Contained Front End
CFE 2.1

User Guide

June 2016

Document version 2.1a

Atea Systems Limited
PO Box 22042, 2 Ganges Road
Khandallah, Wellington, New Zealand
NZBN 9429036367115

Atea Systems Pty Limited
PO Locked Bag Q800, QVB Post Office
Sydney, NSW 1230, Australia
ABN 57 122 952 783

www.ateasystems.com
Copyright © 2016 Atea Systems Limited. All rights reserved.

Contents

1 Overview – Makes Telephone System Tasks Repeatable 4
2 Getting Started – same login for Phone and CFE administrators 5
2.1 Log on from a web browser 5
2.2 Getting around – navigation tabs and breadcrumbs 5
3 Configuring users and phones 7
3.1 Add a user into the CUCM directory – via AD or via CFE 7
3.1.1 Add a new user – AD not used 8
3.1.2 Add a new user – using AD 8
3.2 Search for a user 9
3.3 Add an IP Tel device to a User 10
3.3.1 Choose a site 10
3.3.2 Choose the phone template (profile) 11
3.3.3 Assign a phone device and a phone number (New user configure) 12
3.3.4 Optional - assign a UDP device and a phone number (New user configure) 13
3.3.5 Optional - assign a Softphone device and a phone number (New user configure) 13
3.3.6 Save the settings for the new user 13
3.4 Change a user's directory details 14
3.5 Add or Change a user's IP Tel device or reset PIN or Password 16
3.5.1 Change device settings 18
3.5.2 Change Device Name (Modify User Device Profile / IP Phone) 20
3.5.3 Edit speed dials (Modify User Device Profile / IP Phone) 21
3.5.4 Edit BLF's speed dials (Modify User Device Profile / IP Phone) 22
3.5.5 Modify or delete the line – basic settings (Modify Line) 24
3.5.6 Modify or delete the line – advanced including Call Forward settings 25
3.5.7 Add a new line – (Modify User Device Profile / IP Phone) 27
3.6 Create User voice mailbox 28
3.7 Delete or swap a user's IP Tel device 30
3.8 Delete a user from the CUCM directory 33
3.9 New phone – setting up a phone not associated to a user 34
3.9.1 New phone – select site and choose profile 34
3.9.2 New phone – Assign phone device and phone number 35
3.10 Modify phone – change or delete an existing phone 36
3.10.1 Find an existing phone 36
3.10.2 Modify or delete the telephone device (Modify IP Phone) 37
4 Bulk add and delete of users 39

4.1 Bulk Add Users – Process to add users in bulk 39
4.2 Bulk Add Users – preparing the CSV file 40
4.3 Bulk Add Users – importing and processing the file 40
4.4 Bulk Delete Users – removes phones and device profiles 42
5 Reports on activity 43
6 Link to current documentation 45
7 Terms used in this guide 45

Document History

Date	Author	Version	Summary
20 June 2016	Murray Lum	2.1a	Updated to version 2.1 user interface
19 May 2015 Nov 2015	Murray Lum	1.5b 1.5c 1.5d	Updated for version 1.5.31 including: Integration of new user and directory user screens into the modify user module. Buttons to Restart and Reset a phone device. Update breadcrumbs Update LDAP sync options

Related Documents

Document	Description
CFE Administration Guide	Guide for administrators who are installing, setting up or changing system settings on the CFE.

1 Overview – Makes Telephone System Tasks Repeatable

The CFE simplifies a number of configuration tasks on the Cisco telephone system, allowing people who are less familiar with the telephone system to safely make configuration changes that are easily repeated.

Streamline your operations and costs

The CFE allows organisations to streamline their operations for performing service request moves, adds and changes of telephones, by freeing up time for skilled resources. Only pre-defined changes can be made, reducing the likelihood and impact of configuration changes made in error.

Separate areas for configuring users and telephones, or the CFE itself

The CFE is split into two areas; one for making changes to telephones or users, and one for setting up the CFE. An administrator can be set up as either a phone administrator, or a CFE administrator, or both.

- **Phone administrators** set up users and telephones.
- **CFE administrators** set up the CFE to match the CUCM environment. These items are generally set up once, with additions as telephone solution is adapted over time.

Set up your CFE to match your systems and processes

Configuration options allow you to set defaults for a number of automated items, and set the CFE to match your systems. This can be done when the CFE is first installed, and also as your telephone system evolves, such as when new sites are added. This guide explains the items that can be changed by the CFE administrator.

Your CFE may not have all the features shown in this guide

Some features in your CFE are determined at installation time and by the license option purchased. Some items in this guide may not appear in your solution. Specific settings are:

- Bulk add user settings
- Bulk delete user devices / device profiles
- Device only CSS (where the Calling Search Space for the device include class of service dialling restrictions – legacy method for configuring CUCM)
- CAPSL – Cisco Automated Provisioning Systems for LDAP, which configures phones for users with minimal intervention by administration staff

2 Getting Started – same login for Phone and CFE administrators

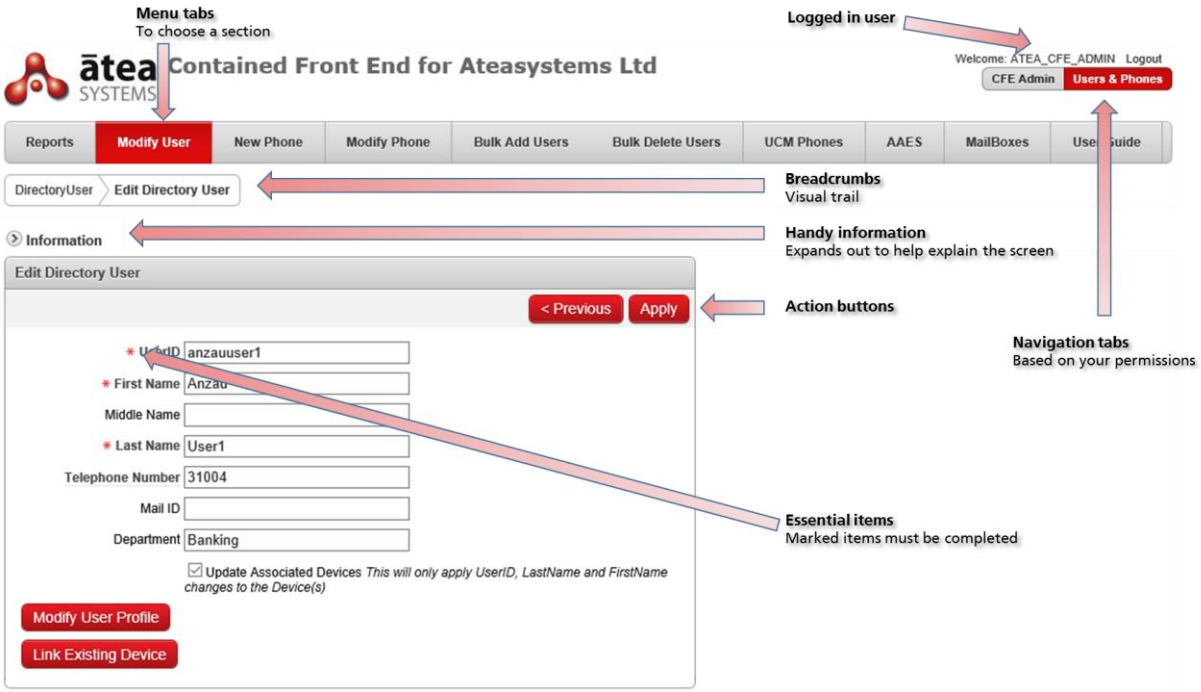
2.1 Log on from a web browser

1. **Enter the URL** or address for the CFE application. The usual format for the url is:

   http://[server IP address]:8080/apex/f?p=cfe

2. Enter your **user name and password**. This is usually the same as your LAN login. If you do not regularly have a LAN login, then an alternative login account may be provided.

2.2 Getting around – navigation tabs and breadcrumbs



Menu tabs

Displays the options available for the selected module. You may see more or less menu tabs based on your access permissions and how your CFE is configured.

Bread crumbs

These indicate where you are and allow you to go back to a previous screen by clicking on a preceding item.

Navigation tabs
These show the CFE modules available to you. Your permissions may allow you to see just a single tab. The red tab is the one currently selected.

Navigation bar - User name and logout
Shows who is logged in, and allows you to logout of the CFE.

Essential items are marked with a red asterisk
Any item marked with a red asterisk must be completed before going to the next screen.

Action buttons determine the next step
Use the action buttons to move to the next step. Sometimes there is an action button next to a field. This is usually specific to that individual field, such as checking whether the entry is valid.

Help text for handy information
Expand this section to see the on screen help.

3 Configuring users and phones

In the CFE, a User is an entry in the CUCM directory. This directory user is normally (but not always) a person and can be searched for and dialled from other phones. Examples of users are 'John Smith' or 'ANZAC Meeting Room'. A user can either just be a directory entry or can have a device associated to them like a phone or a User Device Profile (UDP).
A phone on the other hand, is just the handset that sits on a desk from which calls can be made. There is no associated entry in the directory that people can search for to find the number for this phone. Phones are generally referred to as a 'logged out device' when a company uses Extension Mobility (EM) or if not using EM perhaps it is just a phone in a waiting room.

To set up a user, the steps are:

1. Create the user entry (via AD or CFE depending on your system)
2. Add an IP Tel device (phone, device profile or softphone)
3. Assign the site and profile
4. Assign a phone device and telephone number
5. Add options: User Device Profile (UDP), softphone

To set up a phone, the steps are:

1. Assign the site and profile
2. Assign a phone device and a telephone number

3.1 Add a user into the CUCM directory – via AD or via CFE

There are two ways to add a User into the directory. One is via a directory that CUCM is synchronised with, such as Active Directory (AD) or other LDAP source. The other method is directly through CFE.

Create users through AD/LDAP

Where Active Directory is being used, create all new users in AD first. Once the CUCM has synchronised with AD, the user will also be created within the CUCM, but without a telephone. Or in the case of an Extension Mobility (EM) user, they will be without a device profile. LDAP synchronisation for the CUCM is usually set to an interval between 6-24 hours (Cisco has restricted the minimum interval to six hours). You may create several of these staggered during the day (up to 20 on release 10.5).

Create users through CFE

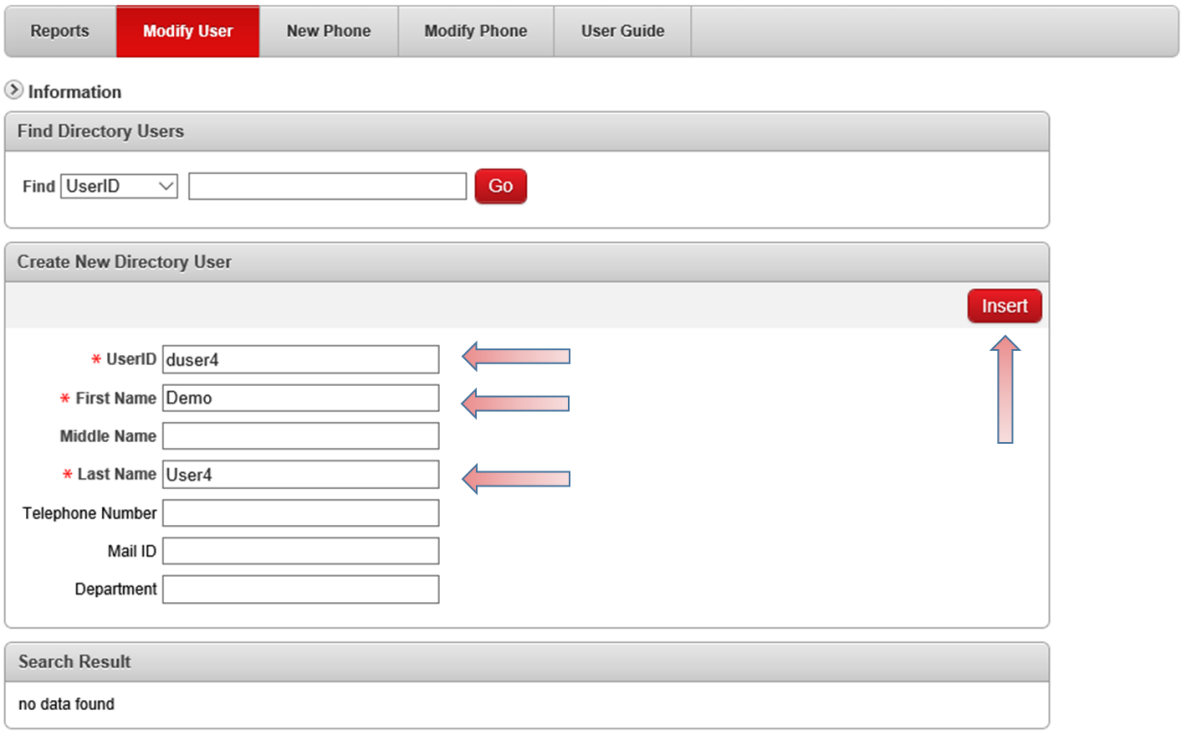
Where Active Directory is not being used, users can be added into the CUCM directory straight from CFE using the Directory Users page.

3.1.1 Add a new user – AD not used

This only applies if you are not using Active Directory (AD). Users can be added into the CUCM Directory straight from CFE using the **Modify Users** page.

On the **Modify User** page:

1. Enter the details in the section **Create New Directory User**



   This section only appears if the CUCM does ***not*** have LDAP synchronisation to AD.

   The items marked * are mandatory.

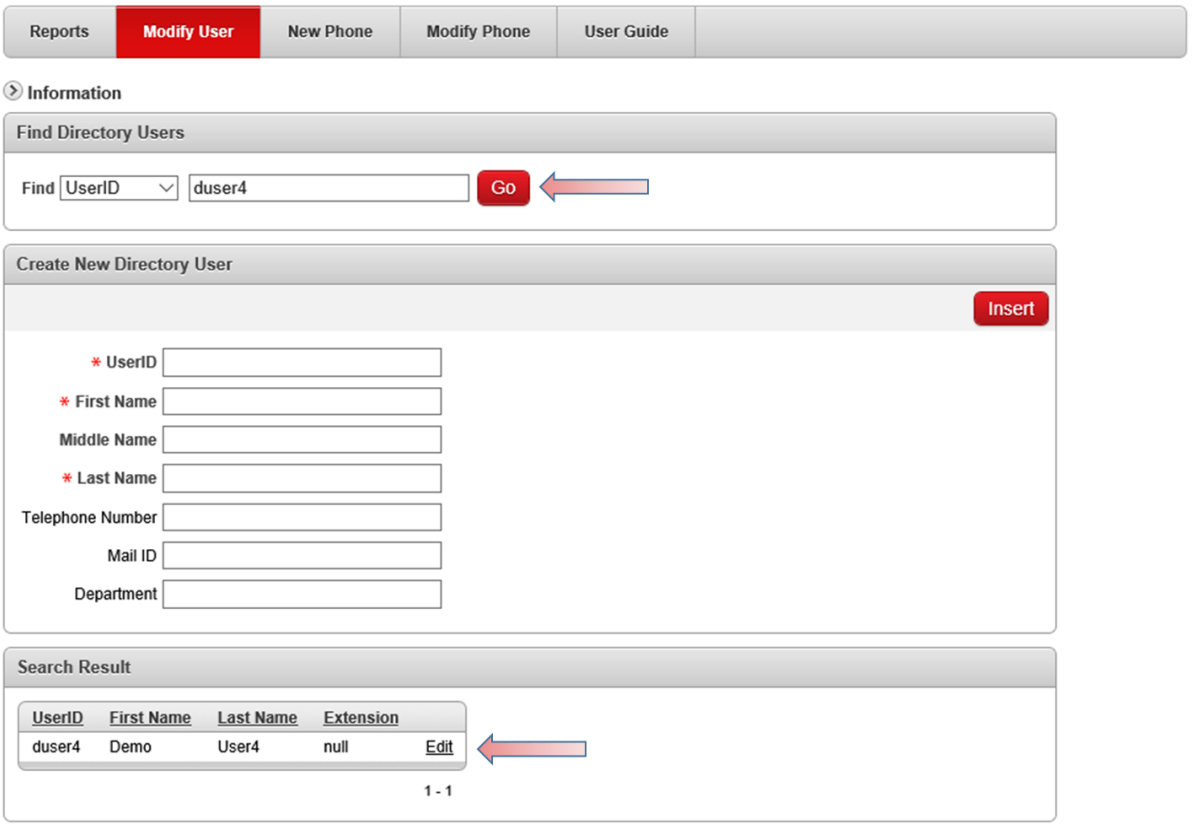
2. Click **Insert**

3.1.2 Add a new user – using AD

Add the new user into AD. The user details will appear in the CFE after both the AD and the CUCM have synchronised.

3.2 Search for a user

On the **Modify User** page, use the section under **Find Directory Users**.

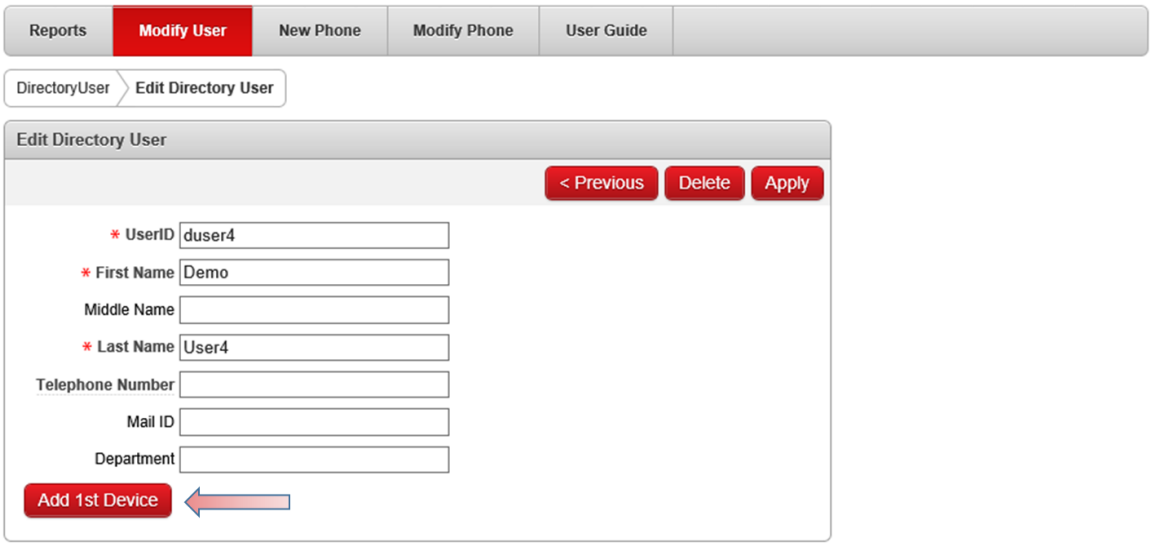


1. Under "**Find**", choose the search option from UserID, last name, first name or extension number.
2. Enter your search criteria (or leave blank) and click "**Go**"
3. Select the user from the list, click **Edit**.

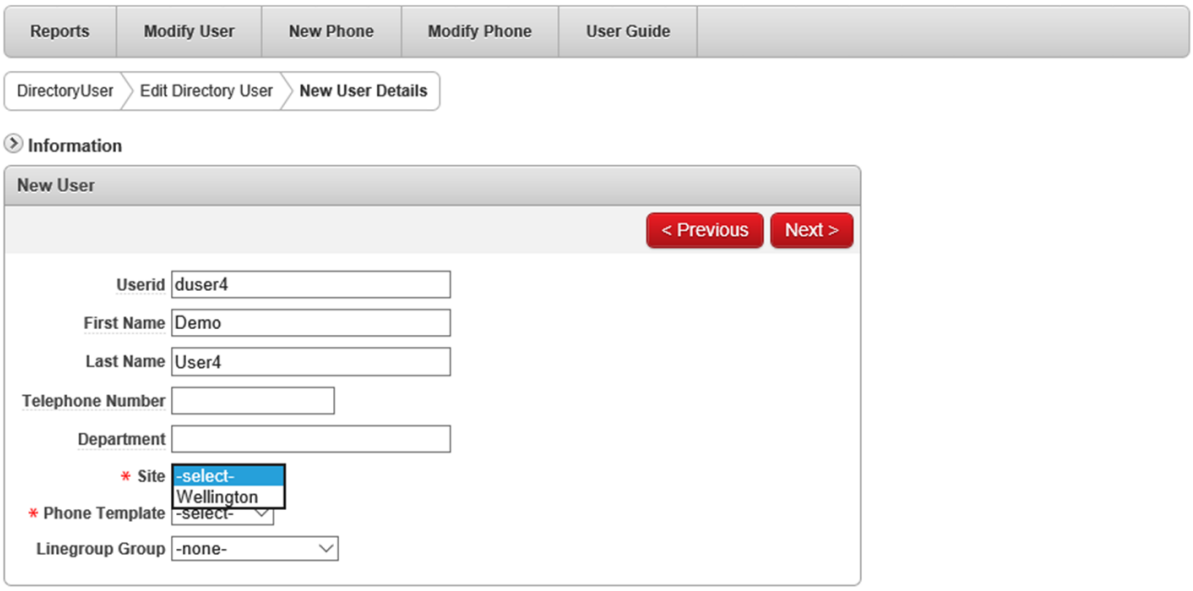
3.3 Add an IP Tel device to a User

Once a user is in the CUCM directory, add IP Tel devices to them such as a phone or a UDP.

1. On the **Modify User** page, use **Find Directory Users** (see 3.2 Search for a user) to search for the user, then click the **Edit** link
2. Click on **Add 1st Device**.

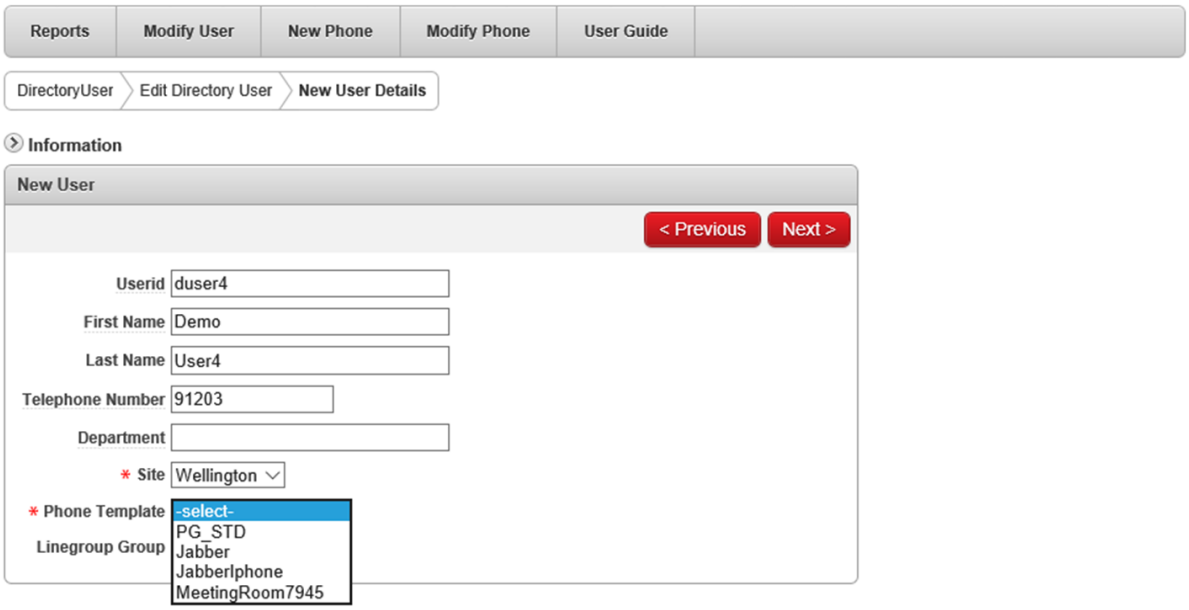


3.3.1 Choose a site



3. Select the **site** for the user from the drop-down list.

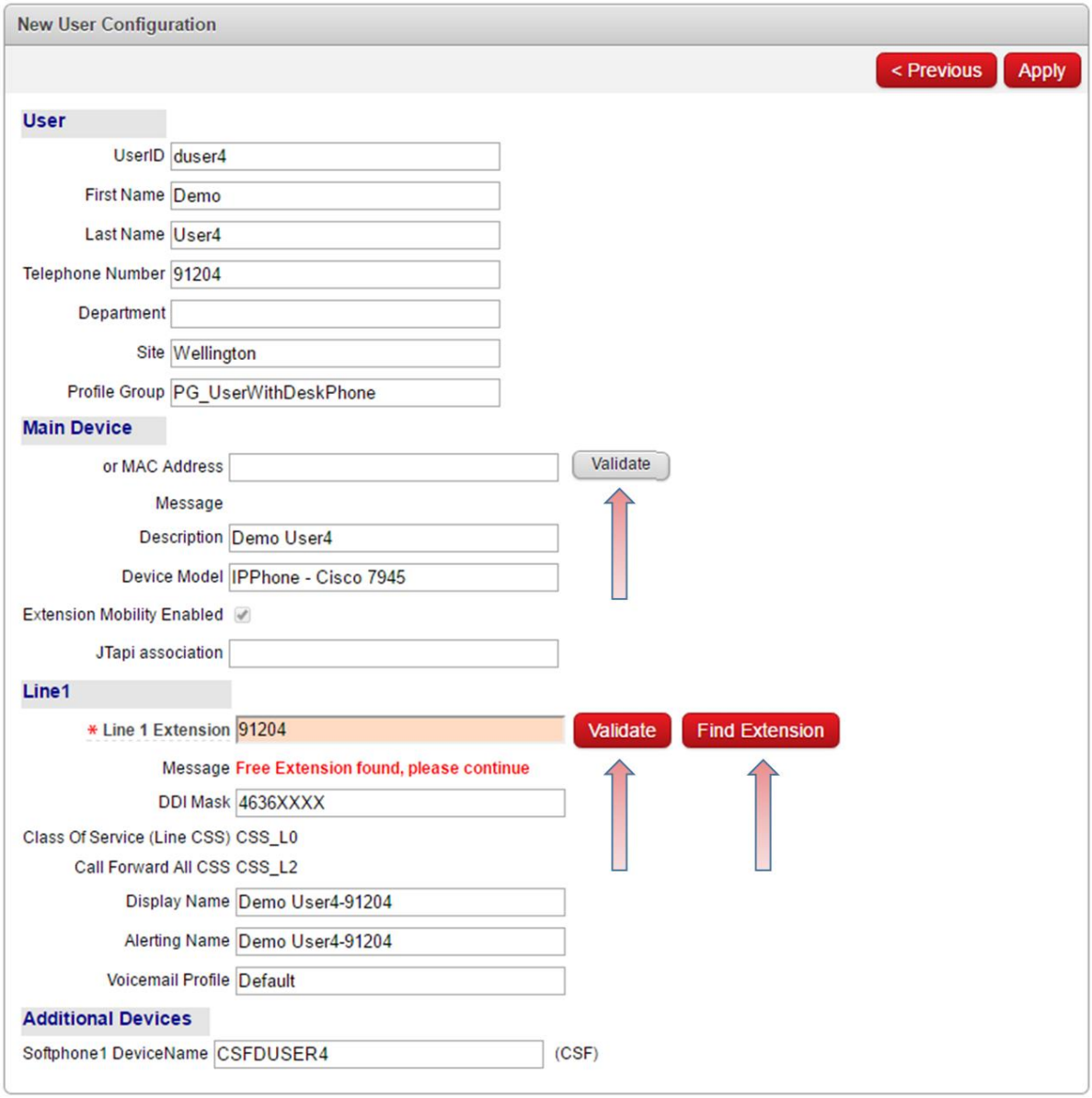
3.3.2 Choose the phone template (profile)



4. Select the **Phone Template** profile for the user from the drop-down list.
5. Complete the other fields. Depending on how your CFE setup, these may include
   - Telephone number
   - Department
   - JobID (for the job reference)
   - Linegroup Group (used with hunt groups)
6. When you are done click **Next >**

Note: Sites and profiles are set up in the CFE administration section. To add new sites or profiles, see the person responsible for the administration of the CFE.

3.3.3 Assign a phone device and a phone number (New user configure)



7. Under **Device** (physical phones only – ignore if UDP):
   - Enter the **MAC address** of the telephone device to be assigned to the user.
   - Click **Validate** to check that this device is indeed available. If the phone is currently assigned to someone else, you'll need to remove that phone from their profile first (see modify user). If the phone is currently set up as a normal phone, you'll need to delete the phone first (see modify phone).

8. Under **Line1,** either:
   - Click **Find Extension** to automatically retrieve a spare number for the site. This also reserves it for 30 minutes to avoid another CFE user from allocating; OR

- Enter the **extension number** that you wish to assign to the user. This may sometimes be different to the phone number that appears in the directory, and is assigned within AD; AND
- Click **Validate** to check the number you entered is unused, and belongs to the correct site. A warning may pop-up, but still allows you to use this number.

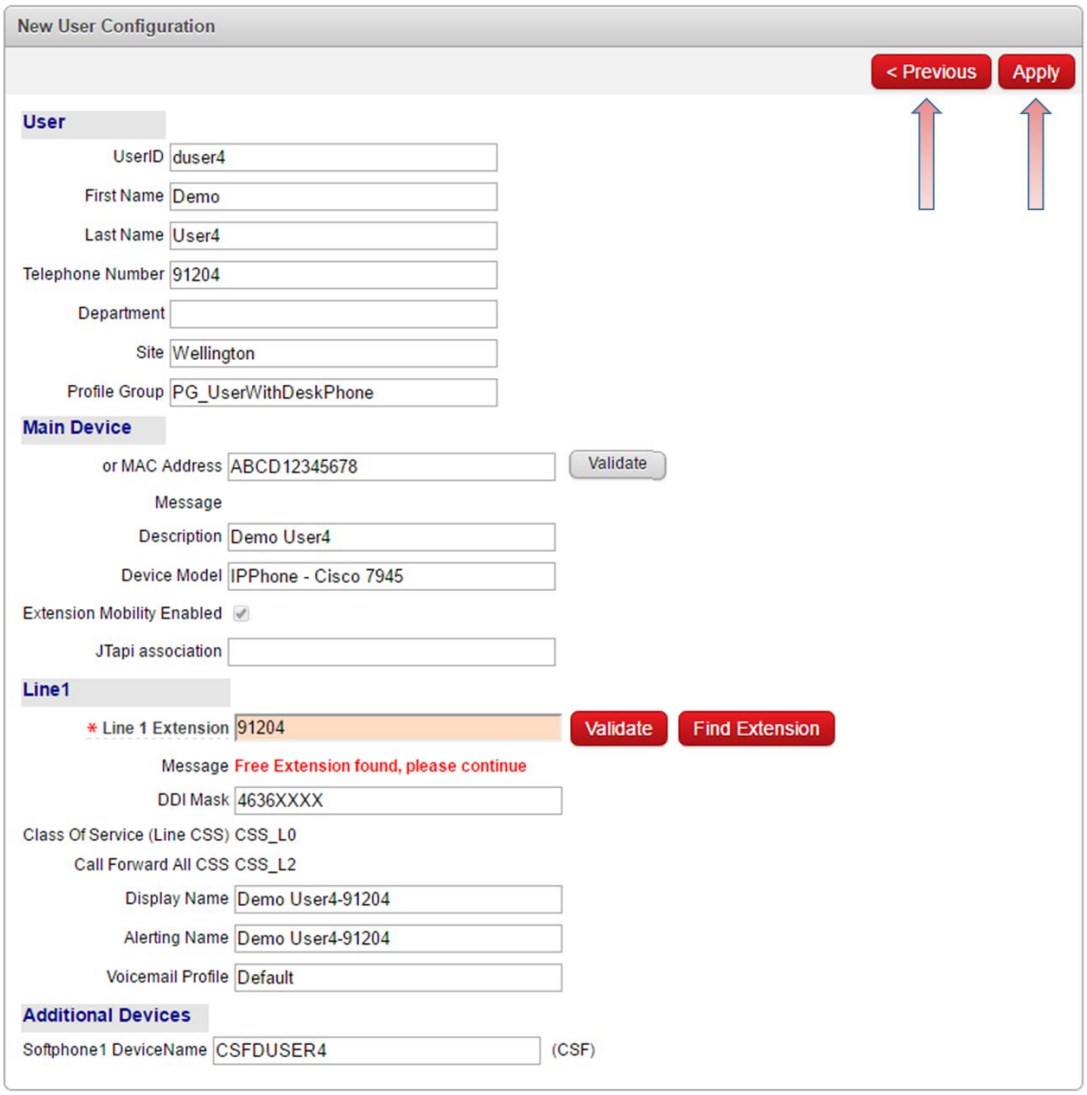
3.3.4 Optional - assign a UDP device and a phone number (New user configure)

This is the same as assigning a phone device but does not require a MAC address. See 3.3.2 Choose the phone template (profile).

3.3.5 Optional - assign a Softphone device and a phone number (New user configure)

This is the same as assigning a phone device. See 3.3.2 Choose the phone template (profile).

3.3.6 Save the settings for the new user



9. When you are done, click an action button:
   - **Previous** takes you back to the previous screen without saving the settings.
   - **Apply** saves the settings, and takes you to the confirmation screen.

10. Click **Modify User** should you wish to make further changes to the user settings, including their line or PIN resets.

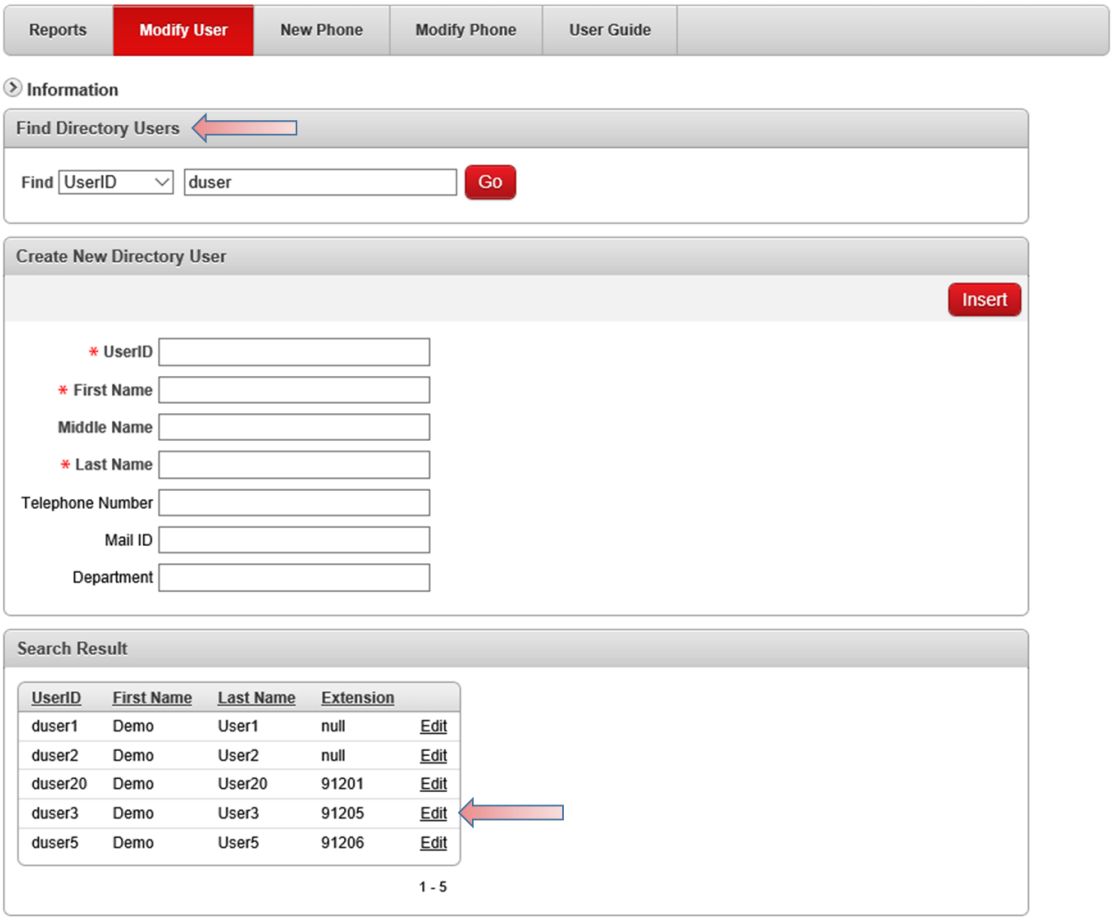
Note: If your CUCM is synchronised to AD, the CFE can be configured to write back the extension number back to AD. The next time CUCM synchronises with AD it will retrieve the extension number and put the number in its directory. If your CUCM is not synchronised with AD, then the CFE can be configured to write the extension number straight to the CUCM directory.

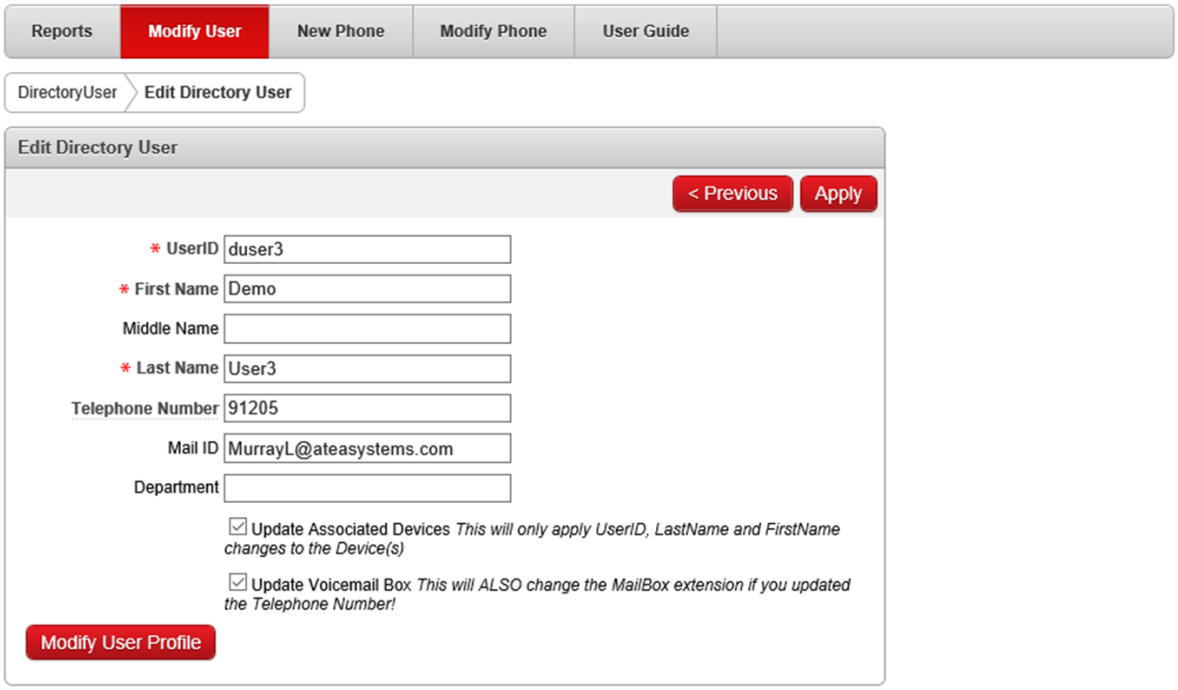
3.4 Change a user's directory details

User directory details can be updated here provided the user was added to the CUCM directory using the CFE. Examples include first and last name, the alerting name and directory number. This will update the CUCM and CUC. Note that this is currently only supported when CUCM is NOT synchronised to AD.

If you want to give this directory user a phone number that is different to their IP Tel number, you can do this here. An example of this would be a sales person's mobile number. (Note there is a CFE setting that will prevent an alternative number to be added if they user has an IP Tel device. If you are not sure what applies to you, please contact Atea support).

1. On the **Modify User** page, use **Find Directory Users** (see 3.2Search for a user) to search for the user, then click the **Edit** link





2. Update details:
   - Items marked * are mandatory

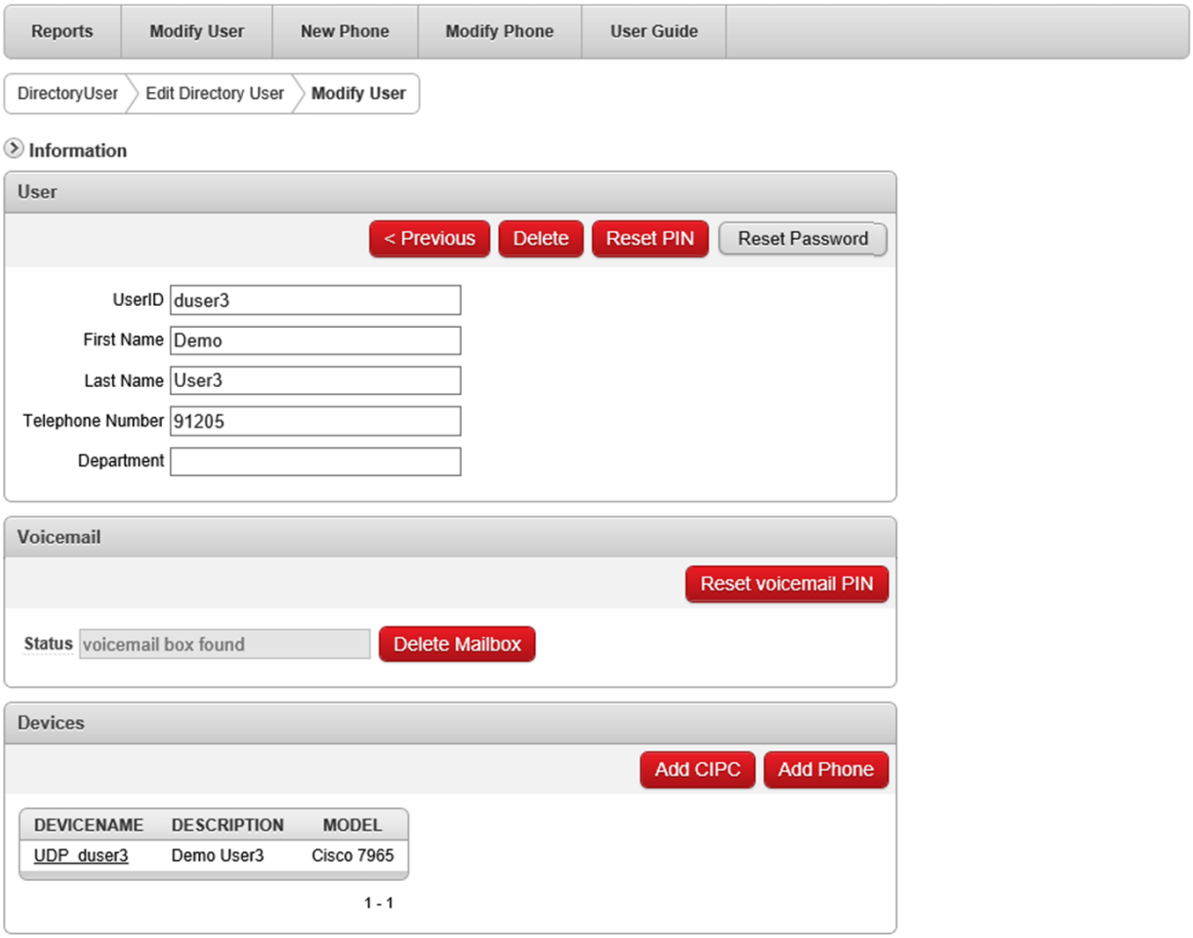
- Check the **Update Associate Devices** option to also update other devices with UserID, LastName and FirstName changes (otherwise this can be done manually by modifying the user's device – see below)
- Check **Update Voicemail Box** if you have changed the Telephone Number and also want to update the MailBox number (where there is voicemail integration).

3. When you are done, click an action button:
   - **Previous** takes you back to the previous screen without saving the settings.
   - **Apply** saves the settings, and takes you to the confirmation screen.

3.5 Add or Change a user's IP Tel device or reset PIN or Password

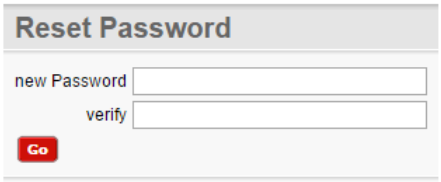
Use this section to modify the users IP Tel device, for example to change their calling restrictions or reset a password or PIN for their phone or voicemail.

1. On the **Modify User** page, use **Find Directory Users** (see 3.2 Search for a user) to search for the user, then click the **Edit** link



2. Click either the **device link** to update, or select an **action button**:

User



- **Previous** – takes you back to the previous screen without saving the settings
- **Delete** – removes the user from the CUCM
- **Reset PIN** – provides a popup to enter a new PIN
- **Reset Password** – provides a popup to enter a new password (If AD/LDAP sync is used, this button is not available)

Voicemail

- **Reset voicemail PIN** – provides a popup to enter a new PIN
- **Delete mailbox** – where linked to Unity Connection

Devices

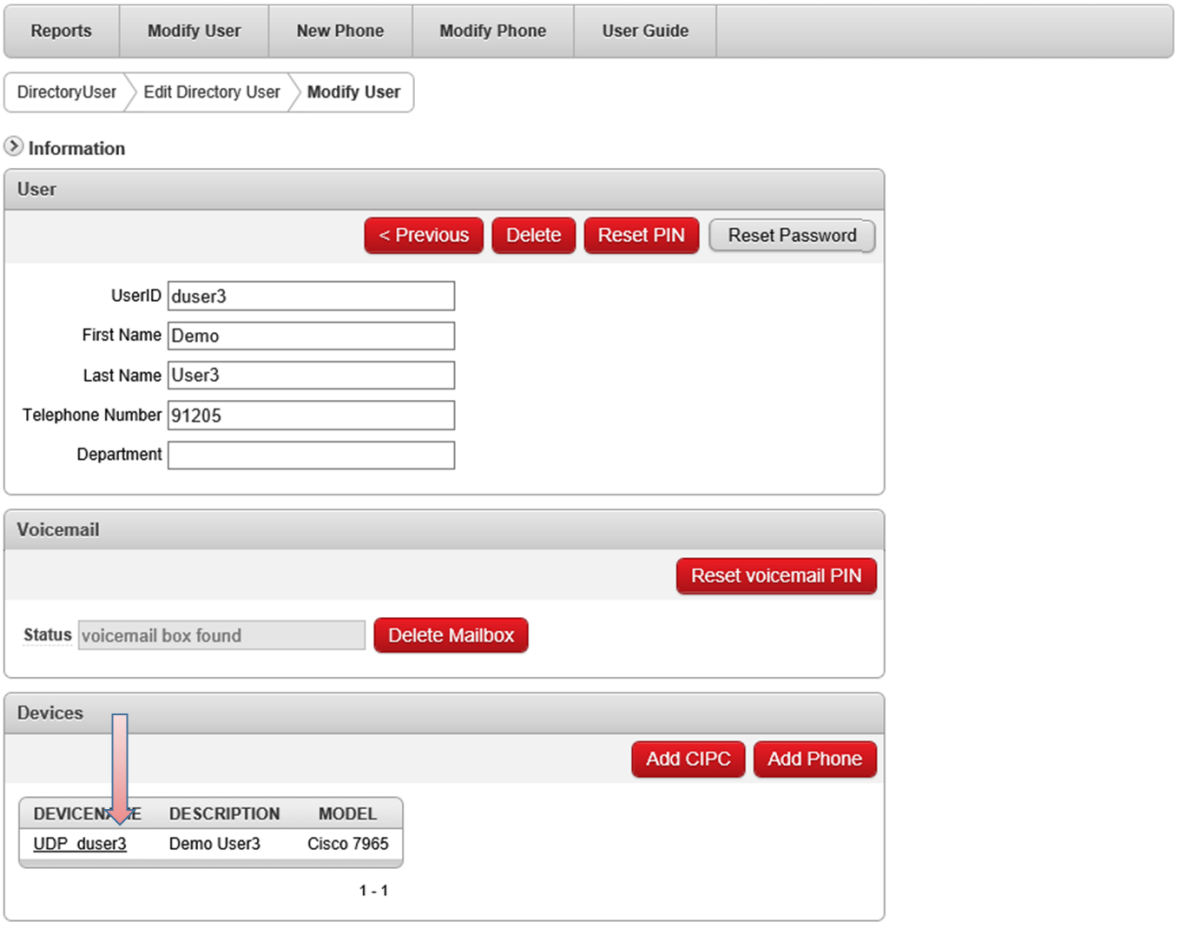
- **Add CIPC** – to add an IP communicator
- **Add Phone** – to add a phone device
- **Device name link** – to edit the settings for existing devices linked to the user.

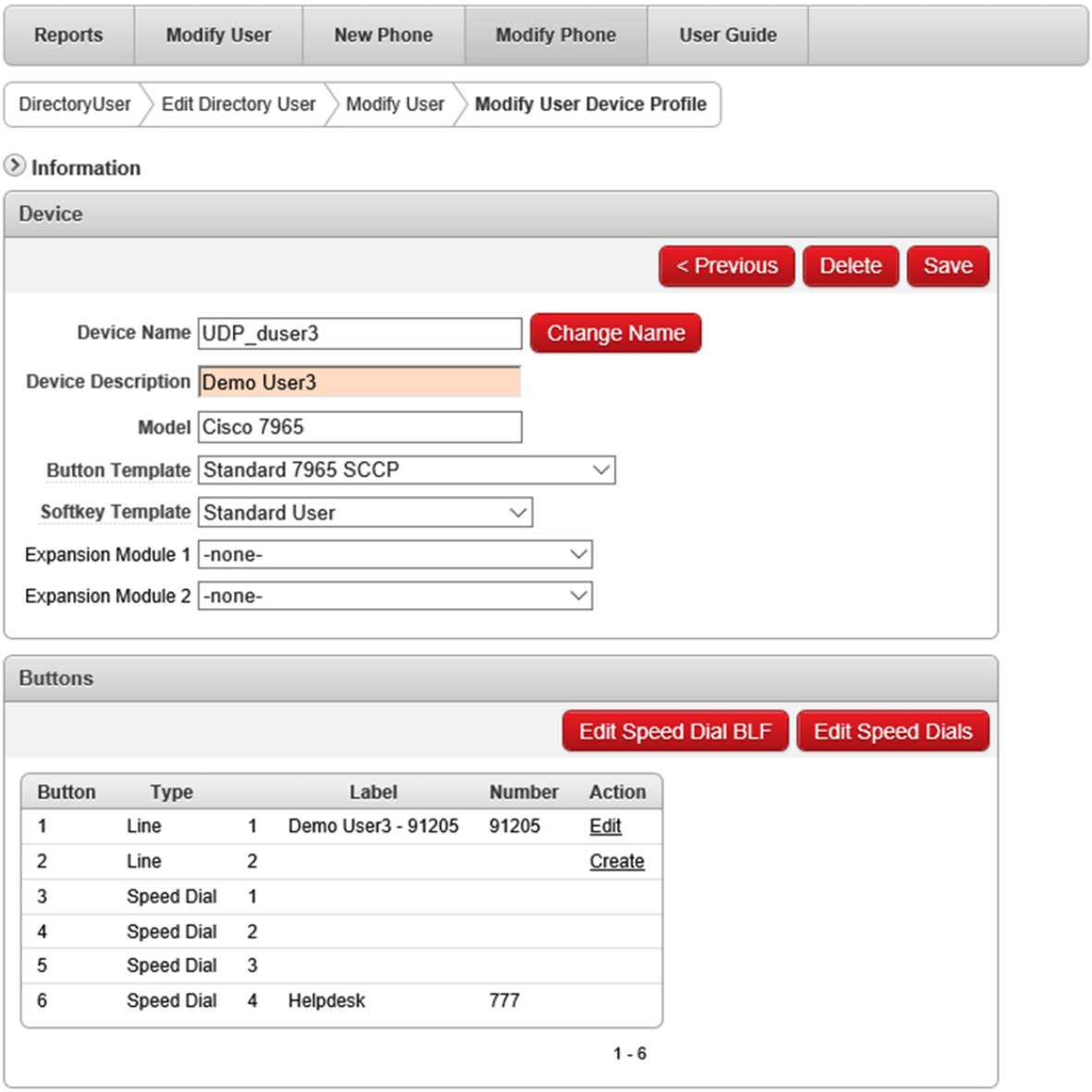
Devices that start with "SEP" are physical telephones. An extension mobility profile is often indicated with "EM". Selecting an item takes you to the Modify Device screen. Alternatively, you can add another device should the user need it.

3.5.1 Change device settings

Use this page to update device settings like button templates, line details and speed dials.

1. Select the **device** link to the device by from Modify User profile page





2. On this page you may change these device settings:
   - **Device Name** – name of the device. Clicking the **Change Name** button will open a new screen – see 3.5.2 Change Device Name (Modify User Device Profile / IP Phone)
   - **Device Description** – edit the existing text
   - **Model** – this is the model of phone and you cannot change it. You can however delete this phone and add the correct one.
   - **Button Template** – select an item from the dropdown list. The phone button template defines which buttons on the side of the phone display are for lines, and which are available for speed dials.
   - **Softkey Template** – select an option from the dropdown list. Otherwise leave it blank to use the system default template.
   - **Expansion Module 1 or 2** – select an option from the dropdown list

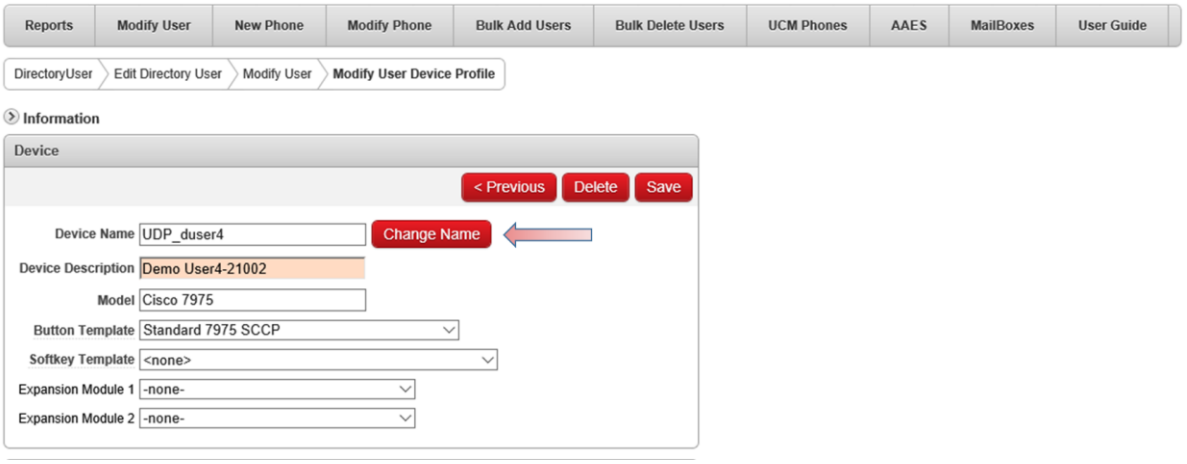
3. To edit the phone buttons:

- The **Edit Speed Dial BLF** button takes you to the page to update the Speed Dial Busy Lamp Field settings - see 3.5.4 Edit BLF's speed dials (Modify User Device Profile / IP Phone)
- The **Edit Speed Dials** button takes you to the page to update the normal Speed Dials – see 3.5.2 Change Device Name (Modify User Device Profile / IP Phone).
- Click **Edit** next to a line to change the line settings – see 3.5.5Modify or delete the line – basic settings (Modify Line) and 3.5.6 Modify or delete the line – advanced including Call Forward settings
- Click **Create** next to a button to create a new line – see 3.5.7 Add a new line – (Modify User Device Profile / IP Phone)

4. When you are done, click an action button:
   - **Previous** takes you back to the previous screen without saving the settings.
   - **Delete** will delete the device and take you back to the modify user page.
   - **Save** keeps and applies the settings.

3.5.2 Change Device Name (Modify User Device Profile / IP Phone)

On the Modify device screen:

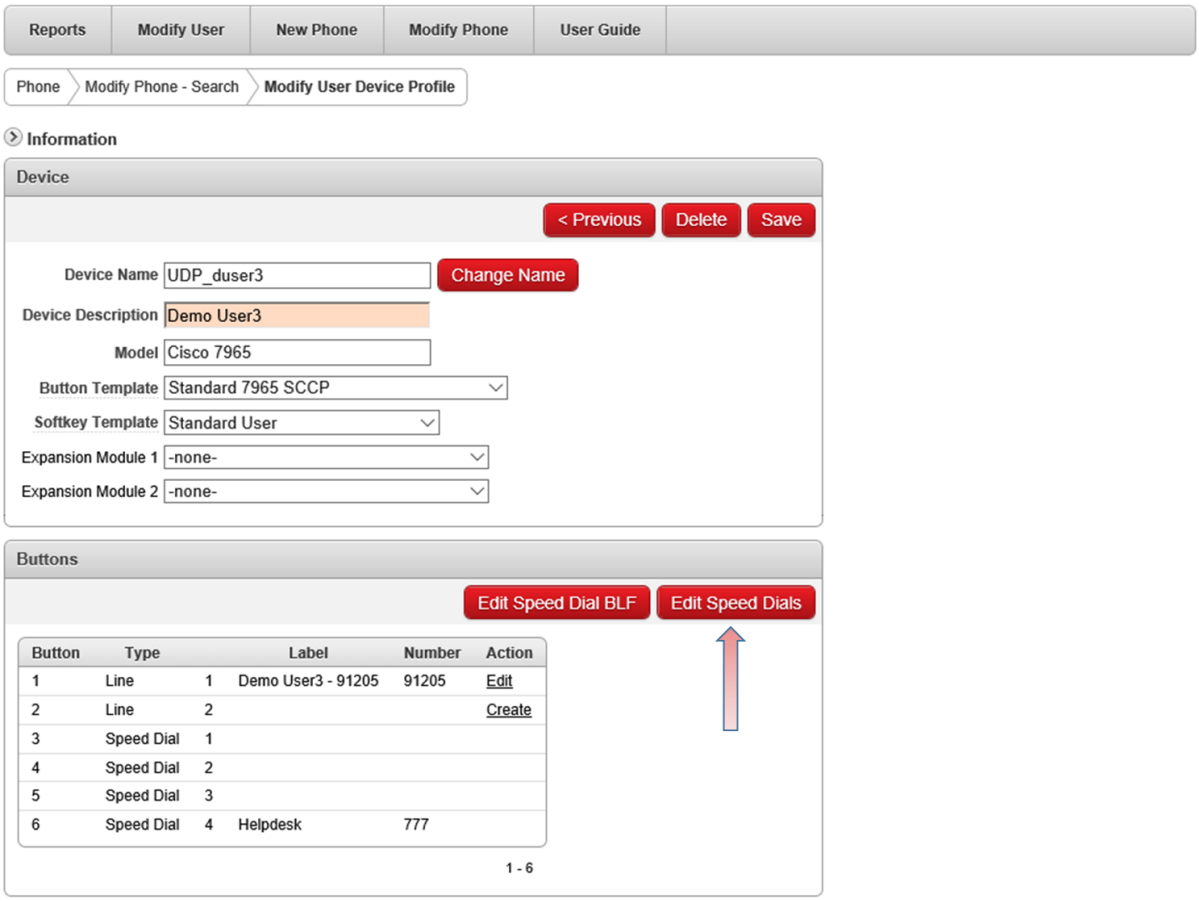


1. Click the **Change Name** button

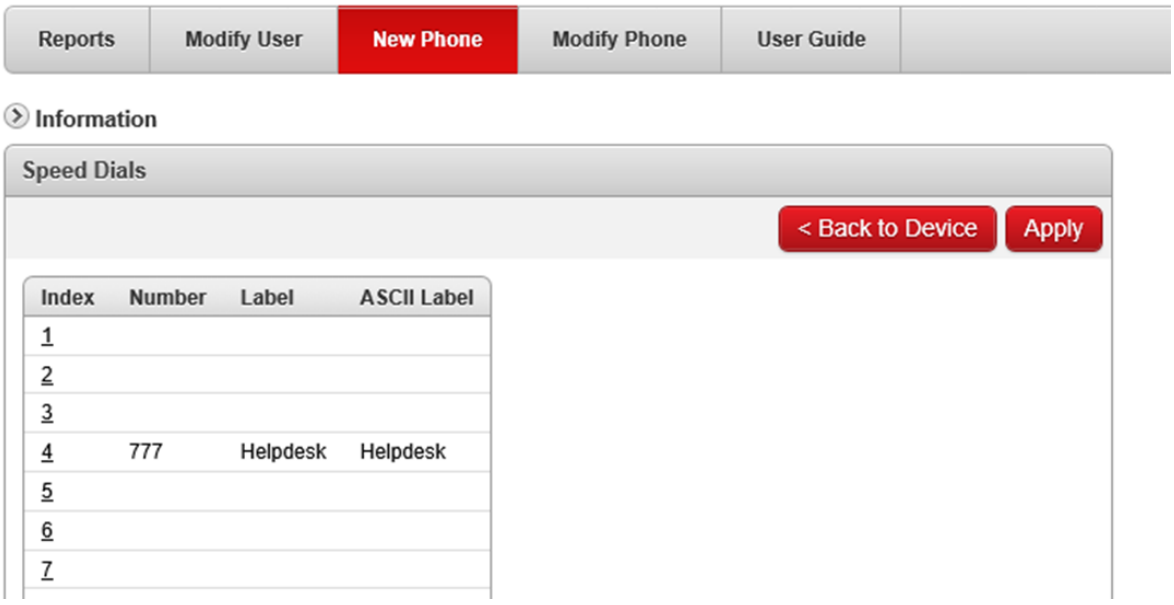
2. Enter the **new name** details and click **Apply** (or **Previous** to return to the previous screen without making any changes).

3.5.3 Edit speed dials (Modify User Device Profile / IP Phone)

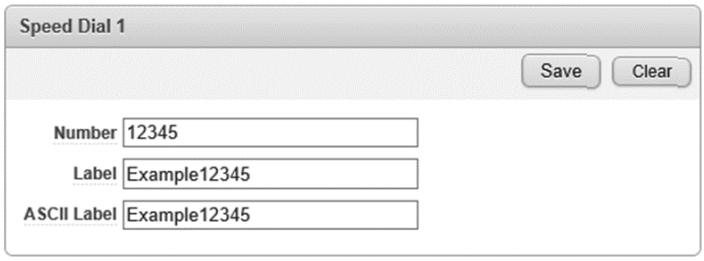
On the Modify user device profile / IP Phone screen:



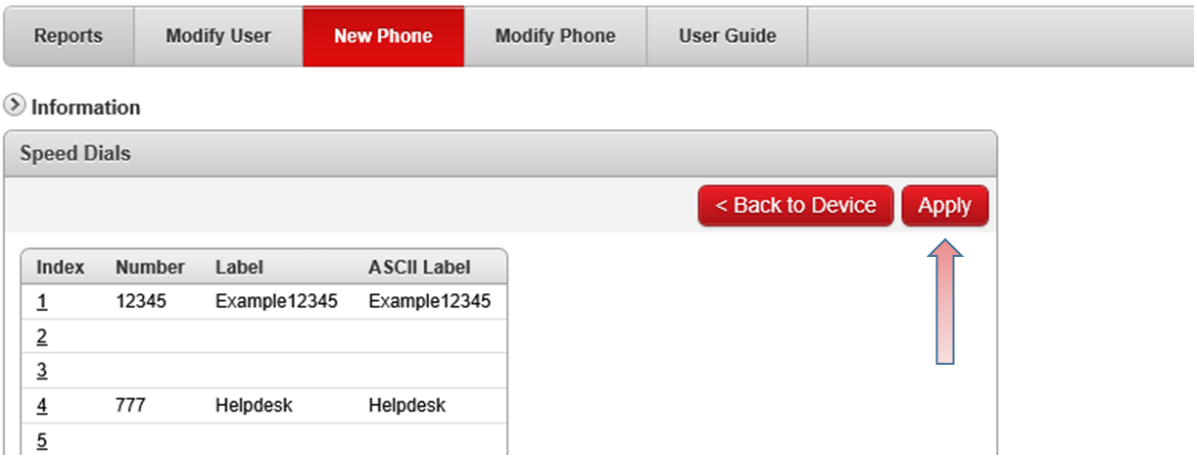
1. Click **Edit Speed Dials** to open the speed dial screen.



2. Select the **index** number of the speed dial you wish to modify. A pop window will appear. The **ASCII label** is the text that is viewable on phones that only display ASCII characters. Fill out all the boxes.



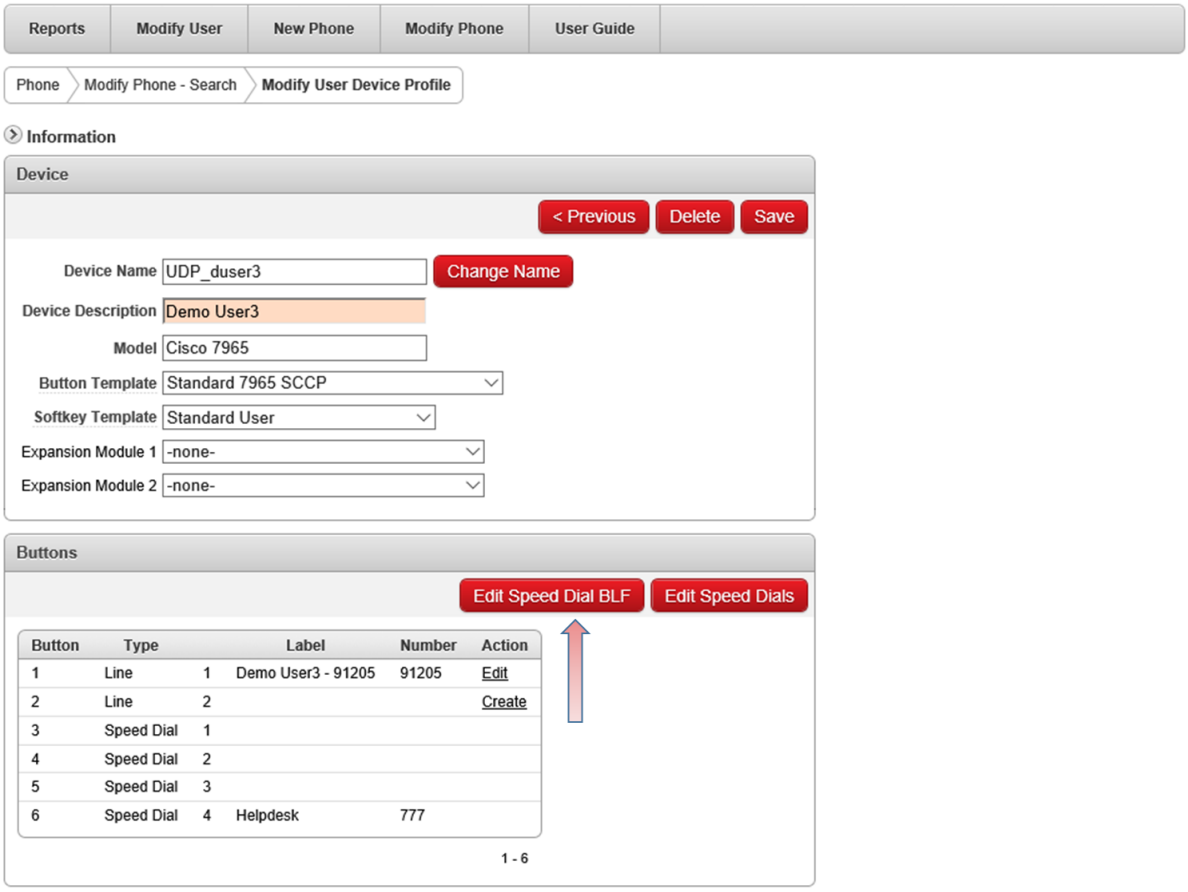
3. Click **Save** (or **Clear** to reset the fields)
4. Repeat for any other speed dials.
5. When you are done, from the **Speed Dials** screen click on **Apply**.



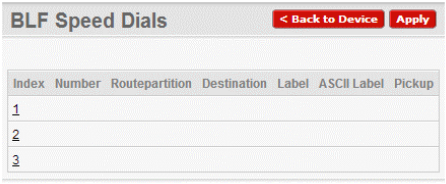
3.5.4 Edit BLF's speed dials (Modify User Device Profile / IP Phone)

With a BLF (Busy Lamp Field) speed dial you can monitor the status of a phone number or SIP URI.

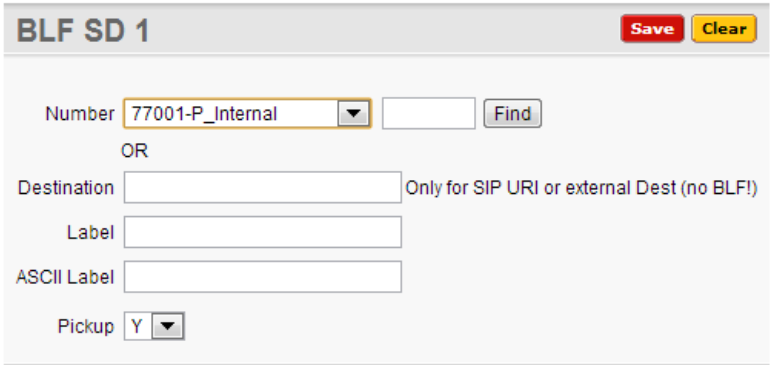
On the Modify Device Profile / IP Phone screen:



1. Click **Edit Speed Dial BLF** to open the BLF Speed Dial screen.



2. Select the **index** number of the speed dial BLF you wish to modify. A pop window will appear.



Do either:

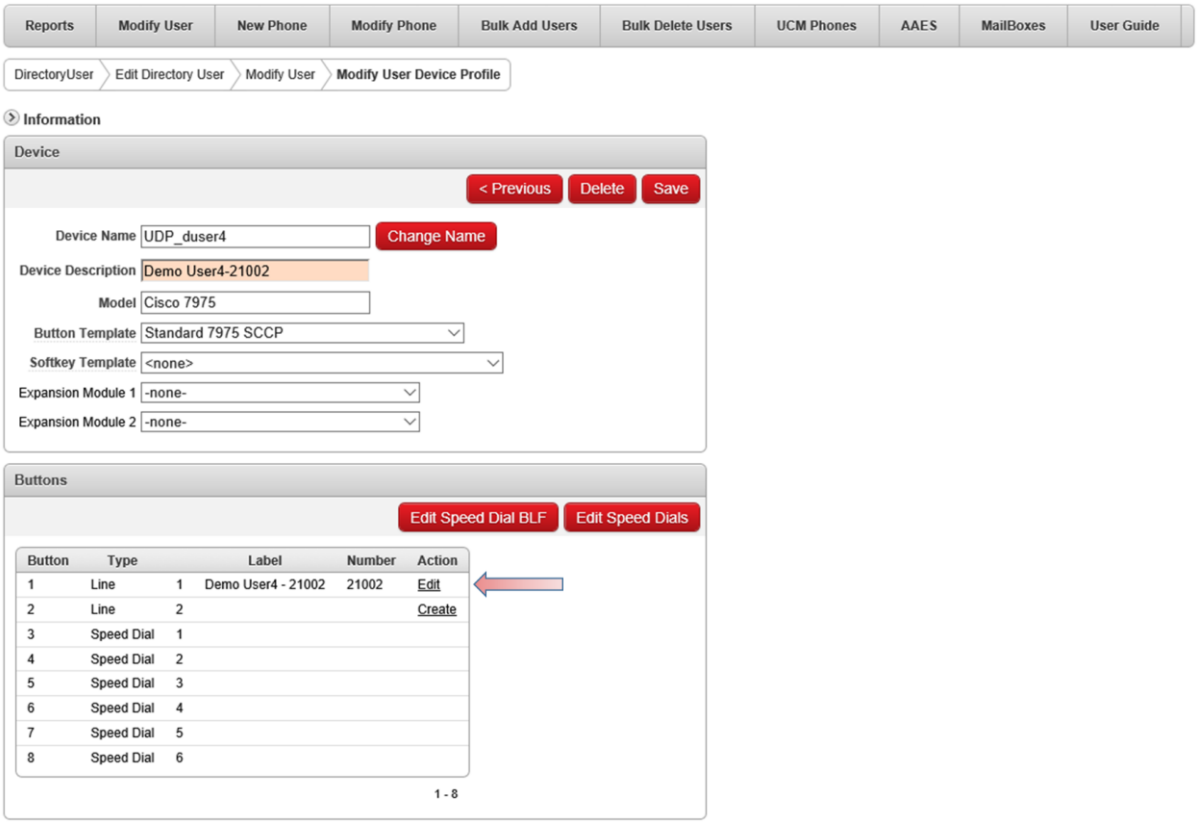
a. Choose a **number** from the directory by using the **drop down** box or type the directory number (either full or in part) into the search box and click Find; OR

b. Enter the details manually for the BLF.
   - **Destination** – the speed dial number. Presence information is not available for external numbers.
   - **Label** – The text to appear on the phone.
   - **ASCII Label** – The text to appear on phones that can only display ASCII characters.
   - **Pickup** – sets whether a user can use call pick to retrieve a call directed at a BLF number.

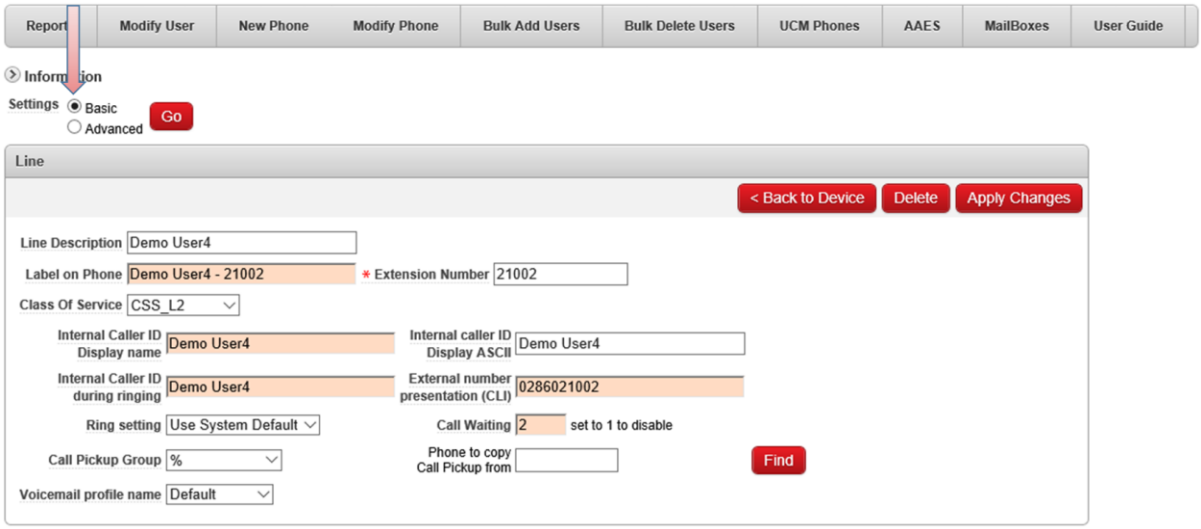
3. Click **Save**.
4. Repeat for any other BLF speed dials.
5. When you are done, from the **BLF Speed Dials** screen click on **Apply**.

3.5.5 Modify or delete the line – basic settings (Modify Line)

On the Modify IP Phone screen:



1. Click **Edit** against the line to make changes to the line settings.
2. Common settings are on the **Basic** screen. Advanced settings include call forwarding.

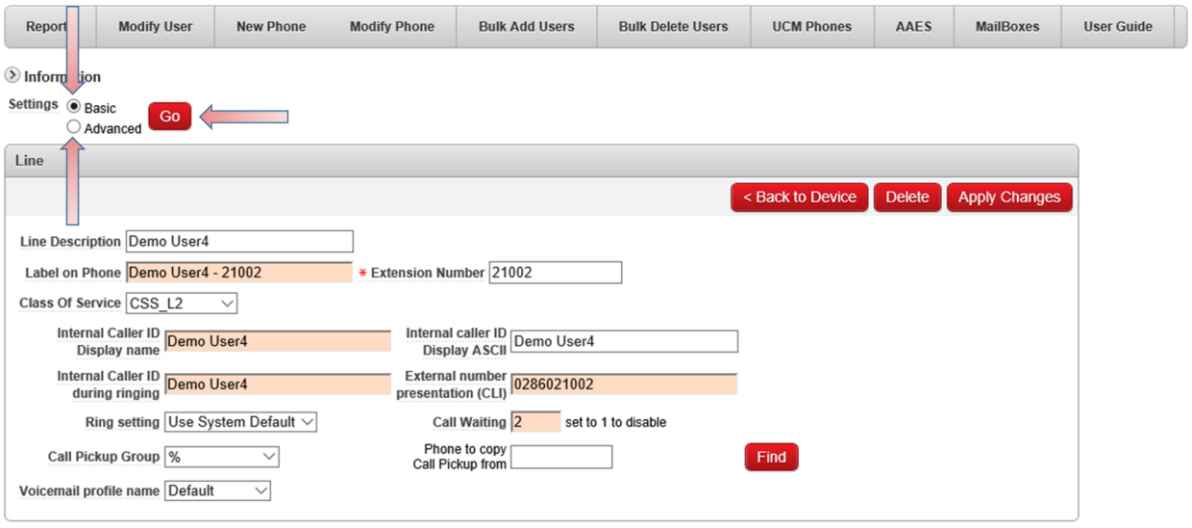


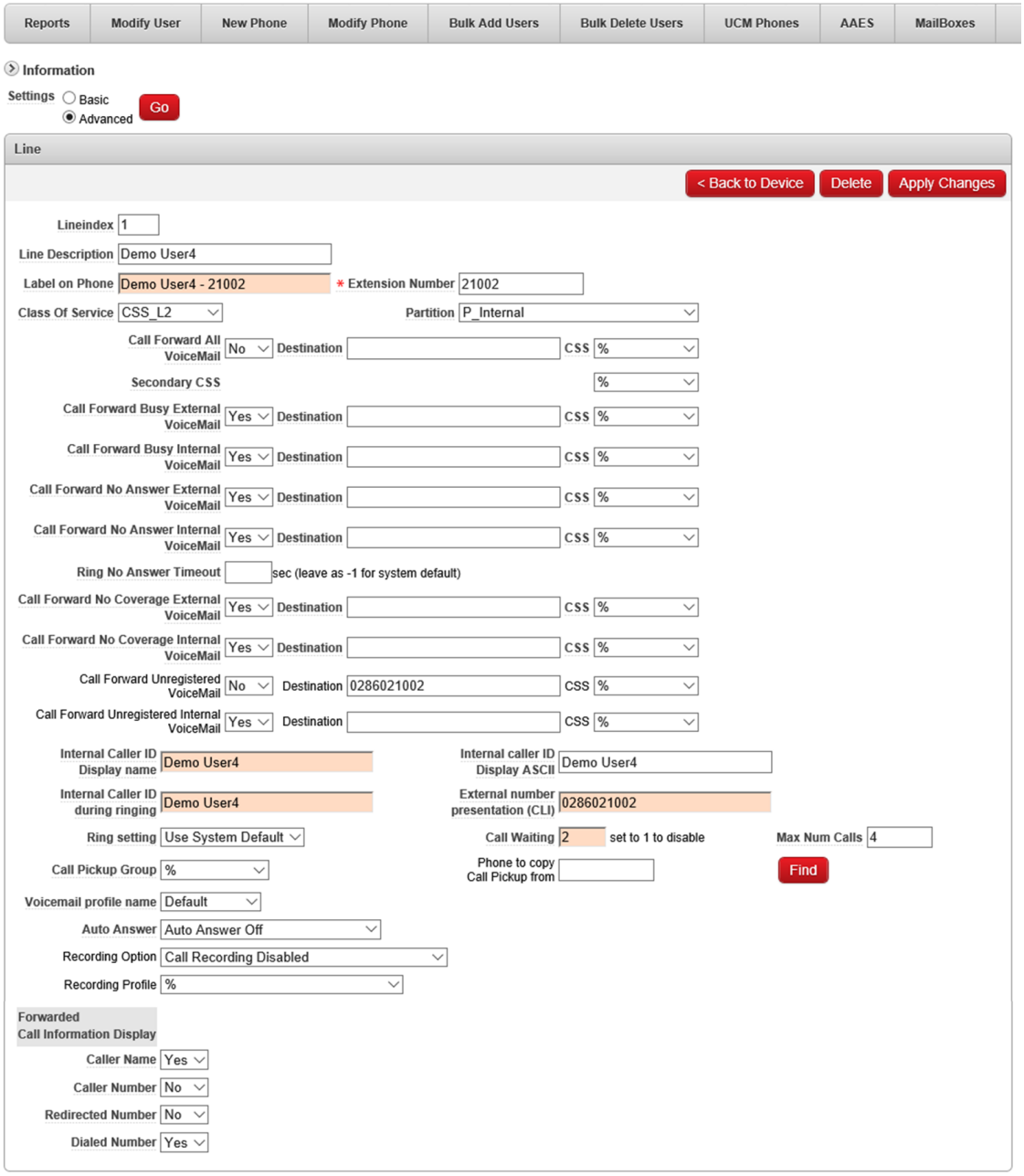
3. Edit the settings. You may change any of the shaded items and items with dropdown boxes. The extension number is mandatory. To change the extension number, delete this line and create a new one.
   - **Label on phone** is the text that displays on the phone screen
   - **Class of Service** is to set calling permissions e.g. make international calls. (Note: This field may be hidden if the CFE is configured for a CUCM that uses the "device only" calling search spaces.)
   - **Caller ID** settings are based on the default for the user's phone profile, but you can change the details for this user here.
   - **Ring Setting** is the system default, disable, flash once, ring once or ring.
   - **Call Waiting** set this to "1" to disable call waiting. Higher values will allow additional calls to "wait" on the line.
   - Set the **Call Pickup Group** to the desired group name. Set this to "%" where call pickup is not set. Alternatively, enter a phone extension to copy the call pickup group setting from and select **Find**.
   - The **Voicemail Profile Name** specifies whether the user has the default voicemail profile or no voicemail. This setting determines whether the voicemail button is active on the phone. The voicemail system must be configured separately.

4. When you are done, click an action button:
   - **Back to Device** takes you back to the previous screen without saving the settings.
   - **Delete** removes the line from the device.
   - **Apply Changes** saves the settings, and sends them to the CUCM.

3.5.6 Modify or delete the line – advanced including Call Forward settings

This screen includes the fields from the basic screen. Use the advanced screen to make detailed changes, and changes to call forward settings. To activate the advanced screen, select **Advanced** and press **Go**.


Report
Modify User
New Phone
Modify Phone
Bulk Add Users
Bulk Delete Users
UCM Phones
AAES
MailBoxes
User Guide
Information
Settings
Basic
Advanced
Go
Line
< Back to Device
Delete
Apply Changes
Line Description
Demo User4
Label on Phone
Demo User4 - 21002
Extension Number
21002
Class Of Service
CSS_L2
Internal Caller ID Display name
Demo User4
Internal caller ID Display ASCII
Demo User4
Internal Caller ID during ringing
Demo User4
External number presentation (CLI)
0286021002
Ring setting
Use System Default
Call Waiting
2
set to 1 to disable
Call Pickup Group
%
Phone to copy Call Pickup from
Find
Voicemail profile name
Default


Reports
Modify User
New Phone
Modify Phone
Bulk Add Users
Bulk Delete Users
UCM Phones
AAES
MailBoxes
Information
Settings
Basic
Advanced
Go
Line
< Back to Device
Delete
Apply Changes
Lineindex
1
Line Description
Demo User4
Label on Phone
Demo User4 - 21002
Extension Number
21002
Class Of Service
CSS_L2
Partition
P_Internal
Call Forward All VoiceMail
No
Destination
CSS
%
Secondary CSS
Call Forward Busy External VoiceMail
Yes
Call Forward Busy Internal VoiceMail
Call Forward No Answer External VoiceMail
Call Forward No Answer Internal VoiceMail
Ring No Answer Timeout
sec (leave as -1 for system default)
Call Forward No Coverage External VoiceMail
Call Forward No Coverage Internal VoiceMail
Call Forward Unregistered VoiceMail
0286021002
Call Forward Unregistered Internal VoiceMail
Internal Caller ID Display name
Demo User4
Internal caller ID Display ASCII
Demo User4
Internal Caller ID during ringing
Demo User4
External number presentation (CLI)
0286021002
Ring setting
Use System Default
Call Waiting
2
set to 1 to disable
Max Num Calls
4
Call Pickup Group
%
Phone to copy Call Pickup from
Find
Voicemail profile name
Default
Auto Answer
Auto Answer Off
Recording Option
Call Recording Disabled
Recording Profile
Forwarded Call Information Display
Caller Name
Yes
Caller Number
No
Redirected Number
No
Dialed Number
Yes

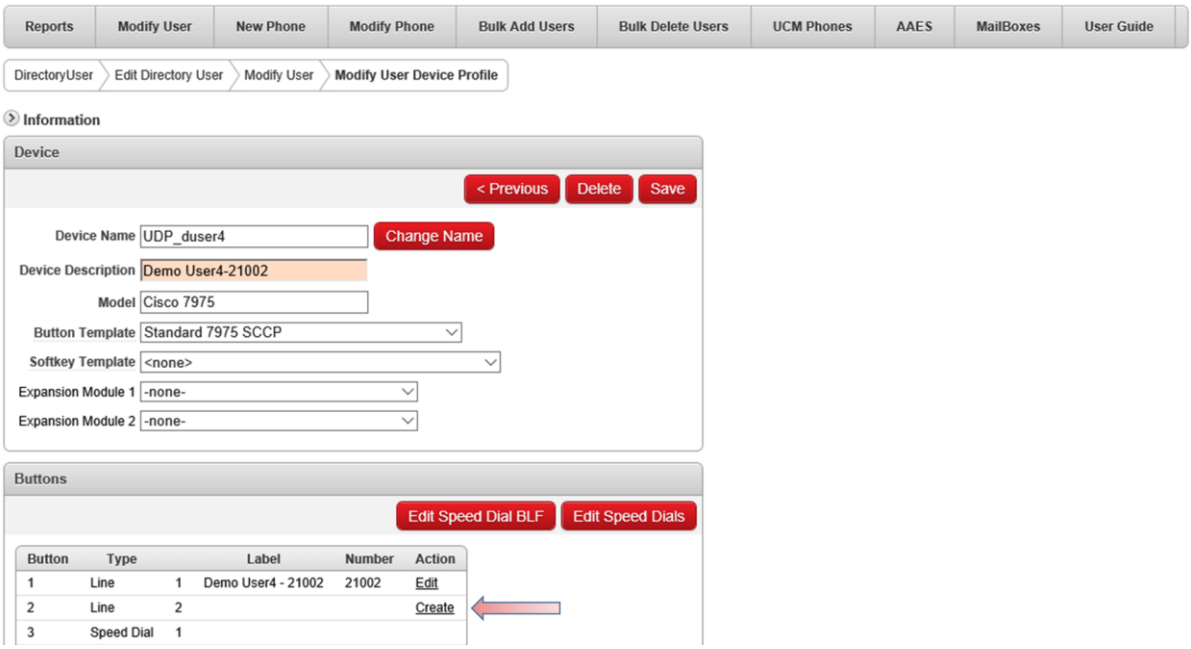
1. Edit the settings. The **extension number** is mandatory. To change the extension number, delete this line and create a new one.
   The settings listed here match those on the CUCM line settings.
2. The **Call Forward** settings:
   - Set **Voicemail** to yes to forward the call to voice mail
   - The **destination** is the alternative number when not forwarding to voicemail
   - **CSS** is the calling-search-space class-of-service to apply upon forwarding the call.
3. The **Caller ID settings** allow you to change the default settings.

4. When you are done, click an action button:
   - **Back to Device** takes you back to the previous screen without saving the settings.
   - **Delete** removes the line from the device.
   - **Apply Changes** saves the settings, and sends them to the CUCM.

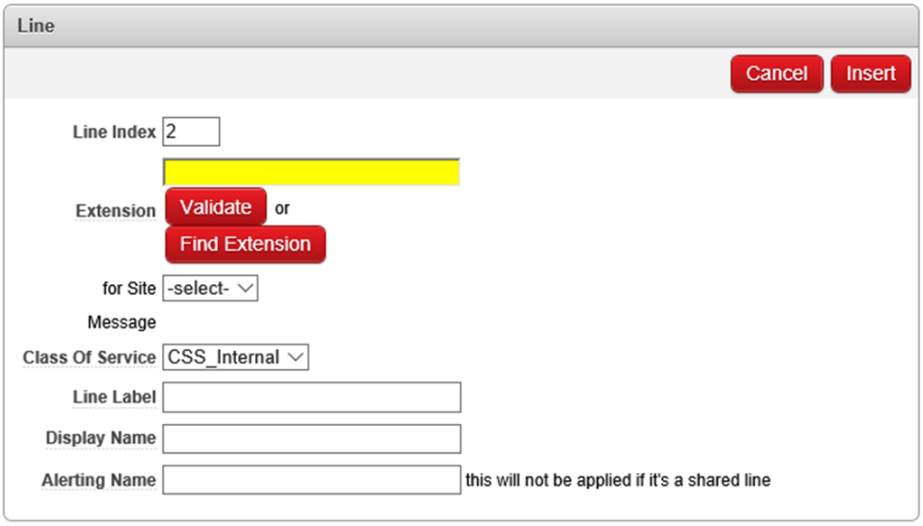
3.5.7 Add a new line – (Modify User Device Profile / IP Phone)

A new line can be added provided there is a spare line in the phone button template selected.

On the Modify IP Phone screen:



1. Select **Create** next to the spare line to open the new line page.



2. Either:
   - Enter the **extension** number for the new line and click **Validate** to check whether the number is suitable. If you enter a shared line, it will show up as being already in use, however you may choose to use it anyhow; OR
   - Alternatively, select the **site**, and click **Find Extension** to automatically get the next free number.

3. Enter the other line details
   - **Line Index** indicates which button on the phone the line appears at. This cannot be changed.
   - **Class of service** defines dialling permissions (e.g. allows international calls). (Note: This field may be hidden if the CFE is configured for a CUCM that uses the "device only" calling search spaces.)
   - **Line Label** appears on the screen on the phone next to the line button
   - **Display Name** will appear as the caller ID for internal calls
   - **Alerting Name** internal caller ID during ringing. This does not apply to shared lines.

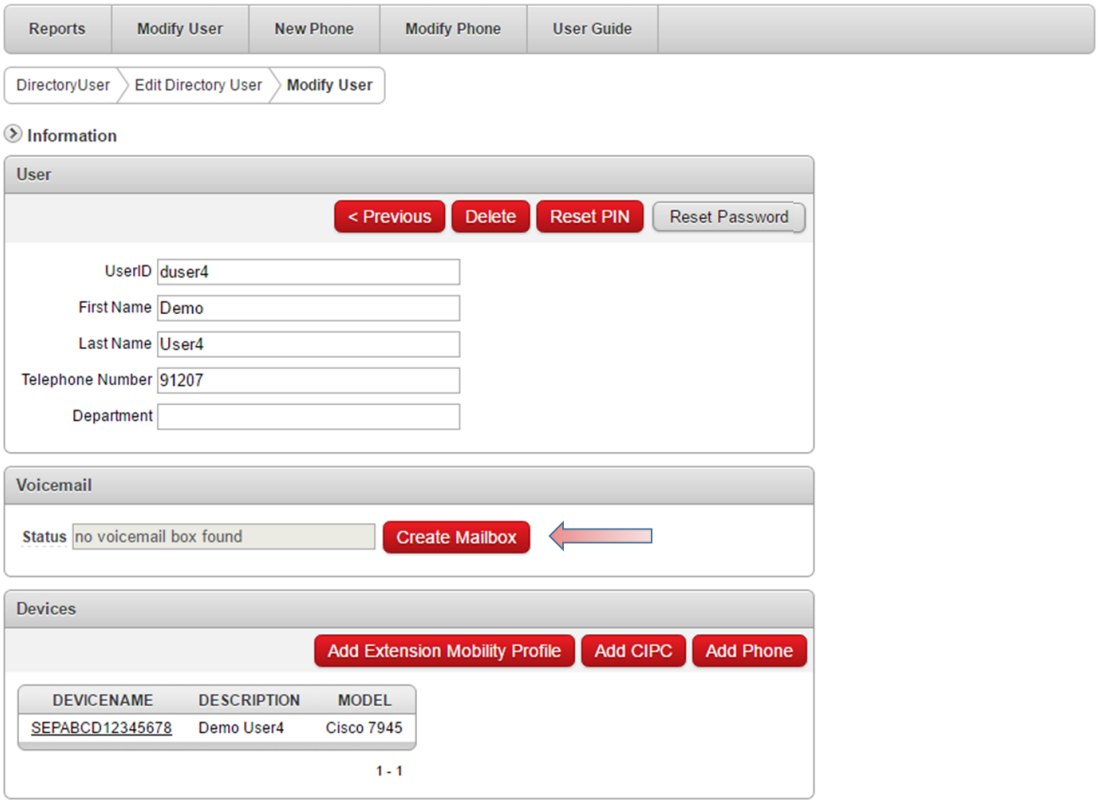
4. When you are done, click an action button:
   - **Cancel** takes you back to the previous screen without saving the settings.
   - **Insert** saves the settings, and sends them to the CUCM.

3.6 Create User voice mailbox

A mailbox can be created for the user where the CFE is connected to the Cisco Unity unified communications system. Usually, the mailbox is part of the site profile.

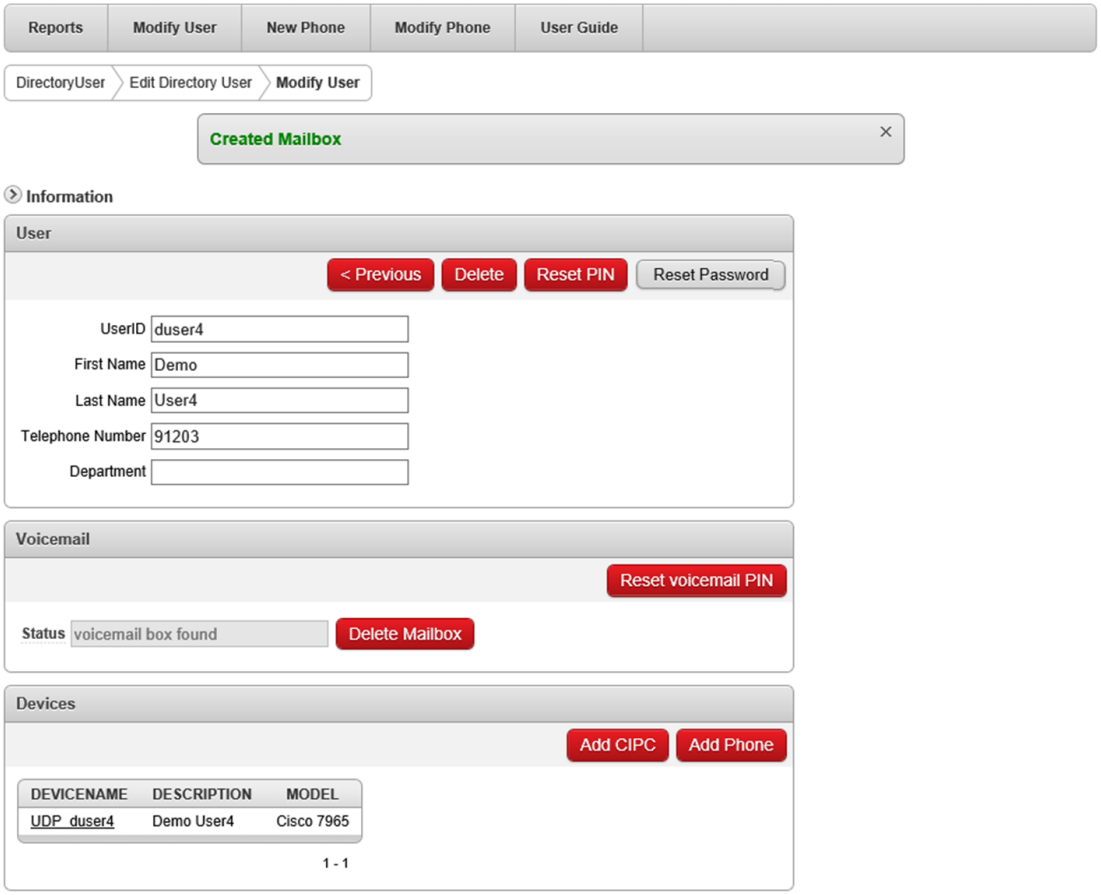
To add a mailbox manually:

1. Search for the user, and click **Edit**



2. Click Create Mailbox

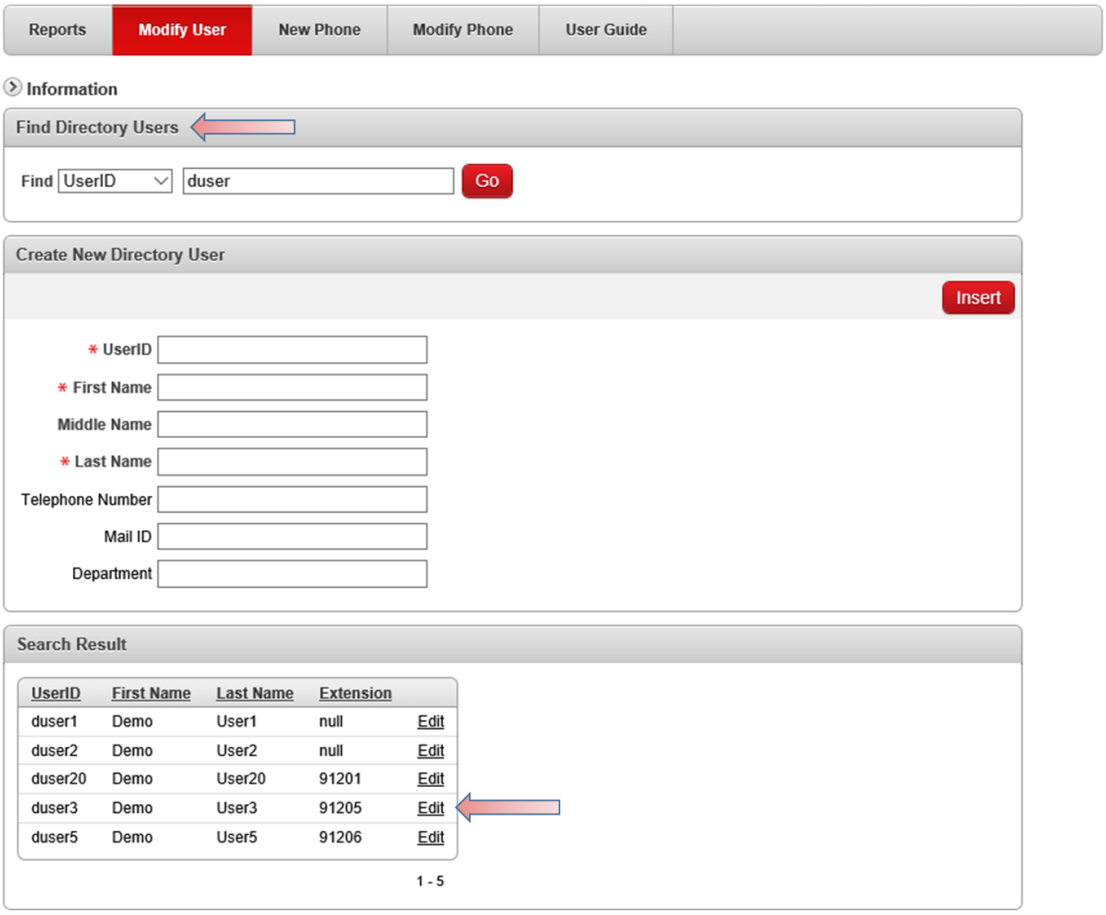
3. Select the **site**, and click **Create Mailbox**.



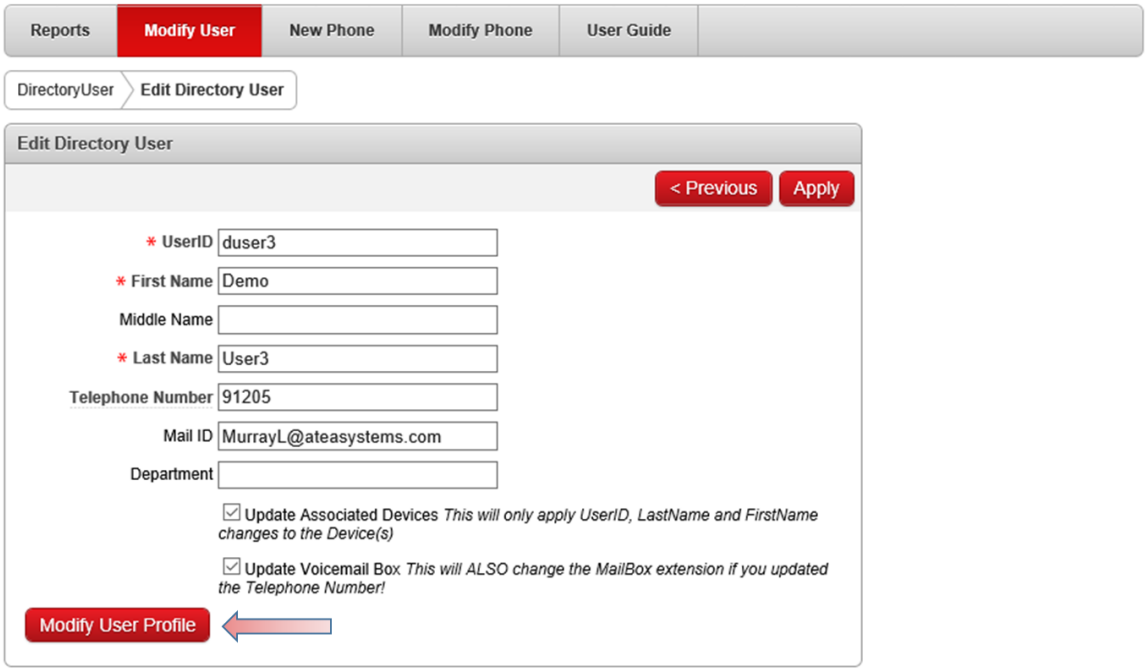
3.7 Delete or swap a user's IP Tel device

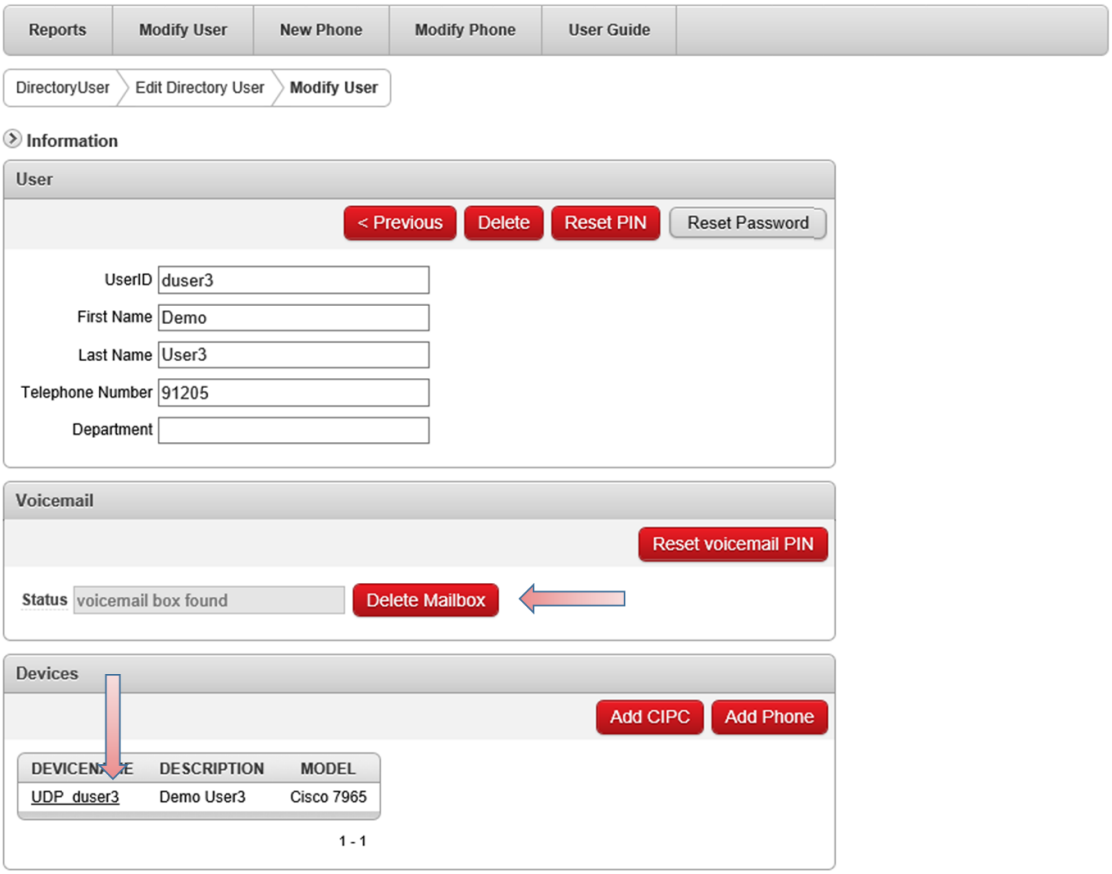
Use this section to remove a user's CUCM device or their mailbox.

1. On the **Modify User** page, use **Find Directory Users** (see 3.2 Search for a user) to search for the user, then click the **Edit** link

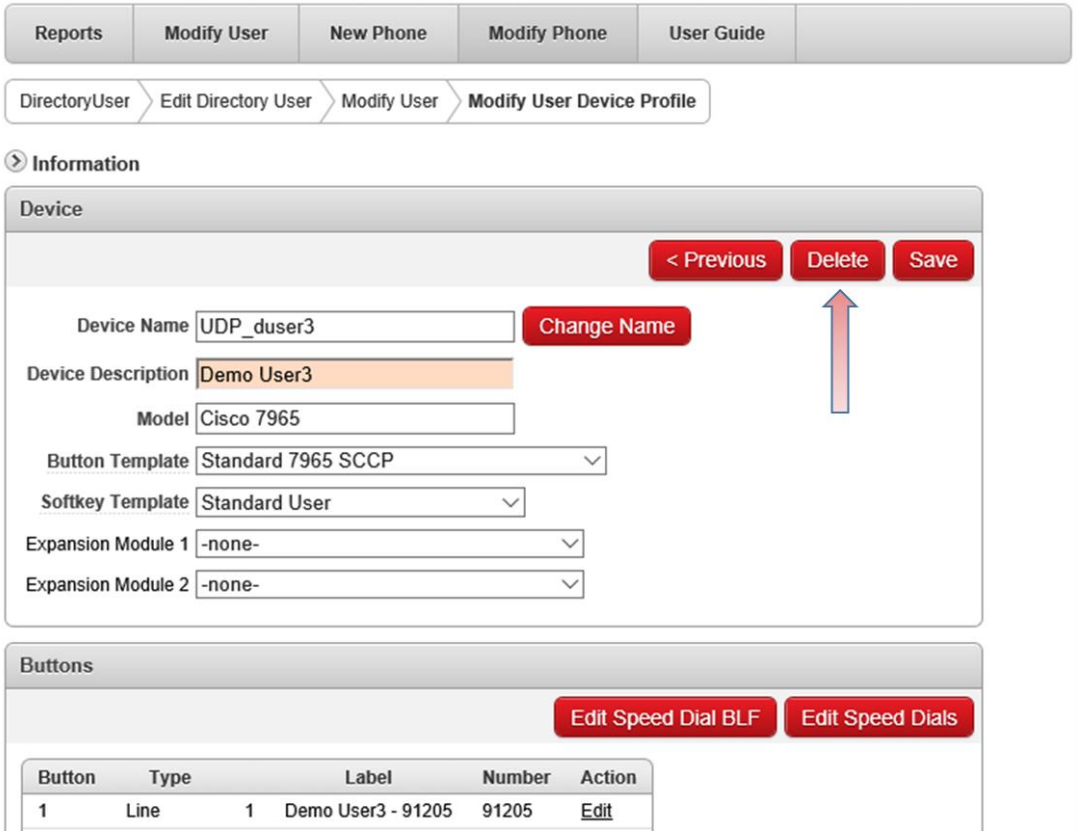


2. Click on **Modify User Profile**





3. Click **Delete Mailbox** to remove the mailbox (if appropriate).
4. Click on the **device link** to go to the specific device to be deleted.

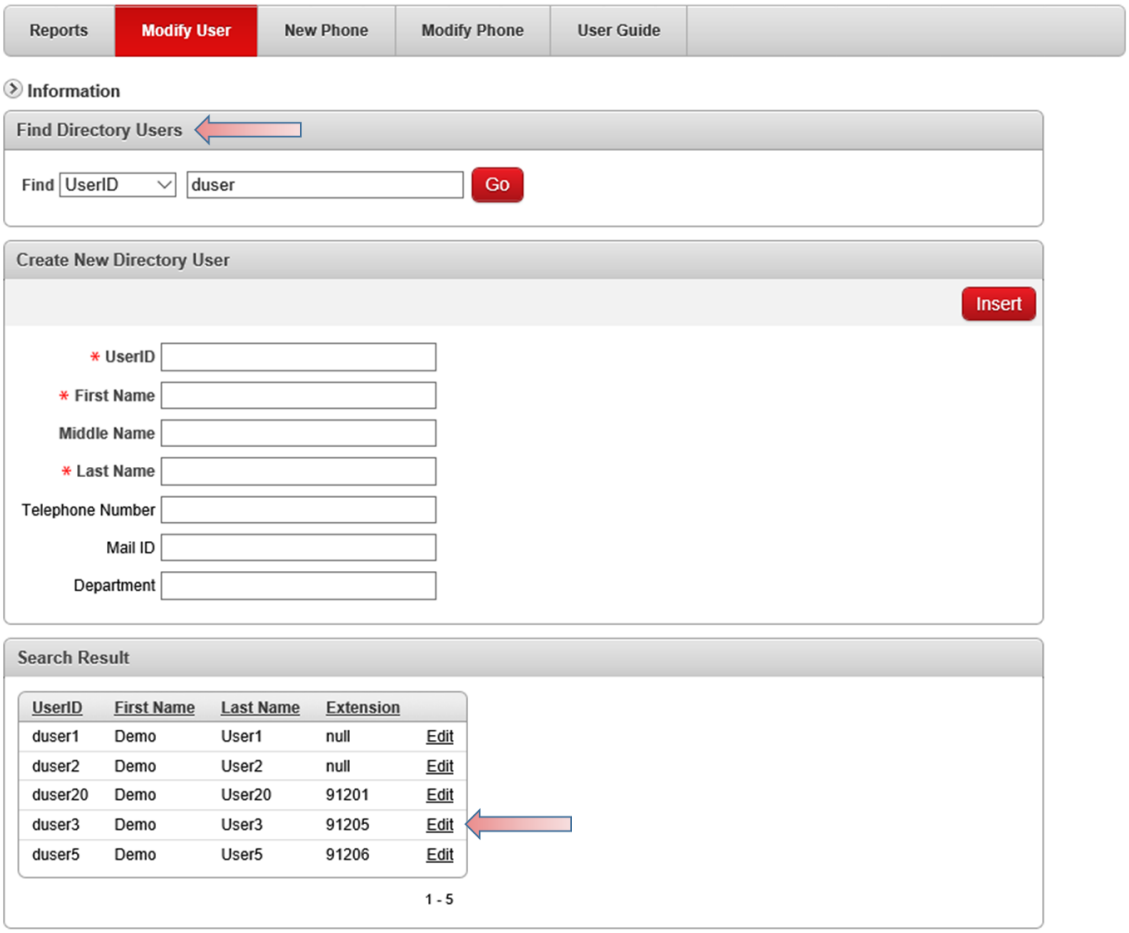


5. Click **Delete** to remove the device. This deletes the device but not the user. It takes you back to the **Modify User** screen, where you may add a different device, or delete the user.
   Devices that start with "**SEP**" are physical telephones. An extension mobility profile is often indicated with "**UDP**".

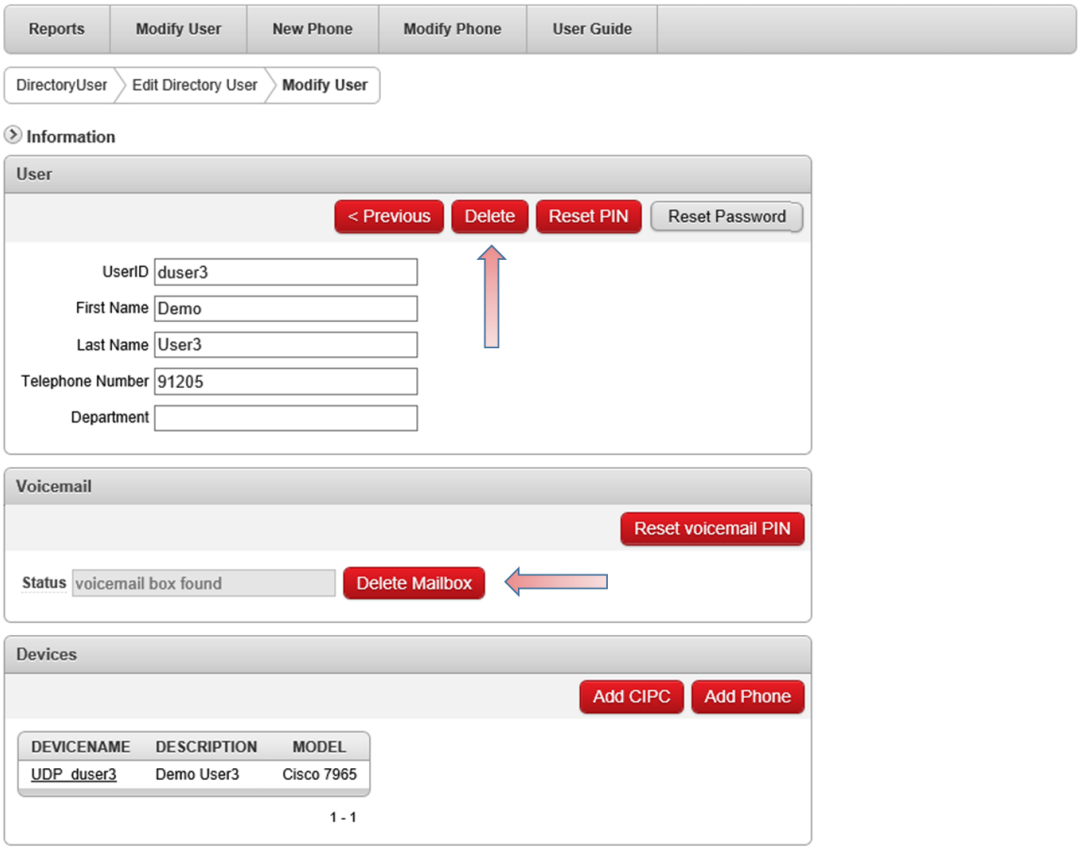
3.8 Delete a user from the CUCM directory

Use this module if your CUCM is not synchronised with AD and you want to remove a user completely from the CUCM directory. ***Remember to remove their IP Tel Devices first***.

1. On the **Modify User** page, use **Find Directory Users** (see 3.2 Search for a user) to search for the user, then click the **Edit** link



2. Click **Delete mailbox** (where appropriate) then click **Delete** to remove the User from the CUCM directory.



3.9 New phone – setting up a phone not associated to a user

Use this module to set up a phone based on a profile, including the phone number and location. You can set up any auto-registered phone connected to the network or create a phone configuration from scratch.

Phones set up using this module are independent of users in the CUCM.

3.9.1 New phone – select site and choose profile

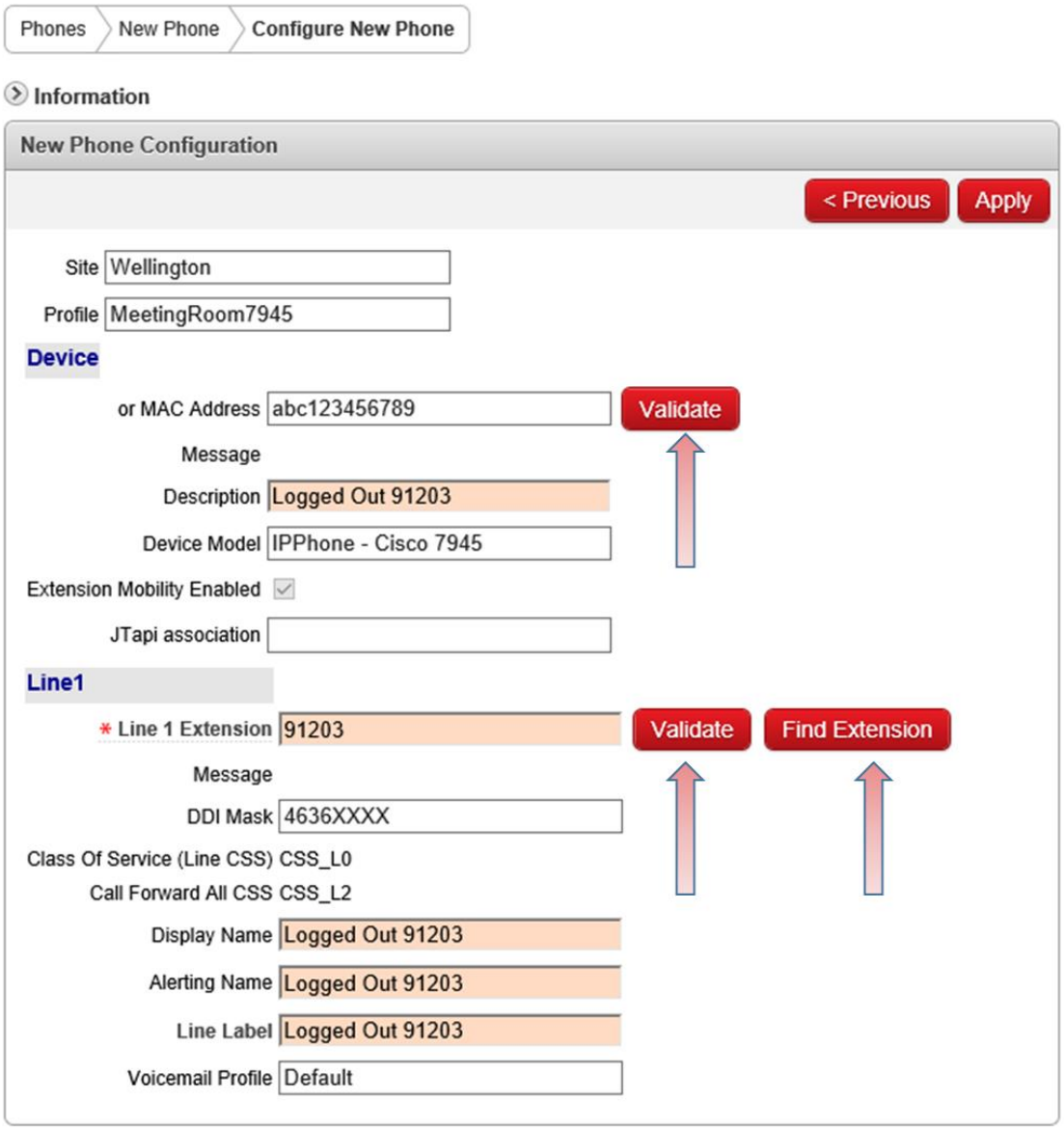
Go to the new Phone screen:

1. Select a **Site** from the range available in the dropdown box
2. Select a profile from the **Template** dropdown. The template defines the number of lines for the device and other standard settings.
3. Click **Next** to assign a phone and phone number on the **Configure New Phone** screen.

3.9.2 New phone – Assign phone device and phone number

The site and phone profile are displayed. Shaded fields can be edited.

On the Configure New Phone screen:



4. Under **Device**:
   - Enter the **MAC address** of the telephone device to be assigned to the user.
   - Click **Validate** to check that this device is indeed available. If auto registration is enabled then only auto-registered phones can be assigned, to avoid accidently configuring a working telephone. If the phone is currently assigned to a user, you'll

need to remove that phone from their profile first (see modify user). If the phone is currently set up as a normal phone, you'll need to delete the phone first (see modify phone).

- JTapi association is for advanced phone configuration, such as call centre agents.

5. Under **Line1,** either:
   - Click **Find Extension** to automatically retrieve a spare number for the site. This also reserves it for 30 minutes to avoid another CFE user from allocating it; OR
   - Enter the **extension number** that you wish to assign to the user. This may sometimes be different to the phone number that appears in the directory, and is assigned within AD; AND
   - Click **Validate** to check the number you entered is unused, and belongs to the correct site. A warning may pop-up, but still allows you to use this number.
   - **DDI Mask** is used to create the DDI number from the extension number (overlapping digits are marked by an "X") which is presented externally as the caller ID
   - **Class of Service** is the dialling permission set by the profile. (Note: This field may be hidden if the CFE is configured for a CUCM that uses the "device only" calling search spaces.)
   - **Display Name** will appear as the caller ID for internal calls
   - **Alerting Name** internal caller ID during ringing
   - **Voicemail Profile** indicates whether voicemail is set by the profile

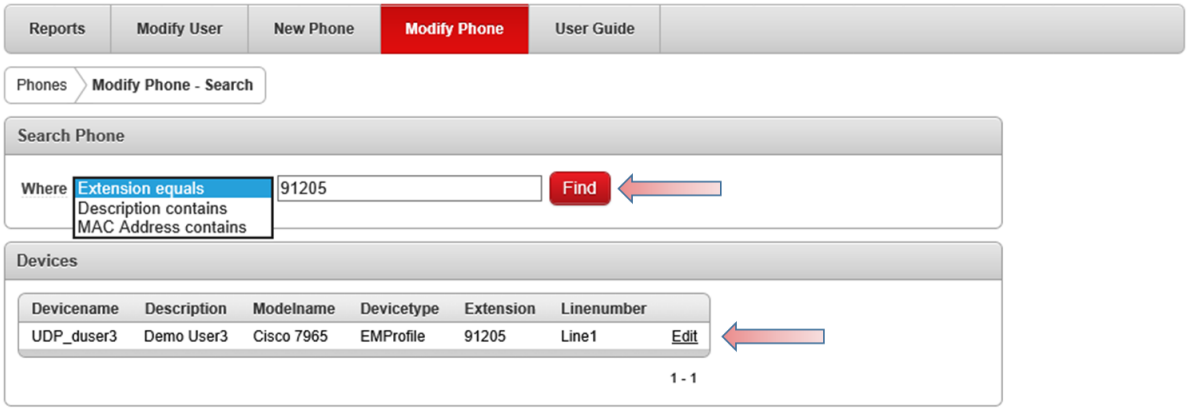
6. When you are done, click an action button:
   - **Previous** takes you back to the previous screen without saving the settings.
   - **Apply** saves the settings, sends them to the CUCM, and takes you to the confirmation screen.

3.10 Modify phone – change or delete an existing phone

Use this module to find an existing phone, make changes and delete lines or the device.

3.10.1 Find an existing phone

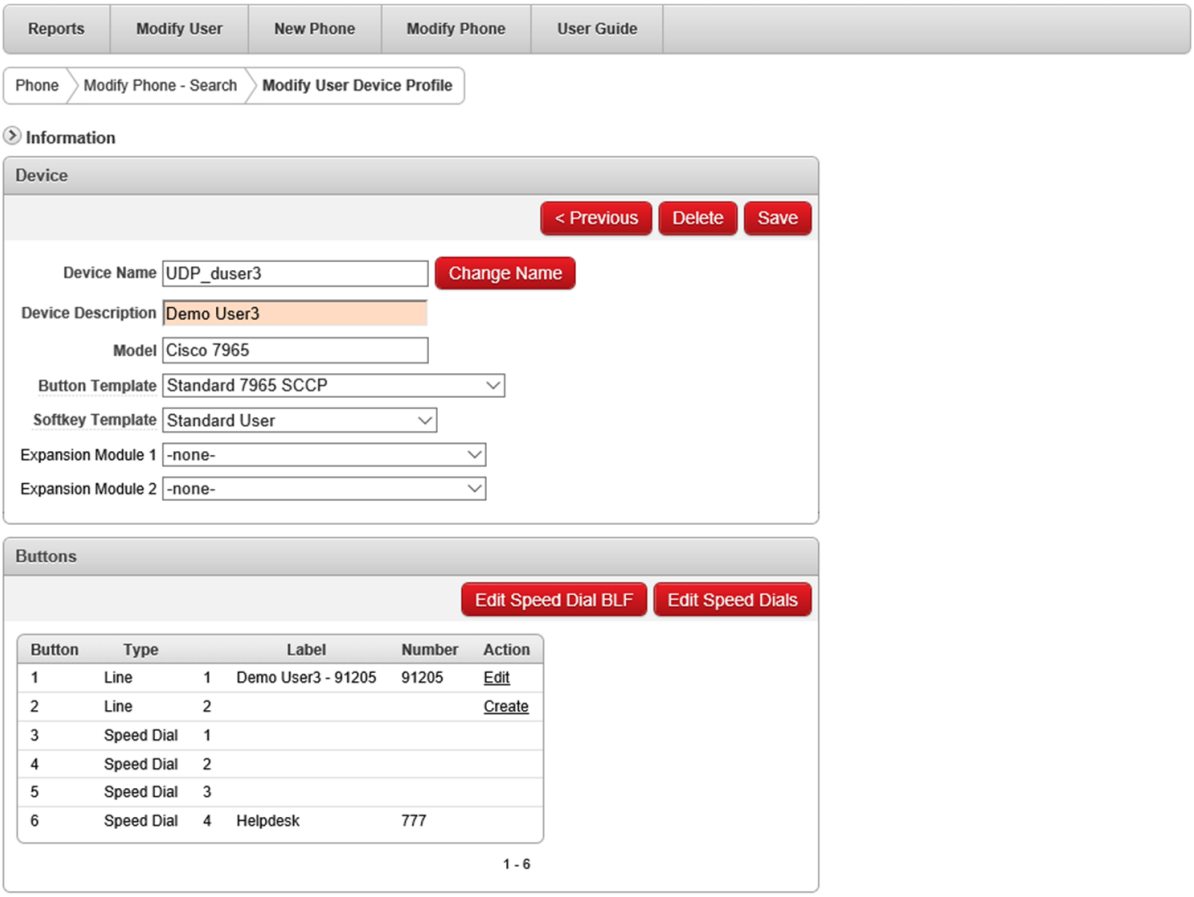
Go to the Modify Phone screen:



1. Select either the **extension number**, **description** or **MAC address** search option. Enter your search criteria and click **Find**.
2. From the resulting list, select **Edit** for the device or extension mobility profile to be modified.

3.10.2 Modify or delete the telephone device (Modify IP Phone)

On the **Phone > Modify Phone – Search > Modify IP Phone** screen:



3. On this page you may change these device settings:
   - **Device Name** – name of the device

- **Device Description** – edit the existing text
- **Model** – this is the model of phone and you cannot change it. You can however delete this phone and add the correct one.
- **Button Template** – select an item from the dropdown list. The phone button template defines which buttons on the side of the phone display are for lines, and which are available for speed dials.
- **Softkey Template** – select an option from the dropdown list. Otherwise leave it blank to use the system default template.
- **Expansion Module 1 or 2** – select an option from the dropdown list

4. To edit the phone buttons:
   - The **Edit Speed Dial BLF** button takes you to the page to update the Speed Dial Busy Lamp Field settings - see 3.5.4 Edit BLF's speed dials (Modify User Device Profile / IP Phone)
   - The **Edit Speed Dials** button takes you to the page to update the normal Speed Dials – see 3.5.2 Change Device Name (Modify User Device Profile / IP Phone).
   - Click **Edit** next to a line to change the line settings – see 3.5.5Modify or delete the line – basic settings (Modify Line) and 3.5.6 Modify or delete the line – advanced including Call Forward settings
   - Click **Create** next to a button to create a new line – see 3.5.7 Add a new line – (Modify User Device Profile / IP Phone)

5. When you are done, click an action button:
   - **Previous** takes you back to the previous screen without saving the settings.
   - **Delete** will delete the phone.
   - **Save** keeps and applies the settings.
   - **Reset** will shut down the device and bring back up. The phone cannot be used while this is happening. Some CTI configurations require this to adopt the new settings
   - **Restart** will restart the device without shutting it down. This is less intrusive than a Reset.

*Note: It is good practice to **RESTART** a device upon completing all changes to a device, to ensure the changes are orderly. Where more complicated systems are connected such as contact centre CTI settings, a full **RESET** may be required.*

4 Bulk add and delete of users

Use this module to manage larger quantities of users using information in a spreadsheet style CSV file. This feature is enabled at time of installation if the appropriate license is purchased.

Data is checked prior to making changes
The bulk operations require user information in CSV (comma separated value) files. As part of the operation, the file content and format is checked prior to making any changes on the telephone system. The results of the checks are presented for each row of data, allowing you the option of correcting any discrepancies, or going ahead and making the changes anyhow. The check results may also be saved as a file.

All changes are included in reports
Results of any changes are also included in the standard reports.

4.1 Bulk Add Users – Process to add users in bulk

We suggest you use this process to add users in bulk lots.

Implement one site at a time

1. **Create the list of users** (UserID) and determine the appropriate phone profile for each one.
2. **Allocate the extension number** for each user. Optionally you can also use the number in AD or let the CFE allocate the next spare number at the site.
3. **Allocate the DDI number** for each user as appropriate.
4. Create the users within AD.
5. **Get the list of MAC addresses** for the phones. Allocate a phone for each user. Often your phone supplier can provide the MAC addresses for the phones being shipped to site.
6. **Install the phones**. Get the site contact(s) to install the correct phone (based on MAC address) for each user at the site. Each phone should auto register with the CUCM.
7. **Prepare the CSV file and import it**. The import will be successful if the CSV file has the correct information, the users are present in AD, the CUCM and AD are synchronised and the phones are installed. At this point the phones will become active.

4.2 Bulk Add Users – preparing the CSV file

The CSV file must have the following headings:

Template: 1
TEMPLATENAME,USERID,MACADDRESS,EXTN1,DDI1,EXTN2

Template: 2
TEMPLATENAME,USERID,EXTN1,DDI1,PUG

Where:

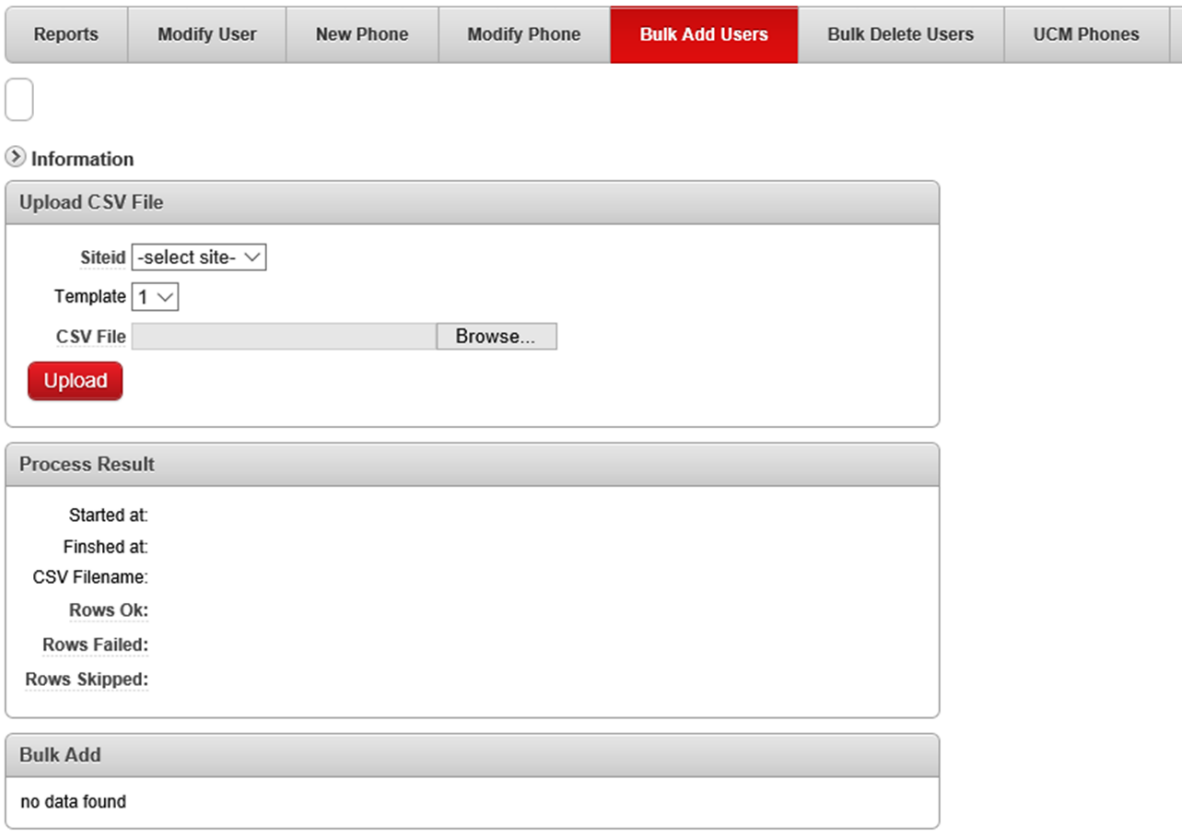
- **TEMPLATENAME** – is the user profile (such as "basic user"). The profile name must match the profiles configured on the CFE.
- **USERID** – is the UserID within AD and the CUCM. The user ID must be valid. If the user is already set up with a profile that is different to the one in this file, then a new profile will be added. A profile that is the same will produce an error.
- **MACADDRESS** – is the MAC address of the telephone device. The phone must be connected to the network in order for the import to be successful.
- **EXTN1** – is the extension number of line 1 for the user. You may enter #ALLOCATE# if you want the CFE to use the next spare number available at the site. Alternatively, you may enter #USEAD# if you want the number allocated in AD to be used.
- **DDI1** – is the direct external phone number for extension 1.
- **EXTN2** – is the extension number for line 2. This is only required for profiles that have two lines.
- **PUG** – is the **pickup group.**

Where any other settings are required in addition to the profiles or system defaults, change these individually after the import is completed.

-- Sample contents for upload file --
TEMPLATENAME,USERID,MACADDRESS,EXTN1,DDI1,EXTN2
Mobile User,testuser1,,88120,49022120,
Mobile User,testuser2,,#ALLOCATE#,,
Mobile User,testuser3,,#USEAD#,,
Basic User,testuser4,0000AABBCC01,88121,,
Agent,testuser4,0000AABBCC02,89120,,99120
--end--

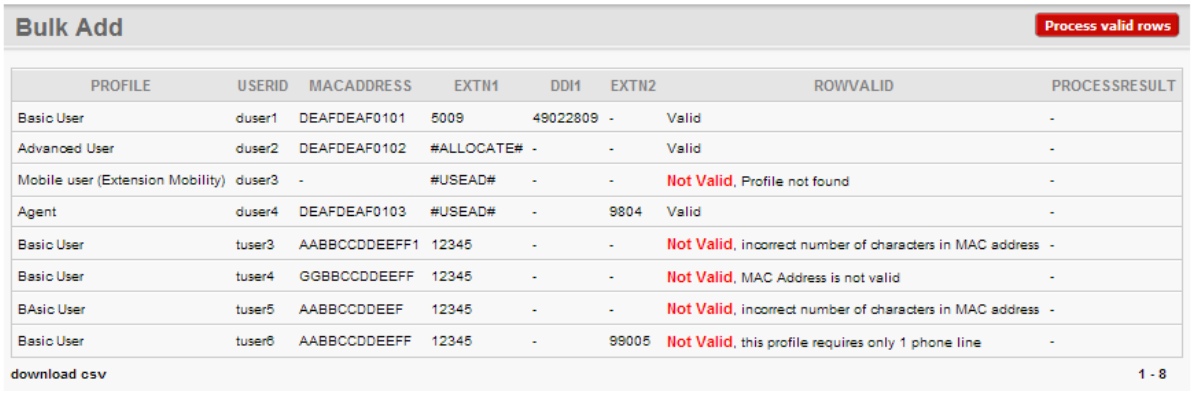
4.3 Bulk Add Users – importing and processing the file

On the bulk Add Users screen:



1. Select the **SiteID** for the users. *Only one site can be included in the CSV file.*
2. Select which file **template** (either 1 or 2)
3. Click **Browse** to and find the location of the CSV file on your computer. Select the CSV file.
4. Click **Upload** to import the CSV file and check the contents.

Bulk Add Users – file contents checking screen:



PROFILE	USERID	MACADDRESS	EXTN1	DDI1	EXTN2	ROWVALID	PROCESSRESULT
Basic User	duser1	DEAFDEAF0101	5009	49022809	-	Valid	-
Advanced User	duser2	DEAFDEAF0102	#ALLOCATE#	-	-	Valid	-
Mobile user (Extension Mobility)	duser3	-	#USEAD#	-	-	Not Valid, Profile not found	-
Agent	duser4	DEAFDEAF0103	#USEAD#	-	9804	Valid	-
Basic User	tuser3	AABBCCDDEEFF1	12345	-	-	Not Valid, incorrect number of characters in MAC address	-
Basic User	tuser4	GGBBCCDDEEFF	12345	-	-	Not Valid, MAC Address is not valid	-
BAsic User	tuser5	AABBCCDDEEF	12345	-	-	Not Valid, incorrect number of characters in MAC address	-
Basic User	tuser6	AABBCCDDEEFF	12345	-	99005	Not Valid, this profile requires only 1 phone line	-

5. After clicking **Upload** the results of each line in the file are presented. The errors are shown so that you can correct your CSV file and re-import it.
6. Optional - Click **download csv** to save the results of the file check.

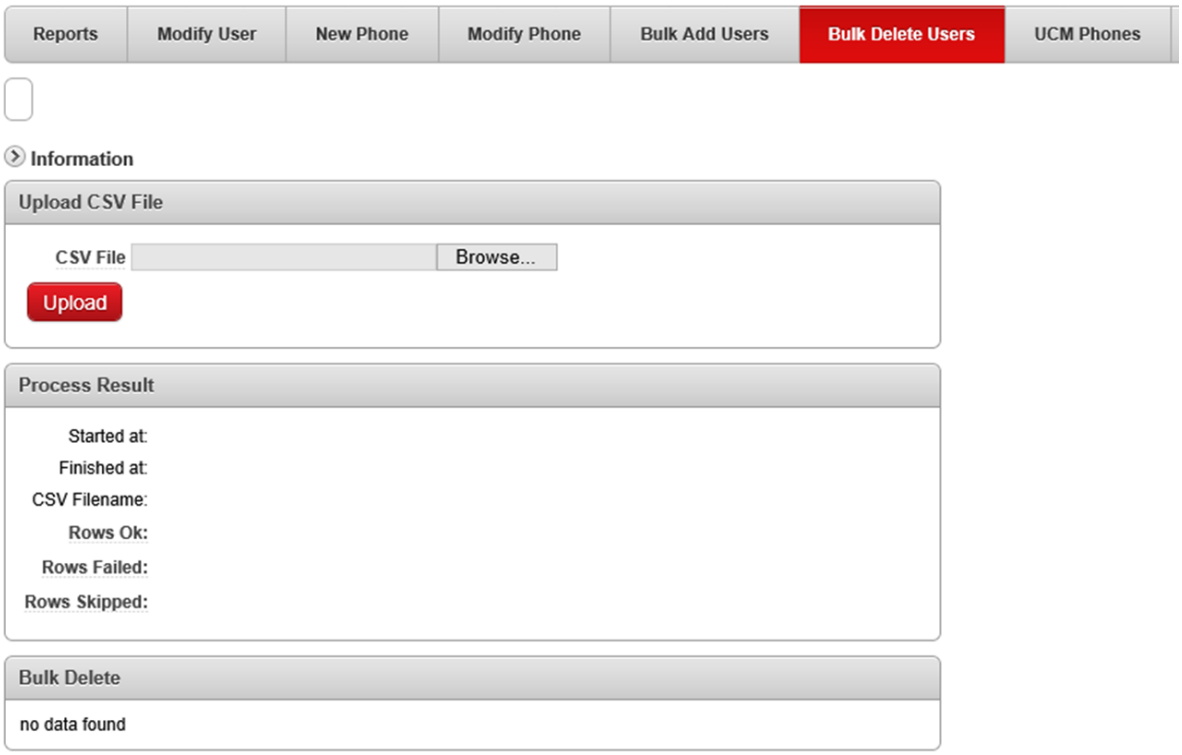
7. Click **Process valid rows** to apply the valid changes to the CUCM. Upon completion of the processing, the Process Result information is also included.
8. Optional - Click **download csv** to save the results of the processing.

4.4 Bulk Delete Users – removes phones and device profiles

Warning: *Delete phones and device profiles **before** deleting Users on AD, otherwise the phones and profile may be orphaned on the CUCM.*

Use this process to delete items from the CUCM prior to deleting the user from AD. When AD synchronisation is being used, the user may only be deleted from AD.

On the **bulk Delete Users** screen:



1. Click **Browse** to and find the location of the CSV file on your computer. Select the CSV file.
2. Click **Upload** to check the contents of the file. The results of the check will be presented.
3. Optional - Click **download csv** to save the results of the file check.
4. Click **Process valid rows** to apply the valid changes to the CUCM. Upon completion of the processing, the Process Result information is also included.
5. Optional - Click **download csv** to save the results of the processing.

Note: If your CUCM is linked to AD, then the users will remain in AD, however their phone profiles will be deleted from the CUCM.

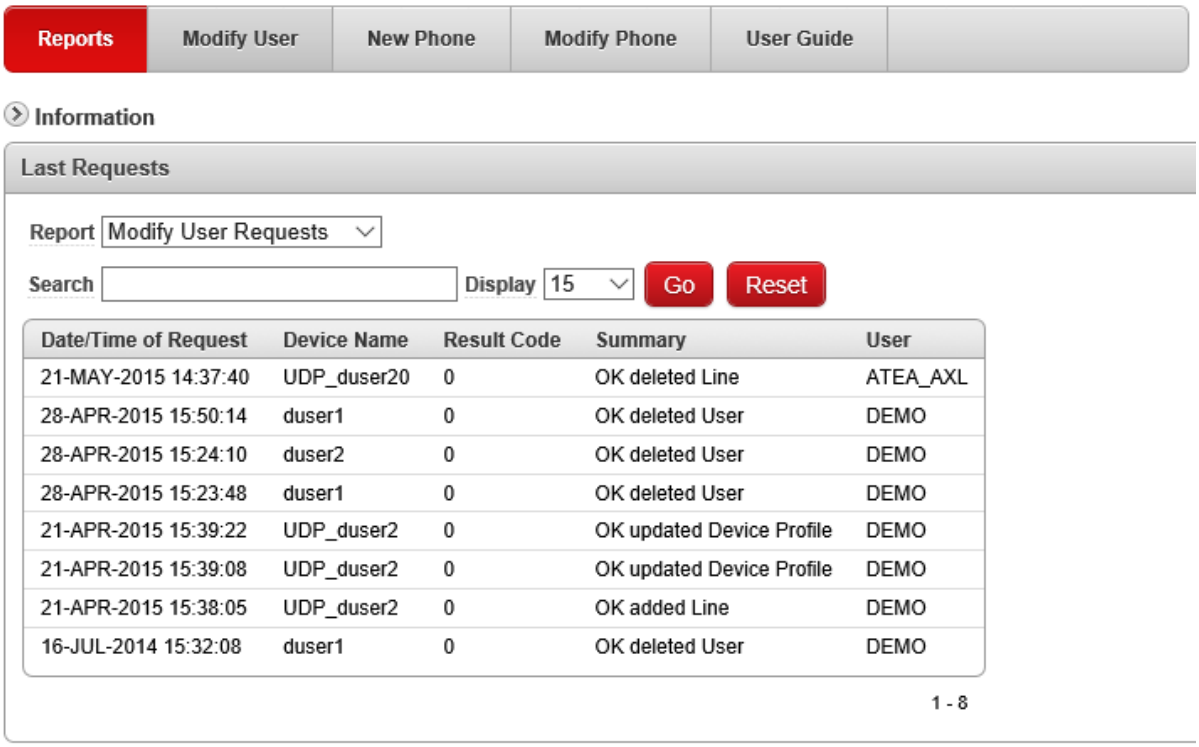
The CSV file must have the following heading
USERID
Where:

- **USERID** is a list of valid UserID's for the users who are to have all their phones and device profiles removed from the CUCM. Phones that are still connected should auto-register with the CUCM and be available for use again.

-- Sample contents for file --
USERID
testuser1
testuser2
testuser3
testuser4
testuser5
--end--

5 Reports on activity

The reports show when and who made each change. These include the results of the bulk processing activity, where this feature is enabled.



Each report provides information about changes presented to the CUCM, with details including:

- Time and date
- Device name
- Result code (o is successful. Any other number indicates the type of error.)
- Summary of result in words
- User who made the request

There are four reports:

- Add User Requests
- Modify User Requests
- Add Phone Requests
- Modify Phone Requests

To run a report

On the **Reports** page:

1. Select the **report type** or enter an item to **search** on. Search items may be extension numbers, part of a MAC address, User, or item.
2. Select the number of lines to **display** in the report.
3. Click **Go** to run the report, or click **Reset** or clear the request.

6 Link to current documentation

Use the **User Guide** link to find the current CFE documentation on the Atea website. The website also has many tips and instructions in the "How-To" section.

7 Terms used in this guide

Term	Description
AD	Microsoft Active Directory. The CUCM is often synchronized to AD using the LDAP feature on the CUCM.
CAPSL	CUCM automated provisioning system for LDAP – optional feature on the Atea CFE.
CFE	Contained Front End – the application allowing users to perform a number of telephone and user related tasks without having direct access to the CUCM.
CLID	Calling line identification. Presentation of the calling telephone number.
CUCM	Cisco Unified Communications Manager or Call Manager. Telephones and users are set up on this device.
DDI or DID	Direct Dial In or Direct Inward Dial number. This is the public telephone number that may be used to call a specific telephone on the system.
Extension	A Cisco IP phone directory number or DN.
EM	Extension Mobility. A feature that enables users to log onto a telephone to automatically adopt their phone properties including phone number and speed dials.
PSTN	Public Services Telephone Network – This is the normal telephone network for public use.
UDP	User device profile. The device profile for an extension mobility user.