spectralink
solving every day

Technical Bulletin CS-15-10

# Making Phone Settings Portable with User Profiles

This technical bulletin explains how to configure the Spectralink 84-Series handsets to leverage User Profiles.

## System Affected

Spectralink 84-Series Handsets

## Description

Have you ever spent time setting up multiple phones with your own personal preferences? Do you work in multiple locations and require your phone to have certain settings so you can be more productive? Spectralink 84-Series Handsets offer you the ability to instantly retrieve your favorite settings or preferences from anywhere within your enterprise network using the User Profiles feature.

User profiles enable administrators to store a user's personal phone settings on the provisioning server. Users can then log in to a phone and access their personal phone settings, such as their contact directory or speed dials, from any phone connected to the provisioning server that has User Profiles enabled. Administrators can configure the User Profiles feature on all phones using Spectralink Software version 4.0.0 or later.

Use the following table as a guide to the compatible phone models, primary users, limitations, and supporting documentation.

Table 1

| Released: | September 2011 | Interoperability Issues: | None |
|---|---|---|---|
| Applies to models: | All Models | Dependencies: | Applies to all phones on the enterprise network |
| Software Version: | Release 4.0.0 & Newer | Limitations: | Multiple same-user logins not supported |
| Main Business Size: | Medium to Large Enterprises | Maintenance: | None |
| Primary Users: | Office, remote & mobile workers | Support Documentation: | See *User Profiles* on pg 164 of the 84-Series Administration Guide |

| Released: | September 2011 | Interoperability Issues: | None |
|---|---|---|---|
| Resources Required: | XML Editor | | |

The User Profiles feature makes a user's personal settings accessible from any phone within the network that has User Profiles enabled. This feature is particularly useful for remote and mobile workers who work in multiple locations. If you are working in a call center environment, users can log in to their personal profile on any available phone. The User Profiles feature is very flexible and can be adapted to a variety of on-site, remote, and mobile working environments.

Because profiles are stored in XML format on the provisioning server, users can access their profiles from any server-connected phone.

Administrators decide whether users are required to log in or not. If no login is required, the phone will be fully functional. If an administrator enables the feature, users will be required to log in to a user profile. A Login screen will display on the phone that users can enter their login credentials and access their user profile. While you are logged in, a Log out key is accessible via the Features fly-out soft key that you can press to log out of your user profile. Once a user logs out, settings in the user profile are no longer accessible. However, the phone will still be capable of placing outgoing calls to authorized numbers provided the administrator has made any available.

Any changes you make while logged into your profile will be saved to the provisioning server and display the next time you log in. When logged into your user profile, you can access, create, and change the following settings:

- Speed dials and line appearances

- The contact directory and call lists

- Background images, ringtones, and the phone's display language

- Phone properties such as volume level and display settings

- Phone features

## How to Use User Profiles

Before you can use User Profiles on your phone, this feature must be enabled by your administrator. After an administrator has enabled the feature, you will be able to:

- Log in to a phone to access your saved personal settings

- Log out of the User Profiles feature

- Place calls to authorized numbers from a phone that is in the logged out state if enabled by your administrator

- Change your user password

> 🔑 **Admin Tip: Enabling the User Profiles Feature**
>
> If you are an administrator looking for User Profile configuration directions, see *User Profiles* in the Spectralink 84-Series Administration Guide
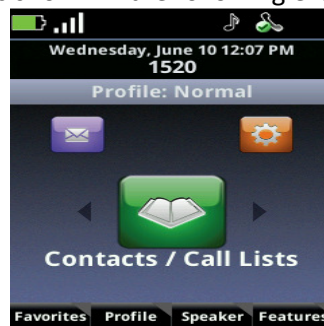
# Logging in to Your User Profile

If phone log in is required, you will need to log in to your personal user profile before you can use the phone. If phone log in is not required, you will have access to the default phone settings and features configured by your administrator and you can log into your personal user profile. Users will need to consult with their administrator to set up a user name and password.

**To log in to your user profile:**

1. If log in is required, enter your credentials in the User Login screen as shown next. If log in is not required, from the phone's idle screen, press the Features fly-out soft key or rotate the carousel to Settings > Feature Settings > User Login > Log in
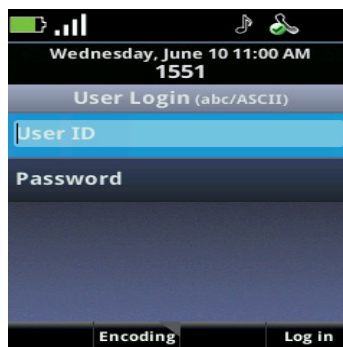


2. Enter your user ID and password and press the **Log in** soft key.
   - If your login credentials are accepted, the phone will update and display the idle screen of your user profile, as shown in the following example.



   - If your login credentials are not accepted, you'll receive a *User login failed* message. If phone log in is required, you will be returned to the *User Login* screen. If phone log in is not required, you will be returned to the phone's idle screen.

If you are still having difficulty logging into your user profile, see your administrator.

**Caution: Avoid Logging into Multiple Phones Simultaneously**

Spectralink recommends that users always log out of the User Profiles feature before logging into another phone. Logging into multiple phones simultaneously can cause the User Profiles feature to function incorrectly and allows others access to your personal user profile and settings on an unattended phones. See your administrator if you want to enable the automatic log out feature.

**Admin Tip: Enabling Automatic User Profile Logout**

Administrators can set the `prov.login.automaticLogout` parameter to a period of inactivity (in minutes) after which users will be automatically logged out of their user profile. This can help to prevent users from logging into multiple phones simultaneously and to prevent unauthorized access to a user profile.

# Logging Out of Your User Profile

Once you are finished using the User Profiles feature on the phone, log out to prevent access to your personal settings. If your administrator has enabled automatic log out, you will be automatically logged out of your user profile after a period of inactivity.

**To log out of your user profile:**

1. On your user profile's idle screen, press the Features fly-out menu soft key and then select Log Out or go to Settings > Feature Settings > User Login > Log out

   • The Log out confirmation screen, shown next, will display.
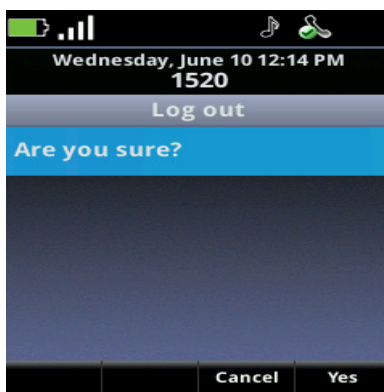


2. Choose **Yes**

   • You will be returned to your phone's idle screen if user login is not required, or to the log in screen if user login is required.

# Placing Calls to Authorized Numbers

If phone log in is required, your administrator can enable up to five authorized numbers you can call while the phone is in the logged out state. When your administrator enables phone log in, the phone will display a User Login screen, shown next, which indicates that the phone is in the logged out state.
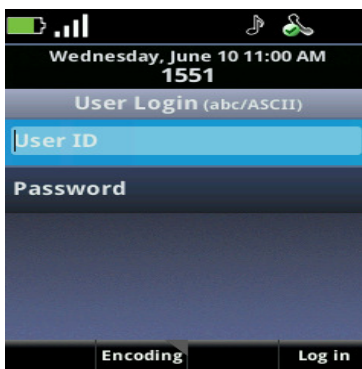


**To place a call to an authorized number from a phone in the logged out state:**

1. On the User Login screen, press the off-hook **START** key.

   The Place an Authorized Call screen will display, as shown next.



2. From the list of available authorized numbers, select the number you want to call, and press the **Dial** soft key.

   The call will be placed to the number you selected.
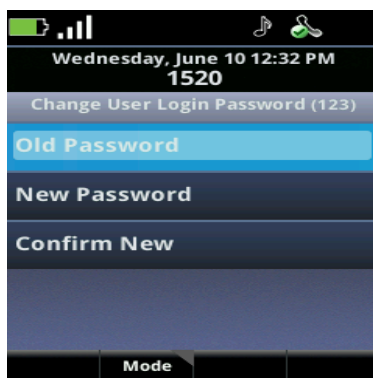
# Changing Your User Password

When you are logged into your user profile, you can change your password.

To change your password:

1. Log in to a phone

2.  On the idle screen, got Settings > Feature Settings > User Login > Change User Login Password

The *Change User Login Password* screen will display, as shown next.



1.  Enter your old password, a new password, and confirm your new password.

2.  Press the **Enter** soft key.

You have successfully changed your password. Use this password the next time you log in.

# How to Configure the User Profiles Feature

As an administrator, you will need to configure the *User Profiles* feature before your users can take advantage of it. Your first step should be to decide on an implementation strategy. Consider any remote or mobile workers who may benefit from this feature. In particular, determine whether you want to enable phone login, which will require users to log into a phone.

If you do enable phone login, you can configure up to five authorized numbers that users can dial from a phone in the logged out state. If you do not want to enable the phone log in, you can configure a default user profile using the master configuration file (the *<MACaddress>*.cfg or 000000000000.cfg file). Use **Table 2**: *User Profiles Configuration Parameters* for a brief description of parameters that you can configure for the User Profiles feature. You can locate all of these parameters in the **site.cfg** template file.

**Web**

For detailed descriptions of each parameter you can configure for the User Profiles feature, see the Spectralink 84-Series Administration Guide.

Table 2

| Parameter Name | Capability |
|---|---|
| prov.login.automaticLogout | Sets the idle time before a phone will log a user out |
| prov.login.defaultOnly | Limits user log in to a single default user and profile |
| prov.login.defaultPassword | Sets the user password for the default user profile |
| prov.login.defaultUser | Sets the user name for the default user profile |
| prov.login.enabled | Enables the *User Profiles* feature |
| prov.login.localPassword | Sets the password for accessing a user profile |
| prov.login.persistent | Keeps users logged in after a power cycle or reboot |
| prov.login.required | Requires users to log in to the phones |

**To configure the User Profiles feature:**

1. Launch your XML editor and locate and open the **site.cfg** template file.

2. Locate and expand the XML structure to expose the prov.login configuration parameters shown next.
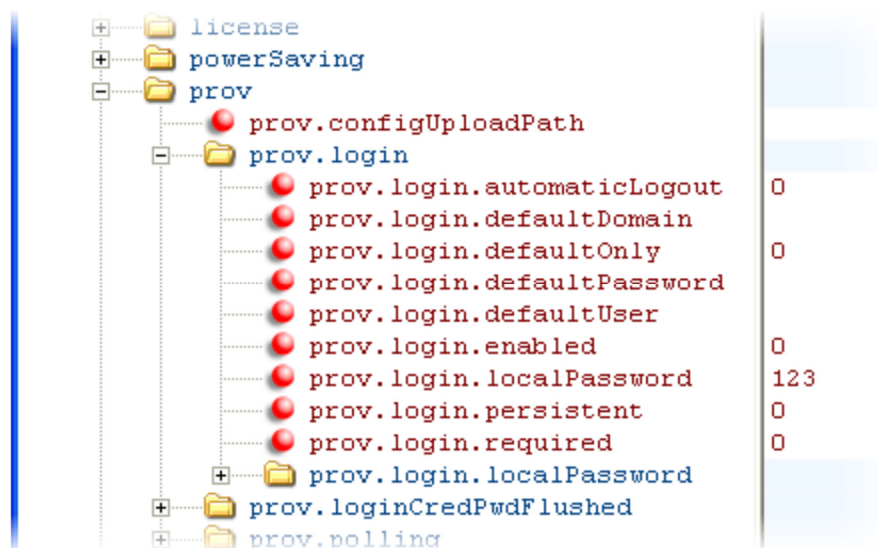


3. Enter parameter values to configure the feature.

4. Save your changes and close the **site.cfg** template.

5. Include the **site.cfg** template in the master configuration file.

6. Reboot your phone(s).

You have successfully configured the *User Profiles* feature.

# Configuring an Authorized Call List

If you enable `prov.login.required`, users will be required to log in to their profile before they can use the phone. However, administrators have the option of configuring up to five authorized numbers that users can call while a phone is in the logged out state. To begin adding authorized numbers, you will need to configure the Phone Lock feature.

**To add an authorized number:**

1. Launch your XML editor and locate and open the **features.cfg** template.

2. Locate and expand the XML tree structure to expose the `phoneLock.authorized` parameters as shown next.



3. Enter the caller identification and phone number into the `phoneLock.authorized.x.description` and `phoneLock.authorized.x.value` fields.

4. Save your changes and close the **features.cfg** template.

5. Include the **features.cfg** template in the master configuration file of your phone.

6. Reboot your phone(s).

The phone contact will be added to the authorized number call menu as shown next.

# PTT Configuration Considerations

When using Push-To-Talk with your 84-Series handsets, it is important that you understand the impact of some configuration items on the handset. Most settings for PTT will be made in the **site.cfg** file or other global configuration file. But if you are configuring PTT groups or need to control the channels available to users then you may want to configure those channel settings in the user specific configuration files. However, these same PTT channel settings will cause the handset to restart to apply them. If your implementation of User Profiles requires the use of PTT channel settings at the user level then you will need to consider the following.

Because PTT channel settings cause a restart of the handset, if User Profiles is configured to not be persistent then when the phone restarts to apply those settings the user would be logged out of the phone. This would lead to a restart loop every time the user logs in. The phone downloads the user configuration file and applies the settings and then restarts the phone again.

To get around this scenario, you will need to configure your handsets to use persistent login. Table 3 below provides the parameter required and a description of the setting. Ensure that this value is set for every handset that will use PTT settings at the user level to prevent issues.

Table 3

| Parameter | Description |
|---|---|
| `prov.login.persistent` | Specify if a user should remain logged in after the handset reboots. |
| | If 0, users are logged out if the handset reboots or restarts. If 1, users remain logged in when the handset reboots or restarts. Set this parameter to "1" if PTT parameters are specified in user-profile-specific cfg files. This way, if the phone reboots, the PTT settings persist. PTT settings (and other settings) will persist until the user logs out. |

# Creating a User Profile File

Before users can use the User Profiles feature, administrators will need to create a user profile in XML format for each user.

**To create an XML user profile:**

1. Launch your XML editor and open the **user.cfg** template attached to this document.

2. In the **user.cfg** template, configure the features and settings for each user's profile. You can use parameters from any Spectralink configuration template.

For example, add the parameters `reg.2.address` and `reg.2.label` to configure the user with an additional phone line and label.

> **Power User: Using the Phone to Add Contacts, Speed Dials, and Features**
>
> You can also configure features and settings for each user's profile using the phone's user interface. This method may be faster than adding parameters in the user XML file. However, you will need to add at least one parameter in the user's XML file for the *User Profiles* feature to work.

3. Rename the **user.cfg** XML file to the User ID for that user's profile. This is the User ID users will use to log into their profile. For example, if the User ID is Brian, change the **user.cfg** file name to **Brian.cfg**.

4. Create a directory on your provisioning server to store each of the XML *<user>*.cfg profiles.

5. In the master configuration file, specify the name of the directory in the `USER_PROFILES_DIRECTORY` field. If you are using a per-phone master configuration file, go to step **a**. If you are using a global master configuration file, go to step **b**.

   - If you are using a per-phone master configuration file, open the *<MACaddress>*.cfg file for each phone and enter the name of the directory containing all of the *<user>*.cfg files into the `USER_PROFILES_DIRECTORY` field. In the following illustration, the directory is named `user_cfg_files`.
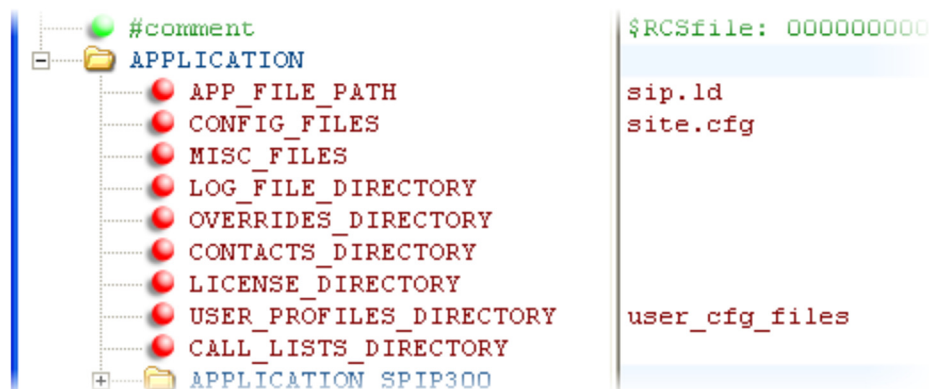


All user profiles in the directory `user_cfg_files` will now be accessible from this phone.

> **Admin Tip: Organizing *<MACaddress>*.cfg Files and *<user>*.cfg Files**
>
> If you are managing only a few user profiles, you can place all of the *<user>*.cfg files in the same directory as your *<MACaddress>*.cfg files. Using this organization, you do not need to specify a directory in the `USER_PROFILES_DIRECTORY` field of every *<MACaddress>*.cfg file.

   - If you are using a global master configuration file, open the **000000000000.cfg** file and enter the name of the directory containing all of the user profiles into the `USER_PROFILES_DIRECTORY` field.

**Admin Tip: Organizing *&lt;MACaddress&gt;*.cfg Files and *&lt;user&gt;*.cfg Files**

If you are managing only a few user profiles, you can place the user profile files in the same directory as your global **000000000000.cfg** files. Using this organization, you do not need to specify a directory in the USER_PROFILES_DIRECTORY field.

When a user updates their password or other user-specific settings while logged into their profile, the new settings will be stored in a new *&lt;user&gt;*-phone.cfg file instead of the *&lt;MACaddress&gt;*.cfg. Likewise, if a user updates their contact directory while logged in, the updates will be defined in a *&lt;user&gt;*-directory.xml.

An up-to-date call list will be defined in a *&lt;user&gt;*-calls.xml file. This list will be retained each time the user logs in to a certain phone.

If a phone has the User Profiles feature enabled and has configuration parameters configured from multiple sources, it will use the following order of precedence:

1. Configuration parameters in the *&lt;user&gt;*-phone.cfg file
2. Configuration parameters in the Web Configuration Utility
3. Configuration parameters in the *&lt;user&gt;*.cfg
4. Configuration parameters in the master configuration file
5. Default values

This profile of the User Profiles feature has shown you how to make your personal phone settings portable so you can maintain productivity in different locations. Administrators will need to configure the User Profiles feature before users can take advantage of it. For more information on setting up user profiles, see *User Profiles* in the Spectralink 84-Series Administration Guide.

## Copyright Notice

## Notice

## Warranty

## Contact Information

| US Location | Denmark Location |
|---|---|
| 800-775-5330 | +45 7560 2850 |
| Spectralink Corporation | Spectralink Europe ApS |
| 2560 55th Street | Langmarksvej 34 |
| Boulder, CO 80301 | 8700 Horsens |
| info@spectralink.com | infodk@spectralink.com |