Checklists for Users, Departments, Lines, and Phones

This chapter contains configuration checklists for the following topics:

Adding a User to the System

Users, which are employees of the company, are allowed to use the phones because you added the users and phones to the system. You can add a user by using one of the following methods:

- Through the Cisco-provided .xls data configuration file in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard (for initial deployment)

- Through the Cisco-provided .xls data configuration file in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (after initial deployment)

- Under **Users/Phones > Users** in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (after initial deployment)

Tip   After you insert users in bulk through the Cisco-provided .xls data configuration file, status for the insertion displays. If errors occur, you can download a report that describe the errors. After you download the report, correct the errors in the Cisco-provided .xls data configuration file, and upload the file again through the Search Phones or Search Users pages in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. (Select **Users/Phones > Users or Phones**, and click **Import Users/Phones**.)

Caution   You cannot add a phone until you assign a user and user extension to line one in the Phone page (or add the user and user extension under the User tab and add the extension under the Phone tab in the Cisco-provided .xls data configuration file). See the "Adding a Phone for a User" section on page 8-3.

When you configure a user ID, make sure that you enter a user ID that identifies who the user is, not the function that the user performs. For example, enter an email ID to identify the user. Do not enter a value that specifies a function, such as operator.

Procedure

Step 1   Perform one of the following:

- For the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard, see Step 2 through Step 6.

- For the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface, see Step 7.

Step 2   If you plan to use the use the Cisco-provided .xls data configuration file in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard, add the configuration data for the user(s) to the Cisco-provided .xls data configuration file.

Step 3   Verify that the data is correct in the Cisco-provided .xls data configuration file.

Step 4   After you have entered *all* configuration data that you want to upload to the system in the Cisco-provided .xls data configuration file, upload the Cisco-provided .xls data configuration file on the Select Setup Mode page in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard. (Select **Automatic Setup**.) You can upload the file from a USB key or from your desktop.

> **Tip** If you are uploading from a USB key, ensure that you insert the USB key into the port on the Cisco Unified Communications Manager Business Edition 3000 server.

Step 5 After you upload the Cisco-provided .xls data configuration file to the server, the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard takes you to the Summary page. After the server reboots, log into the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 6 The Post-Setup wizard allows you to immediately insert the user and phone configuration. Click **Import Users/Phones**.

Step 7 If you have already completed the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard, you can add a user to the system by performing one of the following methods in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface:

- Select **Users/Phones > Users** to add a single or multiple users.

  In the user page, create the extensions, speed dials, username and password, and so on. In addition, you must select a usage profile. Verify that you have configured a usage profile that works for the user and phone.

- To add multiple users from the Cisco-provided .xls data configuration file, select **Users/Phones > Users**. After you verify that the information in the Cisco-provided .xls data configuration file is correct, click **Import Users/Phones** in the Search Users page.

> **Tip** To edit or delete user configuration, select **Users/Phones > Users** in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Adding a Phone for a User

You can add a phone by using one of the following methods:

- Through the Cisco-provided .xls data configuration file in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard (for initial deployment)

- Through the Cisco-provided .xls data configuration file in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (after initial deployment)

- Under **Users/Phones > Phones** in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (after initial deployment)

> **Caution** The following procedure assumes that you have users and user extensions set up in your system. You cannot add a phone unless you assign a user extension as line one in the phone configuration.

> **Tip** After you insert phones in bulk through the Cisco-provided .xls data configuration file, status for the insertion displays. If errors occur, you can download a report that describe the errors. After you download the report, correct the errors in the Cisco-provided .xls data configuration file, and upload the

file again through the Search Phones or Search Users pages in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. (Select **Users/Phones > Users or Phones**, and click **Import Users/Phones**.)

Procedure

Step 1   Perform one of the following:

- For the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard, see Step 2 through Step 6.

- For the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface, see Step 7.

Step 2   If you plan to use the use the Cisco-provided .xls data configuration file in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard, add the configuration data for the phone(s) to the Cisco-provided .xls data configuration file.

Step 3   Verify that the data is correct in the Cisco-provided .xls data configuration file.

Step 4   Install the licenses for the phones in the License page in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard. You cannot add the phone configuration if licenses do not exist for the phones.

Step 5   After you have entered *all* configuration data that you want to upload to the system in the Cisco-provided .xls data configuration file, upload the Cisco-provided .xls data configuration file on the Select Setup Mode page in the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard. (Select **Automatic Setup**.) You can upload the file from a USB key or from your desktop.

    Tip   If you are uploading from a USB key, ensure that you insert the USB key into the port on the Cisco Unified Communications Manager Business Edition 3000 server.

Step 6   After you upload the Cisco-provided .xls data configuration file to the server, the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard takes you to the Summary page. After the server reboots, log into the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 7   The Post-Setup wizard allows you to immediately insert the user and phone configuration. Click **Import Users/Phones**.

Step 8   If you have already completed the Cisco Unified Communications Manager Business Edition 3000 First Time Setup Wizard, you can add a phone to the system by performing one of the following methods in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface:

- Select **Users/Phones > Phones** to add a single or multiple phones.

  You must add an extension to line 1 on the phone.

- To add multiple phones from the Cisco-provided data Cisco-provided .xls data configuration file, select **Users/Phones > Phones**. After you verify that the information in the Cisco-provided .xls data configuration file is correct, click **Import Users/Phones** in the Search Phones page.

    Tip   You cannot add the phone configuration if licenses do not exist for the phones. Select **Maintenance > Manage Licenses** to view and install licenses.

To edit or delete phone configuration, select **Users/Phones > Phones** in the Cisco Unified

Communications Manager Business Edition 3000 Administrative Interface.

If you have not installed the phones, remember to install them on the network. Remember to make test calls with the phones after they are installed.

Adding a Department and a Public-Space Phone

A department is a unique-user type that is used exclusively for public-space phones; this user is reserved for phones in cafeterias, lobbies, break rooms, and so on. A public-space phone cannot support Reach Me Anywhere.

You do not configure passwords for departments, unlike users (**Users/Phones > Users**).

For information on adding a department and a public-space phones, use the following procedure.

Procedure

Step 1   Identify the departments that you need for your system. For example, you may create a department for a phone in each bream room, for each phone in the lobby, for a phone in the cafeteria, for fax support, and so on. (To identify the number of departments that you need, identify how many public-space phones that you have.)

Step 2   Configure the department. Because a department is a special type of user, make sure that you create a department for each public-space phone; for example, if you have 5 public-space phones, you probably need 5 departments, one department per phone.

> **Tip**   Make sure that you add the extensions to the department page.

Step 3   Verify that you have enough licenses installed on the Cisco Unified Communications Manager Business Edition 3000 server. If necessary, obtain and install additional licenses before you add the phones.

Step 4   Add the public-space phone(s). In Cisco Unified Communications Manager Business Edition 3000 Administrative Interface, select **Users/Phones > Phones**.

If you have not already plugged the phone into the network, you can plug the phone in at this time.

Step 5   Make test calls with the public-space phones.

Setting Up the Cisco VG224 Analog Phone Gateway for Fax

To set up the Cisco VG224 Analog Phone Gateway to provide fax support for a site, perform the tasks that are described in the following procedure.

Procedure

Step 1   Configure a department specifically for the Cisco VG224 Analog Phone Gateway. (Select **Users/Phones > Departments**)

Step 2 In the department configuration, add an extension for the Cisco VG224 Analog Phone Gateway.

Step 3 Add the Cisco VG224 Analog Phone Gateway as a phone. For line 1 on the phone, select the extension that you created in the department configuration. (Select **Users/Phones > Phones**.)

Step 4 Make sure that the Cisco VG224 Analog Phone Gateway is connected to the network. Make sure that it has received its IP address and other network settings. After you plug the Cisco VG224 Analog Phone Gateway into the network, plug the fax machine into a port on the Cisco VG224 Analog Phone Gateway.

> **Note** Refer to http://www.cisco.com/en/US/docs/routers/access/vg224/software/configuration/guide/scgvoip.html for information on VG224 configuration.

Setting Up Ad hoc Conferences

To enable the system for ad-hoc conferences, enable the conference bridge in the Sites pages. For more information, see the .

Setting Up Barge

Perform the following procedure to set up barge.

Procedure

Step 1 Enable barge in the usage profile.

Step 2 If you have not already done so, add the user configuration for the two users and make sure that the usage profile is assigned to the users.

Step 3 If you have not already done so, set up the shared lines in the phone configuration. When you configure each phone, assign the same user extension to a line on the phone.

Step 4 Make sure that the shared lines display on the phone, and test the barge functionality on the phones.

Setting Up Call Divert

Perform the following procedure to configure call divert.

Procedure

Step 1 Enable voicemail and call divert in the usage profile.

Step 2 Assign the usage profile to the user. Assign an extension to the user.

Step 3 Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 4   Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page after you assign the extension.

Setting Up Call Forward All

Call forward all automatically redirects all incoming calls that go to line 1 on the phone to a different phone number on another phone.

Note   The user can set call forward all in the Cisco Unified Communications Manager Business Edition 3000 User Preferences Interface or on the phone. You can set up call forward all in the User page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (**Users/Phones > Users**).

Setting Up Call Forward Busy

Perform the following procedure to set up call forward busy.

Procedure

Step 1   Enable call forward busy in the usage profile; enter either a phone number or select **To Voicemail**, if available, in the usage profile.

Step 2   Assign the usage profile to the user. Assign an extension to the user.

Step 3   Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 4   Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page after you assign the extension.

Setting Up Call Forward No Answer

Perform the following procedure to set up call forward no answer.

Procedure

Step 1   Enable call forward no answer in the usage profile; enter either a phone number or select **To Voicemail**, if available, in the usage profile.

Step 2   Assign the usage profile to the user. Assign an extension to the user.

Step 3   Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 4   Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page after you assign the extension.

Step 5   To configure additional system settings, which apply to all phones where call forward no answer is
enabled, select **System Settings > Voice Feature Settings**.

Setting Up Call Park

Perform the following procedure to set up call park.

Procedure

Step 1   Enable call park in the usage profile.

Step 2   Assign the usage profile to the user. Assign an extension to the user.

Step 3   Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business
Edition 3000 Administrative Interface.

Step 4   Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page
after you assign the extension.

Setting Up Call Pickup

Perform the following procedure to set up call pickup.

Procedure

Step 1   Enable call pickup in the usage profile.

Step 2   Assign the usage profile to the user. Assign an extension to the user.

Step 3   Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business
Edition 3000 Administrative Interface.

Step 4   Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page
after you assign the extension.

Setting Up Cisco Extension Mobility

To enable a user or phone for Cisco Extension Mobility, perform the following procedure:

Procedure

Step 1   Enable Cisco Extension Mobility in the usage profile.

Step 2   Assign the usage profile to the user. Assign an extension to the user.

Step 3   Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 4   Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page after you assign the extension.

Setting Up Do Not Disturb

Perform the following procedure to set up do not disturb.

Procedure

Step 1   Enable it in the Phone page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. (Select **Users/Phones > Phones**.)

Step 2   Configure system settings in the Voice Features Settings page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. (Select **System Settings > Voice Feature Settings**.)

Setting Up Meet-Me Conferences

Perform the following procedure to configure Meet-Me conferences.

Procedure

Step 1   Configure the feature code in the dial plan.

Step 2   Enable the conference bridge in the Sites pages.

Step 3   To translate a Meet-Me conference number to an extension in your dial plan, set up a translation rule in the Dial Plan page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Setting Up Music On Hold

Perform the following procedure to set up music on hold.

Procedure

Step 1   Enable music on hold under Advanced Settings on the central site, remote sites, or teleworker site pages.

Step 2   Select the audio source file for the Audio on Hold setting on the Usage Profile page.

Step 3   If you do not plan to use the sample audio source file that is installed by default on the Cisco Unified Communications Manager Business Edition 3000 server, upload a different .wav file on the Music on Hold page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (**System Settings > Music On Hold**).

Music on hold audio source files must meet the following specifications:

- 16-bit PCM .wav file

- Stereo or mono

- Sample rates of 48 kHz, 44.1 kHz, 32 kHz, 16 kHz, or 8 kHz

Tip   Uploading a new audio source file replaces the current file on the system.

Step 4   Verify that the phone supports music on hold. If you have not already configured the phone, configure the phone in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface (**Users/Phones > Phones**). The owner/extension that is assigned to Line 1 on the phone must use the usage profile where the audio source file is selected. In addition, the phone must belong to a site where music on hold is enabled.

Step 5   Test your music on hold functionality to make sure that the phone streams music to the users when a call is placed on hold.

Setting Up Phone Applications

Perform the following procedure to set up phone applications.

Procedure

Step 1   Create the phone application based on the specifications that are described in the *Cisco Unified IP Phone Services Application Development Notes.*

Step 2   Determine where you plan to store the phone application. You cannot put it on the Cisco Unified Communications Manager Business Edition 3000 server.

Step 3   Configure the phone application in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. You can perform this step

- In the Phone Applications page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. Select **Users/Phones > Phone Applications**.

- In the Usage Profiles page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. Select **Users/Phones > Usage Profile**. (Make sure that you move it to the Selected section after you add the configuration.)

Step 4   If you did not add the phone configuration directly to the usage profile, select it in the usage profile (move from the Available section to the Selected section).

Step 5   Verify that the usage profile is applied to the user configuration. In the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface, select **Users/Phones > Users**.

Step 6   Verify that the phone displays the phone application. Test that the phone application works.

Setting Up Rollover Lines

Perform the following procedure to set up rollover lines.

Procedure

Step 1 If you have not already done so, create the user and assign the extension to the user. Assign a usage profile where the phone button template has at least two lines assigned to it.

Step 2 If you have not already done so, add the phone configuration. Make sure that line 1 in the phone configuration uses the extension from the user. In the phone configuration, make sure that you assign the same extension from the user to one of the other lines in the prioritized list.

Step 3 Verify that the phone displays the same extensions. If the same extensions do not display, verify that the phone button template in the assigned usage profile has at least two lines assigned to it. Verify that the phone model supports two lines.

Setting Up Reach Me Anywhere

To enable a user access to the Reach Me Anywhere setting in the Cisco Unified Communications Manager Business Edition 3000 User Preferences Interface, perform the following procedure:

Procedure

Step 1 Enable Reach Me Anywhere in the usage profile.

Step 2 Assign the usage profile to the user. Assign an extension to the user.

Step 3 Add the phone, if it has not already been added to the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface.

Step 4 Assign the extension to Line 1 on the phone. The user ID displays in the owner field in the Phone page after you assign the extension.

$\mathcal{Q}$

Tip   The Reach Me Anywhere setting does not display in the Cisco Unified Communications Manager Business Edition 3000 User Preferences Interface if the usage profile that is assigned to the user has Reach Me Anywhere disabled.

Setting Up Shared Lines

Perform the following procedure to set up shared lines.

Procedure

Step 1 If you have not already done so, add the user(s) configuration and assign an extension to the user(s).

Step 2   If you have not already done so, add the phones that will share the line. When you configure each phone, assign the same user extension to a line on the phone.

Tip   To set up shared lines under the Phone tab in the Cisco-provided .xls data configuration file, enter the same user extension in the Line cell for more than one phone; for example, for rows 1 and 5 under the Phones tab, enter 5001, which is the example extension that will be shared by both phones. Make sure that the extensions are included in the extension range for the dial plan.

Setting Up Speed Dials

Perform the following procedure to set up speed dials.

Procedure

Step 1   Review the phone documentation to verify the number of buttons that are available on the phone. Also verify whether speed dials are supported on the phone model.

Step 2   In the usage profile, configure the phone button template to add speed dials.

Step 3   Add the user, and apply the usage profile to the user. Add the user extension to the user. (You can set up the speed dials in the User page, or the user can set up the speed dials in the Cisco Unified Communications Manager Business Edition 3000 User Preferences Interface.)

Step 4   Add the phone, and assign the user extension to the phone.

Setting Up Voicemail

Perform the following procedure to set up voicemail.

Procedure

Step 1   Verify that you have enough voicemail licenses installed on the Cisco Unified Communications Manager Business Edition 3000 server. If necessary, obtain and install additional licenses before you configure the voicemail support. You need one voicemail license for each user that can access voicemail.

Step 2   Add the voicemail pilot extension to the dial plan.

Step 3   Enable voicemail in the usage profile.

Step 4   If you have not already done so, add the user and assign the usage profile to the user.

Step 5   If you have not already installed and added the phones, add the phones.

Step 6   Test your voicemail functionality.

Setting Up Auto Attendant

Perform the following procedure to set up auto attendant.

Procedure

Step 1   If you have not already done so, add the Voicemail and Auto Attendant Extension to the dial plan.

Tip   Do not assign the Voicemail and Auto Attendant Extension that you configure in the dial plan to the user that is your operator.

Step 2   Configure your auto attendant functionality in the Auto Attendant page in the Cisco Unified Communications Manager Business Edition 3000 Administrative Interface. (**System Settings > Auto Attendant**)

Step 3   Test your auto attendant functionality.

For More Information

- Setting Up the System So that Incoming Calls Reach the Operator, page 8-13
- Setting Up the System So that Incoming Calls Reach the Auto Attendant, page 8-14
- Setting Up the System So that Incoming Calls Reach the Auto Attendant if the Operator is Not Available, page 8-14

Setting Up the System So that Incoming Calls Reach the Operator

Perform the following procedure to ensure that incoming calls reach the operator instead of the auto attendant.

Procedure

Step 1   Configure the main business number in the dial plan.

Step 2   Configure the user for the operator. Make sure that you configure the extension from the main business number for the user.

Step 3   Configure the phone for the operator. Assign the extension for the operator to the phone.

Step 4   Test this functionality.

Setting Up the System So that Incoming Calls Reach the Auto Attendant

Perform the following procedure to ensure that incoming calls reach the auto attendant instead of the operator.

Procedure

Step 1   If you have not already done so, add the auto attendant extension to the dial plan. For the auto attendant extension in the dial plan, enter the extension that is derived from the main business number.

Step 2   Set up a translation rule in the dial plan that ensures that when the extension for the operator is called, the operator extension gets translated to another extension. (You are setting up the operator for internal use only.)

Step 3   Test this functionality.

Setting Up the System So that Incoming Calls Reach the Auto Attendant if the Operator is Not Available

Perform the following procedure to ensure that incoming calls reach the auto attendant if the operator is not available. This procedure assumes that the operator uses voicemail.

Procedure

Step 1   If you have not already done so, configure a user for the operator. Make sure that you configure at least one extension.

Step 2   Ensure that the usage profile that is assigned to the operator has voicemail enabled. If you cannot enable voicemail in the usage profile, verify whether you have enough voicemail licenses installed.

Step 3   In the usage profile for the operator, configure the call forward busy and call forward no answer settings so that the calls go to voicemail.

Step 4   If you have not already done so, configure a phone for the operator and assign the user extension to line 1 on the phone.

Step 5   Create a hunt list that includes the operator feature code from the dial plan or the extension that is assigned to the phone of the operator. Do not include any other extensions in the hunt list.

Step 6   If the hunt list softkey or button exists on the phone of the operator, the operator can log in and log out of the hunt list so that the calls go straight to auto attendant.