enables Unified Personal Communicator user settings on a Unified Presence Processor. Client User Settings can be ordered only through bundle services such as Enable Client Service or Presence Service. Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.)

### Enable SoftPhone Support
- Enables use of a personal computer along with a physical endpoint (both ring at the same time), or a CTI port (a virtual phone defined on Cisco Unified Communications Manager).
- Will not appear in your service list if all of your available Call Processors already support SoftPhone. A list of valid Service Areas appears for specific Call Processors that are available to you. Although you enable this service based on Service Area, you can do so only once per Unified CM, even if more Service Areas are associated with it.
- When ordering, specify the server name or IP address of the user's computer in the Associated PC field.
- Applies only to a Cisco SoftPhone that uses a CTI port. Cisco IP Communicator does not use CTI ports to communicate with Cisco Unified Communications Manager, but acts as a physical endpoint with a MAC address. To order Cisco IP Communicator, you must order a physical endpoint and select Cisco IP Communicator as the endpoint type.
- Required for Cisco Jabber for Desktop to function as a desktop phone on a Cisco Jabber for Desktop client.

### Enhanced Endpoint Service
Includes an endpoint, line, and voicemail. The line is automatically associated with the endpoint that you ordered, and the voicemail is automatically associated with the line.
### Extension Mobility Access or Access with Line
Enables users to log into a specific endpoint type and have their endpoint device profile applied to it. This service is available either by itself, or bundled with a line.

Extension Mobility is available for ordering only if the optional extension mobility details are entered for a Call Processor when it is added to Cisco Prime Collaboration Provisioning.

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.

While ordering Extension Mobility Access for iPhones, order may fail if you use the default values for the following attributes:

- **DND Option**
- **DND Incoming Call Alert (Set-only Attribute)**
- **MLPP Indication**

For ordering Extension Mobility Access for iPhones, it is recommended that you create a service template with the following values for these attributes and apply the template while creating an order:

- **DND Option**—Call Reject
- **DND Incoming Call Alert**—Disable
- **MLPP Indication**—Off

### Extension Mobility Line
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.

### Cisco Jabber Service
Allows you to order Jabber service. Cisco Jabber service is orderable for Cisco Jabber for Tablet, Cisco Jabber for Desktop, Cisco Jabber for Android, Cisco Jabber for BlackBerry, and Cisco Jabber for iPhone. You must have an user role to view the Cisco Jabber Service in the order page.

When you provision Cisco Jabber as a first service for a user, user service configuration will not be a part of ordering wizard. If you want to modify user service configuration (**Enable User for Unified CM IM and Presence**), after provisioning jabber service to the user, go to **Service Details** page of the user, hover over the user services and click **Change** in the actions list.
| **Line** | Line service can be provisioned for a user with or without an endpoint. No shipping, assignment, receipt, or tracking (for returns) steps are required for provisioning a new Line service.  
The Upgrade designation next to the Line service indicates that a line is being ordered for an existing endpoint.  
For Call Processors, the display for a line cannot exceed 30 characters. Ensure 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. Using service templates, you can create keyword based automatic settings, with automatic truncation, that will prevent the character count from exceeding 30 characters.  
End User Association is automatically provisioned for Line services. For more details, see Adding User Roles, on page 21. |
| **Line on a Shared Endpoint** | Order a line on a shared endpoint when users require their own separate lines on the same physical endpoint. When this service is provisioned, the endpoint and all lines on it are displayed in each of the user record.  
The Shared icon appears next to the endpoint that is shared in the user record. |
| **Messaging Service** | Consists of an endpoint, line, voicemail, and e-mail. |
**Endpoint**

Order an endpoint that does not have a line or a directory number associated with it. Must not be associated with a line or a directory number.  
For SIP phones, select Yes to enable Extension Mobility for the following Unified IP Phones only: 7911, 7941, 7942, 7945, 7961, 7962, 7965, 7970, 7971, 7975.

**Guidelines for endpoint names:**

- **Unified Personal Communicator:**
  - Must match the username. (UPC is automatically added to the endpoint name after the order is provisioned.)
  - Must contain uppercase letters (A-Z) or numbers (0-9). Other characters are ignored.
  - May contain 12 additional characters after UPC.  
    For example, if the username is john_jackson, enter JOHNJACKSON.

- **Cisco Jabber for iPhone:**
  - Must contain the prefix TCT. (If you do not enter it, Cisco Prime Collaboration Provisioning automatically adds it.)
  - Must contain no more than 15 characters, including the prefix.
  - Must consist only of alphanumeric characters (A-Z, a-z, 0-9). Cisco Prime Collaboration Provisioning converts lowercase letters to uppercase before pushing the information to the endpoint.

- **Cisco Jabber for Android:**
  - The device name must begin with BOT and all characters must be in uppercase.  
    For example, if you create a BOT device for a user, whose username is tadams, you should enter BOTTADAMS.
  - Must contain no more than 15 characters, including the prefix.
  - Username can contain alphanumeric (A-Z, 0-9), underscore (_), hyphen (-), or period (.).

- **CTI port-Must contain 1 to 15 characters: alphanumeric (A-Z, a-z, 0-9), underscore (_), hyphen (-), or period (.)**

- **IP Communicator-Must contain 1 to 15 characters: alphanumeric (A-Z, a-z, 0-9), underscore (_), hyphen (-), or period (.)**

**Client Services Framework-Must contain 1 to 15 alphanumeric characters (A-Z, a-z, 0-9).**

**Note** Endpoint attributes are displayed based on the supported features for the selected endpoint type.
| **Endpoint Service** | Adds a new endpoint and a line.  
While ordering Endpoint service, the maximum number of lines is dependent on the phone button template for the phone type (if a phone button template is available).  
**Note** Endpoint attributes are displayed based on the supported features for the selected endpoint type. |
| --- | --- |
| **Remote Destination Profile** | Order Remote Destination Profile for users, configure their attributes, and allow selection/configuration of a Remote Destination Profile Line, which supports Single Number Reach (SNR).  
Remote Destination Profile does not support Change Owner and Replace operations.  
Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
| **Remote Destination Profile Line** | Order unlimited Remote Destination Profile Lines in a single Remote Destination Profile. Remote Destination Profile Line supports Auto-assign or Chosen types of Lines.  
Remote Destination Profile Line can be shared among users 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.  
In Remote Destination Profile, you can order Voice Mail or Extension Mobility as they are ordered in the Line services.  
You can order Remote Destination Profile with any user role but not as a pseudo user.  
Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
| **Remote Destination Profile Service** | Enable the Remote Destination Profile service for all Service Areas to shares this Call Processor and also add a Remote Destination Profile Line.  
You can order Remote Destination Profile with any user role but not as a pseudo user.  
Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.) |
Configure an Enable Mobility, Remote Destination Profile, and Remote Destination Profile Line.

For mobility to work on a desktop phone, you must do the following:

- 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. Cisco Prime Collaboration Provisioning does not support softkey customization. You must create a customized template in Cisco Unified Communications Manager.

Once the service is added to the user role, this service will become available for order. (See Adding User Roles, on page 21.)

**Note** If you have ordered Enable Mobility Support service for a user, you cannot order Single Number Reach service for that user (Single Number Reach service option will not be displayed for that user in the User Provisioning page).

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Number Reach</td>
<td>Configure an Enable Mobility, Remote Destination Profile, and Remote</td>
</tr>
<tr>
<td>Service</td>
<td>Destination Profile Line. For mobility to work on a desktop phone, you must</td>
</tr>
<tr>
<td></td>
<td>do the following:</td>
</tr>
<tr>
<td></td>
<td>- Configure the Line on the phone and Remote Destination Profile to be</td>
</tr>
<tr>
<td></td>
<td>shared.</td>
</tr>
<tr>
<td></td>
<td>- Configure the User ID that is used for the Remote Destination as an</td>
</tr>
<tr>
<td></td>
<td>Owner.</td>
</tr>
<tr>
<td></td>
<td>- Create a softkey template in Cisco Unified Communications Manager and</td>
</tr>
<tr>
<td></td>
<td>assign it to a desk phone.</td>
</tr>
<tr>
<td></td>
<td>Cisco Prime Collaboration Provisioning does not support softkey</td>
</tr>
<tr>
<td></td>
<td>customization. You must create a customized template in Cisco Unified</td>
</tr>
<tr>
<td></td>
<td>Communications Manager.</td>
</tr>
</tbody>
</table>

You can create an order to add the Unified Messaging feature if you already have e-mail and voicemail. The Unified Messaging feature allows the retrieval of e-mail from your voicemail, and the retrieval of voicemail from your e-mail.

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.

The Upgrade designation next to the Unified Messaging service indicates that the existing e-mail and voicemail are being upgraded to include the Unified Messaging feature.

A Unified Messaging Service order includes the line, endpoint, voicemail and e-mail, and Unified Messaging services.

The list of services that are available to users is based on user roles and Provisioning system configuration. To modify this list to include the services you require, contact your Provisioning administrator.
Enable presence messaging by enabling the user's presence service settings on a Call Processor.

To configure User Services, do the following:

1. Add the Presence Server to Provisioning and perform the Infrastructure synchronization.
2. Add the Presence Server to the Service Area that will be used for ordering.

**Note**
- User Services is available for Cisco Unified Communications Manager 9.x and above versions.
- For Cisco Unified Communications Manager 10.0 and above, User Services will not be available as an orderable service. It is added by default, when you create an order for a service.

---

### Table: Order Entry Fields

<table>
<thead>
<tr>
<th>GUI Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated PC</td>
<td>The name (DNS resolvable) or IP address of the computer to be used with the SoftPhone support.</td>
</tr>
<tr>
<td>Email ID</td>
<td>Enter the e-mail ID. It cannot contain spaces.</td>
</tr>
<tr>
<td>Display Name (Email)</td>
<td>Enter the name to be used in the From field of the e-mail.</td>
</tr>
</tbody>
</table>

---

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 User Record Details page. After placing the order, you should run user synchronization and Domain synchronization so that the complete email address appears.

2 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 User Record Details page. After placing the order, you should run user synchronization and Domain synchronization so that the complete email address appears.
<table>
<thead>
<tr>
<th><strong>Enable Extension Mobility</strong></th>
<th>Select <strong>Yes</strong> or <strong>No</strong>.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Extension Mobility Line</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Line Type</strong></td>
<td>Select one of the following:</td>
</tr>
<tr>
<td></td>
<td>• Auto-assigned-System automatically assigns a directory number. Auto-assigned numbers come from the service area you selected at the beginning of the order process.</td>
</tr>
<tr>
<td></td>
<td>• Chosen Line-You specify a directory number. The directory number cannot include dashes or spaces. An administrator can choose a specific unused number or a number that the user already has, for a shared line.</td>
</tr>
<tr>
<td></td>
<td>After the line is configured, to save your settings, you must click the save icon on the right side of the page.</td>
</tr>
<tr>
<td></td>
<td>In the Advanced Order Configuration option, you can then configure the provisioning attributes for the line. You can copy the provisioning attributes of a configured line on the same endpoint by selecting the line from the Copy Line field and clicking <strong>Done</strong>.</td>
</tr>
<tr>
<td><strong>Directory Number</strong></td>
<td>You can either enter a directory number directly into the field, or you can choose a directory number by clicking the Chooser icon. If you click the Chooser icon, a Directory Number search page appears. To use the Directory Number search page, do the following:</td>
</tr>
<tr>
<td></td>
<td>1 In the Directory Number search page, choose your search criteria from the following:</td>
</tr>
<tr>
<td></td>
<td>• Directory Number-Enter a specific number to search for.</td>
</tr>
<tr>
<td></td>
<td>• Available DNs-When selected, all directory numbers that are available in the Provisioning database are displayed.</td>
</tr>
<tr>
<td></td>
<td>• Reserved DNs-When selected, all directory numbers that are reserved for the user for whom the order is being placed are displayed.</td>
</tr>
<tr>
<td></td>
<td>• DN Blocks-The directory number blocks that are configured for the Service Area on which the order is being placed are displayed.</td>
</tr>
<tr>
<td></td>
<td>2 Click <strong>Find</strong>. Your search results appear</td>
</tr>
<tr>
<td></td>
<td>3 Click the desired directory number.</td>
</tr>
</tbody>
</table>
During the order process, a page appears that lists the available line positions on the endpoint. Next to the line position, it indicates whether or not the line position is available.

In the line position page, you can do the following:

- 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.
- If you want to configure more than one line, after configuring the first, backup and configure the next.

Line position is not supported on Extension Mobility Access Lines.

<table>
<thead>
<tr>
<th>Selected Endpoint</th>
<th>Select an endpoint from the list.</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAC Address</td>
<td>(Optional) In Prime Collaboration Provisioning Standard, it is mandatory to enter MAC or dummy MAC address. In case of Analog endpoints, MAC address is automatically generated based on the selected voice port.</td>
</tr>
<tr>
<td>Endpoint Type</td>
<td>Select an endpoint type from the list.</td>
</tr>
<tr>
<td>Protocol</td>
<td>Select the protocol. Endpoints may support both SCCP and SIP. Provision with the default protocol set in the Provisioning Attribute. If you do not select a protocol, the default setting will be chosen. If you apply a service template with the setting, the template setting will be used.</td>
</tr>
<tr>
<td>Target Endpoint</td>
<td>Select a target endpoint from the list.</td>
</tr>
<tr>
<td>Phone Button Template</td>
<td>List of available Phone Button Templates.</td>
</tr>
<tr>
<td>Service Template</td>
<td>List of available Service Templates.</td>
</tr>
<tr>
<td>Analog Voice Gateway Reference</td>
<td>Select an analog voice gateway reference. Before executing the user synchronization, the infrastructure synchronization should be executed. During user synchronization, if the synced back analog endpoint 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 endpoint will not be manageable through Cisco Prime Collaboration Provisioning. The Analog Voice Gateway Reference field is enhanced to include the description of the gateway along with the alphanumeric reference number. While configuring the Voice Gateway infrastructure service, if the gateway description is provided, then the description will appear in the Analog Voice Gateway Reference field.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the Remote Destination Profile.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the Remote Destination Profile.</td>
</tr>
<tr>
<td>Selected Remote Destination Profile</td>
<td>Name of the selected Remote Destination Profile.</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------------------</td>
</tr>
<tr>
<td>Service Area</td>
<td>List of available Service Areas. If a Service Area has a Unity Connection configured as a Unified Messaging Processor, and the Unity Connection does not have an external e-mail server, Provisioning will not list this Service Area as an option when ordering Email.</td>
</tr>
<tr>
<td>Unified Messaging</td>
<td>List of available e-mails for which you can enable Unified Messaging.</td>
</tr>
<tr>
<td>Use Dummy MAC Address</td>
<td>Used for Tool for Auto-Registered Phones Support (TAPS) phones. If you check this check box, Provisioning creates a phone with a dummy MAC address, which is unique in the system. After a TAPS phone is provisioned on the Cisco Unified Communications Manager and updated with a real MAC address, you must run a user and Domain synchronization in Provisioning. This updates the dummy MAC address in Provisioning with the real MAC address. After a dummy endpoint is ordered, change and cancel orders do not require a user or Domain synchronization.</td>
</tr>
<tr>
<td>Voicemail Alias</td>
<td>Enter an alias for the voicemail. A voicemail is identified by its alias in Cisco Unity Connection. The alias can be same as the user ID for whom voicemail is ordered.</td>
</tr>
<tr>
<td>Voicemail Display Name</td>
<td>Enter a display name for the voicemail.</td>
</tr>
<tr>
<td>Voiceport</td>
<td>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.</td>
</tr>
<tr>
<td>Advanced Order Configuration</td>
<td>Lists the available provisioning attributes for the ordered service. This allows you to set provisioning attributes when placing an order. Click the plus sign (+) next to the Advanced Order Configuration option to expand this pane. 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. Advanced Order Configuration is available only to users who are assigned the Advanced Ordering authorization role.</td>
</tr>
<tr>
<td>Choose a reserved endpoint</td>
<td>Opens a search page that lists reserved endpoints. A reserved endpoint is booked for a specific user. <strong>Note</strong> Enter MAC Address or Dummy MAC Address of the endpoint while provisioning.</td>
</tr>
</tbody>
</table>
### Copy endpoint

Opens a search page that lists all the endpoints in the system that are supported by the user role. Copy endpoint allows you to provision a new endpoint with the same settings of an existing endpoint.

To copy settings, in the search page, select an endpoint and click **OK** to confirm that you want the endpoint's settings copied to the new endpoint.

This feature is available only to users with the Advanced Ordering role.

When you have Global access, you can copy all the endpoints that are orderable for the user, including managed and unmanaged endpoints, as long as the endpoint belongs to the same Call Processor.

When you have Domain access, you can only copy managed endpoints that are orderable for the user and are in the user's manageable Domains, as long as the endpoint belongs to the same Call Processor.

Because some settings are unique to each endpoint, not all settings are copied to the new endpoint. The following settings are not copied to the new endpoint:

- Directory Number
- MAC Address
- Endpoint Description

When an endpoint is copied, services are not copied to the new endpoint. For example, if lines, voicemails or e-mails exist on the endpoint, they will not be copied to the new endpoint. In addition to this, the set only attributes associated with the endpoint are not copied.

Through Copy endpoint you can only copy the provisioning attributes that are set while creating an order.

If the Cisco Unified Communications Manager version for the copied endpoint does not support an attribute, or if the copied endpoint type does not support an attribute, the attribute is cleared on the new endpoint.

You are allowed to copy only an analog phone to another analog phone. Copying an IP phone to analog phone is not allowed.

When an endpoint is copied, the provisioning attributes that are set during the add order are only copied.

Once the Order is completed, in Cisco Unified Communications Manager, the Overriding Common settings check box is enabled. It means that the default attributes of the new endpoint have been modified.
You can order Cisco Jabber services only if you have enabled Jabber on a Cisco Unified Communications Manager. To enable Jabber for a Cisco Unified Communications Manager, choose **Device Setup**. Hover over Quick View of the device and click **UC Services** tab. Select a Jabber service from the list:

- Cisco Jabber for Tablet
- Cisco Jabber for iPhone
- Cisco Jabber for Desktop
- Cisco Jabber for Blackberry
- Cisco Jabber for Android

<table>
<thead>
<tr>
<th>Orderable Cisco Jabber Services</th>
<th>You can order Cisco Jabber services only if you have enabled Jabber on a Cisco Unified Communications Manager. To enable Jabber for a Cisco Unified Communications Manager, choose <strong>Device Setup</strong>. Hover over Quick View of the device and click <strong>UC Services</strong> tab. Select a Jabber service from the list:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Cisco Jabber for Tablet&lt;br&gt;• Cisco Jabber for iPhone&lt;br&gt;• Cisco Jabber for Desktop&lt;br&gt;• Cisco Jabber for Blackberry&lt;br&gt;• Cisco Jabber for Android</td>
</tr>
</tbody>
</table>

## Processing Orders

After you have submitted orders for users, they are approved and then shipped. Depending on how your Provisioning 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 for Domain Synchronization** section in *Cisco Prime Collaboration Provisioning Guide - Standard and Advanced, 11.x*.

- **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 an endpoint. 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 endpoint has been received. This is controlled by the rule PhoneReceiptDoneBy.

---

**Note**

A Provisioning administrator can configure how these activities are assigned.
Self Care Portal Configuration

- Prime Collaboration Self-Care Overview, page 43
- Creating a Self-Care Account, page 43
- Enabling or Disabling Self-Care Using Batch Provisioning, page 44
- Launching Prime Collaboration Self-Care, page 44
- Customizing Your Personal Settings, page 45
- Self-Care User Migration Script, page 50

Prime Collaboration Self-Care Overview

Prime Collaboration provides a Self-Care portal, which allows subscribers to control preference settings such as user name, password, primary user device and so on. You can update your own account and services by using the Self-Care portal. The Self-Care feature enables you to modify line settings, manage services, add reset Voicemail Box, Voicemail PIN, and configure phone options. The Self-Care portal covers user services across multiple Cisco Unified CM clusters, Unity Connection clusters and IM&P clusters.

Note

When Cisco Unified Communications Manager is shared between two or more users, and if one or more users are using LDAP, Prime Self-Care will be used regardless of the version of Cisco Unified Communications Manager.

To enable Prime Collaboration Self-Care, see Creating a Self-Care Account, on page 43.

Creating a Self-Care Account

You can create a Self-Care account in Standalone (separate logins are available for Assurance and Provisioning features) or Converged (a single sign-on is available to log in and access both Assurance and Provisioning features) Prime Collaboration Provisioning. You can choose to enable or disable Self-Care for each user you create.

You can create a Self-Care account in Prime Collaboration Provisioning. You can choose to enable or disable Self-Care for each user you create.
Note • To assign Self-Care roles, you must enable the CreateSelfCareAccounts rule while creating a new domain. The CreateSelfCareAccounts rule is disabled by default.

• You can also assign Self-Care roles in an existing domain by running the Self-Care Migration Utility. This will enable Self-Care role for existing users. See Self-Care User Migration Script, on page 50 for details.

• The SelfCareUser check box is available only if the CreateSelfCareAccounts rule is enabled.

• After creating users, the users can login to Self-Care only after the globaladmin or domain-admin changes their account password. By default, the user password is empty. You must specify a default password in the DefaultCUPMPassword Data field and set Enabled to true to set the default password.

• If the user’s domain is authenticated with Active Directory, the self-care login will use the AD server defined for the users domain.

To create a Self-Care account for a user:

Procedure

Step 1 Choose User Provisioning.
Step 2 Click Add User and check the Enable Prime Collaboration Self-Care check box.
Step 3 Enter the necessary user information and save.

Enabling or Disabling Self-Care Using Batch Provisioning

You can enable Self-Care while creating new users using Batch Provisioning. To enable Self-Care for a user, provide the authorization role as SelfCareUser in the batch action file.

Batch Provisioning can also be used to enable or disable Self-Care role for an existing user. To enable provide the authorization role as SelfCareUser, and to disable provide none in the batch action file.

Note The CreateSelfCareAccounts rule must be enabled for the domain to create a Self-Care account.

For information on Batch Provisioning see Managing Batch Projects, on page 51.

Launching Prime Collaboration Self-Care

Based on your user role, you can launch Self-Care.

Note If you are using IE 10, you must select the Standards mode for the Self-Care portal to work properly.

A user with only Self-Care role will be directed to the self-care portal after login:
Procedure

**Step 1**
In a browser enter, http://<provisioning-ip>/cupm/selfcareuser/Login.

**Step 2**
Use Self-Care credentials to log in.
Since the user has only Self-Care role, he will be able to access only the Self-Care menu. Provisioning menus will not be available for such a user.

Customizing Your Personal Settings

Self-Care enables you to set individual attributes and personal preferences for the following aspects of phone use:

- **Phone options** include configuring speed dial numbers, do not disturb options, and music when a call is placed on hold.
- **Profile options** allow you to configure options for extension mobility and single number reach.
- **Line options** for a specific line on the phone, such as call forwarding, caller identification, and notifications.
- **User options** for the phone user, such as passwords and personal identification numbers (PINs).

You can update the /opt/cupm/sep/ipt.properties file to hide or display the features displayed in the Phone Settings, Line Settings, and User Settings page of Self-Care portal. For example, if you want to configure the features in the Phone settings, your entries would be:

In Prime Collaboration Provisioning UI, choose Administration > Settings to view the following Endpoint Features.

```
dfc.ipt.selfcare.phone.features=General,SpeedDials,DoNotDisturb,Locale,MusicOnHold,Others#
```

**Note**
You must log in as root user to update the ipt.properties file. You must restart the cupm services for the changes to take effect.

To configure Self-Care options:

**Procedure**

**Step 1**
In a browser, enter http://<provisioning-ip>/cupm/ipt/selfcare/home.html.

**Step 2**
Enter your username and password.
The Self-Care portal screen appears. The Self-Care portal screen contains the following elements:

- **Phone carousel**—The phone carousel (positioned in the lower left side of the screen) contains icons for the phones and service profiles that you can configure. Click the icons at either side of the visible icons to view the additional phones or profiles.
• Main menu—The main menu options (to the right of the phone carousel) are Phone Settings, Line Settings, and User Settings. Depending on your selection in the phone carousel, the Phone Settings option might be replaced by Extension Mobility Settings or Single Number Reach Settings.

• Configuration area—The configurable categories for the selected main menu option appear next. When you click a category, such as Speed Dials, the right side of the screen displays the configurable options.

**Step 3**  
In the phone carousel, select the phone or profile you want to configure.

**Step 4**  
In the Line Settings menu, ensure that you select the correct line for the options you are configuring. The following options are available for you to configure in the Self-Care portal:

• Configuring Phone or Extension Mobility Settings
• Configuring Single Number Reach Settings
• Configuring Line Settings
• Configuring User Settings

---

**Configuring Phone and Extension Mobility Setting**

The following table lists the Phone and Extension Mobility settings you can perform using Self-Care.

**Table 5: Configuring Phone and Extension Mobility Setting**

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Update your phone MAC address and unlock Voicemail Box.</td>
<td>Choose Phone Settings &gt; MAC Address, enter a valid MAC address for your phone, then click Save.</td>
</tr>
<tr>
<td>Speed Dials</td>
<td>Add phone numbers for speed dialing. Add a comma between the numbers to pause speed dialing. You can add any number of commas. Default delay for a comma is two seconds.</td>
<td>Choose Phone Settings &gt; Speed Dials, then click Add. Enter the necessary information and click Save.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>Enable or disable the Do Not Disturb feature. Select the action to be taken if an incoming call arrives while the Do No Disturb feature is enabled.</td>
<td>Choose Phone Settings &gt; Do Not Disturb, then check the Enable Do Not Disturb check box.</td>
</tr>
<tr>
<td>Locale</td>
<td>Select your work and network locales for time and language support.</td>
<td>Choose Phone Settings &gt; Locale, then choose your location from the User Locale drop-down list, and click Save.</td>
</tr>
</tbody>
</table>
**Line Settings**

The following table lists the available line settings for each line of the selected phone or profile:

*Table 6: Line Settings*

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Forward</td>
<td>Set default call-forwarding options. Customize call-forwarding for external or internal incoming calls.</td>
<td>Choose Line Settings then select Call Forward, Caller ID, Notification, or Music On Hold to update and click Save.</td>
</tr>
<tr>
<td>Caller ID</td>
<td>Configure caller ID options.</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td>Set audio and visual options for incoming calls and notification of messages.</td>
<td></td>
</tr>
<tr>
<td>Music On Hold</td>
<td>Select the source of the music to be played when a call is placed on hold.</td>
<td></td>
</tr>
</tbody>
</table>

**User Settings**

The following table lists the available User Settings:
Table 7: User Settings

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Update your name.</td>
<td>Choose User Settings, then select Information, Password, or PIN to update and click Save.</td>
</tr>
<tr>
<td></td>
<td>Enter your email address.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select your primary phone.</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td>Update your password.</td>
<td></td>
</tr>
<tr>
<td>PIN</td>
<td>Update your personal identification number.</td>
<td></td>
</tr>
</tbody>
</table>

Common Self-Care Tasks

The following table lists all the common self-care tasks a user can perform:

Table 8: Common self-care Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change a password</td>
<td>Choose User Settings &gt; Passwords.</td>
</tr>
<tr>
<td>Change a PIN</td>
<td>Choose User Settings &gt; PIN.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> You can change your phone and voice mail PINs. Phone PIN is to reset the Cisco Unified Communications Manager (or Extension Mobility) PIN, and voice mail is to reset the Unity Connection PIN.</td>
</tr>
<tr>
<td>Disable use of a speakerphone</td>
<td>Choose Phone Settings &gt; Others, then check the Disable Speakerphone check box.</td>
</tr>
<tr>
<td>Enable extension mobility</td>
<td>Choose Phone Settings &gt; Others, then check the Cisco Extension Mobility check box.</td>
</tr>
<tr>
<td>Enable video calls</td>
<td>Choose Phone Settings &gt; Others, then check the Enable Video check box.</td>
</tr>
<tr>
<td>Forward calls</td>
<td>Choose Line Settings &gt; Call Forward, then set the options for forwarding incoming calls.</td>
</tr>
<tr>
<td>Provide e-mail information</td>
<td>Choose User Settings &gt; Information, and enter your email address.</td>
</tr>
<tr>
<td>Select a different phone as your primary device.</td>
<td>Choose User Settings &gt; Information, and choose the preferred device from the Primary Device drop-down list.</td>
</tr>
<tr>
<td>Select call and message notifications</td>
<td>Choose Line Settings &gt; Notification, then choose the notification options for incoming calls and messages.</td>
</tr>
</tbody>
</table>
**Configuring Single Number Reach**

The Single Number Reach feature enables you to associate another phone number with your business IP phone number. When a call is received on the business phone number, Cisco Prime Collaboration Provisioning automatically directs the call to ring on the phone you specify as well as the business phone. In this way, the Single Number Reach feature enables callers to reach you by dialing a single number, regardless of your location.

To configure an alternate number for Single Number Reach:

**Procedure**

- **Step 1** In the phone carousel, select the icon associated with the remote destination profile.
- **Step 2** Choose Single Number Reach Settings.  
- **Step 3** Provide the information as described in the Table 9: Field Description for Single Number Reach, on page 49 table, then click Save.
- **Step 4** If needed, click Add New to add an additional alternate number.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Number</td>
<td>Enter the alternate number that Cisco Prime Collaboration Provisioning is to direct calls to when calls are received on your primary phone.</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) Enter a description of the alternate number.</td>
</tr>
<tr>
<td>Enable Reach Me Anywhere</td>
<td>Check the check box to enable incoming calls to ring on multiple phones at the same time.</td>
</tr>
<tr>
<td>This is a mobile device</td>
<td>Check the check box if the alternate number is for a mobile device.</td>
</tr>
<tr>
<td>Allow me … seconds to answer</td>
<td>Enter the length of time (in tenths of seconds) that Cisco Prime Collaboration Provisioning should wait for you to answer the call on the primary phone before directing the call to the alternate number.</td>
</tr>
<tr>
<td>Continue ringing the alternate number for … seconds</td>
<td>Enter the length of time (in tenths of seconds) that Cisco Prime Collaboration Provisioning should ring at the alternate number.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>If the alternate number answers within … seconds</td>
<td>Enter the length of time (in tenths of seconds) that Cisco Prime Collaboration Provisioning should wait after directing a call to the alternate device before connecting a call on the device. This delay prevents calls from being picked up by automated greetings, such as voice mail, on the device.</td>
</tr>
<tr>
<td>Line Association Information</td>
<td>Check the check box for the line to associate with this alternate number.</td>
</tr>
</tbody>
</table>

Self-Care User Migration Script

The SelfCareMigrationUtility can be invoked during the migration, or from the CLI, after migration. The tool processes all the users in the domains that have CreateSelfCareAccounts rule and DefaultCUPMPassword rule set.

For more information on migration, see the Cisco Prime Collaboration Upgrade and Migration Guide.
Batch Provisioning

Managing Batch Projects

Batch Provisioning support is provided for all the devices of Unified Communications Manager, Unity Connection, Unity, Presence Processor, Unity Express, Call Manager Express, and Generic IOS Router. Users with the Administration role can provision devices using batch provisioning.

Sample batch files for all devices are available in the opt/cupm/sep/ipt/config/sample/batchProvisioning directory.

After you create a batch action file, you must create the batch project that it belongs to. When you upload a batch action file, its contents are converted to batch actions, and the columns that are common to all batch actions in the batch action file are displayed.

You must upload batch action files in the correct order according to any dependencies that exist between the batch actions.

To create a batch project:

Procedure

Step 1 Choose Advanced Provisioning > Batch Provisioning.
Step 2 Click Add to create a new project.
Step 3 In the New Batch Project window, enter the name and description and click Add.
Step 4 In the Configure a Batch Project screen that appears after you choose the batch project, click Add Batch Actions to add batch action.
Step 5 In the Add Batch Actions page, select the appropriate File Name and Click Add to Project.
Step 6 You can do one or more of the following:
   • Run the batch project immediately, or schedule it to run later. See the table below for editing, copying, deleting, canceling, exporting and other operations on Batch Projects.
   • Schedule the batch project to be run later.
You can delete the batch projects or batch actions that you no longer require. To delete a batch project or a batch action, select the project or batch action and click **Delete**.

You can resume operation of a batch project which is in Paused state. Click the Resume icon to do so.

Click the **Batch Help** icon at the top right corner of the Batch Provisioning page. The Batch Action Help link opened in a new tab displays a table of all the batch actions along with the attributes and description for different services.

**Table 10: Managing Batch Projects**

<table>
<thead>
<tr>
<th>Batch Operation</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>To run a batch project immediately</td>
<td>1  Choose a batch project in <strong>All Projects</strong> pane.</td>
</tr>
<tr>
<td></td>
<td>2  In the Configure a Batch Project page, click <strong>Run Now</strong>.</td>
</tr>
<tr>
<td>To schedule or reschedule a batch project</td>
<td>1  Choose a batch project in <strong>All Projects</strong> pane.</td>
</tr>
<tr>
<td></td>
<td>2  In the Configure a Batch Project page, click the Calendar icon.</td>
</tr>
<tr>
<td></td>
<td>Specify a date and time in the calendar dialog box that appears and click <strong>OK</strong>.</td>
</tr>
<tr>
<td></td>
<td>3  Click <strong>Yes</strong> in the confirmation message box to schedule or reschedule the batch project as appropriate.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>  Batch projects created for infrastructure configuration cannot be restarted if there is a failure.</td>
</tr>
<tr>
<td></td>
<td>4  Click <strong>Run Now</strong> to execute the batch project.</td>
</tr>
<tr>
<td>To cancel a scheduled batch project</td>
<td>1  Choose a batch project in <strong>All Projects</strong> pane.</td>
</tr>
<tr>
<td></td>
<td>2  In the Configure a Batch Project page, click the <strong>Clear</strong> button next to the Calendar icon.</td>
</tr>
<tr>
<td></td>
<td>3  Click <strong>Yes</strong> to confirm.</td>
</tr>
<tr>
<td></td>
<td>You can cancel a scheduled batch project provided that it has not started processing.</td>
</tr>
</tbody>
</table>
### Batch Operation

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can stop a batch project which is inPaused state and In Progress state. To do this:</td>
</tr>
<tr>
<td>1 Choose the suitable batch project in <strong>All Projects</strong> pane and check its status.</td>
</tr>
<tr>
<td>2 In the Configure a Batch Project page, click <strong>Stop</strong> to stop the batch project.</td>
</tr>
</tbody>
</table>

### To view the batch action details

| 1 Choose a batch project in **All Projects** pane. |
| 2 In the Configure a Batch Project page, hover over **Quick View** of a batch action to view the details. |

The Batch Action Details pane displays all the configured information for the batch project action, including the status and log.

In Batch Provisioning, during endpoint order, users with any user role can add a new endpoint. Even a pseudo user can add an endpoint.

### To edit a batch project and a batch action file

<table>
<thead>
<tr>
<th>To edit a batch project:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Click <strong>All Projects</strong>.</td>
</tr>
<tr>
<td>2 Select the batch project from the list displayed on the right side of the screen and click <strong>Edit</strong>.</td>
</tr>
<tr>
<td>3 In the <strong>Configure a Batch Project</strong> window, click <strong>Add Batch Actions</strong>. Select a batch action file and click <strong>Add to Project</strong>. The new batch action file is added to the selected batch projects.</td>
</tr>
</tbody>
</table>

To edit a batch action file:

| 1 Select the suitable batch project in **All Projects** pane. |
| 2 In the **Configure a Batch Project** window, select the Action required and click **Edit**. |
| 3 In the **Edit Batch Action** window, click **Add New Attribute** to add a new attribute to the action file or click the **Edit** icon to edit the value of any existing attribute. Click **Save**. |

**Note** Only one batch action can be edited at a time.
<table>
<thead>
<tr>
<th>Batch Operation</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>To copy a batch project along with the batch actions</td>
<td>To copy a batch project:</td>
</tr>
<tr>
<td></td>
<td>1. Select the batch project and click <strong>Copy</strong> to copy a batch project along with the batch action.</td>
</tr>
<tr>
<td></td>
<td>2. In the <strong>Copy Batch Project</strong> window, enter the description and rename the auto-populated batch project name, if required, and click <strong>Add</strong>. A copy of an existing batch project along with the batch action files is created with the status showing &quot;Not Scheduled&quot; for batch project and &quot;Not Started&quot; for batch action.</td>
</tr>
<tr>
<td></td>
<td>To copy a batch action:</td>
</tr>
<tr>
<td></td>
<td>1. Select the batch actions and click the expand icon in the right pane.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Copy Action(s)</strong>.</td>
</tr>
<tr>
<td>To export a batch project</td>
<td>1. Click <strong>All Projects</strong> and choose a batch project in the right pane.</td>
</tr>
<tr>
<td></td>
<td>2. Click the expand icon in the right pane and click <strong>Export</strong>. All the batch actions of the selected project is copied to a text file.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> Only one project can be exported at a time.</td>
</tr>
<tr>
<td>To view the current status of a batch project</td>
<td>In the <strong>Configure a Batch Project</strong> page, the Batch Project Actions pane displays the status of each batch action project.</td>
</tr>
<tr>
<td></td>
<td>To view the orders that are in a specific state (for example, In Progress or Completed state), choose the batch project and select the filter in the Batch Project Actions pane.</td>
</tr>
<tr>
<td></td>
<td>After a batch project has completed, you can also check the user records of the users to verify that orders have been processed.</td>
</tr>
<tr>
<td></td>
<td>To see details of a single running order within a batch project, administrators can also use My Activities (Choose <strong>Activities</strong> &gt; <strong>My Activities</strong>) to view each order as it is executed in the workflow.</td>
</tr>
</tbody>
</table>
Troubleshooting

Issue
If all the buttons are disabled in the Configure a Batch Project page, the Batch Project might be in one of the following states:

- In Progress
- Stopped
- Paused

Recommended Action
If the Batch Project is:

- In Progress: Wait till the project gets completed.
- Stopped: Create a new Batch Project or copy the stopped batch project to proceed.
- Paused: Either stop or resume the paused batch project.

Issue
You will not be able to edit a batch action if it is completed or failed.

Recommended Action
You can copy and then edit the batch action.