



## Customizing Your Cisco IP Phone on the Web

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# Getting Started

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Your Cisco IP Phone is a network device that can share information with other network devices in your company, including your computer. This document can inform you about using the Cisco CallManager User Options web pages to control phone features and settings, and to establish and customize phone services.



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**Note** This document describes specific Cisco IP Phone features, settings and services that might be available to you. If you have any questions about the availability of features, settings and services, check with your system administrator.

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Use the following topics in this section to learn about:

- Accessing Your User Options Web Pages, page 2
- Tips for Navigating the User Option Web Pages, page 3

Then, read these sections for information about:

- Customizing Your Phone Features and Settings, page 4
- Customizing Your Phone Services, page 6

# Accessing Your User Options Web Pages

If you use a Cisco IP Phone, follow the steps below to access your personalized User Option web pages.



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**Note** If you use Cisco IP Communicator (a software-based phone), you can access your User Options web pages by right-clicking on the phone interface and choosing Cisco User Options from the floating menu.

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## Procedure

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**Step 1** Obtain a User Options URL, user ID, and default password from your system administrator. Open the URL and log in.

**Step 2** After you enter the URL, the Security Alert dialog box might appear and ask you to choose Yes or View Certificate > Install Certificate. If you don't see this dialog box, skip to step 3.

- If you click **Yes**, the Security Alert dialog box displays each time you log in to your User Options web pages (until you install the certificate).
- If you click **View Certificate > Install Certificate** and follow the instructions on the page, the Security Alert dialog box will not display each time you log in to your User Options web pages. If you have questions about installing certificates, ask your system administrator.



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**Note** Step 2 describes how the Security Alert dialog box displays for Internet Explorer users; it might display differently if you use Netscape Navigator.

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**Step 3** From the general menu, select your device type (phone model) or your device profile (an Extension Mobility user device profile) in the “Select a device” drop-down list.



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**Note** Extension Mobility user device profiles typically begin with “EM”. For more information, see the “Using Extension Mobility” section on page 13. Your system administrator will tell you if you use this feature.

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After you make your selection, a context-sensitive menu appears with options appropriate for your device type or device profile.

**Step 4** To customize your phone or your phone services, click on one of the main menu options.



**Note** Your menu may display different options, depending on how your system administrator configured your phone. If you have any questions about your menu options, check with your system administrator.

If you want to...	Then
Forward all calls to a different number	See the “Forward your calls to another phone” section on page 4.
Add/Update your Speed Dials	See the “Set up speed dials” section on page 4.
Add/Update your Cisco IP Phone Services	See the “Subscribe to services” section on page 7.
Configure your Cisco Personal Address Book	See the “Set up your Personal Address Book” section on page 5.
Change the Message Waiting Lamp policy for your phone	See the “Change the way that the voice message light on your handset works” section on page 4.
Change the Locale for your phone, your device profile(s) and/or your User Options web pages	See the “Change the language for your User Options web pages and/or phone” section on page 4.
Change your Password	See the “Change your password” section on page 5.
Change your PIN	See the “Change your PIN” section on page 5.

## Tips for Navigating the User Option Web Pages

Use the following tips to navigate the User Option web pages:

- Select your device or profile from the menu page to see all of your options.
- Click **Update** to apply and save your changes.
- Click **Return to the Menu** to get back to the context-sensitive menu.
- Click **Log Off** to exit the User Options web pages.
- Click **User Guide** to view the guide for your Cisco IP Phone.

# Customizing Your Phone Features and Settings

You can customize and control the following phone features and settings from your User Options web pages. (If you need help logging in, see the “Accessing Your User Options Web Pages” section on page 2.)



**Note** This section describes specific Cisco IP Phone features and settings that might be available to you. Check with your system administrator if you have questions about your phone features and settings.

<b>If you want to...</b>	<b>Then do this after you select your device or profile</b>
Change the language for your User Options web pages and/or phone	To change the language for your User Options web pages <i>during the current Web session only</i> , use the “View page in” drop-down list at the bottom of each page. Otherwise, choose <b>Menu &gt; Change the Locale...</b> and select a new default language for your User Options web pages and your phone.
Change the way that the voice message light on your handset works	Choose <b>Menu &gt; Change the Message Waiting Lamp policy...</b> and select a phone line. Choose an option from the drop-down list. Typically, the default system policy tells your phone to “always light” when you receive a new voice message.
Forward your calls to another phone	Choose <b>Menu &gt; Forward all calls...</b> and click the check box for a line. You can redirect calls to voice messaging or to another number. If you specify a number, enter the number exactly as you would dial it from your desk phone, including an access code and an area code, such as 9 and/or 1, if necessary.
Cancel forwarding your calls to another phone	Choose <b>Menu &gt; Forward all calls...</b> and click the check box for a line to remove the check mark. You can cancel call forwarding from you phone or from your User Options web pages.
Set up speed dials	Choose <b>Menu &gt; Add/Update Speed Dials</b> and enter a number and label for each available speed dial button. Buttons are available if you are not using them for lines or services.

If you want to...	Then do this after you select your device or profile (continued)
Add a service to a programmable button	<p>You can assign a Service URL to a programmable button on your phone for a one-touch access to phone services, such as weather, stock quotes, Fast Dial, and other services.</p> <p>First, check with your system administrator to make sure that a Service URL button has been configured for your phone.</p> <p>Then, choose <b>Menu &gt; Add/Update Your Service URL Buttons</b>.</p> <p>Choose the service that you want to add to the phone from the “Select a service” drop-down list box and click <b>Update</b>.</p>
Change the ring pattern per phone line (flash-only, ring once, beep-only, etc.)	Choose <b>Menu &gt; Change the Ring Settings for your phone</b> and follow the instructions on the page.
Create an abbreviated dial index that you can access on your phone for quick dialing	<p>Choose <b>Menu &gt; Add/Update Speed Dials</b>. Under “Speed Dial Settings not associated with a button” enter a number and label.</p> <p>Enter the number exactly as you would for a call, for example, with an access code such as 9 or the area code. Click <b>Update</b>.</p>
Change your PIN	Choose <b>Menu &gt; Change your PIN</b> . Your PIN is the code you enter to log in to Extension Mobility and other services on your phone.
Change your password	Choose <b>Menu &gt; Change your Password</b> . Your password is the code you enter to log in to the User Options web pages.
Set up your Personal Address Book	Choose <b>Menu &gt; Configure your...Address Book</b> . First, subscribe to the service. See the “How To Subscribe to Services on the Web” section on page 6.

**Tip**

If you use Extension Mobility, changes you make in the User Options web pages do not take effect until the next time you log in to the Extension Mobility service on your phone.

# Customizing Your Phone Services

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You can subscribe to and customize phone services from your User Option web pages.

Services can include:

- Web-based information, such as stock quotes, movie listings, and weather reports
- Network data, such as corporate calendars and searchable directories
- Phone services, such as Fast Dial and Personal Address Book

The first thing you need to do before using an optional service is to subscribe to it on the web. The next step is to configure the service. After you have subscribed to your service, you can view and modify the service on your phone. Depending on your phone model, you access the service on your phone by pressing the Services button or by choosing **Menu > Services**.

Use the following topics to learn:

- How To Subscribe to Services on the Web, page 6
- How to Customize and Use Established Services, page 8

## How To Subscribe to Services on the Web

Use the table below to learn how to subscribe to services from the User Option web pages once you have logged in and selected your device or profile. (For help logging on, see the “Accessing Your User Options Web Pages” section on page 2.)



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- Note**
- A few services, such as Extension Mobility, may be required and therefore are established for you.
  - This section describes specific Cisco IP Phone services that might be available to you. If you have any questions about the availability of your phone services, check with your system administrator.
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If you want to...	Then do this after you log in and select your device type or profile...
Subscribe to services	Choose <b>Main Menu &gt; Configure your Cisco IP Phone Services</b> . Select a service from the “Available Services” drop-down list and click <b>Continue</b> . Enter more information upon request (such as a zip code or PIN), then click <b>Subscribe</b> .
Change or end subscriptions	Choose <b>Main Menu &gt; Configure your Cisco IP Phone Services</b> . Click on a service in the “Your Subscribed Services” panel to make any changes. Click <b>Update</b> or <b>Unsubscribe</b> .
Access a service on your phone	To view your established services, press the <b>Services</b> button or choose <b>Menu &gt; Services</b> on your phone. Or, if you assigned the service to a programmable button, press the programmable button.
Customize and use your Personal Address Book service	Refer to the “Using Personal Address Book” section on page 8.
Customize and use your Fast Dial service	Refer to the “Using Fast Dial” section on page 11.
Customize and use your Extension Mobility service	Refer to the “Using Extension Mobility” section on page 13.
Customize and use your Web Dialer feature.	Refer to the “Using Cisco Web Dialer” section on page 15.


**Tip**

- If you use Extension Mobility, the changes you make in the User Options web pages do not take affect until the next time you log in to the Extension Mobility service on your phone.
- For one-touch access to the Fast Dial menu, assign the Fast Dial service to an available programmable button.
- You can subscribe to the same service multiple times and give each instance of the same service a unique name. For example, if you want to subscribe to a weather service for several regions, you can rename each version of the service.

# How to Customize and Use Established Services

Once your phone services are set up, you can customize and access them from your computer and your phone. Because instructions for each service can vary, see the section that describes the services that are established for your phone to learn how to customize and use that service.

To get help establishing a service, see the “How To Subscribe to Services on the Web” section on page 6.

Instructions for customizing and using specific services are provided in the following topics:

- Using Personal Address Book, page 8
- Using Fast Dial, page 11
- Using Extension Mobility, page 13
- Using Cisco Web Dialer, page 15

## Using Personal Address Book

The Personal Address Book service allows you to store names and numbers for people internal and external to your company. You can also assign Fast Dial codes to personal address book entries and dial those codes in place of phone numbers.

From your Cisco IP Phone, you can use the Personal Address Book service to look up entries and place calls.



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**Note** The exact name of the Personal Address Book service on your phone may vary depending on how your system administrator configured the service.

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Use the following table to learn how to use the Personal Address Book service.

<b>If you want to...</b>	<b>Then...</b>
Subscribe to the Personal Address Book service	Choose <b>Main Menu &gt; Configure your Cisco IP Phone Services</b> . Select <b>Personal Address Book</b> from the “Available Services” drop-down list, click <b>Continue</b> , and click <b>Subscribe</b> .
Create a new entry from the User Options web pages	Access your User Options web pages (see Accessing Your User Options Web Pages, page 2 for instructions). Then choose <b>Menu &gt; Configure your Cisco Personal Address Book</b> after you have subscribed to this service. To add entries manually, click <b>Add a New Entry</b> . To add entries using a synchronizer application, see the “Installing the Synchronizer” section on page 10.

If you want to...	Then...
Edit an entry from the User Options web pages	Access your User Options web pages (see Accessing Your User Options Web Pages, page 2 for instructions). Then choose <b>Menu &gt; Configure your Cisco Personal Address Book</b> . Enter partial or complete information in a name field and click <b>Find</b> . Click a name from the search results to display the complete entry. Make any changes and click <b>Update</b> .
Edit an entry on your phone	Choose <b>Services &gt; My Address Book</b> (service name may vary). Enter a partial or complete name using your keypad and press the <b>Submit</b> softkey. Select a search result and press the <b>Edit</b> softkey. Press the <b>Name</b> or <b>Phone</b> softkey to make changes, then press <b>Submit</b> and <b>OK</b> .
Dial from an entry on your phone	Choose <b>Services &gt; My Address Book</b> (service name may vary). Enter a partial or complete name using your keypad and press the <b>Submit</b> softkey. Select a search result and press the <b>Dial</b> softkey.
Delete an entry from the User Options web pages	Access your User Options web pages (see Accessing Your User Options Web Pages, page 2 for instructions). Then, choose <b>Menu &gt; Configure your Cisco Personal Address Book</b> . Enter partial or complete information in a name field and click <b>Find</b> . Click the checkbox next to entries that you want to delete and click <b>Delete Selected</b> .
Synchronize with a Microsoft address book application	See the “Applying the Cisco IP Phone Address Book Synchronizer” section on page 10.
Assign Fast Dial codes to entries	See the “Using Fast Dial” section on page 11.

## Applying the Cisco IP Phone Address Book Synchronizer

Use this tool to synchronize data stored in your Microsoft Windows, Microsoft Outlook, or Microsoft Outlook Express address book(s) with the Cisco CallManager directory and Personal Address Book service.

Refer to the installation and configuration instructions that follow.

### Installing the Synchronizer

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- Step 1** Get the Cisco IP Phone Address Book Synchronizer installer file from your system administrator.
  - Step 2** Double-click the TabSyncInstall.exe file provided by your system administrator.  
The Welcome to Cisco IP Phone Address Book Synchronizer window displays.
  - Step 3** Click **Next**.  
The License Agreement window displays.
  - Step 4** Read the license agreement information, and click **Yes** to accept.  
The Choose Destination Location window displays.
  - Step 5** Choose the directory in which you want to install the application and click **Next**.  
The Start Copying Files window displays.
  - Step 6** Verify that you have chosen the correct directory, and click **Next**.  
The installation wizard installs the application to your computer. When the installation is complete, the InstallShield Wizard Complete window displays.
  - Step 7** Click **Finish**.
  - Step 8** To complete the process, see the “Configuring the Synchronizer” section on page 10.
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### Configuring the Synchronizer

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- Step 1** Open the Cisco IP Phone Address Book Synchronizer.  
If you accepted the default installation directory, you can open the application by choosing **Start > Programs > Cisco > IP Phone Address Synchronizer**.
- Step 2** To configure user information, click the **Password** button.  
The Cisco IP Phone User window displays.
- Step 3** Enter the Cisco IP Phone user name and password and click **OK**.
- Step 4** To configure synchronization rules, click the **Rules Options** button.

- Step 5** Choose the synchronization method that you want to use and click **OK**.
- Step 6** To configure Cisco CallManager information, click the **CCM Server** button.  
The Configure Cisco CallManager Web Server window displays.
- Step 7** Enter the IP address or host name of the Cisco CallManager and click **OK**.  
If you do not have this information, contact your system administrator.
- Step 8** Click the **Password** button.  
The Cisco IP Phone User window displays.
- Step 9** Enter your user identification and password for the Cisco IP Phone User Options application.
- Step 10** To start the directory synchronization process, click the **Synchronize** button.  
The Synchronization Status window provides information on the status of the address book synchronization. If you chose the user intervention for duplicate entries rule and you have duplicate address book entries, the Duplicate Selection window displays. Choose the entry that you want to include in your Personal Address Book and click **OK**.
- Step 11** When synchronization completes, click **Exit** to close the Cisco IP Phone Address Book Synchronizer.
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## Using Fast Dial

Fast Dial codes are one or two digit index codes (1 to 99) that you can assign to phone numbers or address book entries. To place a call using Fast Dial codes, select the Fast Dial index code from the menu on your phone's touchscreen. You do not need to dial the entire number.



**Note** The exact name of the Fast Dial service on your phone may vary, depending on how your system administrator configured the service.

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Use the table below to learn how to set up and use Fast Dial codes.

If you want to...	Then...
Subscribe to the Fast Dial service	Access your User Options web pages (see Accessing Your User Options Web Pages, page 2 for instructions). Then choose <b>Main Menu &gt; Configure your Cisco IP Phone Services</b> . Select <b>Fast Dials</b> from the “Available Services” drop-down list, click <b>Continue</b> , and click <b>Subscribe</b> .
Assign a Fast Dial code from the User Options web pages	Choose <b>Menu &gt; Configure your Cisco Personal Address Book</b> , click <b>Fast Dials</b> , and an <b>index code</b> (1 - 99). In the Add a New Fast Dials pop-up window, you can do one of the following:  Click <b>Personal Address Book Entry</b> to assign a Fast Dial code to an existing entry. Select the entry and a phone number from the drop-down menu.  Click <b>Enter a Directory Number</b> to assign a Fast Dial code to a phone number without using your Personal Address Book.
Assign a Fast Dial code on your phone (using address book)	Choose <b>Services &gt; My Address Book</b> (service name may vary). Enter a name and and press the <b>Submit</b> softkey. Select a search result and press the <b>FastDial</b> softkey. Select a phone number (home, work or mobile), then select a Fast Dial <b>index code</b> . This is the number you will dial instead of the phone number. Press <b>OK</b> .
Assign a Fast Dial code on your phone (without address book)	Choose <b>Services &gt; My Fast Dials</b> (service name may vary). Press the <b>Assign</b> softkey and select a Fast Dial <b>index code</b> (1 - 99). This is the number you will dial instead of a phone number. Enter a directory number you want assigned to this index code, then press <b>Submit</b> and <b>OK</b> .
Make a Fast Dial call on your phone	Choose <b>Services &gt; My Fast Dials</b> (service name may vary). To dial, do one of the following: <ul style="list-style-type: none"> <li>• Enter the Fast Dial <b>index code</b> using your key pad.</li> <li>• Use the Navigation button to highlight a code and press the <b>Dial</b> softkey.</li> <li>• If your phone has a touchscreen, press the Fast Dial on your touchscreen that you want to call.</li> </ul>
Remove a Fast Dial on your phone	Choose <b>Services &gt; My Fast Dials</b> (service name may vary). Use the Navigation button to highlight a code and press the <b>Remove</b> softkey. Press <b>Select</b> and <b>OK</b> .
Remove a Fast Dial from User Options web pages	Choose <b>Menu &gt; Configure your Cisco Personal Address Book</b> and click <b>Fast Dials</b> . Click the checkbox next to the entry that you want to remove and click <b>Delete Selected</b> .

**Tip**

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- For quicker access the Fast Dial menu, assign the Fast Dial service to an available programmable button on your phone.
  - Unlike the Speed Dial feature, Fast Dials are not limited by the quantity of available line buttons on your phone. You can create up to 99 Fast Dials.
- 

## Using Extension Mobility

The Extension Mobility feature allows you to configure an Cisco IP Phone as your own, temporarily, by logging in. Once you log in, the phone adopts your device user “profile,” including your lines (your phone numbers), your features (such as speed dials), and your established services. Extension Mobility is useful if you routinely conduct business from different locations in your company or if you have access to shared phones.

Unlike the Personal Address Book or Fast Dial services, you do not need to subscribe to the Extension Mobility service. Your system administrator establishes this service for you.

**Note**

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The name of the EM login service as it appears in your phone’s services menu may vary. The exact wording is determined by our system administrator.

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Here are two common scenarios in which Extension Mobility is established for phone users. If you use Extension Mobility, you probably fit into one, but not both, of these categories. In either case, you can customize your Extension Mobility profile from the User Options web pages.

- You have one or more phones that adopt your extension and personalized feature settings, such as speed dials, only when you log in to the Extension Mobility service. You might share phones or workspaces.
- You have a phone that continually displays your extension and personalized feature settings, such as speed dials, and you do not need to log in to the Extension Mobility service on that phone. Additionally, no one else can use Extension Mobility to log in to your phone. However, you can use Extension Mobility to log in to other phones in your company. You might use this service when you are traveling or away from your desk.

Use the table below to learn how to use Extension Mobility.

If you want to...	Then...
Subscribe to the Extension Mobility service	Your system administrator establishes this service for you.
Log in to Extension Mobility on your phone	Choose <b>Services &gt; EM Login</b> (exact name may vary). If you are prompted, select a device profile. Enter your user ID and PIN. (A user ID and default PIN are provided by your system administrator.)
Log out of Extension Mobility on your phone	Choose <b>Services &gt; EM Log out</b> (exact name may vary). The phone might display “Do you want to log out <your UserID>?” Select <b>Yes</b> .
Change your PIN	Log on to the User Options web pages and choose <b>Menu &gt; Change your PIN</b> . Your PIN is the code you enter to log in to Extension Mobility and other services. Changing your PIN will effect any service that requires a PIN, such as Personal Address Book and Fast Dial. If you use these services and change your PIN, you must update those services before you can use them.
Change settings, features, and services associated with your Extension Mobility profile	Log in to your User Options web pages and choose your Extension Mobility profile. From the menu of options specific to your Extension Mobility profile that appears, make desired changes to settings, features, and services. For example, set up speed dials. (For help logging in, see Chapter 2 “How to Access Your User Options Web Pages on page 2-1.
Apply your Extension Mobility profile to a Cisco IP Phone	Log in to the Extension Mobility service on the phone. Your extension number, and all of the settings, features, and services that you have established in your Extension Mobility profile will apply to that phone after you log in. If you make changes to your Extension Mobility profile while you are logged in to Extension Mobility on a phone, you need to log out and log in again to see the changes on the phone.

**Tip**


- 
- Changes you make in the User Options web pages do not take affect until the next time you log in to the Extension Mobility service on your phone.
  - Settings that are controlled on the phone only, such as contrast and volume, are not maintained in your Extension Mobility profile.
  - Extension Mobility automatically logs you out after a certain amount of time. This time limit is established by your system administrator.
  - You can log in to only one phone at a time. If you want to use another phone, you must log out of the first phone.
  - When you log in or log out using Extension Mobility, any active call completion associated with the Call Back feature is automatically cancelled.
  - If you have activated Call Back and the target phone has been removed from the system, you might hear a fast busy tone when you press Dial or pick up the handset. In this case, cancel the initial CallBack request or try to reactivate Call Back to the phone.
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## Using Cisco Web Dialer

Cisco Web Dialer allows you to make calls from the web by clicking on a telephone number that is linked to your company directory.

You log in to Web Dialer using the same User ID and password that you use to access your User Options web page. Like Extension Mobility, you do not need to subscribe to Web Dialer; your system administrator establishes this feature for you. Unlike Extension Mobility and your other services, Web Dialer does not appear on your list of services on the User Options web page.

Use the table below to learn how to use Web Dialer.

If you want to...	Then...
Subscribe to Web Dialer	Your system administrator establishes this feature for you.
Dial from a corporate directory web page for the first time	<p data-bbox="292 336 1209 397">The first time that you successfully log in to Web Dialer, the Preferences dialog web page opens.</p> <p data-bbox="292 406 1209 467">Select your calling device, such as your Cisco IP Phone or select the extension mobility option. Select your calling line and language.</p> <div data-bbox="292 487 1209 662">  <p data-bbox="292 527 1209 662"><b>Note</b> Extension Mobility user device profiles typically begin with “EM”. For more information, see the “Using Extension Mobility” section on page 13. Your system administrator will tell you if you use extension mobility.</p> </div>
Dial from a corporate directory web page	Open a web browser and go to your company directory. Enter your user ID and password. (Your system administrator can provide your company directory URL, and your user ID and password.) Click on the number in the directory and click <b>Dial</b> to place the call. Click <b>Hangup</b> to end the call. Or, you can hang up from your Cisco IP Phone.
Set up automatic dialing	To connect automatically to the number and to prevent the display of the MakeCall dialog web page, select the check box <b>Do not display call confirmation dialog</b> .
Change your settings	On the MakeCall dialog web page, click <b>Preferences</b> and make your setting changes.
Log out of Web Dialer	On the MakeCall dialog web page, click <b>Logout</b> .



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