UCP for EPM Admin Guide

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Overview

The UCP for EPM module allows end users to use the User Control Panel (UCP) to change and override their phone's button configuration and /or other users' button configurations, depending on the privileges assigned by an administrator. The user's changes will override the phone template that the administrator configured in End Point Manager (EPM), but these changes will not have a global effect. (The original template remains unchanged). The changes a user makes within the User Control Panel are per-user overrides and only affect the phone(s) that the user edits. As an administrator, you can decide which users can edit button configurations, and which phones they will be able to edit.

Prerequisites

1. UCP for EPM requires the commercial End Point Manager in order to function. Both of these modules must be licensed, installed, and active in order for UCP for EPM to work.
2. This wiki assumes you are familiar with the User Management Module and have already created one or more users and linked extension (s). For more information, please see the User Management Module User Guide.
3. This wiki also assumes you are familiar with End Point Manager and have mapped one or more extensions to phone templates. For more information, please see the EPM-Admin User Guide.
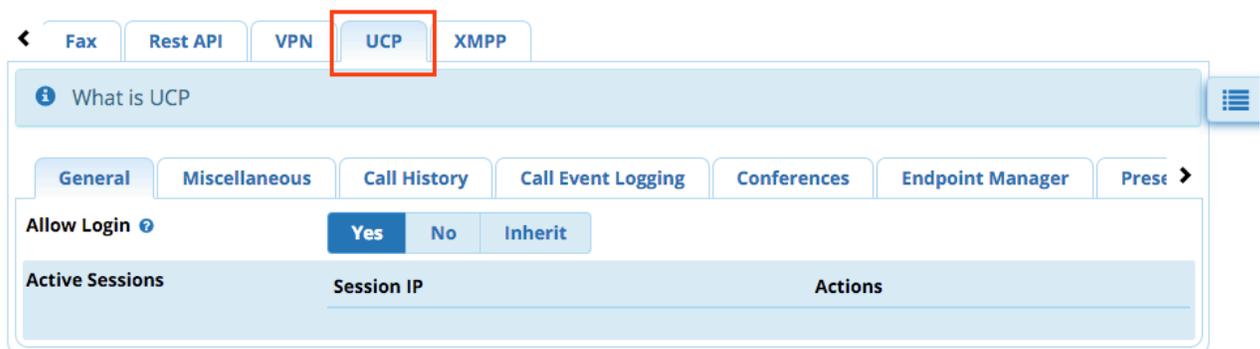
Managing a User's Access to Button Configuration Settings

There is no standalone "UCP for EPM" menu item in the PBX GUI. Instead, you'll use the User Management module, found in the Admin menu of the PBX GUI, to manage which users can edit the button settings for their phones or for other users' phones.

Unless you change settings, a user who has login privileges for UCP will also be able to manage the button settings for their own endpoint. The following instructions explain how to check a user's privileges and make changes if necessary.

1. Log into the PBX GUI.

2. Go to **Admin User Management.**

3. Click the edit button ✏️ for the user you wish to edit.

4. Click the **UCP** tab. (If you do not see the UCP tab at the top, use the right arrow button **>** to scroll.)

5. You should now be viewing the **General** tab in the bottom row of tabs. Check that the user is set to be able to log into the User Control Panel. If the user does not have login access, grant access in one of the two following ways:

1. Set **Allow Login** to **Yes**, or
2. Set **Allow Login** to **Inherit** *and* include the user in a group that has login privileges. ("Inherit" means inherit the group's setting.)

*For example, in the **General** tab below, **Allow Login** is set to **Yes**:*

Edit User

| ‹ | Fax | Rest API | VPN | UCP | XMPP |

ℹ **What is UCP**

| General | Miscellaneous | Call History | Call Event Logging | Conferences | Endpoint Manager | Prese › |

Allow Login ❓ | Yes | No | Inherit |

Active Sessions
Session IP   Actions

6. In the bottom row of tabs, click the **Endpoint Manager** tab. (If you do not see this tab, use the right arrow button **>** to scroll.)

Edit User

| ‹ | Fax | Rest API | VPN | UCP | XMPP |

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Endpoint Access ❓   John Doe <4100> ✕

7. The **Endpoint Access** field shows the user(s) whose button settings can be managed by the user. You can add additional users or remove users (including the user whom you are editing, if you do *not* want that person to be able to edit his/her own phone's buttons).

Endpoint Access ❓   John Doe <4100> ✕

1. **To add a user:** Click within the field to display a drop-down menu of available users. Click on the name of a user to add him/her to the list.

Endpoint Access ❓   John Doe <4100> ✕
                            John Doe <4100>
                            Jane Doe <4101>
                            Susie Smith <4102>
                            Sam Smith <4103>

Endpoint Access ❓   John Doe <4100> ✕ Jane Doe <4101> ✕

2. **To remove a user:** Click the **X** for the user.

Endpoint Access ❓   John Doe <4100> ✕ Jane Doe <4101> ✕

8. Click either the **Submit** or **Submit & Send Email to User** button.


   1. **Submit** saves the changes only.
   2. **Submit & Send Email to User** saves the changes and also e-mails the user, sending login information for the User Control Panel.

9. Click the **Apply Config** button when finished.

Changing Phone Buttons from UCP

1. Go to the User Control Panel. This is usually the IP or FQDN of the PBX followed by "**/ucp**" but may be different – check with an administrator. Alternatively, log into the PBX GUI and click on **UCP** in the menu at the top.

2. Log into the User Control Panel (UCP) as a user who has privileges to edit phone buttons.
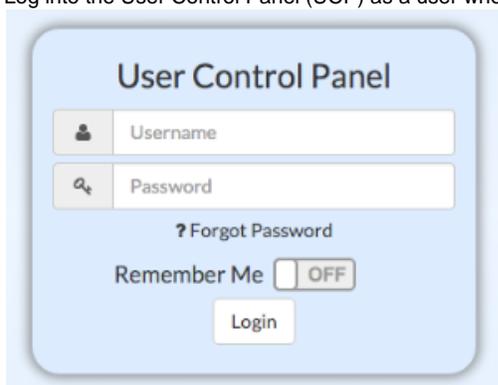
3. Click on **Device Management** in the navigation menu.
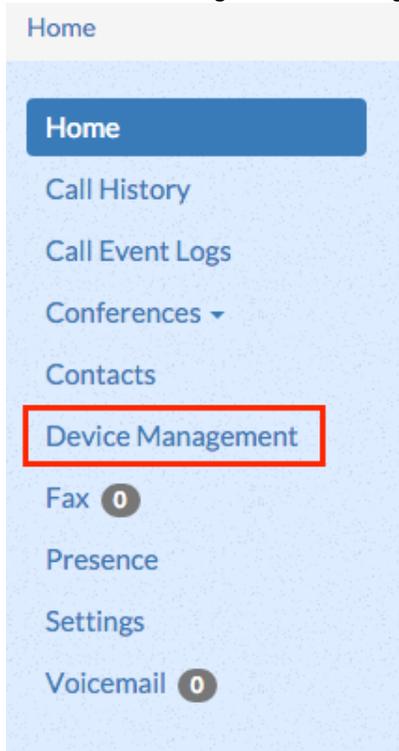
4. You will see the model of the phone, followed by the current button settings. Available buttons and settings vary by phone.
   In this example, we are looking at part of the page for a Digium D70, which has both line keys and soft keys.
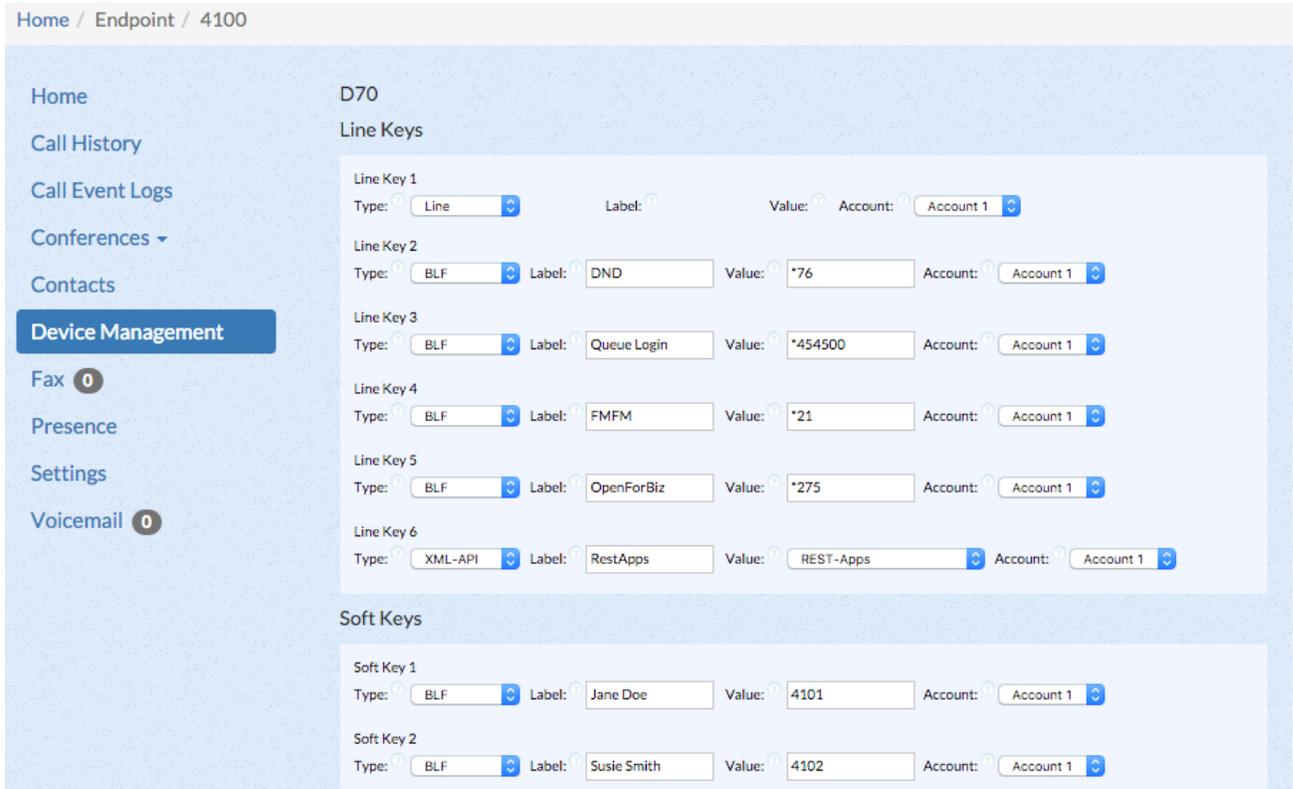
5. Use the drop-down menus and fields to change settings as desired. These are the same settings you will find available in End Point Manager. For each button, you can select a button **type**, **label**, **value**, and **account** (not all options are available with all types of buttons).

6. After you have made the desired changes, scroll down to the bottom of the page and click either **Save Model** or **And Restart**.
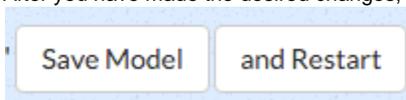

1. **Save Model:** Saves the button configuration, but does not restart the phone. You can restart the phone at another time in order to apply the new configuration.
2. **And Restart:** Saves the button configuration and restarts the phone. The system will send a reboot command to the phone. The new button configuration should appear on the phone after the phone restarts.

Restoring Phone Buttons to Default from UCP

1. Go to the User Control Panel. This is usually the IP or FQDN of the PBX followed by "**/ucp**" but may be different – check with an administrator. Alternatively, log into the PBX GUI and click on **UCP** in the menu at the top.

2. Log into the User Control Panel (UCP) as a user who has privileges to edit phone buttons.
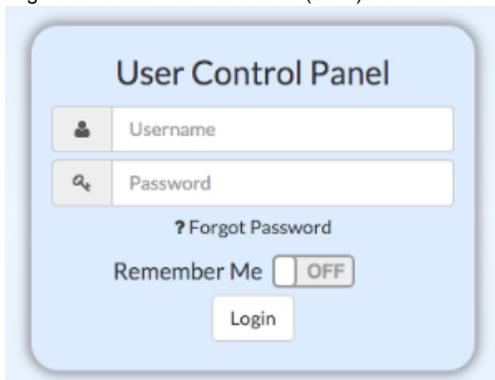
3. Click on **Device Management** in the navigation menu.
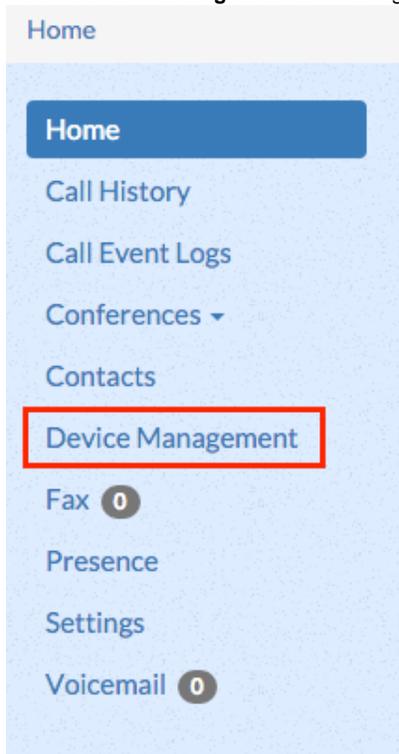
4. Scroll to the bottom of the settings and click the **Reset to Template** button.

5. The page content will reload and display the default settings for the phone template as set by the administrator in End Point Manager.

6. Restart the phone manually to apply the new button settings.