

Cisco Unified Communications Self Care Portal User Guide, Release 10.5(1)

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Unified Communications Self Care Portal

This document describes how to use Unified Communications Self Care Portal to configure user settings for your Cisco Unified IP Phones and Jabber applications. You can configure settings such as speed dial numbers, contact lists, phone services, and voicemail notifications.

This document contains the following sections:

Self Care Portal Settings

The Graphical User Interface

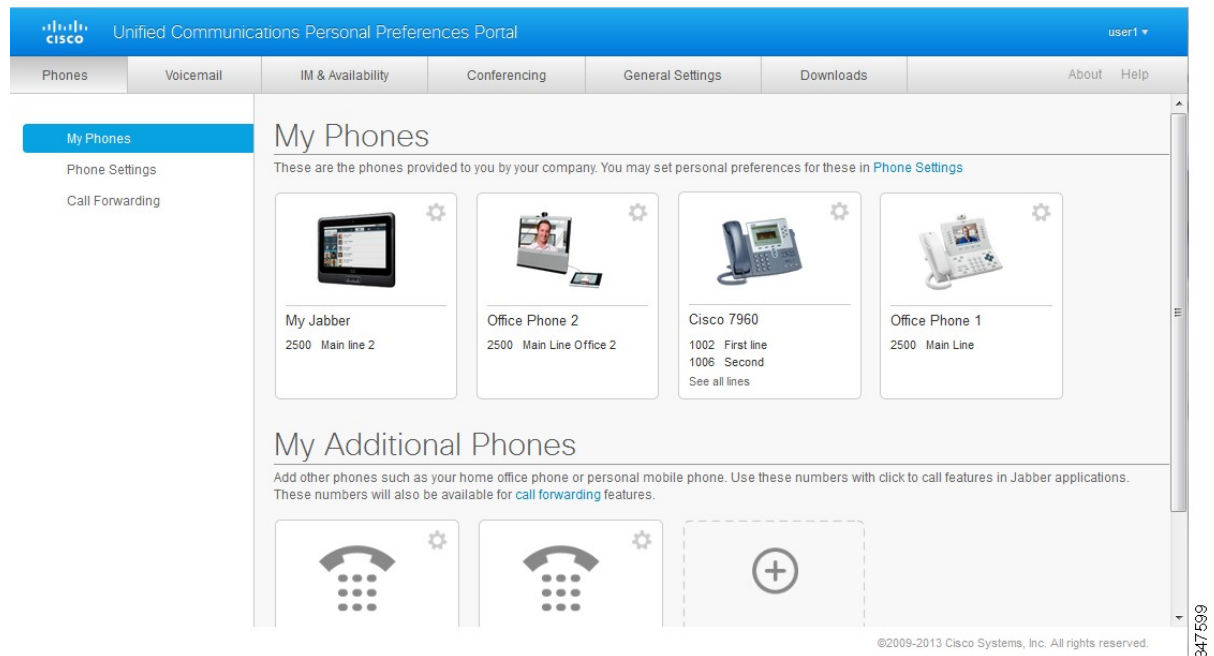
Unified Communications Self-Care Portal uses a web-based graphical interface with six tabs. Each tab contains a link to different options that the user can configure.

The tabs are as follows:

- **Phones**—The settings under this tab allow you to view and configure your phone settings such as speed dial numbers, ring settings, call history, and call forwarding settings.
- **Voicemail**—The settings under this tab allow you to set up your voicemail preferences.
- **IM & Availability**—The settings under this tab allow you to set up your Do Not Disturb and IM & Presence status.
- **Conferencing**—The settings under this tab allow you to set up conferencing options.
- **General Settings**—The settings under this tab allow you to configure settings such as user locales and passwords.
- **Downloads**—The settings under this section allow you to download plugins and applications for your phones.

The following graphic displays the main screen.

Figure 1: User Interface



Common Features and Icons

The Unified Communications Self Care Portal uses the following icons to execute common functions.

Icon	Description
	Add New —Click this icon to add a new item, such as a new phone, new service, or a new speed dial number.
	Delete —Click this icon to delete this setting.
	Edit Settings —Click this icon to edit an existing setting.
	Linked —When the Linked icon displays, phone settings for this particular phone setting are linked. If you update one of your phones, Unified Communications Self Care Portal applies the same update to your other phones. Click the icon to change the status to unlinked so that you can apply unique settings for each phone.
	Unlinked —When the Unlinked icon displays, each of your phones can have unique settings for this phone setting. Click the icon to change the status to linked so that your phones share the same setup for this phone setting.

Launch Self Care Portal

Launch the Self Care Portal to configure and customize your phone settings.

Before you begin

Make sure that your network administrator has enabled Self Care access and provided you with the following details:

- The Self Care Portal URL
- Your username and password

Procedure

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- Step 1** Enter the Self Care Portal URL in the web browser address bar: For example, `https://<server_name:portnumber>/ucmuser`. Note that the address format may vary depending on how the administrator configures the server.
- Step 2** Enter your username and password and click **Sign In**.
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Note Cisco Jabber users can access the portal directly from the Jabber client interface by selecting the Self Care Portal option within the Settings menu.

Phones

The settings that appear under the Phones tab allow you to view and configure settings for each of your Cisco Unified IP Phones and Jabber devices. The Phones tab is split into three main sections:

- My Phones—Under My Phones, you can view a summary of all of your phones and add new phones.
- Phone Settings—Under Phone Settings, you can configure phone settings such as speed dial numbers, ring settings, and voicemail notifications.
- Call forwarding—Under Call forwarding, you can configure call forwarding options for your phones.

My Phones

You can view the details of all your phones in the **My Phones** window. It has two panes; **Company Phones** and **Additional Phones**.

Company Phones

The **Company Phones** pane displays the phones that are provided to you by your company. You can edit and change your company phone names and description in the same pane. You can also configure your company phones. To configure, click **Phone Settings**.

Additional Phones

The **Additional Phones** pane displays the phones that are not provided to you by your company. You can add these phones to the list of numbers and let people reach out to you when you are not at your desk. You can enable Single Number Reach accessibility, Mobility softkey access, or Extend and Connect control by Cisco Jabber. However, you cannot configure the phone settings for your additional phones.

Edit Company Phone

You can change the title and description of your company phones at any time.

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** From the left navigation pane, click **My Phones** to view the company phones.
 - Step 3** Click the company phone that you want to edit and then click **Edit Phone**.
 - Step 4** Enter the new text for the phone description and phones lines.
 - Step 5** Click **Save**.
-

Activate Phone

To use a phone, you must first activate it using the activation code. If you have not activated, the phone displays a message **Ready to Activate**, in the Self Care Portal. Hence, you have to enter an activation code to activate and use the phone.

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** From the left navigation pane, click **My Phones**.
Note A non-activated phone displays the message **Requires Activation**.
 - Step 3** Click the phone that you want to edit and then click the **View Activation Code**. The Activation Code pop-up displays the activation code and barcode.
 - Step 4** Use one of the following options to activate the phone:
 - Input the 16-digit activation code on your new phone.
 - (Optional). If your phone has a video camera, you can use the camera to scan the barcode.
- After activation, your phone is ready for use.
-

Download Phone Manual

You can download the manual for one of your company phones from the Unified Communications Self Care Portal.

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** From the left navigation pane, click **My Phones**.
 - Step 3** Click any of the phones and then click **Download Manual**.
-

Set Up an Additional Phone

Unified Communications Self Care Portal allows you to setup additional phones such as a home office phone, or a mobile phone, to the phones that were provided by your company. Additional phones provide an additional number where you can be reached if you are not at your desk.

To set up an additional phone, perform the following steps:

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** In the left navigation pane, click **My Phones**.
 - Step 3** Under My Additional Phones, click the Add New (⊕) icon. The Add a New Phone window displays.
 - Step 4** Enter the phone number and a description for your phone.
 - Step 5** Optional. If you want to configure Single Number Reach for this phone, check the **Enable Single Number Reach** check box.
 - Step 6** Optional. If this phone is a mobile phone, check the **Enable Move to Mobile** check box.
 - Step 7** Optional. If you want this phone to be enabled for the Extend and Connect feature with Cisco Jabber, check the **Enable Extend and Connect** check box.
 - Step 8** Click **Save**.
-

Enable Single Number Reach on an Additional Phone

You can enable Single Number Reach on your additional phones, so that when someone dials your company phone your additional phones also rings. This enables you to answer your incoming calls from any other phones such as your mobile or home office.

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** From the left navigation pane, click **My Phones**.
 - Step 3** Click the **Additional phones** pane and then click **Edit**.
 - Step 4** Check the **Enable Single Number Reach** check box.
 - Step 5** Check the phone lines that you want to ring when your company phone rings.
 - Step 6** Click **Save**.
-

Set Up Ring Schedule for Single Number Reach

When you enable Single Number Reach for your additional phones, you can also set up a ring schedule. For example, you can set up a ring schedule so that only during office hours can someone reach you on your other phones by dialing your office phone number.

To set up a ring schedule, perform the following procedure:

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** From the left navigation pane, click **My Phones**.
 - Step 3** Click the **Additional phones** pane for the phones on which you want to add a ring schedule.
 - Step 4** Click **Edit** and then click **Create a schedule for this assignment**.
 - Step 5** Complete the fields in the **Add a New Schedule** window to create a ring schedule.
 - Step 6** Click **Save**.
-

Set Additional Phone for Mobility Calls

You can set up one of your additional phones as your mobile phone. This allows you to transfer all the calls from your company phone to the mobile phone.

Procedure

- Step 1** Click the **Phones** tab.
 - Step 2** From the left navigation pane, click **My Phones**.
 - Step 3** Click the **Additional phones** pane and then click **Edit**.
 - Step 4** Check the **Enable Move to Mobile** check box.
 - Step 5** Click **Save**.
-

Phone Settings

The Phone Settings window allows you to set up phone settings for your company phones.

By default, the phone settings for your various company phones are linked. Under the default setting, each of your phones will have an identical configuration for a particular phone setting. Follow the [Link and Unlink Phone Settings, on page 6](#) procedure to link or unlink your phones for various phone settings.

Please note that the options available under Phone Settings apply only to your company phones. You cannot configure phone settings for your additional phones.

Link and Unlink Phone Settings

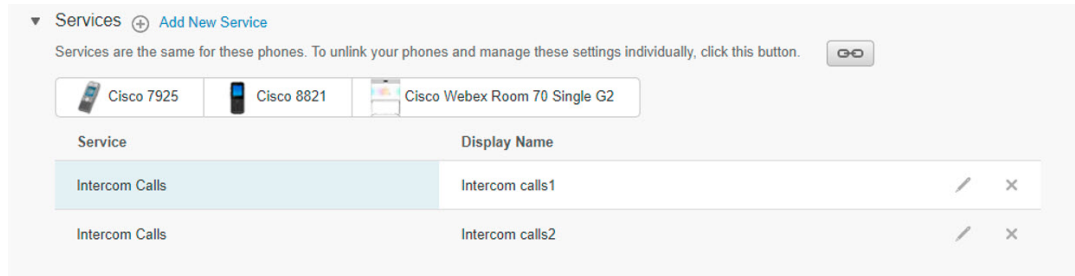
For phone settings, you can link the settings for your phones. When you link phones on a particular phone setting, Unified Communications Self Care Portal applies your configuration for that phone setting to all of your phones. For example, if you have three phones and you link your speed dial numbers for the three phones, all three phones share the same speed dial configuration. If you update a speed dial number for one of the phones, Unified Communications Self Care Portal automatically applies that speed dial number for the other phones as well. To apply a unique phone setting on a linked phone, unlink the phones.

Unified Communications Self Care links and unlinks each phone setting separately. As a result, you can link settings for one specific phone setting, such as speed dial numbers, while leaving another phone setting, such as voicemail notifications, unlinked. By default, all phone settings are linked.

You can link or unlink settings by clicking the Linked/Unlinked icon. The icon displays the current state of whether your phones are linked or unlinked.

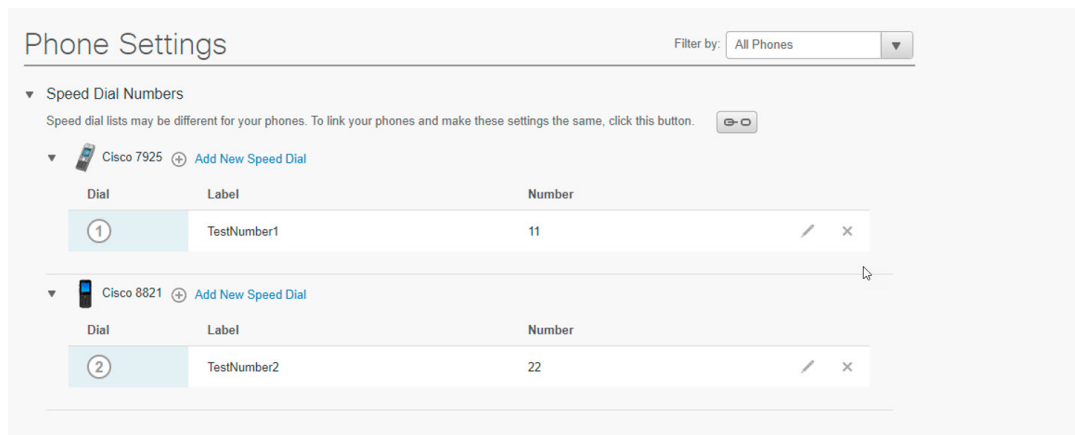
The following graphic displays how a set of devices with linked Services appears in the user interface. Since Services are currently linked, the Linked icon displays and the settings apply to all three devices. You can click the Linked icon to unlink the device and apply unique settings for each device.

Figure 2: Linked Settings



The following graphic displays how a set of phones with unlinked Speed Dial Numbers settings appears in the user interface. Since the settings are unique for each phone, the Unlinked icon displays. You can click the icon to apply the same settings for all two phones.

Figure 3: Unlinked Settings



Procedure

To link or unlink phone settings, do the following:

- To link a phone setting, click the Unlinked icon and choose which phone you want to use for the base phone. Unified Communications Self Care Portal updates that phone setting on all phones with the configuration of the base phone.
- To unlink a linked phone setting, click the Linked icon.



Note The Filter control, which appears in the top right corner of the configuration window, sets which phone you want to view. It has no impact on whether phone settings are linked. If you view the settings of a phone whose settings are linked, and you update that phone's settings, Unified Communications Self Care Portal also updates the linked phones.

Set Up Speed Dial Numbers

You can set up speed dials for the phone numbers that you call frequently. This allows you to connect with people, meetings, or any other connections with the press of a button.

Procedure

Step 1 From Unified Communications Self Care Portal, choose **Phones > Phone Settings > Speed Dial Numbers**.

Note For information on how to use speed dials, refer to your phone documentation.

Step 2 Do the following:

- If your phones are linked, click **Add New Speed Dial**.
- If your phones are not linked, choose the phone to set the speed dial number and click **Add New Speed Dial**.

Step 3 Enter the contact's name or phone number in the **Number** field. Unified Communications Self Care Portal searches the company directory.

Note You can only search the company directory if your network administrator has enabled you with the access permission. The access permission is set using the enterprise parameters of the Unified Communications Manager.

Step 4 Enter a description for the speed dial number in the **Label** text box. Your phone uses the description to display the speed dial number.

Step 5 Assign a speed dial number in the **Speed Dial** text box.

Step 6 Click **Save**.

Set up Phone Services

You can add phone services to your Cisco Unified IP Phones and Jabber applications. The phone services includes the directory, visual voicemails, or weather forecasts and so on. However, the list of available services depends on your configured phone model.

Procedure

Step 1 Click the **Phones** tab.

Step 2 From the left navigation pane, click **Phone Settings**.

Step 3 Click **Services** to expand the Services view.

- Step 4** Do the following:
- If your phones are linked, click **Add new service**.
 - If your phones are not linked, choose a phone to add the service, and click **Add new service**.
- Step 5** From the **Service** drop-down list, choose the service that you want to add.
- Step 6** In the **Display Name** text box, enter the label to identify the service on your phones.
- Step 7** Enter the required parameters.
- Step 8** Click **OK**.
-

Set Up Voicemail Notifications

Voicemail notifications allow you to set up how you want your phone to notify you if there are any new messages.

For example, you can configure your phones to provide screen prompts, flash message waiting light, or a shutter tone for a call to notify that you have new messages.

Procedure

- Step 1** Click the **Phones** tab.
- Step 2** From the left navigation pane, click **Phone Settings**.
- Step 3** Click **Voicemail Notification Settings** from the **Phone Settings** window.
- Step 4** For each of your phones, check any of the notification options that you want to apply to your phones.
- Step 5** Click **Save**.
-

Set Up Call History

Call history allows you to save the list of all the recent calls including the missed calls. If the to and from calls are from the same number, these calls are grouped together.

Procedure

- Step 1** Click the **Phones** tab.
- Step 2** From the left navigation pane, click **Phone Settings**.
- Step 3** Click **Call History** from the **Phone Settings** window.
- Step 4** Check the **Log Missed Calls** check box for each phone number that you want to save the call history.
- Step 5** Click **Save**.
-

Set Up Phone Contacts

Phone contacts allow you to store phone numbers and email addresses for your phone contacts. From your phones, you can also browse your list of contacts and place calls directly from the contact list without having to type in the number each time.



Note Each user has one phone contact list for all their phones. There is no option to link and unlink the phone contact list.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **Phones > Phone Settings > Phone Contacts**.
- Step 2** Click the **Create New Contact** button.
The **Add New Phone Contact** window appears.
- Step 3** Complete the field details for the contact information and contact methods.
- Step 4** Click **Save**.
-

Call Forwarding Options

You can set up the call forwarding option in Cisco Unified IP Phones and Jabber applications to forward your calls to another number.

Set Forward All Calls

If you are away from your desk and do not want to miss your calls, you can forward all your calls to another phone number or to a voicemail.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **Phones** and click **Call Forwarding**.
- Step 2** Click the phone number on which you want to set up call forwarding.
- To forward calls to another phone number, check the **Forward all calls to:** check box, choose **Add a New Number** from the drop-down list and enter the phone number in the field.
 - To forward calls to a voicemail, check the **Forward all calls to:** check box, choose **Voicemail** from the drop-down list.
-

Set Advanced Call Forwarding Options

With Unified Communications Self Care Portal, you can set up advanced call forwarding options, such as call forwarding behavior that is different for internal calls than for external calls. To set up advanced call forwarding, perform the following procedure:

Procedure

- Step 1** Click the **Phones** tab.
- Step 2** In the left navigation pane, click **Call Forwarding**.

- Step 3** Choose the phone number on which you want to set up call forwarding.
 - Step 4** Click **Advanced calling rules**.
 - Step 5** Use the drop-down list boxes to configure call forwarding options for both internal and external calls.
 - Step 6** Click **Save**.
-

Additional Settings

This section describes about the non-phone related settings, such as voicemail, conferencing, and the general settings.

Set Voicemail Preferences

To set voicemail preferences in Unified Communications Self Care Portal, click the **Voicemail** tab and then the **Dial Voicemail Preferences IVR** button. Cisco Web Dialer dials the Voicemail Preferences IVR, where you can set up voicemail preferences for your phones.

Turn on Do Not Disturb Status

If you are too busy with work and do not want to receive any phone calls, you can set your status to Do Not Disturb. Your phone does not ring when people try to dial your number.



Note You can set Do Not Disturb status only to your company provided phones.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **IM & Availability** and click **Do Not Disturb**.
 - Step 2** Check the **Turn on** check box.
 - Step 3** Click **Save**.
-

Turn on IM and Presence Status for Your Phones

You can turn on Cisco Unified IM and Presence status on your phones, so that people know when you are reachable. For example, it displays your status when you are in a meeting, away, or offline.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **IM & Availability** and click **Status Policy**.
 - Step 2** Check the **Automatically update status when there is a meeting on my calendar** check box.
 - Step 3** Click **Save**.
-

Schedule a Conference

The Conferencing tab in Unified Communications Self Care Portal allows you to schedule conferences. Depending on the user profile that your administrator has set up for you, you can set up conferences through either Cisco TelePresence Management Suite or Cisco WebEx. If your user profile does not include the ability to schedule conferences, no option to schedule a meeting will appear.

Set Phone Language

If you are comfortable using a different language, you can set that particular language for your Cisco Unified IP Phones or Jabber application.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **General Settings** and click **Language**.
 - Step 2** Choose an option from the **Display Language** drop-down list and click **Save**.
-

Set Client Password

If you have forgotten your client or portal password, you can reset it using **General Settings** tab.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **General Settings**.
 - Step 2** Click **Client/Portal Password**.
 - Step 3** In the **New Password** text box, enter the password and re-enter the password in the **Confirm New Password** text box.
 - Step 4** Click **Save**.
-

Set Phone Services PIN

The Phone Services PIN is used for enabling different services such as extension mobility, conference calls, mobile connect, and for self-provisioning of new phones.



Note The PIN that you enter must meet the credential policy defined in Unified Communications Manager. For example, if the credential policy specifies a minimum PIN length of 7 digits, the PIN that you enter should be at least 7 digits long and cannot exceed 128 digits. For more information, contact your system administrator.

Procedure

- Step 1** From Unified Communications Self Care Portal, choose **General Settings** and click **Phone Services PIN**.

Step 2 In the **New Phone PIN** text box, enter the PIN and re-enter the PIN in the **Confirm New Phone PIN** text box to confirm.

Step 3 Click **Save**.

Note If your network administrator has enabled PIN Synchronization, you can use the same PIN to log into Extension Mobility, Conference Now, Mobile Connect, and your Cisco Unity Connection voicemail box.

Set the Access Code for Conference Now

You can set your own access code and use it to schedule a meeting. The access code must have three to ten digits. It cannot include spaces, letters, or special characters. You can also reset your access code at any time.

Procedure

Step 1 From Unified Communications Self Care Portal, choose **General Settings** and click **Conference Now**.

Step 2 Enter the meeting number in the **Meeting Number** text box.

Step 3 Enter your access code in the **Attendees Access Code** text box.

Step 4 Click **Save**.

Set Your Login Time Period

To set maximum login time for Extension Mobility (EM) and Extension Mobility Cross Cluster (EMCC), perform the following steps:

Procedure

Step 1 Click **General Settings** tab.

Step 2 Click **Extension Mobility**.

Step 3 To use the maximum login time service parameter settings, click the **Use system default Maximum Login Time** radio button.

Step 4 To set an infinite login time, check the **No Maximum Login Time** radio button.

Step 5 To set a specific login time, check the **Automatically log me out after hours__minutes__** radio button and enter the minutes (between 0 and 59) and hours (between 0 and 168).

Step 6 Click **Save**.

Download Plugins

Application plug-ins extend the functionality of your Cisco Unified IP Phones and Jabber devices. To download plugins for your phone, perform the following procedure:

Procedure

- Step 1** Click the **Downloads** tab.
- Step 2** Select the plugin that you want to download.
- Step 3** Click **Download**.
-

View and Modify Display Name

When you log in as a local user who is not synchronized with Lightweight Directory Access Protocol (LDAP), you can view and modify your display name.



Note When you log in to Unified Communications Self Care Portal, the link to log out of the application shows the display name, if it has been configured earlier. Otherwise, the link to log out shows the User ID.

Procedure

- Step 1** From Unified Communications Self Care Portal, click the **General Settings** tab.
- Step 2** Click **Display Name**.

Note The behavior of this field changes when you log in as the following users:

- Local User—When you log in as local user that is not synchronized with Lightweight Directory Access Protocol (LDAP), you can modify your display name through the **Display Name** field.
- LDAP Synchronized user—When you log in as an LDAP synchronized user, the **Display Name** field becomes non-editable.

The **Display Name** text box appears.

- Step 3** In the **Display Name** text box, enter a name that you want other users to see instead of your user ID.

- Note**
- If you had previously configured a display name, this field is auto-populated with that configured name.
 - If you log in as an LDAP synchronized user, the display name is non-editable and so, the **Save** and **Cancel** buttons do not appear for this field.

- Step 4** Click **Save**.
- Step 5** (Optional) To revert to the previously configured display name, click **Cancel**.
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