INTRODUCTION

Welcome

Welcome to managing your phone and going mobile.

This guide describes how to use your 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, Voicemail PIN reset, Do Not Disturb, Call Forwarding, and Speed Dial
Login to your Account

You can use a variety of popular browsers to access your Account.

1. Enter the URL below to access your Harvard Phone Account in your browser:
   http://phone.harvard.edu/selfservice

2. The login screen appears.

3. Enter your HarvardKey user name and password
   a. User name must be all lower case
   b. Use VPN when not on Harvard network

4. Click Login.

5. The landing page appears. It consists of three main areas.
   - #1: Button Bar — This bar is located on the left-hand side of the screen. The buttons provide links to the various functions in Self Service. Refer to Self Service Buttons and Icons for a description of all buttons on the button bar, as well as miscellaneous buttons and icons used in Self Service.
   - #2: Dashboard — This is the center, 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 (as configured by your Administrator) and personal phones that you configured yourself.
   - #3: Activity Feed Area — This is located on the right-hand side of the screen. This area displays an activity log of all activities that occurred in the current browser session.
Manage Your Harvard Phone Account

Help/Upper Right Quick Menu

In the far upper right of the screen you will notice your username and a drop down arrow. Selecting this feature will enable you to access:

1. My Information
2. Embedded Help documentation on topics such as the User Interface and Available Features and Services
3. Logout
## Self Service Portal Buttons and Icons

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Dashboard" /></td>
<td>Dashboard</td>
<td>Displays an overview of your Self Service configuration, including quick links to the main features and a phones summary view.</td>
</tr>
<tr>
<td><img src="image" alt="My Information" /></td>
<td>My Information</td>
<td>Provides a view of your personal information as configured by your Administrator.</td>
</tr>
<tr>
<td><img src="image" alt="Phones" /></td>
<td>Phones</td>
<td>Displays all phones (and associated lines) assigned to you by your Administrator. Also allows you to configure the phone’s lines.</td>
</tr>
<tr>
<td><img src="image" alt="Voicemail" /></td>
<td>Voicemail</td>
<td>Displays the Voicemail settings that you can configure. Note this area is visible only if you have a Voice mailbox configured. Consult your Administrator if required.</td>
</tr>
<tr>
<td><img src="image" alt="Call Forwarding" /></td>
<td>Call Forwarding</td>
<td>Displays the call forwarding status of your phone lines.</td>
</tr>
<tr>
<td><img src="image" alt="My Availability" /></td>
<td>My Availability</td>
<td>Displays the Do Not Disturb settings for each of your phones.</td>
</tr>
<tr>
<td><img src="image" alt="Speed Dials and BLFs" /></td>
<td>Speed Dials and BLFs</td>
<td>Allows you to manage the speed dials and busy lamp fields for each of your phones.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help</td>
<td>Displays the help pages for each area of Self Service, such as Phones, Voicemail, Call Forwarding, Speed Dials, and so on.</td>
</tr>
<tr>
<td><img src="image" alt="Logout" /></td>
<td>Logout</td>
<td>Logs you out of the Self Service interface.</td>
</tr>
<tr>
<td><img src="image" alt="Add or Insert" /></td>
<td>Add or Insert</td>
<td>Creates a new item such as a phone, line, or speed dial.</td>
</tr>
<tr>
<td>Icon</td>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>📊</td>
<td>Edit</td>
<td>Edits an existing item, such as editing a phone description or number.</td>
</tr>
<tr>
<td>🗑️</td>
<td>Remove or Delete</td>
<td>Removes or deletes the selected item; for example, removes a personal phone or speed dial entry.</td>
</tr>
<tr>
<td>📝</td>
<td>Information</td>
<td>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 the particular area or item.</td>
</tr>
<tr>
<td>🔴</td>
<td>Active Flag</td>
<td>Indicates when certain line settings such as call forwarding or do not disturb are active.</td>
</tr>
<tr>
<td>🔴</td>
<td>Inactive Flag</td>
<td>Indicates when certain line settings such as call forwarding or do not disturb are inactive.</td>
</tr>
</tbody>
</table>

**Editing Your Harvard Phone Account**

Use the Account interface to perform a number of common tasks.

Inline Editing allows you to edit any editable, selectable text directly in place on the page without going to a separate page. It makes the interaction more direct, easier, and faster because you can edit the text in the same place where it is shown.

Inline editing is best for a simple, occasional change. If the primary action on the page is to add or edit detailed information for a phone or line, then it is more efficient to use Edit Mode.

1. Select in the relevant field (for example, phone and speed dial names and numbers). The **Save** and **Cancel** buttons appear when you enter text in the field.

2. Click **Save** to save the changes or click **Cancel** to cancel the change.

To use **Edit Mode**, click on a specific phone or line to open a more detailed and editable view of the selected phone or line on the right-hand side of the screen.
Harvard Phone Account Dashboard

This screen provides a summary of your specific Self Service configuration. The following figure shows a sample Dashboard. The Dashboard dynamically changes based on your configurations.

The quick menu provides links to:

- **My Information** - displays your personal information from the Harvard Directory, such as user ID, names, phone numbers, and email address.
- **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 active.
- **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 active.
- **Speed Dials & Busy Lamp** - displays the speed dial and busy lamp field configuration (if set up) 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 you have a voice mailbox.
- **Your Company Phones** - lists the company phones allocated to you by your administrator. See Phones for more information on how to view and manage your company phones.
- **Your Personal Phones** - lists your personal phones, such as home phone, tablet, mobile phone, and so on. Personal phones can also be configured (if necessary) to ring whenever a company phone rings. You can also edit existing personal phones (by setting them to ring simultaneously with your company phones), or add new phones if necessary. See Add a Personal Phone, Edit a Personal Phone and Delete a Personal Phone for more information on each task.

### Add a Personal Phone

**Before You Begin**

The ability to add, edit, or delete personal phones is only available if your Harvard Account interface has been set up for this capability. Note that personal phones should be non-Harvard phones, for example a home phone, cell phone or other phone with a non-Harvard telephone number. The Simultaneous Ring option should be configured on non-Harvard devices (i.e. should not
be configured on Jabber soft client devices or Harvard Phone desk phones). These devices will always ring when your primary telephone number rings and does not require a Simultaneous Ring configuration. Configuring these devices for Simultaneous Ring will cause problems and inconsistent ringing on these devices.

1. In the Your Personal Phones section of the screen, click + Add a Phone to add a new personal phone (Note: if you haven’t already added a phone, start with step 3)

2. The Name/Phone page appears

3. In the Description field, enter a name for your phone

4. In the Number field, enter a number for your phone (no dashes, include area code ie: +16175551212)

5. Set the Simultaneous Ring toggle switch to either Ring or Off. If you select “Ring”, the phone rings at the same time as your company phone rings. If you select “Off”, simultaneous ring does not work

6. Click Next

7. The Line/Time Zone page appears

8. Check or uncheck the Line check box. When checked, simultaneous ring is active for the selected lines (Note: you must have at least one active line)

9. Choose the required time zone for the phone from the drop-down list. Use “America/New York” for East Coast time

10. Click Next

11. The Ring Schedule page appears

12. Configure the phone's ring schedule. Choose either Ring 24/7 or Add a ring schedule as follows:
   a. (Optional) Choose a ring schedule template from the drop-down list
   b. Enter a ring schedule name
   c. Specify the days, status, and times for the ring schedule. Be sure to set “Ring” to On for each day that you check.

13. Click Save when complete to add the phone or Cancel to cancel the changes
Edit a Personal Phone

1. Select the Dashboard icon on the button bar.
2. In the Your Personal Phones section of the screen, click the Edit icon next to the phone that you want to edit.
3. (Optional) In the Description field, edit the name of your phone.
4. (Optional) In the Number field, edit the number of your phone.
5. Change the Simultaneous Ring (SR) On/Off toggle switch if necessary. If you choose SR On, the selected phone always automatically rings when the company phone rings.
6. Click Next and edit other phone details as required.
7. Click Save when complete to implement the changes or Cancel to cancel the changes.

Changes made in Self-Service are automatically synchronized with Cisco Unified Communications Manager.

Set Advanced Timer for Simultaneous Ring

In general, we advise that you use the default settings for Simultaneous Ring. There may be instances depending on the devices you have configured, whereby the timers should be adjusted specifically to ensure that calls can pull back to your Harvard Phone voicemail if not answered. In this case, please contact your IT Support or Helpdesk for help to adjust these timers.
My Information

View the My Information screen from the Quick Menu, or by selecting the My Information icon on the button bar. This screen provides you with a view of your personal information that is pulled from the Harvard Directory. Note that you cannot change this information from this portal screen. To update this information, contact your Directory Manager or HR representative. The following figure provides an example of the My Information screen.

Greyed out items such as User ID, names, manager and department cannot be edited.

My Information

You can change your voice mail PIN here. Enter a PIN with at least 6 numeric characters.

Sample My Information Screen
Phones

When you select the Phone icon on the button bar or Quick Menu, the Phones screen appears as shown in the following example.

This screen displays all phones (and associated lines) that are assigned to you.

Modify Phones

1. Select the phone you want to edit.

2. The associated phone details are displayed. Note that the basic phone details, such as name, phone type, and description are greyed out, and cannot be edited.

Desk Phone

- Click on the symbol in front of your Line to expand menu options
  - Line Label
    - Allows you to change the name displaying on your phone.
  - Log Missed Calls
    - Checking the box will save a log of incoming calls in your desk phone
  - Visual MWI Policy
    - Message Waiting Indicator (MWI) settings can be changed. Click the to expand your options
      - Use system policy: Lights the ‘red light’ on your phone indicating you have a message
- **Light and Prompt**
  - Lights the red light as well as displays the voice mail icon in the upper right hand of the display screen (on 7841 phones only) with the total number of messages in parenthesis
  - **Prompt Only**
    - The voice mail icon displays in the upper right hand of the display screen (on 7841 phones only) with the total number of messages in parenthesis
  - **Light Only**
    - Visual indication (red light) only
  - **None**
    - No indications of message waiting will display or sound on the desk phone

- **Audible MWI Policy**
  - Setting ‘on’ will enable a ‘stutter dial tone’ (multiple beep tones in short succession) when picking up the handset. This setting will operate in addition to any other Visual MWI settings enabled

- **Ring Setting (Phone Idle)**
  - Allows you to choose how you want your phone to ring when you are not using it
    - **Disable**: no ring
    - **Flash Only**: flashes the red light and amber light without ringing the phone
    - **Ring Once**: Phone rings once but continues to flash
    - **Ring**: Phone rings and flashed red and amber lights

- **Ring Setting (Phone Active)**
  - All the same choices can be selected as above and will be in effect when your phone is in use (on an active call)
The follow applies only if you have Jabber enabled

Desktop Jabber

- Information only: no feature changes available

Mobile Device Jabber

- Allow you to set up your Simultaneous Ring Options for the Jabber app on your mobile device
  - Simultaneous Ring is a feature that will allow you to call forward all Jabber calls destined for your mobile device to ring at a different location
    - Enter the name of the phone where you will be forwarding Jabber calls
    - Enter the phone number where you want your calls to ring
      - Use the required format of +1 area code + 7 digit number (ie +16175551515)
    - Toggle Simultaneous Ring On
    - Click Next
    - Enter your Time Zone, click Next
      - Enter America/New_York for East Coast time
    - By default, the system is set to ring this device 24x7 days per week. Click Save to complete.
To set a schedule choose Add a ring schedule

- To set the same time schedule for the days you want, enter the time period in the From and To boxes, then click Apply
- You may save this schedule and toggle it On or Off depending on your needs by clicking Day On or Day Off box. Click Save to complete

- Or, create a schedule and toggle on Simultaneous Ring to enable the schedule for any given day
- Click Save to complete

**Please note:** Do not enable call forwarding to any device where you already have Jabber enabled. Doing so will create problems with the devices ringing consistently or at all.
Voicemail and Call Forwarding

Voicemail Settings
This screen is only visible if your administrator has allocated a Voice mailbox to you.

If you have a Voice mailbox, you can edit certain Voicemail settings from within your Account, including Time Zone as shown in the following figure. You can also manage your Caller Input keys, and Alternate Numbers & Notification Devices.

Sample Voicemail Screen

Change Your Voicemail Settings
1. Select the **Voicemail** icon on the Button Bar to open the Voicemail Settings screen.
2. Configure the Time Zone to America/New_York for East coast US time.
3. Click **Save** when complete to save the voicemail settings or **Cancel** to cancel the changes you made.
Alternate Numbers & Notification Devices

You can use alternate numbers to provide extra access points to your voice mailboxes. When you call from this number the voicemail recognizes you as a user and prompts for your PIN.

Notifications are used to notify you when you have a new voicemail message. For example, you can set up the system to send you notifications on the phone when you receive a new voicemail message.

Example Alternate Numbers & Notification Devices Page
Manage Alternate Numbers & Notification Devices

To add a new phone number as an alternate number or notification device from which you can retrieve voicemail or voicemail notifications respectively:

1. Click the + icon on the Alternate Numbers & Notification Devices page.
2. The following page appears:

3. Enter a Description and Number for the phone.
4. Check or uncheck the Activate this phone for voicemail retrievals and Activate this phone for voicemail notifications check boxes. If you check the box, the phone is activated for the service.
5. Click Save when complete or Cancel to return to the previous screen.
6. The phone details are synchronized with voicemail.

What to do next

To remove a number, click the Remove (trash can) icon on the Alternate Numbers & Notification Devices page, next to the number you want to remove and then click Save.

To change the status of a check box only, check or uncheck the box as necessary and click Save.

If the phone is set up for simultaneous ring, it can only be changed or removed from the Your Company Phones or Your Mobile Phone Number view. Click the Personal icon next to the required number to see simultaneous ring settings.
Caller Input

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

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

Manage Caller Input Keys

1. Select the Envelope icon on the button bar to open the Voicemail Settings page.

2. In the Caller Input area, configure the caller input keys as necessary:
   a) Click the required key (1 to 9).
   b) Choose the required 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 the required number in the Extension Number field.

3. Click Save when complete to save the caller input settings or Cancel to cancel the caller input settings.
Example Caller Input Page

What to do next

You can edit a caller input key by choosing a different Action from the drop-down list or by changing the target number. Click Save when complete.
Call Forwarding

This screen displays the call forwarding status of your phone lines (Active = call forwarding enabled, Inactive = call forwarding disabled). Note that you must use the Harvard Dial plan when configuring Call Forwarding. Examples include the use of 5 digit Harvard extensions, 91 and 10 digit number, or +1 and 10 digit number. The following figure shows a sample of the Call Forwarding screen and its options. Please remember that if you are forwarding to a non-Harvard phone, you must put “91” before the 10 digit phone number you are forwarding to.

Sample Call Forwarding Screen
Activate Call Forwarding

1. Select the **Call Forwarding** icon. Your lines are displayed showing the call forwarding status of each line.

2. Select the relevant inactive line to activate and configure call forwarding settings.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forward all incoming calls</td>
<td>To forward all incoming calls to a specific number or Voicemail under all circumstances, check the Activate call forwarding &amp; forward all calls to: check box and choose the required destination from the dropdown list. If this check box is checked, the other call forwarding options are hidden.</td>
</tr>
</tbody>
</table>
| Internal calls (calls from a company phone number) | To forward all incoming internal calls to a specific number or Voicemail when the line is busy, check the When the line is busy, forward calls to: check box, and choose the required destination from the dropdown list.  
To forward all incoming internal calls to a specific number or Voicemail when there is no answer, check the When there is no answer, forward calls to: check box, and choose the required destination from the dropdown list. |
| External calls (calls from outside my company) | To forward all external calls to a specific number or Voicemail when the line is busy, check the When the line is busy, forward calls to: check box, and choose the required destination from the dropdown list.  
To forward all external calls to a specific number or Voicemail when there is no answer, check the When there is no answer, forward calls to: check box, and choose the required destination from the dropdown list. |

3. Click **Save** when complete.

4. When you click **Save** at any point, you are given a choice to apply the 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**.
What to do next

To turn off call forwarding for a line, click the required ‘Active’ line, uncheck the check boxes, and click **Save**. Alternatively, you can check 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 a line, click the required ‘Active’ line, change the settings as required, and click **Save**. Alternatively, you can apply the line settings for one of your lines to other lines by checking the relevant check boxes in the Select a Line area of the screen, clicking Assign Line Profile, choosing the line profile to copy from the drop-down list, and clicking **Save**.
My Availability

Set Do Not Disturb

This screen displays the Do Not Disturb settings for each of your phones. When a setting appears Green it shows that the setting is Active or Enabled. When a setting is dimmed, it shows that the setting is Inactive or Disabled. Note that changing DND on Jabber soft-phone devices from this portal does NOT update the presence status on your soft phone devices. It will invoke DND, but availability status will not show DND on those devices.

Sample My Availability Screen

1. Click **My Availability** on the Quick Menu to view the status of the Do Not Disturb (DND) settings for your phones.
2. Click the DND switch beside each phone as required:
   a. DND On indicates that DND is active for the phone. The DND switch turns green when active.
   b. DND Off indicates that DND is inactive for the phone. The DND switch remains dimmed.
3. Click **Save** to implement the settings for each phone or **Cancel** to cancel changes.
4. Click **Save** to implement the setting or **Cancel** to cancel the change.
Speed Dials (Abbreviated Dialing) and Busy Lamp Field (BLF)

Speed dial numbers allow you to store numbers and then use abbreviated dialing from the soft key template on the phone’s LCD display to dial them.

Speed Dials are one or two-digit index codes (1 to 99) that you can assign to phone numbers or contact entries. To place a call using Speed Dials, select the Speed Dials index code from the menu on your phone’s touchscreen. You do not need to dial the entire number.

A Busy Lamp Field (BLF) is an appearance of another person’s line on your phone. This is a visual indication of whether the person is on the phone or not. It does not allow you to pick up their ringing phone or listen to a conversation while they are on the phone.

You will have 1-3 BLFs available to be assigned on your phone. Each one you assign will appear on your phone in the area of your available lines. The phone icon will be in the down position when the person is off the phone and in the sideways, or up position when the person is on the phone.

Additionally, once you have set up your BLF, you can use this as a means to call the extension you have set up by pressing the side button near the BLF extension.

View and Edit Speed Dial/BLF

1. Select the Speed Dial icon on the Button Bar. Your configured phones are displayed.
2. Click a ‘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 been assigned to a busy lamp or speed dial, then the word ‘Unassigned’ is displayed in
the Number field for that button.

3. Select the Edit icon next to the button to which you want to assign a speed dial or busy lamp.

4. Enter information in the fields as required:

   a. Number (or Extension or Destination) —The phone number for this speed dial. Enter
      the phone number exactly as you would dial it from your desk phone, (ie: 96175551515).
      5- digit dialing for internal Harvard calls is also supported in speed
dial configurations.

   b. Label—The name to associate with this speed dial.

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

   When you click Save at any point, you are given the choice to apply the selected speed dial
setting to all phones or the selected phone only. Click the relevant button: Yes, Apply to all
phones or No, only this phone.

What to do next

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(s) as described in the previous steps 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.
Add a Speed Dial

1. To add more 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.

2. Enter information in the fields as required:
   a. Speed Dial Number—The number associated with the speed dial. If you enter two keys with the same value, for instance two 3’s, the system automatically removes the first key and replaces it with the second key.
   b. Number—The phone number for this speed dial. Enter the phone number exactly as you would dial it from your desk phone, (ie: 96175551515).
   c. Label—The name to associate with this speed dial.

3. Click Save when complete to add the speed dial. When there is more than one speed dial, the speed dials are automatically reordered in numerical sequence from lowest to highest. When you click Save at any point, you are given the 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.
What to do next

To edit an existing speed dial entry, click in the appropriate fields and enter new information as described in previous steps. Click **Save** when complete. To remove a speed dial entry, click the **Remove** this speed dial (trashcan icon) next to the speed dial you want to remove and click **Save**. The relevant speed dial is removed from the list.