Cisco Unified Communications Self Care Portal User Guide, Release 12.5(1) SU1

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CHAPTER 1

About Cisco Unified Communications Self Care Portal

Overview of Self Care Portal

This document describes how to use Unified Communications Self Care Portal to customize and configure your phone features and settings. You can use Self Care Portal to manage your phone settings, such as speed dial numbers, ring settings, voicemail notifications, call history, call forwarding, and phone contacts.

Your network administrator controls the access to Self Care Portal and provides you with your login credentials. You can only configure features that are supported on your phone or that your administrator has made available to you. For example, if your phone doesn't support Do Not Disturb, you can't find that feature in Self Care Portal.

Know Your Self Care Portal Interface

Self Care Portal is a web-based graphical user interface (GUI). It has a home page with five tabs—Phones, Voicemail, IM & Availability, General Settings, and Downloads. You can use these tabs to configure and customize your phone features.

The following image shows the Self Care Portal home page.

Figure 1: Self Care Portal Interface
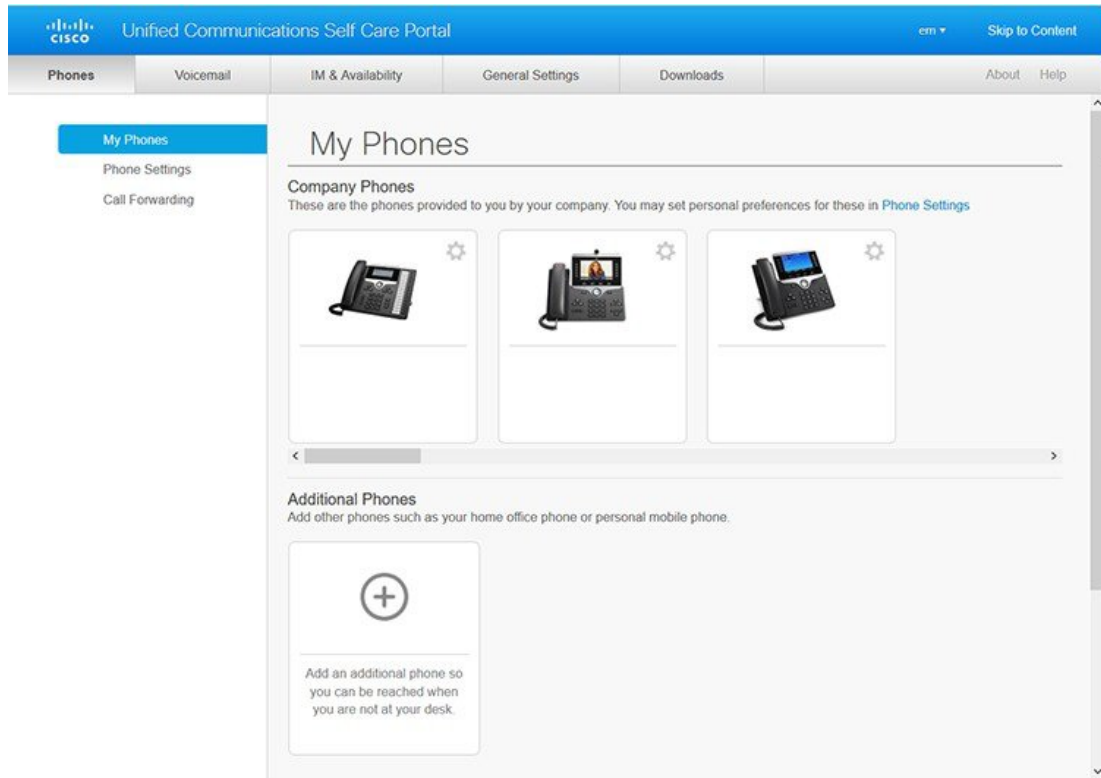
The following table lists the functions of each tab:

Tabs	Function
Phones	Set up speed dial numbers, ring settings, call history, and call forwarding settings.
Voicemail	Set up your voicemail settings.
IM & Availability	Set up instant messages and availability status.
General Settings	Set up or change your password, PIN, conference access code, and display name.
Downloads	Download plugins for your phones.

Company Phones and Additional Phones

There are two types of phones that you can add to Self Care Portal. They are:

- Company Phones—Cisco IP Phones provided by your company. You can configure features for an improved experience.

- Additional Phones—Your personal or mobile phones. You can add these phones to Self Care Portal and use it to handle your work calls. You can't configure any features on them.

To view these phones in Self Care Portal, go to **Unified Communications Self Care Portal** > **My Phones**.

Self Care Portal Buttons and Icons

The Self Care Portal has buttons and icons to add, modify, or delete your phone settings.

Icon	Name	Description
⊕	Add New	Add a new item, such as a new phone, a new service, or a new speed dial number.
✕	Delete	Delete a setting, feature, or function.
✎	Edit Setting	Edit an existing setting.
⊙—⊙	Linked	Share an updated setting with your other phones.
⊙—□	Unlinked	Unshare an updated setting with your other phones.
⚙	Settings	Edit a phone setting, update the name and description of your additional phone, and download a phone manual.

Get Started

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

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**.

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.

Set Your Preferred Language

By default, your Cisco IP Phone and Jabber applications display their content in English. If you're comfortable using a different language other than English, you can set that language as your display language.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **General Settings** > **Language**.

Step 2   From the **Display Language** drop-down list, choose your preferred language, and click **Save**.

Change Your Phone Display Name

You can modify the description for each of your Cisco IP Phones. This makes it easier if you have multiple phones.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **My Phones**.

Step 2   Hover over the name of your phone, click the Settings 🔅 icon, and choose **Edit**.

Step 3   Enter the new name of the phone in the **Description** field, and then click **Save**.

Add Your Additional Phones to Self Care Portal

You can add your additional phones, such as your mobile or home office phones to Self Care Portal. These phones allow you to handle your work calls when you're away from your desk or office.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **My Phones**.

Step 2   Click the Add New ⊕ icon.

Step 3   Enter the phone number and description in the respective fields.

- If you want to enable single number reach (answer your calls from any other device or phones) on your new phone, check the **Enable Single Number Reach** check box.

- If you've added your mobile phone as your new phone, check the **Enable Move to Mobile** check box.

- If you want to enable the Cisco Jabber features on your new phone, check the **Enable Extend and Connect** check box.

Step 4   Click **Save**.

Activate Your Phone

You need to activate your phone with an activation code before you can use it. Your administrator configures a 16-digit activation code. This activation code is valid for one week.

Note   If your phone is not active, you see the **Ready to Activate** message on your phone in the Self Care Portal.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **My Phones**.

Step 2   Choose your phone, and click **View Activation Code**.
The Activation Code pop-up displays the activation code and barcode.

Step 3   Use one of the options to activate your phone:

- Enter the 16-digit activation code on your new phone.

- If your phone has a video camera, you can use the camera to scan the barcode.

Step 4   Click **Save**.

Set Up Phone Services

You can add phone services such as directory, weather forecasts, or visual voicemail on Self Care Portal, if your Cisco IP Phones or Jabber applications support them.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **Phones Settings** > **Services**.

Step 2   Choose your phone and click **Add New Services**.

Step 3   Choose the required services from the **Services** drop-down list, enter the display name in the **Display Name** field, and click **Save**.

Change Your Portal Password

You can change your password anytime. We recommend that you change your default password so that your login remains secure.

Note   You can't generate a new password if you have forgotten it. To generate a new password, contact your network administrator.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **General Settings** > **Client/Portal Password**.
Step 2   Enter your new password in the **New Password** field, re-enter it in the **Confirm New Password** field, and then click **Save**.

Change Your Phone Services PIN

You can use a phone services PIN to configure new phones, enable conference calls, and use mobile connect. The PIN includes numbers without any spaces, letters, or special characters.

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** > **Phone Services PIN**.
Step 2   Enter the PIN in the **New Phone PIN** field, re-enter it in the **Confirm New Phone PIN** field, and then click **Save**.

Schedule a Meeting Using an Access Code

You can use the Self Care Portal to schedule a meeting with your coworkers. If you prefer, you can use an access code to control who attends your meeting. An access code is a unique number, between three to ten digits, without any spaces, letters, or special characters.

Procedure

Step 1 From **Unified Communications Self Care Portal**, choose **General Settings** > **Conference**.

Step 2 Enter the meeting number in the **Meeting Number** field.

Step 3 Enter the access code in the **Attendees Access Code** field, and then click **Save**.

Download the Required Plug-ins

You can download the available plug-ins if you want to extend the functionality of your Cisco IP Phones or Jabber application.

Procedure

Step 1 From Unified Communications Self Care Portal, choose **Downloads**.

Step 2 Choose the plug-in that you want to download and click the **Download** button.

Download Your Phone User Manual

You can download your phone's user manual from the Self Care Portal. If you find that it's not the latest version, go to cisco.com to download the latest version.

Procedure

Step 1 From **Unified Communications Self Care Portal**, choose **Phones** > **My Phones**.

Step 2 Hover over your additional phone, click the Settings ⚙ icon, and choose **Download Manual**.

Sign out From Self Care Portal

After you've configured and customized your settings, you can sign out from Self Care Portal. Before you sign out, make sure that you've saved your settings.

From **Unified Communications Self Care Portal**, click your display name, and choose **Sign Out**. Your display name appears at the top right corner of the home page. If you haven't configured your display name, your user ID appears on the screen.

Phone Feature Configuration

Create Speed-Dial Numbers

You can create speed-dials for the people whom you call frequently, so that you can reach out to them with the press of a button. You can set up to 199 speed-dial numbers. Speed-dial numbers configured from Cisco IP Phone do not appear in Self Care Portal.

Procedure

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

Step 2 Choose your phone and click **Add New Speed Dial**.

Step 3 Enter the required field details such as Number/URI, Label (description) and Speed Dial, and then click **Ok**.

Set Speed Dial Numbers with Pauses

You can set pauses in a speed dial. This allows you to make calls to destinations that require Forced Authorization Code (FAC), Client Matter Code (CMC), dialing pause, or additional digits (such as a user extension, meeting access number, or voice mail password without manual intervention. When you press the speed dial the phone establishes a call and sends other digits to the destination along with the dialing pauses.

To include pauses in a speed dial, you have to specify a comma (,) in the speed dial string. Each comma indicates a pause of two seconds.

For example— you want to set up a speed dial that includes codes such as Forced Authorization Code (FAC) and Client Matter Code (CMC), followed by IVR prompts where:

- The called number is 91886543.

- The FAC code is 8787.

- The CMC code is 5656.

- The IVR response is 987989#. You need to enter this response four seconds after the call connects.

In this case, you can set **91886543,8787,5656,987989#** as the speed dial.
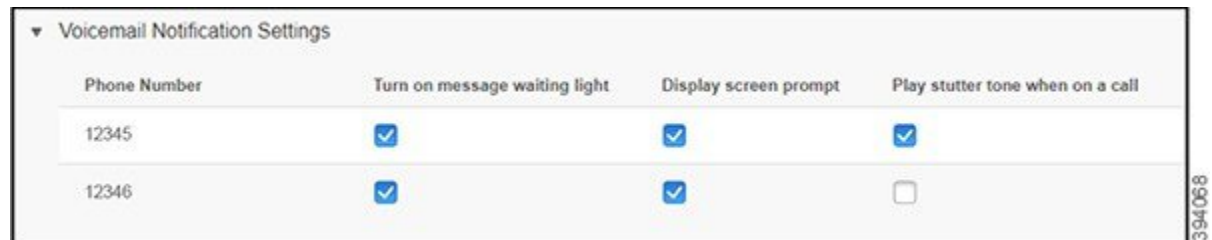
Set Up Your Voicemail Notifications

You receive a notification when someone leaves a message on your phone. The notification options are waiting light, screen prompt, and stutter tone. You can set the same or different notification options for your messages.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **Phone Settings** > **Voicemail Notification Settings**.

Step 2   Choose your phone number and check any of the notification options check boxes to enable them.

- Turn on message waiting light—A red light blinks near the message icon button on your phone screen when you receive a voicemail message.

- Display screen prompt—A voicemail icon appears on your phone screen when you receive a voicemail message.

- Play stutter tone when on a call—You hear a dial tone when you pick up your phone or when you are on a call. The dial tone indicates that there is a voicemail message.

Step 3   Click **Save**.

Set Voicemail Preferences

You can set preferences for your voicemail such as the device on which you want to set the voicemail or your preferred language and so on.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Voicemail.**

Step 2   Click **Dial Voicemail Preferences IVR**.
Cisco Web Dialer dials the Voicemail Preferences IVR, where you can set up voicemail preferences for your phones.

Set up Login Time Limit for Extension Mobility

Cisco Extension Mobility allows you to use different Cisco IP Phones as your own phone and personalize your settings and speed dials, by a simple login process. You can set up a time limit for this login process.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **General Settings** > **Extension Mobility**.

- Click the **Use system default Maximum Login Time** radio button, if you want to retain the default maximum login time limit.
- Click the **No Maximum Login Time** radio button, if you do not want to set the maximum login time limit.
- Click the **Automatically log me out** radio button, enter the hours and minutes in the respective fields, if you want to customize the login time limit.

Step 2   Click **Save**.

Save Your Recent Calls

If you've missed any of your recent incoming calls and want to check who's called you recently, you can go to the call history and view them.

Note   By default, all your missed calls are saved in the call history. If you don't want to save your recent missed calls, uncheck the **Log Missed Calls** check box.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **Phone Settings** > **Call History**.

Step 2   Choose your phone number and check the **Log Missed Calls** check box.

Step 3   Click **Save**.

Add People to Your Phone Contacts

You can save your coworker's phone number and email address to your contact list. From your phone, you can browse or search for your coworker's number and make calls directly without having to type the number each time.

Note The contact list is unique to each phone. You can't share the contact list with your other phones.

Procedure

Step 1 From **Unified Communications Self Care Portal**, choose **Phones** > **Phone Setting** > **Phone Contacts**.

Step 2 Click **Create New Contact**.

Step 3 Enter the required field details for **Contact Information** and **Contact Methods**, and then click **Save**.

Note You can click the edit icon ✎ to modify the contact name or click the delete icon ✕ to remove the contact name from your phone list.

Forward Your Phone Calls

When you're away from your phone or desk, you can forward calls from your Cisco IP Phone to another phone or to a voicemail account.

Call Forward All (CFA) allows a phone user to forward all calls to a directory number. You can configure CFA for internal and external calls and can forward calls to a voicemail system or a dialed destination number by configuring the calling search space (CSS). includes a secondary Calling Search Space configuration field for CFA. The secondary CSS for CFA combines with the existing CSS for CFA to allow support of the alternate CSS system configuration. When you activate CFA, only the primary and secondary CSS for CFA are used to validate the CFA destination and redirect the call to the CFA destination. If these fields are empty, the null CSS is used. Only the CSS fields that are configured in the primary CSS for CFA and secondary CSS for CFA fields are used. If CFA is activated from the phone, the CFA destination is validated by using the CSS for CFA and the secondary CSS for CFA, and the CFA destination gets written to the database. When a CFA is activated, the CFA destination always gets validated against the CSS for CFA and the secondary CSS for CFA.

prevents CFA activation on the phone when a CFA loop is identified. For example, identifies a call forward loop when the user presses the CFwdALL softkey on the phone with directory number 1000 and enters 1001 as the CFA destination, and 1001 has forwarded all calls to directory number 1002, which has forwarded all calls to directory number 1003, which has forwarded all calls to 1000. In this case, identifies that a loop has occurred and prevents CFA activation on the phone with directory number 1000.

Tip   If the same directory number exists in different partitions, for example, directory number 1000 exists in partitions 1 and 2, allows the CFA activation on the phone.

CFA loops do not affect call processing because supports CFA loop breakout, which ensures that if a CFA loop is identified, the call goes through the entire forwarding chain, breaks out of the Call Forward All loop, and the loop is completed as expected, even if CFNA, CFB, or other forwarding options are configured along with CFA for one of the directory numbers in the forwarding chain.

For example, the user for the phone with directory number 1000 forwards all calls to directory number 1001, which has forwarded all calls to directory number 1002, which has forwarded all calls to directory number 1000, which creates a CFA loop. In addition, directory number 1002 has configured CFNA to directory number 1004. The user at the phone with directory number 1003 calls directory number 1000, which forwards to 1001, which forwards to 1002. identifies a CFA loop, and the call, which breaks out of the loop, tries to connect to directory number 1002. If the No Answer Ring Duration timer expires before the user for the phone with directory number 1002 answers the call, forwards the call to directory number 1004.

For a single call, may identify multiple CFA loops and attempt to connect the call after each loop is identified.

Note   The forward does not work from self care portal unless **css** is already configured correctly to reach this number from line web page , and the "forwarded to ###" always comes up.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **Call Forwarding**.

Step 2   Choose your phone number and do the following:

- To forward calls to a voicemail account, check the **Forward all calls to:** check box, and choose **Voicemail** from the drop-down list.
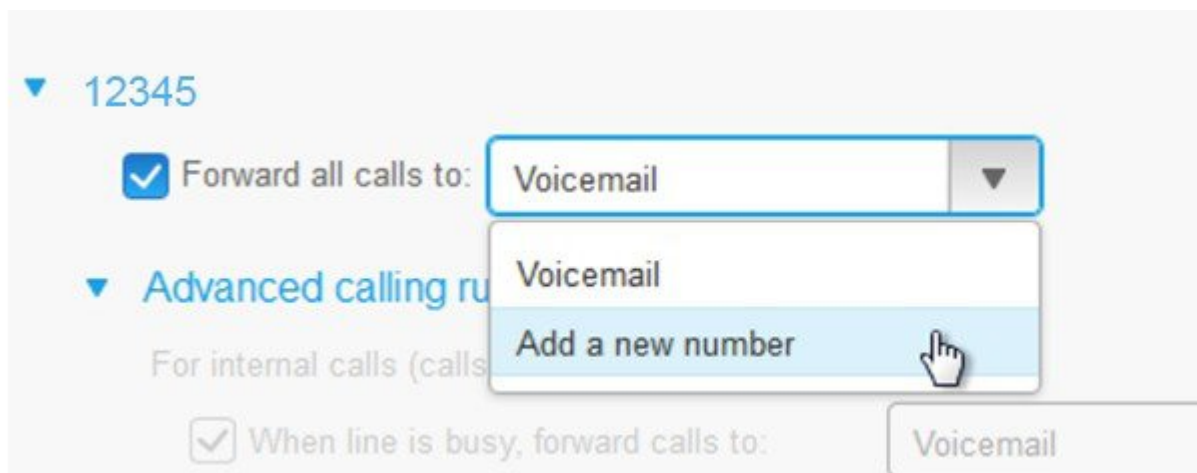
- To forward calls to another phone number, check the **Forward all calls to:** check box, and choose **Add a new number** from the drop-down list, and enter the phone number in the text box.

Step 3   To forward your internal or external calls, click **Advanced calling rules** and choose either **Voicemail** or **Add a new number** from the drop-down list, and then click **Save**.

Note   To delete or remove a Call Forwarding setting, do the following:

- To delete the Call Forward All settting, uncheck the **Forward all calls to:** check box and click **Save**.

- To delete an advanced call forwarding setting, expand the **Advanced calling rules** area, uncheck the check box for the setting that you want to delete, and click **Save**.

Handle Work Calls From Any Phone

You can answer your work calls from your personal mobile phone or home office phone. You can add these phones as additional phones in the Self Care Portal. If someone dials your company phone, your additional phones also ring.

You can also set the time interval when you want someone to reach out to you on your phones.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **My Phones**.

Step 2   Click the Add New ⊕ icon.

Step 3   Enter the phone number and description in the respective fields.

Step 4   Check the **Enable Single Number Reach** check box and the **Enable Move to Mobile** check box.

Step 5   Click **Advanced call timing** and choose any of the options if you want to set up a time interval for the call transfer.

- **Wait ( ) seconds before ringing this phone when my business line is dialed**—Allows you to set the time interval for your desk phone to ring before trying to contact you at the new number.

- **Prevent this call from going straight to this phones voice mail by**

    - **Using a time delay of ( )seconds to detect when calls go straight to voicemail**—Allows you to set up a time interval before allowing the call to reach your phone's voicemail

    - **Requiring you to respond to a prompt to be connected**—Your call is on hold and prompts you to enter a digit on your phone to answer the call rather than send it to your phone's voicemail.

- **Stop ringing this phone after ( ) seconds to avoid connecting to this phones voicemail**—Allows you to set up a ring time interval for your phone to stop ringing, so that the calls are not moved to your phone's voicemail.

Step 6   Click **Save**.

Transfer Your Work Calls to Your Personal Phone

You can use your mobile phone to handle calls that are associated with your desk phone number. These mobile phones are added as additional phones in the Self Care Portal. This allows you to attend to your work calls when you are away from your desk.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **Phones** > **My Phones**.

Step 2   Hover over your additional phone, click the Settings ⚙ icon, and choose **Edit**.

Step 3   In the **Edit Additional Phone** dialog box, check the **Enable Move To Mobile** check box, and then click **Save**.

Instant Message and Presence Status

Let Others Know That You're Busy

When you're busy with work and don't want to receive any calls, set your status to Do Not Disturb. Your phone doesn't ring when other people try to dial your number.

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

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **IM & Availability** > **Do Not Disturb**.

Step 2   Check the **Turn on** check box and click **Save**.

Share Your Work Status

You can turn on your instant message and presence status, so that your coworkers are aware of your work status. For example, if you're away, online, offline, or in a meeting, the status appears accordingly.

Procedure

Step 1   From **Unified Communications Self Care Portal**, choose **IM & Availability** > **Status Policy**.

Step 2   Check the **Automatically update status when there is a meeting on my calendar** check box, click **Status Policy**, and click **Save**.