# User Guide for IM and Presence Service on Cisco Unified Communications Manager, Release 9.0(1)

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CHAPTER 1

# Getting Started with the Cisco Unified CM IM and Presence User Options Interface



## Supported Browsers

The Cisco Unified CM IM and Presence User Options interface supports these browsers:

- Microsoft Internet Explorer 6
- Microsoft Internet Explorer 7
- Microsoft Internet Explorer 8
- Firefox 3.x

**Note** IM and Presence does not currently support Safari or Google Chrome.

### Related Topics


Signing In to Cisco Unified CM IM and Presence User Options, on page 1


## Signing In to Cisco Unified CM IM and Presence User Options

### Before You Begin

You use the Cisco Unified CM IM and Presence User Options interface to customize settings, create personal response messages and organize contacts.

- To be able to sign into the Cisco Unified CM IM and Presence User Options interface, the administrator must assign the user to the "Standard CCM End User" Group.

- Obtain the following information from your system administrator:
  - A URL address for Cisco Unified CM IM and Presence User Options.
  - Your username and password for Cisco Unified CM IM and Presence User Options.
- Make sure you are using a supported browser.

### Procedure

**Step 1** Open a supported web browser on your computer.

**Step 2** Enter the URL address for Cisco Unified CM IM and Presence User Options, similar to: http://<*IM and Presence server*>/cupuser.

**Step 3** Enter your username for Cisco Unified CM IM and Presence User Options.

**Step 4** Enter your password Cisco Unified CM IM and Presence User Options provided by your system administrator.

**Step 5** Select **Login**.

To sign out of the User Options interface, select **Logout** in the upper, right corner of the User Options window. For security purposes, you will be automatically signed out of User Options after thirty minutes of inactivity.

### Related Topics

Supported Browsers , on page 1

CHAPTER 2

# Setting Up Your Privacy Policies



## Setting Your Default Privacy Policy

Privacy policies allow you to determine which users can see your availability status, and send you instant messages (IM). This release of IM and Presence supports the contact list rule whereby anyone in your contact list (being watched by you) is able to see your availability status by default *unless* you explicitly deny that person permission to view your status.

You use privacy policies, therefore, to allow and block users and domains. The following options allow you to configure privacy policy either as a default setting at the organizational level or by specific request to the user.

- Allow—Users/domains are allowed to see your availability status and are able to send you instant messages by default. unless you explicitly add the user/domain to your Blocked list. You can set the Allow privacy policy for internal users and domains only. This option is *not* available for external (federated) users/domains.
- Block—Users/domains that you block cannot see your availability status and cannot send you instant messages. Users that you block always see your status as Unavailable. You can set the Block privacy policy for internal and external (federated) users and domains.
- Ask Me—Ask Me privacy policy prompts users (via a request) to either explicitly block or allow the exchange of availability status and IM from specific users/domains. The client application prompts the user to authorize or reject the subscription. You can set the Ask Me privacy policy for external (federated) users and domains only, and only if the external contact or domain is *not* in either the Allowed or Blocked list for the user.

### Procedure

**Step 1** Select **User Options > Privacy Policies**.

**Step 2** Select one of these options:

| If You Want To... | Do This |
|---|---|
| *Allow all internal users* to see your availability and send you instant messages (except those internal users/domains that you explicitly add to your blocked exception list).<br>**Note** See the exception to this policy setting in the Troubleshooting Tips section of this topic. This policy will not allow external users to see your availability. | **1** Select **Allow** from the Internal users (within your company/organization): drop-down menu.<br>**2** (Optional) Add internal users to your blocked exception lists following the procedures described in this module. See What To Do Next. |
| *Block all internal users* from seeing your availability and sending you instant messages (except those internal users that you explicitly add to your allowed exception list).<br>**Note** This policy will not block external users from seeing your availability. | **1** Select **Block** from the Internal users (within your company/organization): drop-down menu.<br>**2** (Optional) Add internal users to your allowed exception list following the procedures described in this module. See What To Do Next. |
| *Block all external users* from seeing your availability and sending you instant messages (except those external users that you explicitly add to your allowed exception list).<br>**Note** This policy will not block internal users from seeing your availability. | **1** Select **Block** from the External users (all others): drop-down menu.<br>**2** (Optional) Add external users to your allowed exception list following the procedures described in this module. See What To Do Next. |
| *Prompt all users* (with an Ask Me request) to set their own Allow/Block policy for external users (except those external users that you explicitly add to your allowed/blocked exception list).<br>**Note** This policy will not block internal users from seeing your availability. | **1** Select **Ask Me** from the External users (all others): drop-down menu.<br>**2** (Optional) Add external users to your allowed/blocked exception list following the procedures described in this module. See What To Do Next. |

**Step 3** Select **Save Defaults**.

### Troubleshooting Tips

The IM and Presence server automatically authorizes a user that is on the contact list of another user to view their availability status. Note this exception to the *Allow all internal users* policy setting if you turn *off* automatic authorization on the IM and Presence server and both the global and local domain default is set to Allow - the user will be prompted to either approve or reject the subscription request. This is the Ask Me scenario for the local domain. For more information about the automatic authorization setting on IM and

Presence, see the *Deployment Guide for IM and Presence Service on Cisco Unified Communications Manager* (on Cisco.com).

### What to Do Next

- If you want to override the default Allow/Block privacy policy set for internal/external users at organizational level, see the following topics that describe how to configure exception lists for users.

# Adding Internal Users to Your Allowed or Blocked Exception Lists

This procedure allows you to manage the exceptions to the general privacy policy in the form of Allow and Block lists. Depending on the default privacy policy that you set at organizational level, either the allowed or blocked list is available for you to edit. In this way, you can override the default policy behavior to add specific people within your organization to your allowed or blocked list.

- Setting the Allow policy for specific users enables them to be able to see your availability and send you instant messages even if the general policy blocks them.
- Setting the Block policy for specific users prevents them from viewing status and exchanging IM when they are using Cisco clients (Cisco Jabber Version 8) - even if the general policy allows them. Users on the Contact list are always allowed unless explicitly blocked on the Exception list. Note that some third-party XMPP clients will still send and receive IMs regardless of the policy that you set.

### Before You Begin

Set your default privacy policy.

### Procedure

**Step 1** Select **User Options > Privacy Policies**.

**Step 2** Select **Add User** in the User Settings frame on the Privacy Policy window.

**Step 3** Perform one of these actions:

- Select **Allow** to allow the user to see your availability.
- Select **Block** to block the user from seeing your availability.

**Step 4** Enter a valid User ID for the internal user. The User ID must exist in your internal network in the format<*userid@domain*>.

**Step 5** Select **Local domain**.

**Step 6** Select **Add** to add the internal user to the local domain.

### Troubleshooting Tips

- Federated users can add a local user using either an emailid or a standard JID. The choice depends on whether the Administrator has enabled or disabled the emailid for the domain.

- Once you **Add** a user to your Allowed/Blocked list, the details display in the table on this window. To remove any user from your Allowed/Blocked list, check the check box for the user and select **Delete Selected**.

# Adding External Users to Your Allowed or Blocked Exception Lists

This procedure allows you to manage the exceptions to the general privacy policy in the form of Allow and Block lists. Depending on the default privacy policy that you set at organizational level, either the allowed or blocked list is available for you to edit. In this way, you can override the default policy behavior to add specific people outside of your organization to your allowed or blocked list.

- Setting the Allow policy for specific users enables them to be able to see your availability and send you instant messages even if the general policy blocks them.
- Setting the Block policy for specific users prevents them from seeing your availability and sending you instant messages even if the general policy allows them (via a positive response to an Ask Me request).

### Before You Begin

Set your default privacy policy.

### Procedure

**Step 1** Select **User Options > Privacy Policies**.

**Step 2** Select **Add User** in the User Settings frame on the Privacy Policy window.

**Step 3** Perform one of these actions:

- Select **Allow** to allow the user to see your availability.
- Select **Block** to block the user from seeing your availability.

**Step 4** Enter a valid User ID for the internal user. The User ID must exist in your internal network in the format (*<userid@domain>*.

**Step 5** Select one of these domains to which the user belongs:

- **Federated domain**.
- **Custom domain** - a custom domain is an external domain that is not in the federated domain list.

**Step 6** Complete one of these actions:

| If you selected... | Do this: |
|---|---|
| Federated domain | Select the domain with which you are federating from the drop-down list. |

| If you selected... | Do this: |
|---|---|
| Custom domain | Enter the domain for the user.<br>**Note** An example of a custom domain is 'mycompany.com'. |

**Step 7** Select **Add**.

### Troubleshooting Tips

Once you **Add** a user to your Allowed/Blocked list, the details display in the table on this window. To remove any user from your Allowed/Blocked list, check the check box for the user and select **Delete Selected**.

# Adding External Domains to Your Allowed or Blocked Exception Lists

### Before You Begin

You can allow or block a whole external domain. If you block an external domain, any requests to see your availability from users in that domain are blocked, provided you have not added those external users to your allowed list.

### Procedure

**Step 1** Select **User Options > Privacy Policies**.

**Step 2** Select **Add Domain** in the User Settings frame on the Privacy Policy window.

**Step 3** Perform one of these actions:

- Select **Allow** to allow the user to see your availability.
- Select **Block** to block the user from seeing your availability.

**Step 4** Select one of these domains to allow or block:

- **Federated domain**
- **Custom domain** - a custom domain is an external domain that is not in the federated domain list.

**Step 5** Complete one of these actions:

| If you selected... | Do this: |
|---|---|
| Federated domain | Select the domain with which you are federating from the drop-down list. |

| If you selected... | Do this: |
|---|---|
| Custom domain | Enter the domain for the user.<br>**Note** An example of a custom domain is 'mycompany.com'. |

**Step 6** Select **Add**.

### Troubleshooting Tips

Once you **Add** a domain to your Allowed/Blocked list, the details display in the table on this window. To remove any domain from your Allowed/Blocked list, check the check box for the domain and select **Delete Selected**.

CHAPTER 3

# Organizing Your Contact List



## Adding Contacts to Your Contact List

### Before You Begin

- Your system administrator sets the number of contacts you can have on your list, with a maximum of 100. Contact your system administrator to verify the contact limit on your phone.
- You can add an external contact by either selecting an external domain, or configuring a custom domain for users that are outside of your organization.
- Internal and external users on the Contact list are exceptions to the internal and external policies. Users on the Contact list are always allowed unless explicitly blocked on the Exception list.
- On your instant messaging application, you may add contacts whose availability status is not visible to you, for example, you may want to add people that you just wish to call from the contact list on the application. These types of contacts are not visible on the contact list on the **User Options** interface.
- If you make changes to your contact list (adding/deleting/modifying), your changes are automatically reflected on Cisco clients (for any users who are signed in).

### Procedure

**Step 1** Select **User Options > Contacts** .

**Step 2** Select **Add New**.

**Step 3** Select one of these options:

| If the contact that you want to add is... | Do this: |
|---|---|
| Internal - a user that belongs to your local domain (typically your company or organization) | **1** Add the userid of the federated contact that you want to add, in the Contact field.<br>**2** Select<br>**Select from domain list**<br>**3** Select an internal (local) domain from the Domain menu.<br>**4** Optionally enter an Alternate Name for the user if you want to a nickname to display on their computer.<br>**Note** You are prevented from adding users/domains that are already blocked by the administrator. The organizational privacy policy must be set to allow the internal domain or specific users from this domain to view your availability status and send you instant messages (IM). |
| External - a user that belongs outside of your local domain (typically your company or organization) | Perform one of the following actions:<br>**1** Add the userid of the federated contact that you want to add, in the Contact field.<br>**2** Select<br>**Select from Domain List.**<br>• Select an external domain from the Domain menu.<br>**3** Select<br>**Enter Custom Domain.**<br>• Enter the custom domain for those contacts that are outside of your organization.<br>**Note** You are prevented from adding users/domains that are already blocked by the administrator. The organizational privacy policy must be set to ask you (in a popup window) to allow the external domain or specific users from this domain to view your availability status and send you instant messages (IM). |

**Step 4** (Optional) Enter an alternate name (nickname) for the contact.

**Step 5** Select **Save**.

### Troubleshooting Tips

You can only have one alternate name (nickname) per contact. If you optionally enter an Alternate Name for a contact, it displays on Cisco clients but not necessarily on Third-Party XMPP clients. If you update the name of a contact, this name change updates in your contact list on Cisco Jabber and updates across all your contact groups.

# Deleting Contacts From Your Contact List

### Procedure

**Step 1** Select **User Options** > **Contacts**.

**Step 2** Select Find.

**Step 3** Perform one of these actions:

| If You Want To... | Do This: |
|---|---|
| Delete all your contacts | Select **Select All.** |
| Delete selected contacts | Check next to the name of the contact you want to delete. |

**Step 4** Select **Delete Selected**.

**Step 5** Select **OK**.

### Troubleshooting Tips

It may take some time for a contact to be deleted because it involves database processing. A message displays on the UI indicating that "a recent update to your contact list has not yet taken effect. It is queued for processing shortly." If you refresh the page, the updated contact list displays.

# Viewing Your Contact List

### Procedure

**Step 1** Select **User Options > Contacts**.

**Step 2** Select **Find**.

# Configuring the Contact List Refresh Timer

You can modify how frequently you want the contact list to refresh on your phone.

### Procedure

**Step 1** Select **User Options > Preferences**.

**Step 2** Enter a value (in seconds) from 7-3600 in the **Phone Display Refresh Interval** field. The default value is 30 seconds.

**Step 3** Select **Save**.

CHAPTER 4

# Troubleshooting the Cisco Unified CM IM and Presence User Options Interface



## Cannot Sign In To The User Options Interface

**Problem** I am accessing the correct **User Options** web page, but I cannot sign in using my user name and password.

**Solution** Contact your system administrator to verify that you are using the correct link to the **User Options** web pages, and that you are entering the correct username and password. Also verify that you are registered as a licensed user, and you have the assigned access to the **User Options** web pages.

## Signed Out Automatically From User Options Interface

**Problem** I have to re-enter my User Options user name and password to access the User Options interface.

**Solution** For increased security, the User Options web pages automatically signs you out after thirty minutes of inactivity.

CHAPTER 5

# How To Access the Accessibility Options



## Accessing the Icons in the Window

Cisco Unified CM IM and Presence User Options provide functionality that allows you to access icons on the window without using a mouse. You can perform this procedure from any point on the window, so you do not need to scroll or tab through various fields.

Many windows in IM and Presence have icons that display at the top of the window; for example, an icon of a disk for Save, an icon that is a plus sign (+) for Add, and so on.

### Procedure

**Step 1** Press Alt, press 1, and then press Tab.

**Step 2** The cursor highlights the first icon from the left. Press Tab again to move to the next icon.

**Step 3** Press Enter to perform the function of the icon.

## Accessing the Buttons in the Window

Cisco Unified CM IM and Presence User Options provide functionality that allows you to access icons on the window without using a mouse. You can perform this procedure from any point on the window, so you do not need to scroll or tab through various fields.

Many of the windows in IM and Presence have buttons that display at the bottom of the window; for example, a button for Save, a button for Add, and so on.

### Procedure

**Step 1** Press Alt, press 2, and then press Tab.

**Step 2** The cursor highlights the first button from the left. Press Tab again to move to the next button.

**Step 3** Press Enter to perform the function of the button.