

# 4974 - Initial Setup of the Basic Settings on the Cisco Small Business Office Manager

## Objective

The Small Business Office Manager is a no-cost desktop application designed for office administrators or IT personnel. A Cisco partner would first configure the networking system using the Cisco Configuration Assistant (CCA) and then customize the Cisco Office Manager application for the site administrator. After initial setup, an administrator can use the CCA to modify the system's voice and user settings, view video streams from IP cameras, and analyze the current network status.

The objective of this document is to show an administrator how to log in and initialize basic settings on the Cisco Small Business Office Manager.

**Note:** If you would like to reconfigure settings for individual devices on your network topology after initial set up by the Office Manager you will have to use the Cisco Configuration Assistant (CCA). An article regarding how to reconfigure devices using the CCA can be found [here](#).

## Applicable Devices

- UC500 configured using the Cisco Configuration Assistant

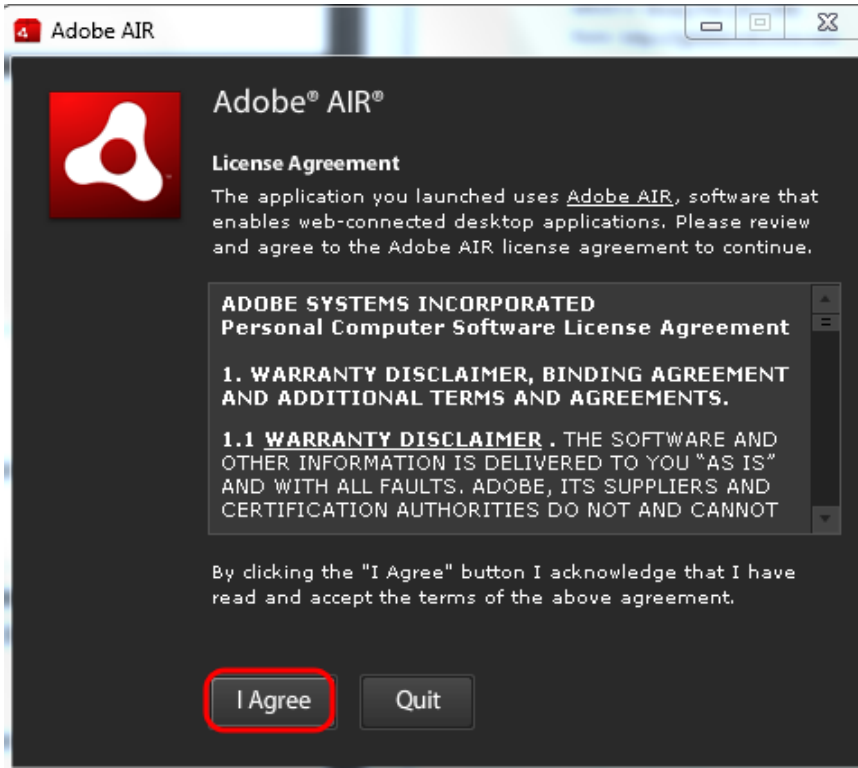
## Initial Setup of the Office Manager

Step 1. The procedures in this section assume that:

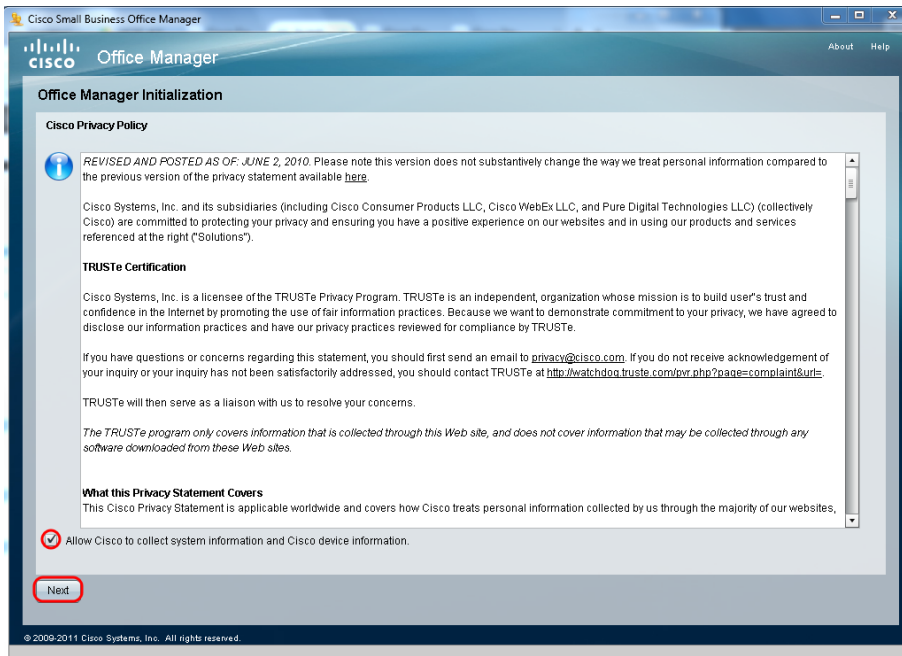
- All CSBCS platform devices, network settings, telephony features, users, and VPN/SSLVPN servers are configured and functioning normally.
- The Office Manager Setup program that was saved during installation is on the office administrator PC.
- Cisco Configuration Assistant is not running. The Office Manager can only run when the CCA is not running.
- Administrative privileges are enabled on the office administrator PC.
- The office administrator PC is behind the UC500 on the local network and has obtained an IP address from the UC500.

Step 2. Open the Cisco Small Business Office Manager program.

Step 3. If Office Manager is opened for the first time, the *Adobe Air License Agreement* dialog will open. Read through the terms and click **I Agree**.



Step 4. Review the Cisco Privacy Policy Statement. Choose if you want to allow Cisco to collect system and Cisco device information and then click **Next**.



Step 5. In the *Partner Information* window, enter in your contact information, and click **Next**, then the *End User Information* window will appear.

The screenshot shows the 'Office Manager Initialization' window with the 'Partner Information' section. The form includes the following fields:

- Contact Name:
- Company Name:
- Country:
- Street:
- City:  State:  Zip:
- Office Phone:
- Mobile Phone:
- Email:
- Web Site:
- cisco.com ID:
- Cisco Certification Level:
- Years In Industry:
- Note:

Below the form, there is a legend:   
 \* Indicates a required field.

At the bottom of the form area, there are two buttons: 'Previous' and 'Next'.

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Step 6. In the *End User Information* window, enter the contact information for your customer, and click **Next**.

The screenshot shows the 'Office Manager Initialization' window with the 'End User Information' section. The form includes the following fields:

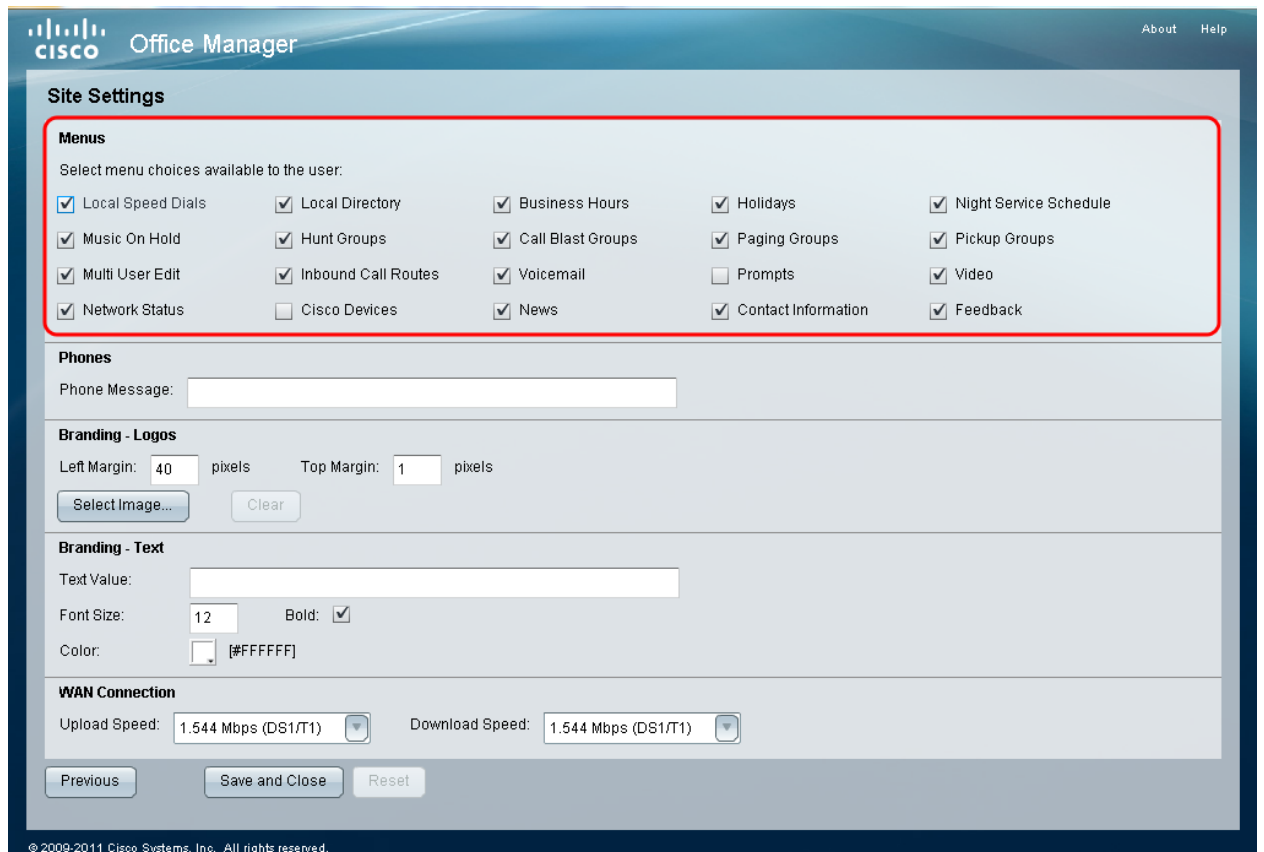
- Contact Name:
- Company Name:
- Country:
- Street Address:
- City:  State:  Zip:
- Phone:
- Email:
- Vertical Market:

Below the form, there is a legend:   
 \* Indicates a required field.

At the bottom of the form area, there are two buttons: 'Previous' and 'Next'.

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Step 7. The *Site Settings* page appears. On the *Menus* section, you can show or hide menus for features you want to enable for your customer. Any menus not checked will be hidden and cannot be accessed by the customer.



The following menu choices allow your customer to:

- Local Speed Dials – Add and/or remove phone numbers that appear on the Local Speed Dials menu on all phones.
- Local Directory – Add and/or remove phone numbers from the Local Directory menu that appear on all phones.
- Business Hours – Modify open hours schedule used by the Auto Attendant.
- Holidays – Modify the list of holidays used by the Auto Attendant.
- Night Service Schedule – Modify the hours that Night Service is active on your system.
- Music on Hold – Enable or disable Music on Hold and upload a different Music on Hold file.
- Hunt Groups, Call Blast Groups, Paging Groups, Pickup Groups – Manage members for hunt groups, call blast groups, paging groups, and call pickup groups configured on the system.

- Multi User Edit – View, enable, or disable selected features and configure a voice-mail PIN for all users.
- Inbound Call Routes – View information about how calls to external DID numbers are routed to the internal extensions.
- Voicemail – View voice mailbox information for users and groups, including mailbox size, usage, total messages, new messages, saved messages and other information.
- Prompts (unchecked by default) – View a list of Auto Attendant prompt files, see which users are authorized to record prompts, and the extension to dial to manage prompts.
- Video – View streaming video for up to 4 Cisco PVC2300/WVC2300 cameras installed at the customer site.
- Network Status – View UC500 bandwidth utilization, number, and the type of network connections, remote VPN access, and firewall status.
- Cisco Devices (unchecked by default) – View detailed information for supported Cisco devices at the site. Enabling this option will display WAN IP address, LAN IP address, Gateway IP address, firmware version, Primary DNS server IP address, and uptime.
- News – View an RSS (Really Simple Syndication) newsfeed.
- Contact Information – View or edit support contact information.
- Feedback – Submit comments and suggestions for the Office manager Application.

Step 8. Enter a brief message to be displayed on the phone desktop for all phones at the customer site in **Phone Message**.

The screenshot shows the Cisco Office Manager interface. The 'Site Settings' section is active, and the 'Phones' subsection is highlighted with a red border. Within 'Phones', there is a text input field labeled 'Phone Message:'. Below this, there are sections for 'Branding - Logos' (with input fields for Left Margin: 40 pixels and Top Margin: 1 pixels), 'Branding - Text' (with input fields for Text Value, Font Size: 12, Bold: checked, and Color: #FFFFFF), and 'WAN Connection' (with dropdown menus for Upload Speed: 1.544 Mbps (DS1/T1) and Download Speed: 1.544 Mbps (DS1/T1)). At the bottom, there are buttons for 'Previous', 'Save and Close', and 'Reset'.

**Note:** If this field is left blank, the default message is “Cisco Unified CME.”

Step 9. Click **Select Image...** to browse for an image to be uploaded and displayed as a logo. For best results, use a PNG-format image file. You can set the **Left Margin** and **Top Margin** for the logo area of the Office manager banner.

**Note:** The total logo area is 500 x 40 pixels and is composed of image, text, left margin, and top margin.

The screenshot shows the Cisco Office Manager interface. The top navigation bar includes the Cisco logo and the text "Office Manager". On the right side of the bar are links for "About" and "Help". The main content area is titled "Site Settings" and contains several sections:

- Menus:** A section with the instruction "Select menu choices available to the user:" followed by a grid of 15 checkboxes. The checked items are: Local Speed Dials, Local Directory, Business Hours, Holidays, Night Service Schedule, Music On Hold, Hunt Groups, Call Blast Groups, Paging Groups, Pickup Groups, Multi User Edit, Inbound Call Routes, Voicemail, Prompts, Video, Network Status, Cisco Devices, News, Contact Information, and Feedback.
- Phones:** A section with a "Phone Message:" label and an empty text input field.
- Branding - Logos:** This section is highlighted with a red border. It contains "Left Margin:" with a value of 40 and "pixels", and "Top Margin:" with a value of 1 and "pixels". Below these are two buttons: "Select Image..." and "Clear".
- Branding - Text:** A section with a "Text Value:" label and an empty text input field. Below it are "Font Size:" (value 12), "Bold:" (checked), and "Color:" (value [#FFFFFF]).
- WAN Connection:** A section with "Upload Speed:" and "Download Speed:" labels, both set to "1.544 Mbps (DS1/T1)".

At the bottom of the page are three buttons: "Previous", "Save and Close", and "Reset". A copyright notice at the very bottom reads "© 2009-2011 Cisco Systems, Inc. All rights reserved."

**Note:** Images larger than 200x40 pixels (width x height) are clipped.

Step 10. Enter your company name or other branding messages in the **Text Value** field. You can also specify the **Font Size**, enable text bold, or change the **Color** of the text.

The screenshot shows the Cisco Office Manager 'Site Settings' page. The 'Branding - Text' section is highlighted with a red box. It contains the following fields:

- Text Value:
- Font Size:
- Bold:
- Color:

Other sections visible include 'Menus' with various checkboxes, 'Phones' with a 'Phone Message' field, 'Branding - Logos' with margin settings, and 'WAN Connection' with 'Upload Speed' and 'Download Speed' dropdowns.

**Note:** The branding area of the page updates so that you can preview your logo in real time. Verify that the logo and branding message are readable.

Step 11. Set the **Upload Speed** and **Download Speed** to the maximum values supported by the customer's network. These values determine the upper limit for the UC500 WAN bandwidth meter displayed on the Network Status page in the Office Manager.

The screenshot shows the Cisco Office Manager 'Site Settings' page. The 'WAN Connection' section is highlighted with a red box. It contains the following fields:

- Upload Speed:
- Download Speed:

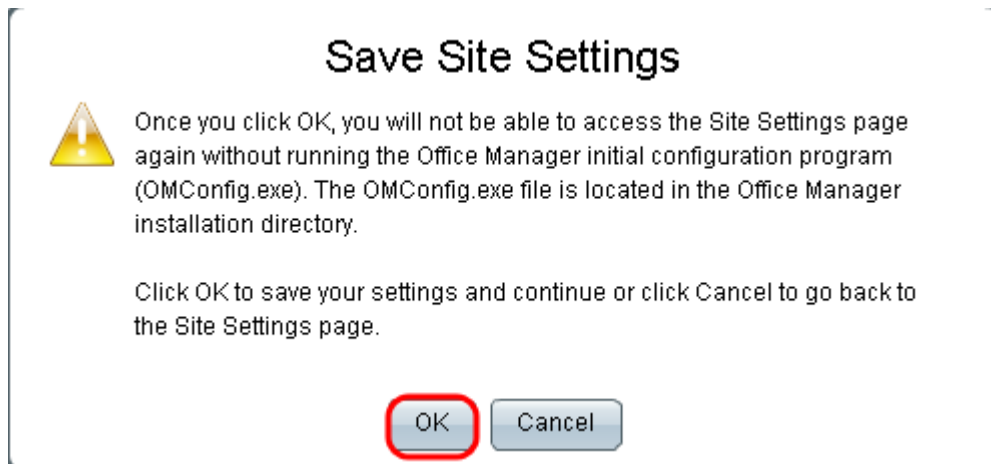
Other sections visible include 'Menus', 'Phones', 'Branding - Logos', and 'Branding - Text'.

Step 12. When you are finished with customizing site settings, click **Save and Close**.

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**Note:** If you want to revert back to previous settings, click **Reset** to reset changes.

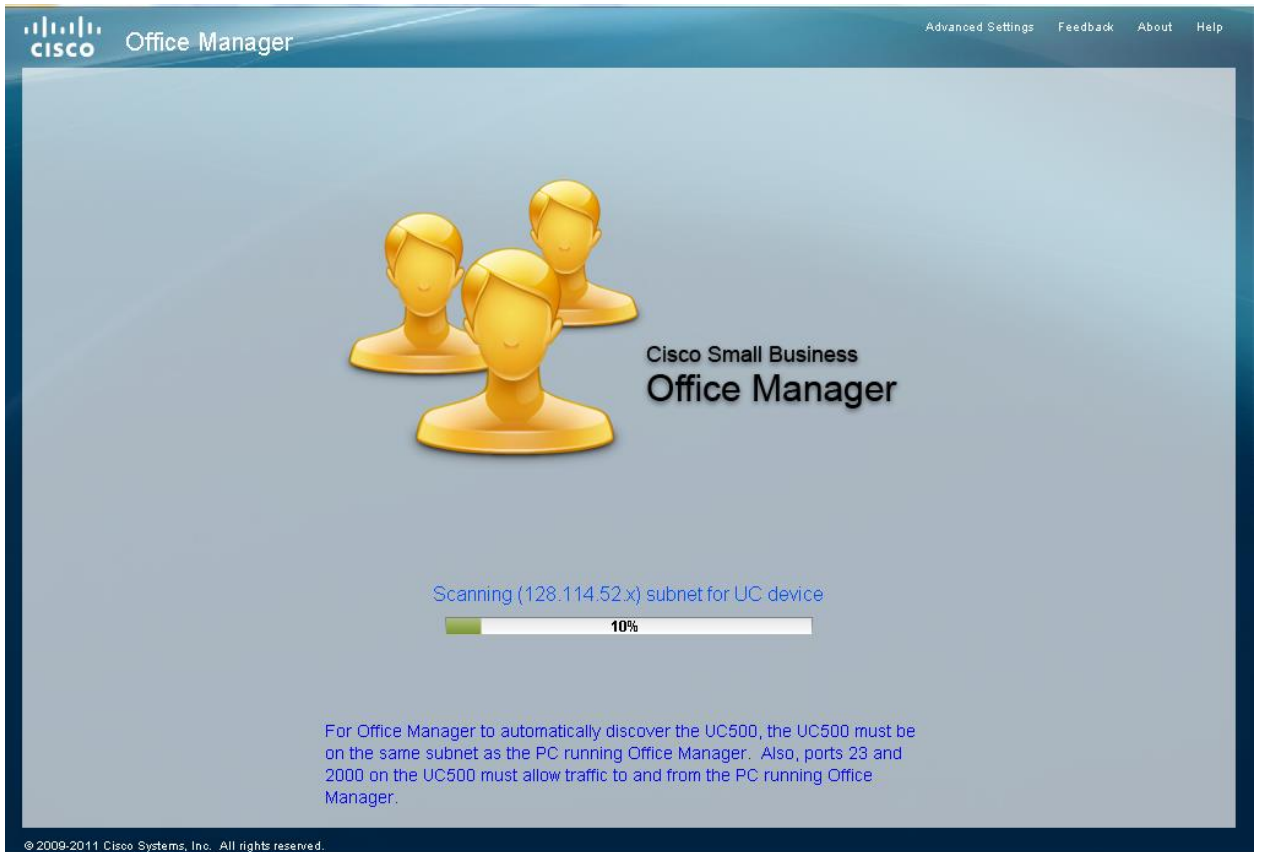
Step 13. Click **OK** when prompted to save your site settings.



**Note:** Once you click OK, you will not be able to access the *Site Settings* page without running the OMConfig.exe setup file to initialize the configuration. The OMConfig.exe file is located in the Office Manager Installation directory.



Step 14. The Office Manager will automatically attempt to discover the UC500 and all other connected devices.



**Note:** The Office Manager will not be able to discover the UC500 if it is on a different VLAN or subnet.. Verify that all prerequisites in Step 1 are satisfied and reopen the Office Manager software.

Step 15. If the device discovery is successful, the *Log In* dialog will appear. Enter the administrator username and password, and click **Submit** to enable the password for the UC500

### Log In

Enter the username and password for the Cisco UC500 series system located at 192.168.10.1

Username:

Password:

Enable Password:

**Note** By default, the enable password is the same as your CCA administrative password..

Step 16. (Optional) To update or add support contact information and site-specific notes for your customer, choose **Support > Contact Information** from the feature menu on the left and fill in your information. Click **Save** when finished.

The screenshot displays the Cisco Office Manager interface for editing support contact information. The left sidebar shows the navigation menu with 'Support > Contact Information' selected. The main content area is titled 'Support Contact Information' and features a summary card for 'Your Company Name' with contact details for Claire Jones. Below this is a form with the following fields:

Company Name	Your Company Name	Primary Contact	Claire Jones
Office Phone	972-999-9999	Mobile Phone	972-000-0000
Email	cjones@domain.com	Web Site	www.cisco.com
Note	<b>New Support Hours</b>: Monday through Friday 8:00 am to 6:00pm CST		

At the bottom of the form, there are 'Save' and 'Reset' buttons. The 'Save' button is circled in red.