



# VOSS Automate Self-service Guide

Release 21.2

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# Contents

- 1 What's New** **1**
  - 1.1 Self-service Guide: Release 21.2 . . . . . 1
  
- 2 Preface** **2**
  - 2.1 Purpose . . . . . 2
  - 2.2 Audience . . . . . 2
  - 2.3 Conventions . . . . . 2
  
- 3 Accessing Self-service** **3**
  - 3.1 Accessing Self-service . . . . . 3
  - 3.2 First Login and Password Expiry or Reset . . . . . 4
  
- 4 Minimal Mode** **5**
  - 4.1 Accessing Minimal Mode . . . . . 5
  - 4.2 Minimal Mode Features . . . . . 6
  - 4.3 Change Password . . . . . 6
  - 4.4 Configure Your Password Reset Questions . . . . . 7
  - 4.5 Reset Your Password . . . . . 9
  
- 5 Manage Your Self-service** **10**
  - 5.1 Manage Your Self-service . . . . . 10
  - 5.2 Configure Your Password Reset Questions . . . . . 10
  - 5.3 Reset Your Password . . . . . 11
  
- 6 Introduction** **12**
  - 6.1 User Interface . . . . . 12
  - 6.2 Available Features and Services . . . . . 13
  - 6.3 Session Timeout . . . . . 13
  
- 7 Buttons and Common Tasks** **14**
  - 7.1 Buttons and Icons . . . . . 14
  - 7.2 Common Tasks . . . . . 15
  
- 8 Home** **16**
  - 8.1 Home . . . . . 16
  
- 9 My Information** **17**
  - 9.1 My Information . . . . . 17
  - 9.2 Change Your User Language . . . . . 17
  - 9.3 Manage Your Password and PIN . . . . . 18
  - 9.4 Change Your Password . . . . . 18
  - 9.5 Password Hints and Rules . . . . . 19
  - 9.6 Change Your PIN . . . . . 19

9.7	Access Webex . . . . .	19
<b>10</b>	<b>Phones</b>	<b>20</b>
10.1	Phones . . . . .	20
10.2	Manage a Phone . . . . .	20
10.3	Add Your Own Smart Device . . . . .	21
10.4	Edit a Smart Device . . . . .	22
10.5	Bulk Modify Your Company Phones . . . . .	22
10.6	Your Personal Phone Management . . . . .	22
10.7	Add a Personal Phone . . . . .	23
10.8	Edit a Personal Phone . . . . .	24
10.9	Delete a Personal Phone . . . . .	24
10.10	Bulk Modify Your Personal Phones . . . . .	24
<b>11</b>	<b>Voicemail</b>	<b>26</b>
11.1	Voicemail Settings . . . . .	26
11.2	Create your own Voicemail Account . . . . .	26
11.3	Change your Voicemail Settings . . . . .	26
11.4	Alternate Numbers and Notification Devices . . . . .	27
11.5	Manage Alternate Numbers and Notification Devices . . . . .	27
11.6	Caller Input . . . . .	27
11.7	Manage Caller Input Keys . . . . .	28
11.8	Message Actions . . . . .	28
11.9	Manage Message Actions . . . . .	28
<b>12</b>	<b>Call Forwarding</b>	<b>29</b>
12.1	Call Forwarding . . . . .	29
12.2	Activate and Manage a Line for Call Forwarding . . . . .	29
<b>13</b>	<b>My Availability</b>	<b>31</b>
13.1	My Availability . . . . .	31
13.2	Set Do Not Disturb for your Phone . . . . .	31
<b>14</b>	<b>Speed Dials and BLFs</b>	<b>32</b>
14.1	Speed Dials and BLFs . . . . .	32
14.2	Manage Speed Dials and Busy Lamps (Phone Button Template) . . . . .	32
14.3	Add a Speed Dial (Abbreviated Dials) . . . . .	33
<b>15</b>	<b>Links</b>	<b>34</b>
15.1	Links . . . . .	34

# 1. What's New

## 1.1. Self-service Guide: Release 21.2

- EKB-9934: Reset security questions saves “successfully” but the TXN in the backend actually fails:  
*Accessing Minimal Mode*

## 2. Preface

### 2.1. Purpose

This document provides instructions on using the Self-service interface to:

- View basic telephone information such as phone numbers and lines.
- Add, edit or delete personal phones.
- Manage aspects of a phone's lines such as line label, management of missed calls, visual and audible message waiting indicator (MWI) setting, and ring settings.
- Configure telephone services such as Voicemail, Do Not Disturb, Call Forwarding and Speed Dial.

### 2.2. Audience

This document is intended for end users to configure and manage their telephone services using the Self-service interface.

### 2.3. Conventions

This document uses the following conventions:

Convention	Description
<b>Bold font</b>	Commands and keywords and user entered text appear in bold font.
<i>Italic font</i>	Document titles, new or emphasized terms and arguments for which you supply values are in <i>italic</i> font.

## 3. Accessing Self-service

### 3.1. Accessing Self-service

This procedure logs you in to Self-service.

#### Pre-requisites:

- Obtain the URL (address) of your Self-service Web page.  
SSO users with the relevant SSO identity provider credentials use a login URL as follows, where {SSO login URI} is the Login URI for the IdP: `http://<Hostname>/sso/{SSO login URI}/login`
- Obtain your user ID and password from your system administrator.

#### Perform these steps:

1. Go to the URL provided, for example: `https://<Hostname>/selfservice/#/login?theme=[your_theme]`

---

**Note:** You can define the language setting for your Login page by appending the appropriate parameter values to the URL, provided the language is installed, for example: `https://<Hostname>/selfservice/#/login?theme=[your_theme]&lang=en-us`

In this example, if `[your_theme] = voss_theme`, your Self-service interface displays in the VOSS theme, and the text on your Login page displays in English. Contact your administrator for details on which theme to include.

---

2. To log in, enter your user ID (or email address) and password in the relevant fields.

- For standard login, the user ID may be either of the following:
  - `{username}@hierarchy`
  - `{email address}`
  - `{username}`

---

**Important:** If logging in with just `{username}`, the username must be unique at the hierarchy, else login fails. In this case, log in using either `{username}@hierarchy` or `{email address}`. Email address must be unique in the system.

Note that the hierarchy is in dot notation and corresponds with the hierarchy to which the user belongs. The hierarchy level is the level at which the user is created. The hierarchy on the login form is prefixed with `sys.hcs`, for example, `sys.hcs.MyProvider.MyReseller.MyCustomer.MySite`.

---

- When logging in with LDAP credentials, the username is in the format:

```
{user ID}@{hierarchy}
```

{user ID} corresponds to the log in attribute name (for example email address, user principal name, sAMaccountName). The log in attribute name is configured in the Authentication attribute of the LDAP device connection associated with this hierarchy.

@hierarchy is not required when the user ID corresponds to the user's email address. The hierarchy is in dot notation and corresponds with the hierarchy to which the user belongs. The hierarchy level is the level at which the user is created. The hierarchy on the login form is prefixed with `sys.hcs`, for example, `sys.hcs.MyProvider.MyReseller.MyCustomer.MySite`.

3. If displayed in the login screen banner, read the Privacy Policy and Cookie Policy.
4. Click **Login** (or press **Enter**). View the Self-service landing page.

---

**Note:**

- The Self-service administrator configures the appearance of the landing page. For more information about the landing page, see 'User Interface'.
- When logging in for the first time, you may be prompted to change your password. See 'First Login' for details.
- The **Logout** and **Password Reset Questions** menu items are not available for SSO users. For information around logging out from an identity provider (IdP) initiated session, see the identity provider's user documentation.

## 3.2. First Login and Password Expiry or Reset

If configured by your Administrator, you may be prompted to change your password when you login to Self-service for the first time (this is only applicable to VOSS Automate authenticated users):

1. Enter the current password in the **Current Password** field.
2. Enter the new password in the **New Password** field. See "Password Hints and Rules" to make sure you meet the required password criteria.
3. Re-enter the new password in the **Repeat Password** field.
4. Click the **Submit** button.

After logging in for the first time, we strongly recommend that you configure your password reset questions as described under "Configure Your Password Reset Questions".

See "User Interface" for more information about the landing page.



## 4. Minimal Mode

### 4.1. Accessing Minimal Mode

Once configured by your administrator, you can log in to Self-service Minimal Mode:

1. Obtain the address (URL) of your Self-service Web pages, as well as your **User ID**, **Email** and **Password** from your administrator.
2. Browse to the website address provided, for example:

```
https://<Hostname>/selfservice/#/login?theme=[your_theme] (login).
```

You can also set the language setting for your Login Page by appending the appropriate parameter values to the URL, provided the language is installed, for example:

```
https://<Hostname>/selfservice/#/login?theme=[your_theme]&lang=en-us
```

With this example, if [your\_theme] = voss\_theme, then your Self-service interface is displayed in the VOSS theme, and the text on your Login page will be displayed in English. Contact your administrator for details on which theme to include.

3. Enter your **User ID** or **Email** address and **Password** in the appropriate fields:
  - For standard login, when logging in use the following format:  
`{User ID or Email}`
  - When logging in with LDAP credentials, the username is in the format:  
`{user ID}` - this corresponds to the login attribute name (for example email address, user principal name, sAMaccountName). The login attribute name is configured in the Authentication attribute of the LDAP device connection associated with this hierarchy.
4. If displayed in the login screen banner, read the Privacy Policy and Cookie Policy.
5. Tap **Login** or **Enter** to log in to Self-service Minimal Mode. Once you have logged in, your landing page is displayed.

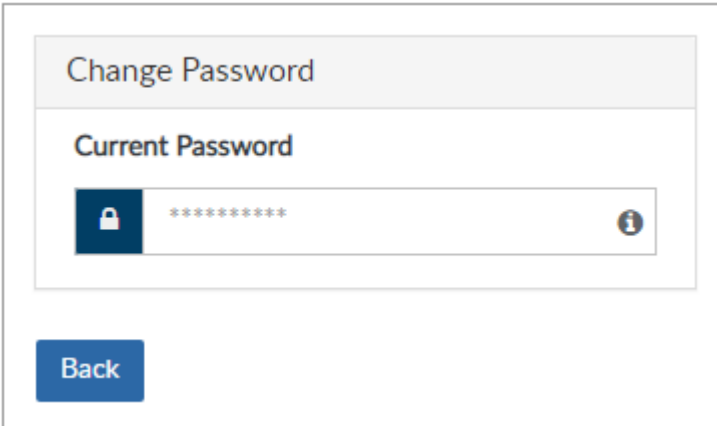
## 4.2. Minimal Mode Features

If your administrator has assigned a Self-service Feature Display Policy to you that has enabled the **Enable (CFWD Only) Minimal Mode**, once you are logged in your Minimal Mode landing page is displayed:

1. **Theme.** This is the Self-service theme set up for you by your administrator.
2. **User icon.** Tap for your user options:
  - Change Password. See [Change Password](#).
  - Password Reset Questions. See [Configure Your Password Reset Questions](#)
  - Logout
3. **Logged in user.** Displays the logged in user.
4. **Forward all calls to voicemail.** Select this check box to forward all calls to Voicemail and tap **Apply changes**.  
This disables the **Forward all calls to** field and recent numbers below.
5. **Forward all calls to.** Enter the number to which you want to forward all your calls and tap **Apply changes**.
6. **X.** Tap to clear this field.
7. **Forward to {number}.** Displays the last three numbers to which you have forwarded calls.  
The most recent number is the first one, and it gets 'bumped down' each time you forward to a new number.  
Tap an existing number to automatically populate the field with this number.
8. **Apply changes.** Tap to apply any of the above actions.

## 4.3. Change Password

1. Enter your current password in the **Current Password** field.



The screenshot shows a 'Change Password' form. At the top is a header 'Change Password'. Below it is a section titled 'Current Password' containing a text input field. The input field has a lock icon on the left and a password strength indicator icon on the right. The password is masked with asterisks. Below the input field is a blue 'Back' button.

2. Enter your new password in the **New Password** field.

While entering your new password, a password strength meter indicates the strength of your password.

Make sure that your password includes the required characters and symbols.

**New Password**

.....

.....

.....

.....

.....

Your password must contain:

- at least 1 uppercase letter
- at least 1 lowercase letter
- at least 1 number
- at least 1 symbol
- at least 8 characters

3. Confirm (re-enter) your password in the **Repeat Password** field.

Change Password

Current Password

.....

New Password

.....

Repeat Password

.....

Back Save Password

4. Tap **Save Password** to change your password.

## 4.4. Configure Your Password Reset Questions

1. Choose the security question from the **Question 1** drop-down list.
2. Enter your answer to the above question in the **Answer 1** field.

---

**Important:** You must provide a unique answer for each security question.

---


- Repeat steps 1 and 2 until you have configured the required number of security questions as determined by your administrator (maximum = 5).
- Enter your password in the **Please enter your password** field.

Please select & answer the 5 questions ×

---

Question 1	Select a question	▼
Answer 1	Select a question first	
Question 2	Select a question	▼
Answer 2	Select a question first	
Question 3	Select a question	▼
Answer 3	Select a question first	
Question 4	Select a question	▼
Answer 4	Select a question first	
Question 5	Select a question	▼
Answer 5	Select a question first	

**Please enter your password**

	*****
---	-------

- Tap **Submit** when complete to configure your security questions and answers.

## 4.5. Reset Your Password

**Note:** You can only reset your password if you have already provided answers to the security questions created by your administrator. See [Configure Your Password Reset Questions](#) if required.

---

If you forget your password while attempting to log in to Self-service Minimal Mode:

1. Enter your **User ID** or **Email** address.
2. Tap the **I forgot my password?** hyperlink located above the **Login** button.
3. Answer the security questions provided.
4. Type your new password in the **New password** field and repeat it in the **Repeat password** field.
5. Tap **Submit**. Your password is changed.
6. Tap **Login** if you want to attempt to log in again.

## 5. Manage Your Self-service

### 5.1. Manage Your Self-service

A logged in user can manage their Self-service account as follows:

- Reset Your Password - accessed from your Login page when you have forgotten your password.
- Password Reset Questions - allows you to configure your own password reset questions.

### 5.2. Configure Your Password Reset Questions

1. Log in to Self-service.
2. Click the arrow next to the logged in user at the top right-hand side of the screen above the **Activity Feed** area.
3. Choose the **Password Reset Questions** option from the drop-down menu. The **Password Reset Questions** screen is displayed.
4. Type your password in the **Current Password \*** field.
5. Choose the security question from the **Question \*** drop-down list.
6. Enter your answer to the above question in the **Answer \*** field.

---

**Important:** You must provide a unique answer for each security question.

---

7. Repeat steps 5 and 6 until you have configured the required number of security questions (as determined by your administrator).
8. Enter your password in the **Please enter your password** field.
9. Click **Submit** when complete to configure your security questions and answers.

## 5.3. Reset Your Password

You can only reset your password if you have already provided answers to the security questions created by your administrator. See “Configure Your Password Reset Questions”.

If you forget your password while attempting to log in to Self-service:

1. Enter your email address in the **Email** field on the Login screen.
2. Click the **I forgot my password** hyperlink located below the **Password** field.
3. Click in each security question field and type the correct answer. The number of available security questions is determined by your administrator.
4. Click in the **New Password** field and type your new password. See “Password Hints and Rules”.
5. Re-enter your new password in the **Repeat Password** field.
6. Click **Submit**. Your password is changed and you are returned to the Login screen.

## 6. Introduction

### 6.1. User Interface

When you log in to Self-service, you are taken to your landing page. The appearance of your landing page, as well as the available features and services, depends on how your administrator has configured Self-service.

The landing page consists of four main areas:

1. **Button Bar** - Located on the left-hand side of the screen. The buttons provide links to the various features and services in Self-service. See the “Buttons, Icons and Common Tasks” topic for a description of all buttons on the button bar as well as miscellaneous buttons and icons used in Self-service.
2. **Dashboard** - The centre, main area of the screen. It provides quick links to the main Self-service functionality, as well as a summary view of your company phones (configured by your Administrator) and personal phones that you can configure yourself.
3. **Activity Feed Area** - Located on the right-hand side of the screen. This area displays an activity log of all the user’s activities that occurred in the current browser session, notifications include:
  - **Authentication messages**, for example: “Your last successful login was on Apr 18, 2016 12:45:32 PM”
  - **Failed Login Attempts messages**, for example: “2 failed login(s) since your last successful login on Apr 17, 2016 10:15:34 PM”
  - **Language installation messages**, for example: “Self-service Language successful Apr 18, 2016 12:45:32 PM”
  - **General system messages**, for example: “The server is busy so the result of your request cannot be displayed right now. However, your request is still running. Please refresh to see if your change has taken effect Apr 18, 2016 12:45:32 PM”

Important Note: If a transaction causes an error, you will also be notified of this with a pop-up notice on the associated transaction screen that can be dismissed. All error messages and notifications returned by the system are also displayed in the **Activity Feed** area. We recommend that you regularly inspect the **Activity Feed** area during each browser session.

4. Drop-down options - Directly above the **Activity Feed** area, the currently logged in user is displayed. There are four options available from this drop-down:
  - **My Information** - Also accessed from the Button Bar - refer to “My Information” for more details.
  - **Help** - Also accessed from the Button Bar - see “Buttons and Icons” for details.
  - **Password Reset Questions** - Allows you to configure your password reset questions - see “Configure Your Password Reset Questions”.



- **Logout** - Also accessed from the Button Bar - see “Buttons and Icons” for details.

## 6.2. Available Features and Services

Depending on how your administrator has configured your system, not all the features and services described in this document may be available to you.

For example, you will only have access to Voicemail if a Voicemail account has been created for you. This is done either by your administrator or by yourself (if your administrator has given you the required permissions).

Furthermore, your administrator can enable either full Voicemail functionality or limited functionality, whereby you may be restricted from using certain Voicemail Settings such as Caller Input or Alternate Numbers and Notification Devices.

## 6.3. Session Timeout

To assist in data security, Self-service has been designed with an automatic session timeout feature. Session timeouts are configured in your credential policy by your administrator. Contact your administrator for details if required.

There are two types of timeouts. In both instances, the following message is displayed to notify you of a pending timeout:

“Your session will expire in 30 seconds.”

- **Idle Timeout** - defines the number of minutes a session remains active when there is no activity in the session. Default = 20 minutes.

Any mouse or keyboard activity after receiving session timeout notification is deemed as ‘activity’, and results in the extension of your current session. If there is no activity within the specified time, you are automatically logged out of Self-service and returned to the Login screen as soon as you try to perform a transaction.














- **Absolute Timeout** - defines the maximum number of minutes a session can be active. Default = 1440 minutes (24 hours).

After the time period elapses, you are automatically logged out of Self-service and returned to the Login screen as soon as you try to perform a transaction.






## 7. Buttons and Common Tasks

### 7.1. Buttons and Icons

The button names are displayed when you hover over a button. The available buttons depend on how your Administrator has configured Self-service.

-  Home - Displays an overview of your Self-service configuration, this includes quick links to main features and a phones summary view.
-  My Information - Provides you with a view of your personal information as configured by administrator.
-  Phones - Displays all phones (and associated lines) assigned to you by your administrator. Also allows you to configure the phone's lines.
-  Voicemail - Displays the Voicemail settings that you can configure. Note that area is visible only if you have a Voicemail box. Consult your administrator if required.
-  Call Forwarding - Displays the call forwarding status of your phone lines.
-  My Availability - Displays the Do Not Disturb settings for each of your phones.
-  Speed Dials & BLFs - Allows you to manage the speed dials and busy lamp fields for each of your phones.
-  Help - Displays the help pages for each area of Self-service, such as Phones, Voicemail, Call Forwarding, Speed Dials, and so on.
-  Logout - Logs you out of the Self-service interface.
-  Add or Insert - Creates a new item, such as a phone, line, or speed dial.
-  Edit - Edits an existing item, such as edit a phone description, or number.
-  Remove or Delete - Removes or deletes the selected item, for example personal phone or speed dial entry.
-  Information - Typically located in the top, right-hand corner of certain display areas such as 'Select a Phone', 'Your Personal Phones', and so on, or next to an item. When you move your cursor over this

icon, text is displayed that describes the purpose of that particular area or item.

-  Active Flag - Indicates if certain line settings such as call forwarding or do not disturb are active.
-  Inactive - Indicates if certain line settings such as call forwarding or do not disturb are inactive.
-  Refresh - Located in the top, right-hand corner of each display area that can be edited. Click to update the specific area. Typically done to refresh the view to include any updates, such as adding a speed dial.
-  Close - Located in the top, right-hand corner of a pop-up pane. Click to dismiss the pop-up pane
-  Privacy Policy - If configured by the administrator, this button shows in the button bar and provides a link to the Privacy Policy URL.

## 7.2. Common Tasks

The user interface allows for a number of common tasks:

- Inline Edit  
Certain fields, including phone and speed dial names and numbers, can be edited inline by clicking in the relevant field. Note that **Save** and **Cancel** buttons appear upon entering text in the field.
- Editing Items - **Select a Phone** or **Select a Line**.

Clicking on a specific phone or line, opens a more detailed and editable view of the selected phone or line on the right-hand side of the screen.

## 8. Home

### 8.1. Home

This screen, which is also your landing page, provides you with a summary of your specific Self-service configuration. See Available Feature and Services for more information.

Quick Menu - provides links to:

- My Information - Displays your personal information such as user ID, names, telephone numbers, and email address. Also indicates whether you have passwords and PINS configured for Self-service, CUCM and Voicemail. Provides a link to your Webex personal meeting room (if your administrator has configured you for this feature).
- Phones - Displays your configured company phones (and associated lines).
- Call Forwarding - Displays the call forwarding status of your phone lines. A green 'Active' flag indicates that one or more of your phone lines has call forwarding activated (enabled).
- My Availability - Displays the do not disturb status of your phone lines. A green 'DND Active' flag indicates that one or more of your phone lines has the do not disturb feature activated (enabled).
- Speed Dials & BLFs - Displays the speed dial and busy lamp field configuration (if configured) for each of your company phones.
- Voicemail - Displays the configured time zone and language settings for your Voicemail account. These settings are only visible if a Voicemail account has been allocated to you.
- Links - Displays links to pre-determined objects or items such as a support site or a downloadable user guide.

Your Company Phones - lists the company phones allocated to you by your administrator. See Phones for more details on how to view and manage your company phones. See Add Your Own Smart Device for details on how to add your own smart device to your company phones (if your Administrator has given you the required permissions).

Your Personal Phones - lists the personal phones that you configured, such as mobile phone, tablet, and so on. Personal phones can be configured to ring whenever a company phone rings to facilitate the Single Number Reach feature. You can also edit existing personal phones (by configuring them to ring simultaneously with your company phones), or add new phones if required. See Your Personal Phone Management for more details.

## 9. My Information

### 9.1. My Information

The My Information section of the screen provides you with a view of your personal information as configured by your administrator.

Greyed out items such as User ID, names, manager, department, and email address can not be edited.

Editable details include, phone numbers and language (displayed in the Self-service interface).

The My Credentials section of the screen is only available to VOSS Automate authenticated users, and is not applicable or visible to LDAP or SSO authenticated users. It displays all Self-service, CUCM and Voicemail passwords and PINs (if configured by your administrator). Passwords and PINs can be edited if required.

The Webex Self-service section of the screen is only visible if your administrator has configured you to use the Webex feature. It provides you with a link to the Webex server.

See also:

- [Change Your User Language](#) for more details about changing the language that is displayed in the Self-service interface.
- [Manage Your Password and PIN](#) for more details about changing your password and PIN.
- [Access Webex](#).

### 9.2. Change Your User Language

This option allows you to set or change the language displayed in the Self-service portal.

1. Click **My Information** on the button bar.
2. In the **My Information** section of the screen, choose the language from the **Language** drop-down list. If you choose a right-to-left language, for example Hebrew or Arabic, your Self-service interface will be displayed right-to-left. This means that menus, labels and tooltips will show on the right hand side of the interface controls and the text will read from the right-to-left direction.
3. Click **Save** when complete. Text displayed in the Self-service portal is shown in your chosen language.

## 9.3. Manage Your Password and PIN

You can manage the Passwords and PINs that you use to access UC services in your solution.

### 9.3.1. Passwords

Password management is not available if your system is setup for LDAP authentication or Single Sign-on. If change password is available, it is used to access the self-service portal as well as other UC services depending on your assigned services and system setup.

Your administrator allocates a password to you upon creating your user account. See [First Login](#).

Make sure that your passwords are secure. Passwords must include at least one numeral, punctuation character and must be a combination of upper case and lower case letters. See [Change Your Password and Password Hints and Rules](#).

### 9.3.2. PIN

The change PIN capability allows you to change your PIN to access the services you have been assigned that require PINs for access, e.g. Voicemail and Phone Login for roaming.

You are allocated a default PIN when your administrator creates your user and roaming profile. See [Change Your PIN](#).

## 9.4. Change Your Password

1. Click **My Information** on the button bar.
2. In the **My Credentials** section of the screen, enter your current password in the **Current Password** field.
3. Enter a new password in the **New Password** field. See “Password Hints and Rules” for more information.

Note that while entering your new password, a password strength meter appears above the **New Password** field. This meter indicates and informs you of the strength of your password, for example: ‘Your password is not strong enough’, ‘Weak password, estimated crack time: 7 hours’, ‘Good password, estimated crack time: 3 months’, ‘Perfect password, estimated crack time: centuries’.

4. Confirm (re-enter) your password in the **Repeat Password** field.
5. Click **Save Password** to change your password.

## 9.5. Password Hints and Rules

When considering a password, make sure that it complies with the following:

- Must consist of at least eight characters, and contain at least:
  - one upper-case letter
  - one lower-case letter
  - one number
  - one special character or symbol. Supported special characters and symbols are ` ~ ! @ # \$ % ^ & \* ( ) - \_ = + [ { ] } | \ : ; ' " , < . > / and ?
- Do not use keyboard pattern based or obvious passwords such as a birthday or your name.
- Do not share your passwords with other users.
- Do not write down your password or store it in an obvious place, such as on a pin-board or in a diary.

## 9.6. Change Your PIN

1. Click **My Information** on the button bar.
2. In the **My Credentials** section of the screen, enter a new PIN in the **New PIN** field. The minimum PIN length is configured by your administrator. Contact your administrator if required.
3. Confirm (re-enter) your PIN in the **Repeat PIN** field.
4. Click **Save PIN** to change your PIN.

## 9.7. Access Webex

If your administrator has configured you to use the Webex feature:

1. Click **My Information** on the button bar.
2. Click the Launch Webex Self-service link in the Webex Self-service section of the screen. You will be redirected to your Webex server.
3. Access Webex using either your user id or the access code provided.

# 10. Phones

## 10.1. Phones

This screen displays all phones (and associated lines) that are assigned to you. It also allows you to configure basic phone settings and phone line settings, such as:

- Hunt Group Setting - **Logged into Hunt Group** check box - selected = yes, cleared = no.
- Phone Language configuration - Drop-down list. Options available are determined by the language packs installed on the Unified CM. If a language is not chosen, the Unified CM's default language is displayed on the phone LCD.
- Line Label - Typically a friendly name used to identify the line/s associated to your device.
- Management of missed calls - **Log Missed Calls** check box (selected = yes, cleared = no).
- Visual and audible message waiting indicator (MWI) settings - options are: **Use System Policy, Light and Prompt, Prompt Only, Light Only** and **None**.
- Ring settings (phone idle and phone active) - options are: **Use System Default, Disable, Flash Only, Ring Once, Ring**, and **Beep Only**.

See also: "Manage a Phone".

## 10.2. Manage a Phone

1. Click **Phones** on the button bar.
2. Click on the phone that you want to edit. The associated phone details are displayed. Note that the basic phone details, such as name, phone type, protocol and description are greyed out, and can not be edited.
3. If the phone is a member of a hunt group, you can select or clear the **Logged into Hunt Group** check box to login or logout of the hunt group respectively. Selected = phone rings when a call is made to the hunt group, cleared = phone does not ring when a call is made to the hunt group.
4. Click the **Phone Language** drop-down and choose the language to display on your phone LCD. Only languages that are installed on the Unified CM are available in the drop-down list. If no language is chosen, the phone automatically uses the default language configured in Unified CM.
5. Add or edit the Line Label if required.
6. Click on the **+** icon next to the line that you want to edit.
7. Select or clear the **Log Missed Calls** check box. Selected = missed calls are logged.



8. Configure the required visual message waiting indicator policy by selecting the desired option from the drop-down list. Select the message-waiting policy that best suits your needs. If, for example, you are an administrative assistant who shares the manager's directory number as a secondary directory number, you may want to have the policy set to **Light and Prompt**. You will then be able to see whether the manager's line has pending voice messages. If you are a general office worker, who shares a line appearance with a co-worker, you may set the policy so that the indicator lights only when messages are pending for the primary line appearance. Available options are:
  - **Use System Policy**. Follows the policy determined by your system administrator. Contact your phone system administrator if you are not sure what policy is used.
  - **Light and Prompt**. Causes the lamp to light and displays the prompt if there is a message waiting on this line of your phone.
  - **Prompt only**. Displays the prompt if a message is waiting on the primary line.
  - **Light only**. Lights the message-waiting lamp if a message is waiting on the primary line.
  - **None**. Causes the lamp to stay off even when you have messages waiting on this line. The message waiting indicator on your phone's display still shows if you have messages on this line.
9. Configure the audible message waiting indicator policy by choosing an option from the drop-down list. Available options are: **Off**, **On**, or **Default**.
10. Configure the ring setting (phone idle). This defines the way the line on your phone rings when you receive a call while the phone is not in use. Available ring setting options are: **Use System Default**, **Disable**, **Flash only**, **Ring once**, **Ring**, and **Beep only**.
11. Configure the ring setting (phone active). This defines the way the line on your phone rings when you receive a call while you are on the phone already. Available ring setting options are: **Use System Default**, **Disable**, **Flash only**, **Ring once**, **Ring**, and **Beep only**.
12. If you want to automatically register/provision a phone using the **Activation Code**, enter the activation code into your phone before the **Activation Code Expiry** date. Activation codes are only applicable to certain phone types, e.g. 7811, 7832, 7861, 8841, 8851NR, 8865, etc.
13. Click **Save** to implement the settings or **Cancel** to abort. Changes made in Self-service are automatically synchronized with Unified CM.

If you want to view, add or edit personal phones or their settings, for example description, time zone or and ring schedule click **Personal** next to the relevant number. See "Add, Edit or Delete a Personal Phone" for details.

## 10.3. Add Your Own Smart Device

1. Click **Home**.
2. In the **Your Company Phones** section of the screen, click **+ Add your own smart device**.
3. Enter a name for your smart device in the **Description** field.
4. Select the lines (check boxes) to associate to the smart device.
5. Choose the smart device from the available options in the **Device Type** drop-down list, for instance, **iPhone**, **iPad** or **Android Phone or Tablet**.
6. Enter a number for your smart device in the **Your mobile number** field.
7. Select the check boxes to configure your smart device, namely, **Use this phone for retrieving Voicemail** and **Receive SMS notifications for Voicemails**.

8. Click **Save** when complete to add the smart device or **Cancel** to abort.

Changes made in Self-service are automatically synchronized with Unified CM.

## 10.4. Edit a Smart Device

1. Click **Home**.
2. In the Your Company Phones section of the screen, click the smart device that you want to edit.
3. Edit the smart device details as required. See Manage a Phone steps 3 to 12 for details.

Only your administrator can delete phones in the Your Company Phones area of the Self-service interface.

## 10.5. Bulk Modify Your Company Phones

You can modify multiple 'your company' phones at the same time in the **Select a Phone** area of the screen:

To log multiple phones into a hunt group, or to log multiple phones out of a hunt group:

1. Select the check boxes to choose the phones you want to modify, or click the **Select** arrow and choose **All** to select all phones.
2. Click **Login HG** or **Logout HG** if you want all the selected phones to be logged into or out of a Hunt Group respectively.
3. Click **Save** to configure the hunt group action on the selected phones.

To assign the same language to multiple phones:

1. Select the relevant check boxes for the phones you want to modify, or click the **Select** arrow and choose **All** to select all phones.
2. Click **Assign Language**, and choose the language from the drop-down list.
3. Click **Save** to assign the selected language to the phones.

## 10.6. Your Personal Phone Management

Your Personal Phones is only available (and visible) if your administrator has allocated a remote destination profile (RDP) to you. Multiple RDPs per user is not supported. If you are associated with multiple RDPs, the personal phones feature is hidden. If a dual mode device, such as the Cisco Dual Mode for Android or iPhone, is associated to you, you can manage both the phone number and simultaneous ring setting for the device.

The badge in the description column (Mobile or SNR) indicates which of the two types of remote destination personal phones this is:

- Mobile = Mobile Identity dual mode device, e.g. Iphone, Android, Tablet
- SNR = Single Number Reach (remote destination profile). For SNR type personal phones only, a Move to Mobile toggle switch is available to facilitate the transfer of active calls to this mobile phone.

You can also allocate a remote destination profile to yourself (if your Administrator has given you the required permissions) by clicking **+ Click here to enable personal phone management**.

See Add, Edit or Delete a Personal Phone for more information on each respective task.

Changes made in Self-service are automatically synchronized with Unified CM.

## 10.7. Add a Personal Phone

**Note:** Note that you can only add a SNR type personal phone.

1. Click **Home**.
2. In the **Your Personal Phones** section of the screen, click on the **+ Add a Phone** link to add a new personal phone.
3. Enter a name for your phone in the **Description** field.
4. Enter a number for your phone in the **Number** field.
5. Configure **Simultaneous Ring** and/or **Move to Mobile** as required (see below).

### 10.7.1. Configure Simultaneous Ring

1. Set the **Simultaneous Ring** toggle switch to either **Ring On** or **Ring Off**. **Ring On** = Simultaneous Ring enabled (this phone will ring simultaneously when your company phones are called), **Ring Off** = Simultaneous Ring disabled.
2. Click **Next**.
3. Select or clear the Line, for example 4301, check box. When selected, simultaneous ring is active for the selected line(s).
4. Choose the time zone for the phone from the drop-down list.
5. Select or clear the **Set advanced timer options for simultaneous ring** check box. If selected, configure the following:
  - Number of seconds to wait before this phone rings when the business line is dialed.
  - fine tune options for preventing redirected calls going to this phone's Voicemail.
6. Click **Next**.
7. Configure the phone's ring schedule: choose either **Ring 24/7** or **Add a ring schedule** as follows:
  - Enter a ring schedule name.
  - Specify the days (alternatively click the **Select** drop-down and choose an option), status (**Ring On** or **Off**), and times (**From, To**) for the ring schedule.
8. Click **Save** when complete to add the personal phone or **Cancel** to abort.

### 10.7.2. Configure Move to Mobile

To transfer active calls to this SNR type personal phone, set the **Move to Mobile** toggle switch to **MP On**, click **Next** twice, and then click **Save**.

Changes made in Self-service are automatically synchronized with Unified CM.

## 10.8. Edit a Personal Phone

1. Click **Home**.
2. In the **Your Personal Phones** section of the screen, click the **Edit** icon next to the phone that you want to edit.
3. Edit the name of your phone in the **Description** field.
4. Edit the number of your phone in the **Number** field.
5. Edit the **Simultaneous Ring (SR) On/Off** toggle switch.
6. Click **Next** and edit other phone details as required. See “Add a Personal Phone” for details.
7. Edit the **Move to Mobile On/Off** toggle switch (only available for SNR type personal phones). Set the **Move to Mobile** toggle switch to **MP Off** to remove the remote destination but not the remote destination profile. See “Add a Personal Phone” for details.
8. Click **Save** when complete to implement the changes or **Cancel** to abort. Changes made in Self-service are automatically synchronized with Unified CM.

See also: “Bulk Modify Your Personal Phones” for information on how to bulk modify multiple personal phones.

## 10.9. Delete a Personal Phone

See “Bulk Modify Your Personal Phones” for details on how to delete one or more personal phone.

## 10.10. Bulk Modify Your Personal Phones

You can modify multiple ‘your personal’ phones at the same time in the **Your Personal Phones** area of the screen:

To set simultaneous ring on or off for multiple phones:

1. Select the check boxes to choose the personal phones you want to modify, or click the **Select** arrow and choose **All** to select all phones.
2. Click **SR On** or **SR Off** if you want the selected phones to have simultaneous ring set to On or Off respectively. If the **SR On** option is selected, then the selected phones will automatically always ring simultaneously with your company phone.

To configure the ring schedule for multiple phones:

1. Select the check boxes to choose the personal phones you want to modify, or click the **Select** arrow and choose **All** to select all phones.
2. Click **Ring 24/7** if you want to set the chosen phones to always ring simultaneously with your company phones. If not clicked then the phones keep their original ring schedule.
3. Click **Save** to configure the simultaneous ring option on the selected phones.

To delete one or more personal phone:

1. Select the relevant check boxes to choose the personal phones you want to delete, or click the **Select** arrow and choose **All** to select all phones.
2. Click **Delete** to delete the chosen personal phones. A confirmation dialog box is displayed.
3. Click **Yes** to delete the phones or **Cancel** to abort the process.

# 11. Voicemail

## 11.1. Voicemail Settings

This screen is only visible to you if a Voicemail account has been allocated to you. This can be done either by your administrator or by yourself (if your administrator has given you the necessary permissions).

Once you have a Voicemail account, you can edit certain Voicemail settings from within Self-service, these include: Time Zone and Language settings. You can also manage your Caller Input keys as well as your Alternate Numbers and Notification Devices and Message Actions.

Your administrator also configures the Voicemail features and services that are available to you. See Available Features and Services.

## 11.2. Create your own Voicemail Account

To create your own Voicemail account:

1. Click **Voicemail** on the button bar to open the Voicemail screen.
2. Click the **+ Click here to create your Voicemail account** link.
3. When complete, the Voicemail screen is displayed, showing the Voicemail features as configured by your administrator. These include any or all of the **Voicemail Settings**, **Caller Input**, **Alternate Numbers & Notification**, and **Message Actions** areas.

## 11.3. Change your Voicemail Settings

If you have a Voicemail account you can modify certain Voicemail settings:

1. Click **Voicemail** on the button bar to open the **Voicemail Settings** screen.
2. Configure the **Time Zone** and **Language** settings as required by selecting or clearing the **Use System Default Time Zone** (for Time Zone) and **Use System Default Language** (for Languages) check boxes. If the check box is selected, Self-service will use the system default settings. If the check box is cleared, Self-service will use the setting that is chosen from the associated drop-down list.
3. Click **Save** when complete to save the Voicemail settings or **Cancel** to abort.

## 11.4. Alternate Numbers and Notification Devices

Alternate numbers are used to provide users with alternate access points to their Voicemail boxes.

Notifications are used to notify you when you have a new Voicemail message. For instance, you can configure the system to send you notification via phone or sms when you receive a new Voicemail message.

## 11.5. Manage Alternate Numbers and Notification Devices

To add a new phone number to act as an alternative number or notification device from which you can retrieve Voicemail or Voicemail notifications respectively:

1. Click the **+** icon on the **Alternate Numbers & Notification Devices** screen.
2. Enter a **Description** and **Number** for the phone.
3. Select or clear the **Activate this phone for voicemail retrievals**, **Activate this phone for voicemail notifications**, and **Activate this phone for SMS notifications** check boxes. Selected = activated. Check boxes available are as configured by your administrator.
4. Click **Save** when complete or **Cancel** to return to the previous screen. The phone details are synchronized with the Voicemail Server, for example Unity Connection.

To remove a number click the **Remove** icon next to the number you want to remove and then click **Save**. Alternatively, you can edit the details of an existing number by clicking the **Edit** (pen) icon, entering a new number and description in the relevant field, and clicking **Save**. This effectively updates the old number and description with the new information.

To change the status of a check box only, simply select or clear the check box and click **Save**.

If the phone is configured for simultaneous ring, it can only be modified or removed from the **Your Company Phones/Your Mobile Phone Number** view. Click the **Personal** icon next to the number to go to that view.

## 11.6. Caller Input

Caller inputs associate the caller input keys to specific numbers. You can choose an action to associate with each key by choosing it from a drop-down list. Currently the following options are available:

- Ignore Key
- Hang Up
- Take a message
- Skip Greeting
- Restart Greeting
- Transfer to Alternate Contact Number
- Send caller to User

## 11.7. Manage Caller Input Keys

1. Click **Voicemail** on the button bar to open the **Voicemail Settings** screen.
2. In the **Caller Input** area of the screen, configure the caller input keys:
  - a. Click on the required key (\*, #, or 0 to 9).
  - b. Choose the action for the key from the drop-down list. You can only see the caller input keys that have been allocated to you by your administrator. If you choose the **Transfer to Alternate Contact Number** option, enter a number in the **Extension Number** field.
3. Click **Save** when complete to save the caller input settings or **Cancel** to abort.

You can edit caller input keys that you configured yourself by choosing a different Action for the key from the relevant drop-down list or by changing the target number (as applicable). Click **Save** when complete.

## 11.8. Message Actions

Actions to determine how incoming Voicemail, Email, Fax and Receipt messages are handled. Message actions include:

- Reject the Message
- Accept the Message
- Relay the Message
- Accept and Relay the Message

If the selected message action involves relaying the message, you must enter a valid email address in the **Relay Address** field.

## 11.9. Manage Message Actions

1. Click **Voicemail** on the button bar to open the **Voicemail Settings** screen.
2. In the **Message Actions** area of the screen:
  - a. Click the required **Message Type** drop-down, for example **Voicemail**.
  - b. Choose the required message action from the drop-down list.
  - c. Enter a valid email address in the **Relay Address** field. This is only required if the selected message action involves relaying the message, for instance **Accept and Relay the Message**.
3. Click **Save** when complete to save the message action settings or **Cancel** to abort.

You can edit message actions by choosing a different message action from the relevant drop-down list and clicking **Save** when complete.



## 12. Call Forwarding

### 12.1. Call Forwarding

This screen displays the call forwarding status of your phone lines (Active = call forwarding enabled, Inactive = call forwarding disabled).

### 12.2. Activate and Manage a Line for Call Forwarding

1. Click **Call Forwarding** on the button bar. Your lines are displayed showing the call forwarding status of each line.
2. Click the relevant **Inactive** button next to the line for which to activate and configure call forwarding settings. The following call forward settings are available (these settings are also collectively known as the 'Line Profile' - see under 'Another method to apply the line settings of one of your lines to other lines') below:
  - **Forward all incoming calls** - If you want to forward all incoming calls to either Voicemail or a specific number under all circumstances, select the **Activate call forwarding & forward all calls to:** check box and choose a destination from the drop-down list. If you choose the **Specify another number** option, enter your own destination in the adjacent free text field. If this check box is selected, the other call forwarding options are hidden.
  - **Internal calls (calls from a company phone number)** - If you want to forward all incoming internal calls to either Voicemail or a specific number when the line is busy, select the **When the line is busy, forward calls to:** check box, and choose a destination from the drop-down list. If you choose the **Specify another number** option, enter your own destination in the adjacent free text field. If you want to forward all incoming internal calls to either Voicemail or a specific number when there is no answer, select the **When there is no answer, forward calls to:** check box, and choose a destination from the drop-down list. If you choose the **Specify another number** option, enter your own destination in the adjacent free text field.
  - **External calls (calls from outside my company)** - If you want to forward all external calls to either Voicemail or a specific number when the line is busy, select the **When the line is busy, forward calls to:** check box, and choose a destination from the drop-down list. If you choose the **Specify another number** option, enter your own destination in the adjacent free text field. If you want to forward all external calls to either Voicemail or a specific number when there is no answer, select the **When there is no answer, forward calls to:** check box, and choose a destination from the drop-down list. If you choose the **Specify another number** option, enter your own destination in the adjacent free text field.
3. Click **Save** when complete.

Upon clicking **Save** at any stage, you are given a choice to apply the selected call forward settings to all lines or to this line only. Click the relevant button: **Yes, Apply to all lines** or **No, only this line**.

To deactivate lines that currently have call forwarding activated, click the 'Active' line, clear the check boxes, and click **Save**. Alternatively, you can select the relevant check boxes in the **Select a Line area** of the screen, or click the **Select** arrow and choose **All** to select all lines, and then click **Deactivate CF**.

To edit call forwarding settings for active lines, select the relevant check box of the line you want to edit, change the settings as required, and click **Save**.

Another method to apply the line settings of one of your lines to other lines is to select the relevant check box in the **Select a Line** area of the screen, click **Assign Line Profile**, choose the line profile to copy from the drop-down list and click **Save**.

## 13. My Availability

### 13.1. My Availability

This screen displays the Do Not Disturb (DND) settings for each of your phones (Active = DND On, Inactive = DND Off).

### 13.2. Set Do Not Disturb for your Phone

1. Click **My Availability** on the button bar to view the current status of the do not disturb (DND) settings for your phones.
2. Toggle (click on) the DND switch:
  - DND **On** indicates that DND is active for the phone
  - DND **Off** indicates that DND is inactive for the phone
3. Click **Save** to implement the setting or **Cancel** to abort.

You can also modify the do not disturb setting for multiple phones at the same time:

1. Select the check boxes to choose the phones you want to modify, or click the **Select** arrow and choose **All** to select all phones.
2. Click **DND On** or **DND Off** to set the relevant DND setting.
3. Click **Save** to configure the chosen DND setting for all selected phones.

## 14. Speed Dials and BLFs

### 14.1. Speed Dials and BLFs

Speed dial numbers allow you to store numbers and then use side buttons on the phone, or abbreviated dialing from the soft key template, to dial the stored numbers.

Some phones, such as Model 7960 and 7970 have speed dial buttons on the right-hand side of the phone that you can use to dial frequently dialed numbers. The Cisco 7912 phones do not have buttons, but you can use the Soft Key template on the phone LCD display.

Speed Dials 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 Speed Dials, select the Speed Dials index code from the menu on your phone's touch screen. You do not need to dial the entire number. The number of speed dials available is dependent on the phone button template. The exact name of the speed dial service on your phone may vary, depending on how your system administrator configured the service.

Busy lamps also allow you to store numbers and then use side buttons on the phone to dial the stored numbers. The status of the lamp indicates if the line is currently in use.

Some Cisco phones, such as the 7931 series, have busy lamps on the right-hand side that you can use to dial frequently dialed numbers.

Busy lamps are one or two-digit index codes (1 to 99) that you can assign to phone numbers or address book entries.

The number of busy lamps available is dependent on the phone button template. The exact name of the busy lamp service on your phone may vary, depending on how your administrator configured the service.

### 14.2. Manage Speed Dials and Busy Lamps (Phone Button Template)

To assign a speed dial or busy lamp field (BLF) to a button:

1. Click **Speed Dials & BLFs** on the button bar. Your configured phones are displayed.
2. Click the relevant 'Phone' to view the speed dials and busy lamp fields configured for that specific line (as determined by the phone button template for that phone). If a button has not yet been assigned to a busy lamp or speed dial, then the word 'Unassigned' is displayed in the **Number** field for that specific button.
3. Click **Assign this button** next to the button to which you want to assign a speed dial or busy lamp.
4. Enter information in the fields as required:

- **Number** - The phone number (or URI) for this speed dial. Note that you must enter the telephone number (or URI) exactly as you would dial it from your desk phone, including an access code (such as 9), country code, or area code as applicable. A URI is in the `username@host` format, where the host can be an IPv4 address or fully qualified domain name. The username portion of a URI can be a maximum of 47 characters and the full URI a maximum of 254 characters.
- **Label** - The name that you want to associate with this speed dial.

5. Click **Save** when complete to assign the speed dial to the button.

Upon clicking **Save** at any stage, you are given a choice to apply the selected speed dial setting to all phones or to this phone only. Click the relevant button: **Yes, Apply to all phones** or **No, only this phone**.

To edit an existing speed dial or BLF entry, click **Edit** next to the button you want to edit. Enter new information in the relevant field as described above and click **Save** when complete.

To remove a speed dial or BLF entry, click **Remove** next to the entry that you want to remove and click **Save**. The button number returns to the Unassigned status.

## 14.3. Add a Speed Dial (Abbreviated Dials)

1. Click **Speed Dials & BLFs** on the button bar. Your configured phones are displayed.
2. Click the relevant 'Phone' to view the speed dials and BLFs configured for that specific line.
3. To add additional speed dials over and above those provided for by the phone button template, click **+** **Add a Speed Dial** in the **Abbreviated Dials** area of the screen.
4. Enter information in the following fields:
  - **Key** - The key associated with the speed dial. Note that if you enter two keys with the same value, for instance two number 3's, then the system automatically removes the first instance and replaces it with the second instance.
  - **Number** - The phone number (or URI) for this speed dial. Note that you must enter the telephone number (or URI) exactly as you would dial it from your desk phone, including an access code (such as 9), country code, or area code as applicable. A URI is in the `username@host` format, where the host can be an IPv4 address or fully qualified domain name. The username portion of a URI can be a maximum of 47 characters and the full URI a maximum of 254 characters.
  - **Label** - The name that you want to associate with this speed dial.
5. Click **Save** when complete to add the speed dial. When there is more than one speed dial, the speed dials are automatically re-ordered in numerical sequence from lowest to highest.

Upon clicking **Save** at any stage, you are given a choice to apply the selected speed dial setting to all phones or to this phone only. Click the relevant button: **Yes, Apply to all phones** or **No, only this phone**.

If you want to insert a speed dial entry directly above an existing speed dial entry, click **+** **Insert a new speed dial above this entry** to open an empty speed dial entry form. Enter the information and click **Save** when complete.

To edit an existing speed dial entry, click in the appropriate fields and enter new information as described above. Click **Save** when complete.

To remove a speed dial entry, click **Remove this speed dial** next to the speed dial you want to remove and click **Save**. The relevant speed dial is removed from the list.

## 15. Links

### 15.1. Links

Links are configured and controlled by your administrator. They provide hyperlinks to pre-determined objects or items, such as a Support site or a downloadable user guide.

If your administrator has not configured any links for you, this section is not displayed. Contact your administrator for more information.