



## End User Setup and Handling

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## End User Setup and Handling on Cisco Unified Presence

You can set up the authorization policy for Cisco Unified Presence end users and perform bulk user contact list imports and exports.

## Configure User Assignment in System Topology



**Note**

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This topic is only applicable if you have chosen to manually assign your users.

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In system topology management GUI, you can manually unassign, assign or reassign users. You can assign users to a single node, and you can also distribute groups of users across the node, or nodes, in a cluster, or a given subcluster.

### Before You Begin

- Read the user assignment recommendations topic.
- You may want to export users in bulk. Use the Bulk Administration Tool (BAT) to perform this procedure.

### Restriction

- You can only assign licensed users.
- If you turn on High Availability in a subcluster, note that you can only assign or move users to nodes in that subcluster that are *not* in a failover state. Valid node states are Normal and Running in Backup Mode.

**Procedure**

**Step 1** Choose **Cisco Unified Presence Administration > System > Topology**.

**Step 2** Perform one of these actions:

<b>If you want to:</b>	<b>Action</b>
Assign users	Choose <b>Assign Users</b> .
Unassign or reassign users	Choose <b>All Assigned Users</b> in the left pane of the system topology interface.

**Step 3** Use the Find User Assignment window to find and display users.

**Step 4** Perform one of the following actions:

- Check the users that you wish to assign, and click **Assign Selected Users**.
- Choose all users, and click **Assign All Users**.

**Step 5** Using the list boxes in the Change Assignment frame, specify your user assignment:

- to a named node
- to a named subcluster (auto-assigned)
- to all subclusters (auto-assigned)
- to nothing (unassigned)

**Step 6** Click **Save**.

**Related Topics**

- [Multi-node Scalability and WAN Deployments, page 2-1](#)
- [Create Subclusters in System Topology, page 17-9](#)
- [Turn On or Off High Availability for a Subcluster, page 17-17](#)
- For information about exporting users in bulk using BAT, see the Online Help in Cisco Unified Presence Administration.

# Authorization Policy Configuration

## Automatic Authorization

Cisco Unified Presence authorizes all availability subscription requests that it receives from SIP-based clients in the local enterprise. A local user running a SIP-based client automatically receives the availability status for contacts in the local enterprise, without being prompted to authorize these subscriptions on the client. Cisco Unified Presence only prompts the user to authorize the subscription of a contact in the local enterprise if the contact is on the blocked list for the user. This is the default authorization behavior for SIP-based clients on Cisco Unified Presence, and you cannot configure this behavior.

In the XMPP network, it is standard behavior for the server to send *all* availability subscriptions to the client, and the client prompts the user to authorize or reject the subscription. To allow enterprises to deploy Cisco Unified Presence with a mix of SIP-based and XMPP-based clients (to align the authorization policy for both client types), Cisco provides the following automatic authorization setting on Cisco Unified Presence:

- When you turn on automatic authorization, Cisco Unified Presence automatically authorizes all availability subscription requests it receives from both XMPP-based clients and SIP-based in the local enterprise. This is the default setting on Cisco Unified Presence.
- When you turn off automatic authorization, Cisco Unified Presence only supports XMPP-based clients. For XMPP-based clients, Cisco Unified Presence sends all availability subscriptions to the client, and the client prompts the user to authorize or reject the availability subscription. SIP-based clients will not operate correctly on Cisco Unified Presence when you turn off automatic authorization.

**Caution**

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If you turn off automatic authorization, SIP-based clients such as Cisco Unified Personal Communicator Release 7.x are *not* supported. Only XMPP-based clients (Cisco Unified Personal Communicator Release 8.0 and third-party XMPP clients) are supported when you turn off automatic authorization.

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**Related Topics**

- [User Policy and Automatic Authorization, page 15-3](#)
- [Configure the Authorization Policy, page 15-4](#)
- *Integration Guide for Configuring Cisco Unified Presence for Interdomain Federation*

## User Policy and Automatic Authorization

In addition to reading the automatic authorization policy, Cisco Unified Presence reads the policy settings for the user to determine how to handle availability subscription requests. Users configure the policy settings from either the Cisco Unified Personal Communicator client and the Cisco Unified Presence User Options interface. A user policy contains the following configuration options:

—Blocked list - a list of local and external (federated) users that will always see the availability status of the user as unavailable regardless of the true status of the user. The user can also block a whole federated domain.

—Allowed list - a list of local and external users that the user has approved to see their availability. The user can also allow a whole external (federated) domain.

—Default policy - the default policy settings for the user. The user can set the policy to block all users, or allow all users.

On the Cisco Unified Presence User Options interface, the user can also choose an ‘ask me’ setting so that the user is prompted to set their own Allow/Block policy for external contacts (except those external contacts that a user explicitly adds to their Allowed/Blocked list).

Note that if you turn *off* automatic authorization, Cisco Unified Presence automatically authorizes subscription requests a user that is on the contact list of another user. This applies to users in the same domain, and users in different domains (federated users). For example:

- UserA wishes to subscribe the view the availability status of UserB. Automatic authorization is off on Cisco Unified Presence, and UserB is *not* in the Allowed or Blocked list for the UserA.
- Cisco Unified Presence sends the availability subscription request to the client application of UserB, and the client application prompts userB to accept or reject the subscription.

- UserB accepts the availability subscription request, and UserB is added to the contact list of UserA.
- UserA is then automatically added to the contact list for UserB without being prompted to authorize the availability subscription.

Cisco Unified Presence will automatically add UserA to the contact list of UserB even if the policy for UserB (i) blocks the external domain, or (ii) the default policy for the user is block all, or (ii) 'ask me' is chosen.

If you deploy interdomain federation between a local Cisco Unified Presence enterprise and a supported external enterprise, Cisco Unified Presence does not apply the automatic authorization setting to availability subscription requests received from external contacts, *unless* the user has applied a policy on that external contact or domain. On receipt of a availability subscription request from an external contact, Cisco Unified Presence will only send the subscription request to the client application if the user chooses 'ask me' to be prompted to set their own Allow/Block policy for external contacts, and if the external contact or domain is *not* in either the Allowed or Blocked list for the user. The client application prompts the user to authorize or reject the subscription.


**Note**


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Cisco Unified Presence uses common user policies for both availability and instant messages.

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**Related Topics**

- [Automatic Authorization, page 15-2](#)
- [Configure the Authorization Policy, page 15-4](#)
- For information about the Cisco Unified Presence User Options interface, see the *User Guide for Cisco Unified Presence* at this URL:  
[http://www.cisco.com/en/US/products/ps6837/products\\_user\\_guide\\_list.html](http://www.cisco.com/en/US/products/ps6837/products_user_guide_list.html)
- For information about the interdomain federation integration for Cisco Unified Presence, see the *Integration Guide for Configuring Cisco Unified Presence for Interdomain Federation* at this URL:  
[http://www.cisco.com/en/US/products/ps6837/products\\_installation\\_and\\_configuration\\_guides\\_list.html](http://www.cisco.com/en/US/products/ps6837/products_installation_and_configuration_guides_list.html)

## Configure the Authorization Policy

See the Online Help topic in the Cisco Unified Presence Administration interface for a definition of all the parameters on this window.

**Procedure**

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- Step 1** Choose **Cisco Unified Presence Administration > Presence > Settings**.
- Step 2** Configure the authorization setting as follows:

If You Want To...	Do This
Turn on automatic authorization so that Cisco Unified Presence automatically authorizes all availability subscription requests it receives from both XMPP-based clients and SIP-based in the local enterprise.	Check <b>Allow users to view the availability of other users without being prompted for approval.</b>
Turn off automatic authorization so that Cisco Unified Presence only supports XMPP-based clients, and sends all availability subscriptions to the client where the user is prompted to authorize or reject the availability subscription.	Uncheck <b>Allow users to view the availability of other users without being prompted for approval.</b>

**Step 3** Click **Save**.

**Step 4** Restart the Cisco UP XCP Router service.

#### Related Topics

- [DNS Domain Configuration, page 7-3](#)
- [Automatic Authorization, page 15-2](#)
- [Chat Setup and Management, page 18-1](#)

## Bulk Rename of Contact IDs

The Cisco Unified Presence Bulk Assignment Tool (BAT) allows you to rename the contact ID (JID) in user contact lists from one format to another. For example, you can rename a user's contact ID from `firstname.lastname@domain.com` to `userid@domain.com` and BAT will update each user's contact list with the new contact ID.



#### Caution

Bulk rename of contact IDs is used in the migration of users from Microsoft Lync/OCS/LCS to Cisco Unified Presence. See the *Partitioned Intradomain Federation Guide for Cisco Unified Presence* for detailed instructions of how this tool should be used as part of the user migration process. Using this tool in any other circumstances is not supported.

Before you can run this job, you must upload a file containing a list of contact IDs and the corresponding new format of each of those contact IDs. The file must be a CSV file with the following format:

```
<Contact ID>, <New Contact ID>
```

where `<Contact ID>` is the existing contact ID and `<New Contact ID>` is the new format of the contact ID.

The following is a sample CSV file entry:

```
bob.jones@example.com, bjones@example.com
```

Complete the following procedure to upload the CSV file and rename the contact IDs for a list of users.

**Note**

You must complete this procedure on each Cisco Unified Presence cluster.

**Procedure**

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- Step 1** Upload the CSV file with the list of contact IDs that you want to rename in all contact lists.
- On the publisher node, choose **Cisco Unified Presence Administration > Bulk Administration > Upload/Download Files**.
  - Click **Add New**.
  - Click **Browse** to locate and choose the CSV file.
  - Choose **Contact** as the Target.
  - Choose **Rename Contacts – Custom File** as the Transaction Type.
  - Click **Save** to upload the file.
- Step 2** On the publisher node, choose **Cisco Unified Presence Administration > Bulk Administration > Contact List > Rename Contacts**.
- Step 3** In the **File Name** field, choose the file that you uploaded.
- Step 4** Choose one of the following:
- Click **Run Immediately** to execute the Bulk Administration job immediately.
  - Click **Run Later** to schedule a time to execute the Bulk Administration job. For more information about scheduling jobs in BAT, see the Online Help in Cisco Unified Presence Administration.
- Step 5** Click **Submit**. If you chose to run the job immediately, the job runs after you click Submit.
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## Bulk Export of User Contact Lists

The Cisco Unified Presence Bulk Assignment Tool (BAT) allows you to export the contact lists of users who belong to a particular node or subcluster to a CSV data file. You can then use BAT to import the user contact lists to another node or subcluster in a different cluster. The BAT user contact list export and import features facilitate the moving of users between clusters. For more information about importing user contact lists, see [Bulk Import of User Contact Lists, page 15-8](#).

BAT allows you to find and choose the users whose contact lists you want to export. The user contact lists are exported to a CSV file with the following format:

```
<User ID>,<User Domain>,<Contact ID>,<Contact Domain>,<Nickname>,<Group Name>
```

[Table 15-1](#) describes the parameters in the export file.

**Table 15-1 Description of Input File Parameters**

Parameter	Description
User ID	The user ID of the Cisco Unified Presence user.
User Domain	The Presence domain of the Cisco Unified Presence user.

Parameter (continued)	Description
Contact ID	The user ID of the contact list entry.
Contact Domain	The Presence domain of the contact list entry.
Nickname	The nickname of the contact list entry. If the user has not specified a nickname for a contact, the Nickname parameter will be blank.
Group Name	The name of the group to which the contact list entry is to be added. If a user's contacts are not sorted into groups, the default group name will be specified in the Group Name field.

The following is a sample CSV file entry:

```
userA,example.com,userB,example.com,buddyB,General
```

Complete the following procedure to export user contact lists with BAT and download the export file.

#### Procedure

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- Step 1** Choose **Cisco Unified Presence Administration > Bulk Administration > Contact List > Export**
- Step 2** Use the selection criteria to find the users whose contact lists you want to export. See the Online Help topic in the Cisco Unified Presence Administration interface for more information about finding and choosing users.
- Step 3** Click **Next**.
- Step 4** In the **File Name** field, enter a name for the CSV file.
- Step 5** Choose one of the following:
- Click **Run Immediately** to execute the Bulk Administration job immediately.
  - Click **Run Later** to schedule a time to execute the Bulk Administration job. For more information about scheduling jobs in BAT, see the Online Help in Cisco Unified Presence Administration.
- Step 6** Click **Submit**. If you chose to run the job immediately, the job runs after you click Submit.
- Step 7** To download the export file after the job has run, choose **Cisco Unified Presence Administration > Bulk Administration > Upload/Download Files**.
- Step 8** Find and choose the export file that you want to download.
- Step 9** Click **Download Selected**.
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#### Related Topic

[Bulk Import of User Contact Lists, page 15-8](#)

# Bulk Import of User Contact Lists

You can use the Cisco Unified Presence Bulk Assignment Tool (BAT) to import user contact lists into Cisco Unified Presence. With this tool, you can prepopulate contact lists for new Cisco Unified Presence client users or add to existing contact lists. To import user contact lists, you must provide BAT with an input file that contains the user contact lists.

The input file must be a CSV file in the following format:

```
<User ID>,<User Domain>,<Contact ID>,<Contact Domain>,<Nickname>,<Group Name>
```

The following is a sample CSV file entry:

```
userA,example.com,userB,example.com,buddyB,General
```

[Table 15-2](#) describes the parameters in the input file.

**Table 15-2 Description of Input File Parameters**

Parameter	Description
User ID	The user ID of the Cisco Unified Presence user. It can have a maximum of 132 characters. <b>Note</b> This is a mandatory parameter.
User Domain	The Presence domain of the Cisco Unified Presence user. It can have a maximum of 128 characters. <b>Note</b> This is a mandatory parameter.
Contact ID	The user ID of the contact list entry. It can have a maximum of 132 characters. <b>Note</b> This is a mandatory parameter.
Contact Domain	The Presence domain of the contact list entry. The following restrictions apply to the format of the domain name: <ul style="list-style-type: none"> <li>Length must be less than or equal to 128 characters</li> <li>Contains only numbers, upper- and lowercase letters, and hyphens (-)</li> <li>Must not start or end with hyphen (-)</li> <li>Length of label must be less than or equal to 63 characters</li> <li>Top-level domain must be characters only and have at least two characters</li> </ul> <b>Note</b> This is a mandatory parameter.
Nickname	The nickname of the contact list entry. It can have a maximum of 255 characters.
Group Name	The name of the group to which the contact list entry is to be added. It can have a maximum of 255 characters. <b>Note</b> This is a mandatory parameter.



**Note**

If you are moving users to another node or subcluster in a different cluster, you can use BAT to generate the CSV file for chosen users. See [Bulk Export of User Contact Lists, page 15-6](#) for more information.



Complete the following steps to import user contact lists into Cisco Unified Presence:

- [Check Maximum Contact List Size, page 15-9](#)
- [Upload the Input File using BAT, page 15-10](#)
- [Create a New Bulk Administration Job, page 15-10](#)
- [Check Results of Bulk Administration Job, page 15-10](#)

#### Before You Begin

Before you import the user contact lists, you must complete the following:

1. Provision the users on Cisco Unified Communications Manager.
2. Ensure that the users are licensed and assigned to Cisco Unified Presence.



#### Note

The default contact list import rate is based on the server hardware type. You can change the contact list import rate by choosing **Cisco Unified Presence Administrator > System > Service Parameters > Cisco Bulk Provisioning Service**. However, if you increase the default import rate, this will result in higher CPU and memory usage on Cisco Unified Presence.

## Check Maximum Contact List Size

Before you import contact lists, Cisco recommends that you check the Maximum Contact List Size and Maximum Watchers settings in Cisco Unified Presence.

Cisco recommends that you set the Maximum Contact List Size and Maximum Watchers settings to Unlimited while importing user contact lists to Cisco Unified Presence. This ensures that each migrated user contact list is fully imported. After all users have migrated, you can reset the Maximum Contact List Size and Maximum Watchers settings to the preferred values.



#### Note

It is possible to exceed the maximum contact list size without losing data when importing contact lists using BAT; however, Cisco recommends temporarily increasing the Maximum Contact List Size setting or setting the value to Unlimited for the import. You can reset the maximum value after the import is complete.

[Configure Maximum Contact List Size Per User, page 13-3](#) describes how to configure the Maximum Contact List Size. [Configure Maximum Number of Watchers Per User, page 13-4](#) describes how to configure the Maximum Watchers settings. The system default value is 200 for Maximum Contact List Size and 200 for Maximum Watchers.



#### Note

You only need to check the maximum contact list size on those clusters that contain users for whom you wish to import contacts. When you change Presence settings, the changes are applied to all nodes in the cluster; therefore you only need to change these settings on the Cisco Unified Presence Publisher node within the cluster.

#### What To Do Next

[Upload the Input File using BAT, page 15-10](#)

## Upload the Input File using BAT

The following procedure describes how to upload the CSV file using BAT.

### Procedure

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- Step 1** Choose **Cisco Unified Presence Administration > Bulk Administration > Upload/Download Files**.
  - Step 2** Click **Add New**.
  - Step 3** Click **Browse** to locate and choose the CSV file.
  - Step 4** Choose **Contact Lists** as the Target.
  - Step 5** Choose **Import Users' Contacts – Custom File** as the Transaction Type.
  - Step 6** Click **Save** to upload the file.
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### What To Do Next

[Create a New Bulk Administration Job, page 15-10](#)

## Create a New Bulk Administration Job

The following procedure describes how to create a new bulk administration job in Cisco Unified Presence Administration.

### Procedure

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- Step 1** Choose **Cisco Unified Presence Administration > Bulk Administration > Contact List > Update**.
  - Step 2** From the File Name drop-down list, choose the file to import.
  - Step 3** In the Job Description field, enter a description for this Bulk Administration job.
  - Step 4** Choose one of the following:
    - Click **Run Immediately** to execute the Bulk Administration job immediately.
    - Click **Run Later** to schedule a time to execute the Bulk Administration job. For more information about scheduling jobs in BAT, see the Online Help in Cisco Unified Presence Administration.
  - Step 5** Click **Submit**. If you chose to run the job immediately, the job runs after you click Submit.
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### What To Do Next

[Check Results of Bulk Administration Job, page 15-10](#)

## Check Results of Bulk Administration Job

When the Bulk Administration job is complete, the Cisco Unified Presence BAT tool writes the results of the contact list import job to a log file. The log file contains the following information:

- The number of contacts that were successfully imported.

- The number of internal server errors that were encountered while trying to import the contacts.
- The number of contacts that were not imported (ignored). The log file lists a reason for each ignored contact at the end of the log file. The following are the reasons for not importing a contact:
  - Invalid format—invalid row format, for example, a required field is missing or empty
  - Invalid contact domain—the contact domain is in an invalid format; see [Table 15-2](#) for the valid format of the contact domain
  - Cannot add self as a contact—you cannot import a contact for a user if the contact is the user
  - User’s contact list is over limit—the user has reached the maximum contact list size and no more contacts can be imported for that user
  - User is not assigned to local node—the user is not assigned to the local node
- The number of contacts in the CSV file that were unprocessed due to an error that caused the BAT job to finish early. This error rarely occurs.

Complete the following procedure to access this log file.

**Procedure**

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- Step 1** Choose **Cisco Unified Presence Administration > Bulk Administration > Job Scheduler**.
- Step 2** Click **Find** and choose the job ID of the contact list import job.
- Step 3** Click the **Log File Name** link to open the log.
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