Manage End Users

- End User Overview, on page 1
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End User Overview

When administering an up and running system, you may need to make updates to the list of configured end users in your system. This includes:

- Setting up a new user
- Setting up a phone for a new end user
- Changing passwords or PINs for an end user
- Enable end users for IM and Presence Service

The **End User Configuration** window in Cisco Unified CM Administration allows you to add, search, display, and maintain information about Unified CM end users. You can also use the **Quick User/Phone Add** window to quickly configure a new end user and configure a new phone for that end user.

End User Management Tasks

Procedure

	Command or Action	Purpose
Step 1	Configure User Templates, on page 2	If you have not configured your system with user profiles or feature group templates that includes universal line and device templates, perform these tasks to set them up. You can apply these templates to any new end users in order to quickly configure new users and phones.

	Command or Action	Purpose
Step 2	Add a new end user using one of the following methods • Import an End User from LDAP, on page 6 • Add an End User Manually, on page 7	If you have configured and if your system is synchronized with a company LDAP directory, you can import the new end user directly from LDAP. Else, you can add and configure the end user manually.
Step 3	Assign a phone to a new or existing end user by performing either of the following tasks: • Add New Phone for End User , on page 8 • Move an Existing Phone to a End User, on page 9	You can use the 'Add New Phone' procedure to configure a new phone for the end user using settings from a universal device template. You can also use the 'Move' procedure to assign an existing phone that has already been configured.
Step 4	Change the End User PIN, on page 9	(Optional) To change the pin for an end user in Cisco Unified Communications Manager Administration.
Step 5	Change the End User Password, on page 10	(Optional) To change the password for an end user in Cisco Unified Communications Manager Administration.
Step 6	Create a Cisco Unity Connection Voice Mailbox, on page 10	(Optional) To create individual Cisco Unity Connection voice mailboxes in Cisco Unified Communications Manager Administration.

Configure User Templates

Perform the following tasks to set up a user profile and feature group template. When you add a new end user, you can use the line and device settings to quickly configure the end user and any phones for the end user.

Procedure

	Command or Action	Purpose
Step 1	Configure Universal Line Template, on page 3	Configure universal line templates with common settings that are typically applied to a directory number.
Step 2	Configure Universal Device Template, on page 3	Configure universal device templates with common settings that are typically applied to a phone.
Step 3	Configure User Profiles, on page 4	Assign universal line and universal device templates to a user profile. If you have the self-provisioning feature configured, you can enable self-provisioning for the users who use this profile.

	Command or Action	Purpose
Step 4	Configure Feature Group Template, on page 5	Assign the user profile to a feature group template. For LDAP Synchronized Users, the feature group template associates the user profile settings to the end user.

Configure Universal Line Template

Universal Line Templates make it easy to apply common settings to newly assigned directory numbers. Configure different templates to meet the needs of different groups of users.

Procedure

Step 1 In Cisco Unified CM Administration, choose **User Management** > **User/Phone Add** > **Universal Line Template**.

Step 2 Click **Add New**.

Step 3 Configure the fields in the **Universal Line Template Configuration** window. See the online help for more information about the fields and their configuration options.

Step 4 If you are deploying Global Dial Plan Replication with alternate numbers expand the **Enterprise Alternate Number** and **+E.164 Alternate Number** sections and do the following:

a) Click the **Add Enterprise Alternate Number** button and/or **Add +E.164 Alternate Number** button.
b) Add the **Number Mask** that you want to use to assign to your alternate numbers. For example, a 4-digit extension might use 5XXXX as an enterprise number mask and 1972555XXXX as an +E.164 alternate number mask.
c) Assign the partition where you want to assign alternate numbers.
d) If you want to advertise this number via ILS, check the **Advertise Globally via ILS** check box. Note that if you are using advertised patterns to summarize a range of alternate numbers, you may not need to advertise individual alternate numbers.
e) Expand the **PSTN Failover** section and choose the **Enterprise Number** or **+E.164 Alternate Number** as the PSTN failover to use if normal call routing fails.

Step 5 Click **Save**.

What to do next

Configure Universal Device Template, on page 3

Configure Universal Device Template

Universal device templates make it easy to apply configuration settings to newly provisioned devices. The provisioned device uses the settings of the universal device template. You can configure different device templates to meet the needs of different groups of users. You can also assign the profiles that you've configured to this template.

Before you begin

Configure Universal Line Template, on page 3

Procedure

Step 1 In Cisco Unified CM Administration, choose **User Management** > **User/Phone Add** > **Universal Device Template**.

Step 2 Click **Add New**.

Step 3 Enter the following mandatory fields:

a) Enter a **Device Description** for the template.
b) Select a **Device Pool** type from the drop-down list.
c) Select a **Device Security Profile** from the drop-down list.
d) Select a **SIP Profile** from the drop-down list.
e) Select a **Phone Button Template** from the drop-down list.

Step 4 Complete the remaining fields in the **Universal Device Template Configuration** window. For field descriptions, see the online help.

Step 5 Under **Phone Settings**, complete the following optional fields:

a) If you configured a **Common Phone Profile**, assign the profile.
b) If you configured a **Common Device Configuration**, assign the configuration.
c) If you configured a **Feature Control Policy**, assign the policy.

Step 6 Click **Save**.

What to do next

Configure User Profiles, on page 4

Configure User Profiles

Assign universal line and universal device template to users through the User Profile. Configure multiple user profiles for different groups of users. You can also enable self-provisioning for users who use this service profile.

Before you begin

Configure Universal Device Template, on page 3

Procedure

Step 1 From Cisco Unified CM Administration, choose **User Management** > **User Settings** > **User Profile**.

Step 2 Click **Add New**.

Step 3 Enter a **Name** and **Description** for the user profile.

Step 4 Assign a **Universal Device Template** to apply to users' **Desk Phones**, **Mobile and Desktop Devices**, and **Remote Destination/Device Profiles**.

Step 5 Assign a **Universal Line Template** to apply to the phone lines for users in this user profile.

Step 6 If you want the users in this user profile to be able to use the self-provisioning feature to provision their own phones, do the following:

a) Check the **Allow End User to Provision their own phones** check box.

b) In the **Limit Provisioning once End User has this many phones** field, enter a maximum number of phones the user is allowed to provision. The maximum is 20.

Step 7 If you want Cisco Jabber users who are associated with this user profile, to be able to use the Mobile and Remote Access feature, check the **Enable Mobile and Remote Access** check box.

Note

- By default, this check box is selected. When you uncheck this check box, the **Client Policies** section is disabled, and No Service client policy option is selected by default.
- This setting is mandatory only for Cisco Jabber users whom are using OAuth Refresh Logins. Non-Jabber users do not need this setting to be able to use Mobile and Remote Access. Mobile and Remote Access feature is applicable only for the Jabber Mobile and Remote Access users and not to any other endpoints or clients.

Step 8 Assign the Jabber policies for this user profile. From the **Desktop Client Policy**, and **Mobile Client Policy** drop-down list, choose one of the following options:

- No Service—This policy disables access to all Cisco Jabber services.
- IM & Presence only—This policy enables only instant messaging and presence capabilities.
- IM & Presence, Voice and Video calls—This policy enables instant messaging, presence, voicemail, and conferencing capabilities for all users with audio or video devices. This is the default option.

Note
Jabber desktop client includes Cisco Jabber for Windows users and Cisco Jabber for Mac users. Jabber mobile client includes Cisco Jabber for iPad and iPhone users and Cisco Jabber for Android users.

Step 9 If you want the users in this user profile to set the maximum login time for Extension Mobility or Extension Mobility Cross Cluster through Cisco Unified Communications Self Care Portal, check the **Allow End User to set their Extension Mobility maximum login time** check box.

Note
By default **Allow End User to set their Extension Mobility maximum login time** check box is unchecked.

Step 10 Click **Save**.

What to do next

Configure Feature Group Template, on page 5

Configure Feature Group Template

Feature group templates aid in your system deployment by helping you to quickly configure phones, lines, and features for your provisioned users. If you are syncing users from a company LDAP directory, configure

a feature group template with the User Profile and Service Profile that you want users synced from the directory to use. You can also enable the IM and Presence Service for synced users through this template.

Procedure

Step 1 In Cisco Unified CM Administration, choose **User Management** > **User/Phone Add** > **Feature Group Template**.

Step 2 Click **Add New**.

Step 3 Enter a **Name** and **Description** for the Feature Group Template.

Step 4 Check the **Home Cluster** check box if you want to use the local cluster as the home cluster for all users whom use this template.

Step 5 Check the **Enable User for Unified CM IM and Presence** check box to allow users whom use this template to exchange instant messaging and presence information.

Step 6 From the drop-down list, select a **Services Profile** and **User Profile**.

Step 7 Complete the remaining fields in the **Feature Group Template Configuration** window. Refer to the online help for field descriptions.

Step 8 Click **Save**.

What to do next

Add a new end user. If your system is integrated with a company LDAP directory, you can import the user directly from an LDAP directory. Otherwise, create the end user manually.

- Import an End User from LDAP, on page 6
- Add an End User Manually, on page 7

Import an End User from LDAP

Perform the following procedure to manually import a new end user from a company LDAP directory. If your LDAP synchronization configuration includes a feature group template with a user profile that includes universal line and device templates and a DN pool, the import process automatically configures the end user and primary extension.

Note You cannot add new configurations (for example, adding a feature group template) into an LDAP directory sync after the initial sync has occurred. If you want to edit an existing LDAP sync, you must either use Bulk Administration, or configure a new LDAP sync.

Before you begin

Before you begin this procedure make sure that you have already synchronized Cisco Unified Communications Manager with a company LDAP directory. The LDAP synchronization must include a feature group template with universal line and device templates.

Procedure

Step 1 In Cisco Unified CM Administration, choose **System** > **LDAP** > **LDAP Directory**.

Step 2 Click **Find** and select the LDAP directory to which the user is added.

Step 3 Click **Perform Full Sync**.
Cisco Unified Communications Manager synchronizes with the external LDAP directory. Any new end users in the LDAP directory are imported into the Cisco Unified Communications Manager database.

What to do next

If the user is enabled for self-provisioning, the end user can use the Self-Provisioning Interactive Voice Response (IVR) to provision a new phone. Otherwise, perform one of the following tasks to assign a phone to the end user:

- Add New Phone for End User , on page 8
- Move an Existing Phone to a End User, on page 9

Add an End User Manually

Perform the following procedure to add new end user and configure them with an access control group and a primary line extension.

Note Make sure that you have already set up an access control groups that has the role permissions to which you want to assign your user. For details, see the "Manage User Access" chapter.

Before you begin

Verify that you have a user profile configured that includes a universal line template. If you need to configure a new extension, Cisco Unified Communications Manager uses the settings from the universal line template to configure the primary extension.

Procedure

Step 1 In Cisco Unified CM Administration, choose **User Management** > **User/Phone Add** > **Quick User/Phone Add**.

Step 2 Enter the **User ID** and **Last Name**.

Step 3 From the **Feature Group Template** drop-down list, select a feature group template.

Step 4 Click **Save**.

Step 5 From the **User Profile** drop-down list, verify that the selected user profile includes a universal line template.

Step 6 From the **Access Control Group Membership** section, click the + icon.

Step 7 From the **User is a member of** drop-down list, select an access control group.

Step 8 Under **Primary Extension**, click the + icon.

Step 9 From the **Extension** drop-down list, select a DN that displays as **(available)**.

Step 10 If all line extensions display as **(used)**, perform the following steps:

a) Click the **New...** button.
The **Add New Extension** popup displays.

b) In the **Directory Number** field, enter a new line extension.

c) From the **Line Template** drop-down list, select a universal line template.

d) Click **OK**.
Cisco Unified Communications Manager configures the directory number with the settings from the universal line template.

Step 11 (Optional) Complete any additional fields in the **Quick User/Phone Add Configuration** window.

Step 12 Click **Save**.

What to do next

Perform one of the following procedures to assign a phone to this end user:

- Add New Phone for End User , on page 8
- Move an Existing Phone to a End User, on page 9

Add New Phone for End User

Perform the following procedure to add a new phone for a new or existing end user. Make sure that the user profile for the end user includes a universal device template. Cisco Unified Communications Manager uses the universal device template settings to configure the phone.

Before you begin

Perform one of the following procedures to add an end user:

- Add an End User Manually, on page 7
- Import an End User from LDAP, on page 6

Procedure

Step 1 In Cisco Unified CM Administration, choose **User Management** > **User/Phone Add** > **Quick/User Phone Add**.

Step 2 Click **Find** and select the end user for whom you want to add a new phone.

Step 3 Click the **Manage Devices**.
The Manage Devices window appears.

Step 4 Click **Add New Phone**.
The Add Phone to User popup displays.

Step 5 From the **Product Type** drop-down list, select the phone model.

Step 6 From the **Device Protocol** drop-down list select SIP or SCCP as the protocol.

Step 7 In the **Device Name** text box, enter the device MAC address.

Step 8 From the **Universal Device Template** drop-down list, select a universal device template.

Step 9 If the phone supports expansion modules, enter the number of expansion modules that you want to deploy.

Step 10 If you want to use Extension Mobility to access the phone, check the **In Extension Mobility** check box.

Step 11 Click **Add Phone**.
The Add New Phone popup closes. Cisco Unified Communications Manager adds the phone to the user and uses the universal device template to configure the phone.

Step 12 If you want to make additional edits to the phone configuration, click the corresponding Pencil icon to open the phone in the **Phone Configuration** window.

Move an Existing Phone to a End User

Perform this procedure to move an existing phone to a new or existing end user.

Procedure

Step 1 In Cisco Unified CM Administration, choose **User Management** > **User/Phone Add** > **Quick/User Phone Add**.

Step 2 Click **Find** and select the user to whom you want to move an existing phone.

Step 3 Click the **Manage Devices** button.

Step 4 Click the **Find a Phone to Move To This User** button.

Step 5 Select the phone that you want to move to this user.

Step 6 Click **Move Selected**.

Change the End User PIN

Procedure

Step 1 In Cisco Unified Communications Manager Administration, choose **User Management** > **End User**.
The **Find and List Users** window appears.

Step 2 To select an existing user, specify the appropriate filters in the **Find User Where** field, click **Find** to retrieve a list of users, and then select the user from the list.
The **End User Configuration** window is displayed.

Step 3 In the **PIN** field, double-click the existing PIN, which is encrypted, and enter the new PIN. You must enter at least the minimum number of characters that are specified in the assigned credential policy (1-127 characters).

Step 4 In the **Confirm PIN** field, double-click the existing, encrypted PIN and enter the new PIN again.

Step 5 Click **Save**.

Note
You can login to Extension Mobility, Conference Now, Mobile Connect, and Cisco Unity Connection voicemail with the same end user PIN, if **End User Pin synchronization** checkbox is enabled in the **Application Server Configuration** window for Cisco Unity Connection. End users can use the same PIN to log in to Extension Mobility and to access their voicemail.

Change the End User Password

You cannot change an end user password when LDAP authentication is enabled.

Procedure

Step 1 In Cisco Unified Communications Manager Administration, choose **User Management** > **End User**.
The **Find and List Users** window appears.

Step 2 To select an existing user, specify the appropriate filters in the **Find User Where** field, click **Find** to retrieve a list of users, and then select the user from the list.
The **End User Configuration** window is displayed.

Step 3 In the **Password** field, double-click the existing password, which is encrypted, and enter the new password. You must enter at least the minimum number of characters that are specified in the assigned credential policy (1-127 characters).

Step 4 In the **Confirm Password** field, double-click the existing, encrypted password and enter the new password again.

Step 5 Click **Save**.

Create a Cisco Unity Connection Voice Mailbox

Before you begin

- You must configure Cisco Unified Communications Manager for voice messaging. For more information about configuring Cisco Unified Communications Manager to use Cisco Unity Connection, see the *System Configuration Guide for Cisco Unified Communications Manager* at:

  http://www.cisco.com/c/en/us/support/unified-communications/unified-communications-manager-callmanager/products-installation-and-configuration-guides-list.html

- You must associate a device and a Primary Extension Number with the end user.
- You can use the import feature that is available in Cisco Unity Connection instead of performing the procedure that is described in this section. For information about how to use the import feature, see the *User Moves, Adds, and Changes Guide for Cisco Unity Connection*.

Procedure

Step 1 In Cisco Unified Communications Manager Administration, choose **User Management** > **End User**.
The **Find and List Users** window appears.

Step 2 To select an existing user, specify the appropriate filters in the **Find User Where** field, click **Find** to retrieve a list of users, and then select the user from the list.
The **End User Configuration** window is displayed.

Step 3 Verify that a primary extension number is associated with this user.

Note
You must define a primary extension; otherwise, the Create Cisco Unity User link does not appear in the **Related Links** drop-down list.

Step 4 From the **Related Links** drop-down list, choose the Create Cisco Unity User link, and then click **Go**.

The Add Cisco Unity User dialog box appears.

Step 5 From the **Application Server** drop-down list, choose the Cisco Unity Connection server on which you want to create a Cisco Unity Connection user, and then click **Next**.

Step 6 From the **Subscriber Template** drop-down list, choose the subscriber template that you want to use.

Step 7 Click **Save**.

The mailbox is created. The link in the **Related Links** drop-down list changes to Edit Cisco Unity User in the **End User Configuration** window. In Cisco Unity Connection Administration, you can now view the user that you created.

Note
After you integrate the Cisco Unity Connection user with the Cisco Unified Communications Manager end user, you cannot edit fields in Cisco Unity Connection Administration such as Alias (User ID in Cisco Unified CM Administration), First Name, Last Name, and Extension (Primary Extension in Cisco Unified CM Administration). You can only update these fields in Cisco Unified CM Administration.