VOSS-4-UC
Business Admin Portal Guide

Release 19.3.4

Sep 30, 2021

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1 What's New

1.1. Business Admin Portal Guide: Release 19.3.4-PB5

- EKB-10181: Add "Fetch real-time phone status" action to Phones page. See: *Phones*

1.2. Business Admin Portal Guide: Release 19.3.4-PB4

- EKB-9163: AddSubscriberFrom Profiles fails at CFT evaluation when "Use generated phone name" is unset and "Phone Name" is not specified. See: *Subscribers*

1.3. Business Admin Portal Guide: Release 19.3.4-PB3

- N/A

1.4. Business Admin Portal Guide: Release 19.3.4-PB2

- N/A

1.5. Business Admin Portal Guide: Release 19.3.4-PB1

- N/A

1.6. Business Admin Portal Guide: Release 19.3.4

- EKB-5670: Existing CUCM LDAP Synced users not showing in BAP view/AddSubscriberFromProfile. See: *Subscribers*
- EKB-6710: Counts on Subscriber page are not correctly counting Subscribers for LDAP and Local. See: *Subscribers*
- EKB-7364: Support device reset PRT. See: *Features and Services Interfaces*

- VOSS-779: Cisco Headset management. See: *Headsets*
- VOSS-808: Business Admin Portal Improvements (EKB-6027: Inform user when not all choices of a dropdown have been fetched) . See: *Search in a Drop-Down List*
- VOSS-808: Business Admin Portal Improvements (EKB-6533: Add “Enable IM & Presence” checkbox to Subscriber page in Business Admin Portal) . See: *Subscribers*
- VOSS-808: Business Admin Portal Improvements (EKB-6531: Add ability to modify Entitlement Profile for Subscriber Business Admin Profile) . See: *Subscribers*
- VOSS-808: Business Admin Portal Improvements (EKB-6178: Expose IPCC Extension field on Subscriber page) . See: *Subscribers*

2 Overview of Business Administration Portal

The Business Administration Portal runs in parallel to the current administrative portal. It provides controlled access to all of your Unified Communications (UC) features and settings from a single window. Details about an item without leaving the page.

The intuitive, simplified user interface enables you to carry out common UC tasks such as adding, modifying or deleting subscribers, phones and lines, as well as associated subscriber and phone services and features such as Voicemail, WebEx, Single Number Reach (SNR), Mobility, Jabber and Speed Dials.

2.1. Accessing the Business Admin Portal

Note:

- The Business Admin Portal v2 uses the same base address (URL) as the Admin GUI. The base address is then suffixed with BAP specific login details (see below). Your username and password are the same.
- If you are configuring a proxy server to access the Business Admin Portal endpoint `/business-admin`, the following paths should all be added to your server configuration to point to the root server path (without this endpoint):
  - `/api`
  - `/noninteractivelogin`
  - `/logout`
  - `/login`

---

1. Browse to the appropriate website address, for example:

   `https://<Hostname>/business-admin`

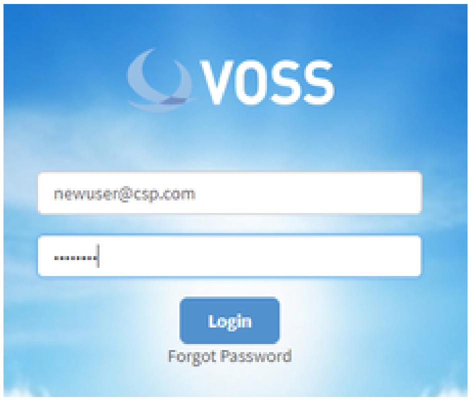
   You will be redirected to:

   `https://<Hostname>/portal/#/business-admin` (login) .

   If a theme is applied to the login screen, use:

   `https://<Hostname>/portal/#/login?targetAppMode=business-admin&theme=<theme_name>`

2. Enter your username and password in the appropriate fields.



3. Click **Login** or press **Enter** to login to the Business Admin Portal. Once you have logged in, your landing page is displayed.

The appearance of your landing page depends on the roles defined in the Admin GUI.

Note: The **Forgot Password** hyperlink is not available in release 19.3.4 PB5 and will be available from 21.2.

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3 Understanding the User Interface

3.1. Administrator User Interface

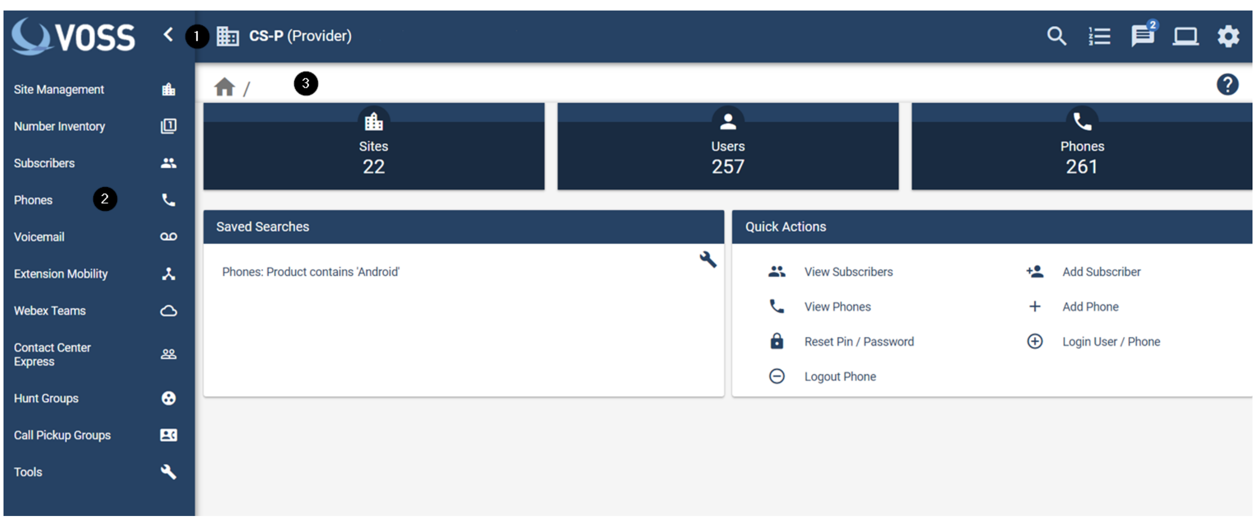
The Business Administration Portal (BAP) interface menus and functionality is defined as an interface type in VOSS-4-UC, along with the required role-based access.

Note: The menus, features, and functionality described in this topic is based on the default interface type shipped with the VOSS-4-UC product. Your system administrator may have customized a Business Admin Portal Custom Interface for your organization. The look and feel, and the availability of features and dashboards is defined via the interface type selected for your access role, and field display policies.

Refer to the Core Feature Guide for details.

The main interface is divided into three functional areas:

1. Toolbar
2. Menus
3. Dashboards (either the home page, service dashboard, menu landing page, or lists)



Related topics

- *User Interface Controls*
- *Lists* (working in the lists)
- Feature Detail Dashboards in the Core Feature Guide

3.1.1. Toolbar

The table describes options on the Business Admin Portal toolbar:

Company brand and menu labels toggle	Displays your company brand as well as a toggle switch to show (**<**) or hide (**>**)the side menu labels.
Organization (hierarchy) selection	Triggers a pop-up that allows you to navigate to a specific level in the organization, for example, to provider, customer, or site level, so that you can view and manage resources at that hierarchy. The hierarchy level you're at remains visible at all times. For details, see *Organization Navigation*.
Search icon	Opens the search dialog, where you can specify criteria to run a search. See *Carry Out a Search*.
Transaction log icon	Opens the **Transaction Log** page, which lists the most recent transactions in your system. See: *Transactions View*.
Messages icon	Opens **Messages**, which lists recent notification messages and transactions, including last login details, and a link to the transaction log.
Application mode icon	Allows you to toggle between the VOSS-4-UC Admin Portal and the Business Admin Portal (provided you have access to both interfaces).
Settings	A drop-down menu providing access to the following: • Profile name: links to your account, to view and/or edit the following: – Account Settings (view username, email address, role, last login, last password change) – Preferences (define whether the default application mode is Business Admin Portal or Admin Portal, provided you have access to both interfaces) • About: opens the About page, displaying release and version information • Sign out
Home icon	Home button to go to the Business Admin Portal home page for your current hierarchy level.
Navigation breadcrumb	A navigation path adjacent to the Home button allows you to move to other areas of the system, based on your current location. For example, to go from an instance view (such as view subscriber) to a list of those instances (such as the subscriber list).
Help	Opens the system online help.

3.1.2. Menus

A left navigation menu in the Business Admin Portal provides access to resource and service landing pages.

This topic describes the default menu layout that ships with the system. The custom interface defined for your role determines the menu layout you will see in the Business Admin Portal.

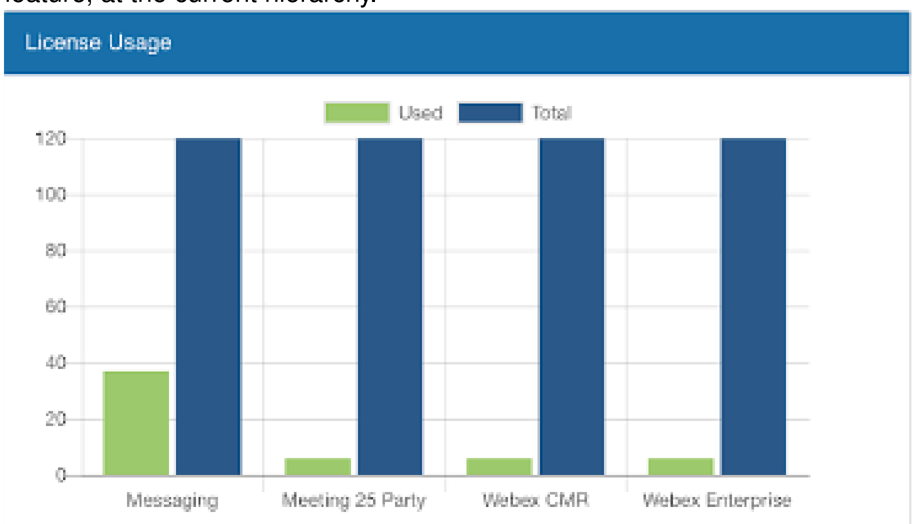
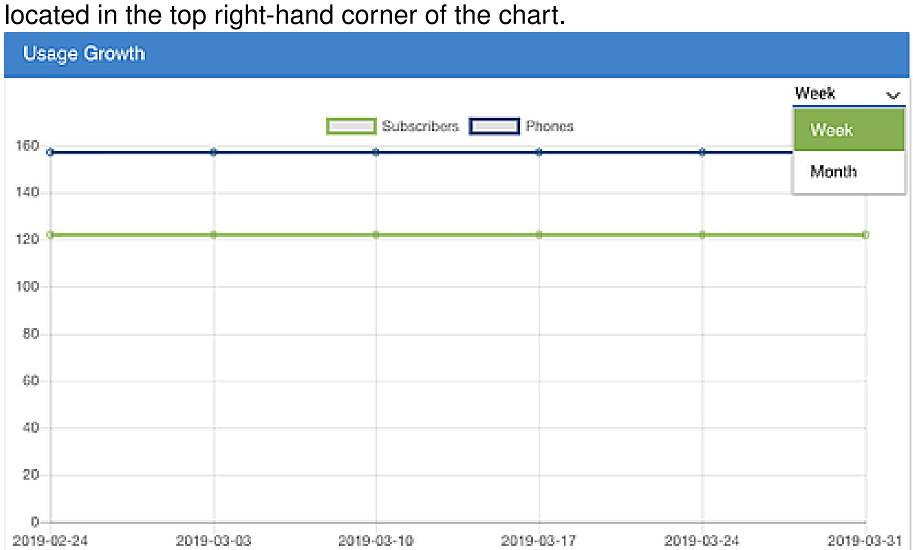
Selecting a menu item opens the landing page for the option you choose. The default menus are as follows:

- Site Management (sites and site defaults)
- Number Inventory (lines, and internal and external numbers, including number associations)
- Subscribers
- Phones
- Voicemail
- Extension Mobility
- Webex Teams (Webex Teams, users and licenses)
- Contact Center Management (Contact Center agents, teams, skills and resource groups)
- Hunt Groups (Hunt group members and groups)
- Call Pickup Groups (Call pickup group members and groups)

Landing Pages

Selecting a menu in the left navigation opens the related menu landing page, with options for viewing and managing the service or feature.

The default landing pages provide the following types of features:

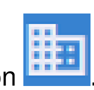
Counters	Cards providing item counts relevant to the menu, for example, the number of sites, internal inventory, external inventory, lines, or subscribers. Clicking on a counter opens the list view for the item. 
Quick Actions	Links to the screens for viewing and managing a feature or service. Some quick action links, such as Delete, launch just a pop-up. If available, the *View* links (for example, view sites, view internal inventory) open the list views, allowing you to view and manage these items from the lists.
Graphs and charts	Visual display of data (if available), providing a quick view of metrics for the feature or service, for example, license usage information for the Webex teams feature, at the current hierarchy.  Usage charts that illustrate time periods, for example **Usage Growth**, allow you to configure the chart to display in either weeks or months, using a drop-down located in the top right-hand corner of the chart. 

3.1.3. Home page

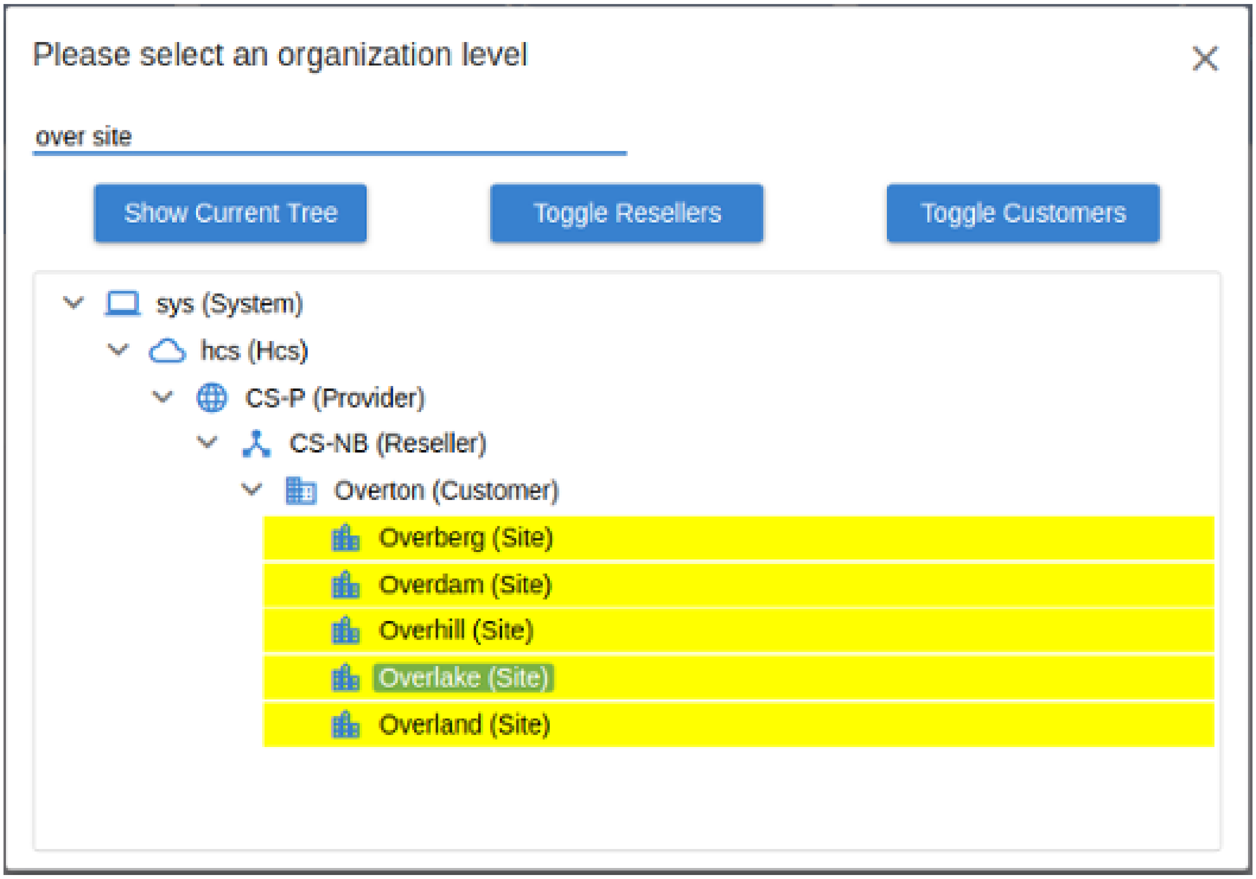
When logging in to the Business Admin Portal, the Home page is the first page you see. The Home page provides a summary view of your entire system, and includes:

Counters	Cards displaying the total number of sites, subscribers, and phones, at the current hierarchy level (for example, at customer or site level). Click on a counter to go to the relevant menu landing page.
Quick Actions	Links to common tasks, including: • View Subscribers • View Phones • Reset Pin / Password • Logout Phone • Add Subscriber • Add Phone • Login User / Phone
Saved Searches	Links to saved searches.
MACDs Per Day	A graph indicating the number of move, add, and delete transactions performed at the specified hierarchy, in the past week. Graphs display only when data is available.
Notifications	The following notification types display on the home page: • Session expiry notification: Displays alert message ("Your session will expire in <n> seconds.") when the **Idle Session Timeout (minutes)** value in the credential policy associated with your user role is reached. Click **Stay Logged In** to continue your session. For details, see topics on credential policies and session timeouts in the Core Feature Guide. • Missing required fields: The system alerts you if you're attempting to submit a form with missing required data.

3.2. Organization Navigation

To access organization navigation from the top menu bar, click the **Organization Selection** button .

The Organization Selection widget provides a tree view of the organization as well as a number of features to navigate, filter and search the organization tree.



- Use the Expand (>) and Contract (V) tree view icons to show or hide elements under the selected tree.
- The **Filter** text box can be used to search for and filter organization labels by multiple phrases contained in the tree name ("contains" and logical AND of phrases)

  Filter results are highlighted in the tree.
- The **Toggle Resellers** and **Toggle Customers** buttons can be used to expand or contract the tree under each of these organization types.

Note: If a node in the tree organization is selected and highlighted, nodes on the same level are hidden. Use the **Show Entire Tree** button to expand the entire tree and to show any branches in the tree have been hidden

3.3. Carry Out a Search

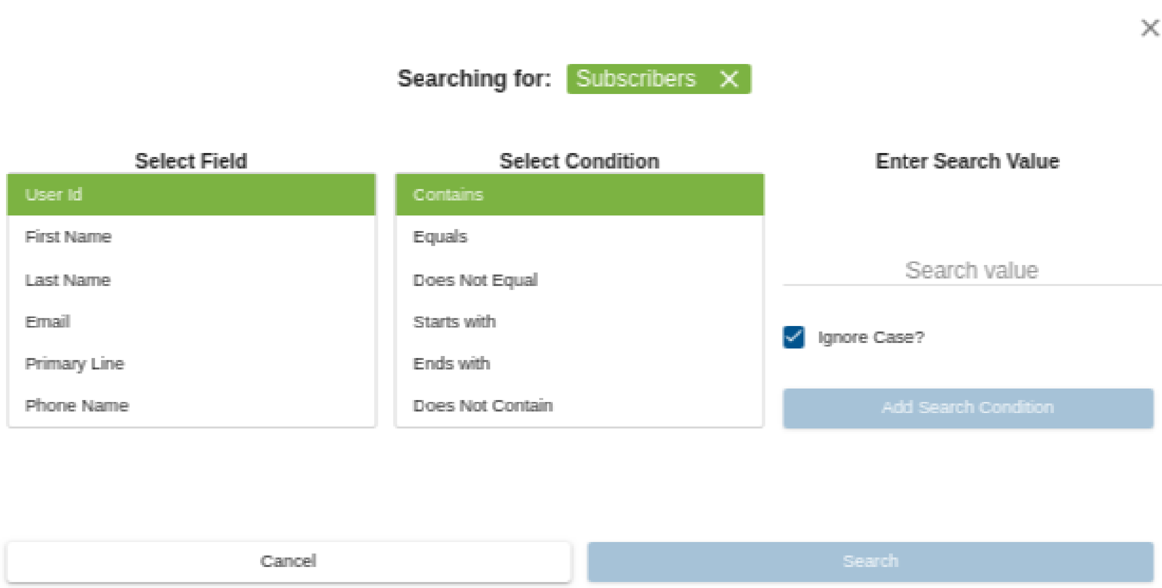
1. Click the **Search** icon (magnifying glass) at the top-right of the top menu bar to open a pop-up interface with a **What would you like to search for?** drop-down box where you can choose a feature or service, such as:
   - Subscribers
   - Phones
   - Lines

- Internal Number Inventory
- Hunt Groups
- Sites
- Voicemail

The options available are those ‘allowed’ for you by your administrator.

2. Upon selecting a drop-down item, you are presented with selection boxes for:

   - **Select Field**: the item’s attributes, for example for **Subscriber** you can choose **User ID**, **Phone Name** and so on.
   - **Select Condition**: a match operator to be applied to a search value.



3. Type into the **Enter Search Value** box and choose string case sensitivity.
4. Select **Add Search Condition** to add the search criteria or additional criteria. An option is also available to remove an added condition before carrying out the search.
5. Click **Search** to carry out the search.

The search results list header will show the search condition that was carried out and the search also shows as column filters in the list.

Note:

- To search for rows with no value in a selected Column, choose any Filter Type option, select the **Ignore Case** check box and type `None` in the Value. This works for all list views except Subscriber
- The **Located At** column will only filter on the actual hierarchy name and not the displayed text next to it, for example “site”, “customer”, and so on.
- When sorting, a blank value appears as if the value was “None” in terms of alphabetical order
- With no search filter applied, sort will work on any column in the list view.
- With a search filter applied to a single column, sort will work on the search filtered column only.
- With a search filter applied to more than one column, the sort functionality will not work.

- The sorting of columns (ascending or descending) by clicking column headers while a search filter is applied, is only supported for Starts With search filters.
- Leading spaces on a field in the list view are dropped when rendering the list view, so this may affect the sort order.

3.4. Search in a Drop-Down List

3.4.1. Overview

The existing search results (using 'Contains' search criteria) on a drop-down is limited to a maximum of 1000 items. When there are more than a 1000 items in a drop-down, a message is displayed at the bottom of the list:

"**Not all options have been loaded.** Please use the search icon next to this field to search through all options."

See also "Using the Drop-Down Search" below.

A new paginated, drop-down pop-up form is now available that allows a user to search and paginate through the list search results (using 'Starts with' search criteria) in order to select a specific item. This is particularly useful when search results in a drop-down exceed 1000 items, or if you require a more granular search capability.

The new pop-up form is available on various forms such as; Add or Modify Subscriber, Line Search, Reset UC Password, and so on.

3.4.2. Using the Drop-Down Search

The drop-down search capability works the same on all forms.

The following example illustrates use when searching for and adding a **Line** for a **Directory Number**:

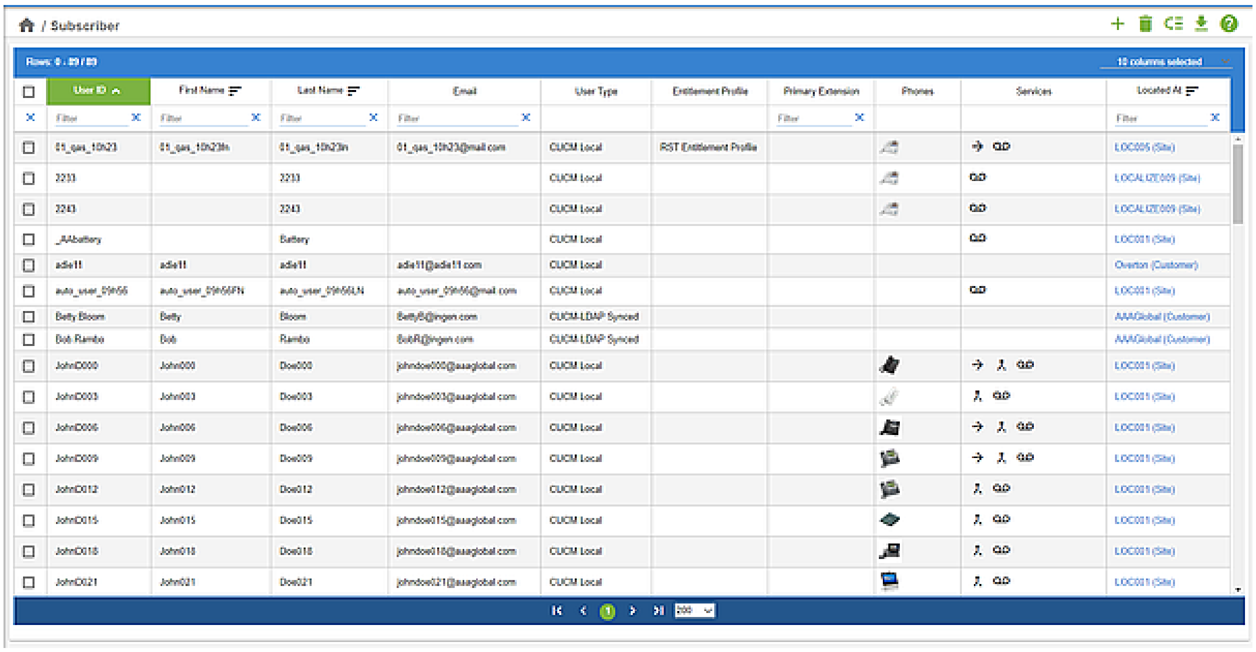
1. Click the **Search** icon next to the **Directory Number** drop-down list ().
2. A pop-up table opens displaying all directory numbers at the selected hierarchy. Multiple pages may be presented depending on the quantity of directory numbers.
3. Search for, and then select the required Directory Number.
   - Click '<' or '>' to scroll through the pages.
   - Enter a value in the **Filter (starts with)** text box. The pop-up form filters the form results on the entered text.

Note: You can also enter a new **Directory Number** in the **Filter (starts with)** text box.

3.5. Lists

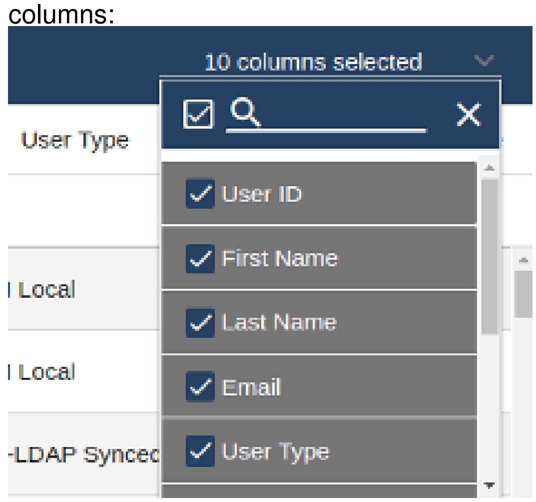
Organization Level and Controls

In the Business Admin Portal, data displayed on summary list views depend on the organization level you're at, and the service or resource you're working with.



The table describes general functionality of the Business Admin Portal summary list views:

Component	Description
Home	Click the Home icon to go to the home page.
Path	The path and name of currently selected functionality. You can click in the path to choose a different organization level.
Icons	Available icons for actions depend on the feature or functionality you're working with. For example, to obtain information, or to manage the item. For example: • Add:  • Delete: Delete:  • Move:  • Export:  • Help: 

Component	Description
View and sort lists	• List headers display the number of displayed rows (out of total rows), and provides *n columns selected* control to show/hide columns:  • Selected columns are retained for your profile (also between sessions) • Columns can be resized by dragging the column divider • The list footer provides list page navigation controls and a drop-down to set the number of displayed rows per page (maximum 2000 items per page). However, since this can take some time, the page display a warning if the value exceeds 200. • Default sort order for data in the first column is descending (indicated by column highlight and order direction chevron ("^") • Columns with a sort icon can be sorted
Icons in columns	Icons indicate device or service references in columns: • Hover over an icon to view details • Click on an icon to edit the device or service.
Located At	If this column is available, organizational level location name and type (for example, "Overton (Customer)") is shown as a hyperlink that can be used to show the list items for the selected organizational level. This organizational level is then also shown above the list view.

3.6. Transactions View

The Transaction log list can be accessed from the **Transaction Log** button on the top menu bar .

On the transaction list:

- Use the **Filter** button to open the pop up dialog with which you can filter the transaction list
- Use the **My Transactions** button to filter the transaction list to the current user

Select a transaction from the list to see details of the transaction.

On the **Details** tab:

- A transaction status message is shown.
- If the details are for a sub-transaction, a **Go to parent transaction** link is available.
- For parent transactions that were triggered form input:
  - Use the **Replay** button to open the pop up dialog with which you can filter the transaction list
  - Use the **Edit and Replay** button to open the input form of the transaction. You can edit values and the form and save to re-submit the transaction
- If the parent transaction has any associated sub-transactions, a **Sub Transactions** tab is available to show the list.
- If the transaction has any associated log details, a **Logs** tab is available to inspect its log entries. Log messages can also be filtered and sorted. Select a log entry to see details.

3.6.1. Detail Column

Information is shown according to the type of entity and the operation carried out by the transaction.

The comments in the table below can be used when creating a transaction filter and specifying the value of the filter text.

Action	Entity	Comment
Create, Update, Clone and Delete	all models	Detail will only contain the name on the model
Execute	DataSync, Workflow, Event, Scheduler	Detail will contain the instance name
Bulk operations on Modify, Delete, Move	all models	• The parent transaction detail contains: "[no. of succeeded / no. of total] were [updated / deleted / moved to destination_organization level] successfully." • Bulk move from different organization levels to one organization level show the destination organization level name in the parent transaction detail. • Each child transaction detail will contain the name of instance that is deleted.
Data Import	all models	Detail shows only the imported file name.
Device Import	all devices	Detail shows host name or device address
All operations	all models	The following attribute values are considered first for inclusion in the Detail column: `country_name`, `DialPlanName`, `name`, `ip`, `host`, `address`, `description`, `username`, `type`, `entity_id`, `userid`, `pattern`, `RoleCurrent`. Otherwise, the Detail column will be empty.

Note that the contents of the Detail column of transaction lists are not localized.

3.7. Features and Services Interfaces

The Business Administration Portal (BAP) allows you to easily view and manage the features or services located at any level of your organization.

Features and services that may be available on your side menu according to your role and that can be managed, include:

- Sites and Site Defaults (*Site Management*)
- Number Management, i.e. internal and external numbers (including number associations), and Lines (*Number Inventory*)
- Subscribers (Users) (*Subscribers*)
- Phones (*Phones*)
- Voicemail (*Voicemail*)
- Extension Mobility (*Extension Mobility*)
- Webex Teams (user and license management - *Webex Teams Dashboard*)
- Contact Center (agents, teams, skills and resource groups - *Contact Center Management*)
- Hunt Groups (members and groups - *Hunt Groups Dashboard*)

- Call Pickup Groups (members and groups - *Call Pickup Groups Dashboard*)

3.7.1. Manage a Feature or Service

Note: The Business Administration Portal (BAP) interface menus and functionality is defined as an interface type in VOSS-4-UC, along with the required role based access.

A default interface type is provided. Menus, features and functionality described here may not be available if your administrator has created a Business Admin Portal Custom Interface for you.

Field Display Policies for features on Business Admin Portal Custom Interface are available to manage the available panels on the detail feature dashboard.

Common feature management tasks such as listing, adding, deleting and editing can be carried out by navigating to the required organization selection and selecting the feature menu.

You may be prompted to select a organization level from the pop up. Otherwise, click **Organization Selection** and choose the organization level. See: *Organization Navigation*.

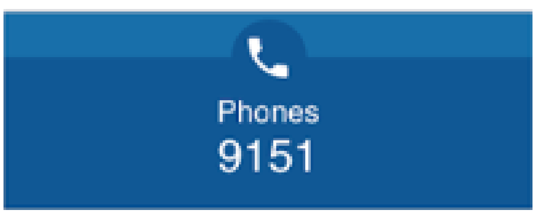
3.7.2. Menu Landing Page

Selecting the menu opens the **Menu Landing Page**.

The menu landing page dashboard provides an entry point to easily manage a feature or service.

The following types of controls may be available:

- **Counters** item counts, for example the number of Sites, Internal Inventory, External Inventory, Lines, Subscribers, etc. Click on the counter to access the list view for that item.

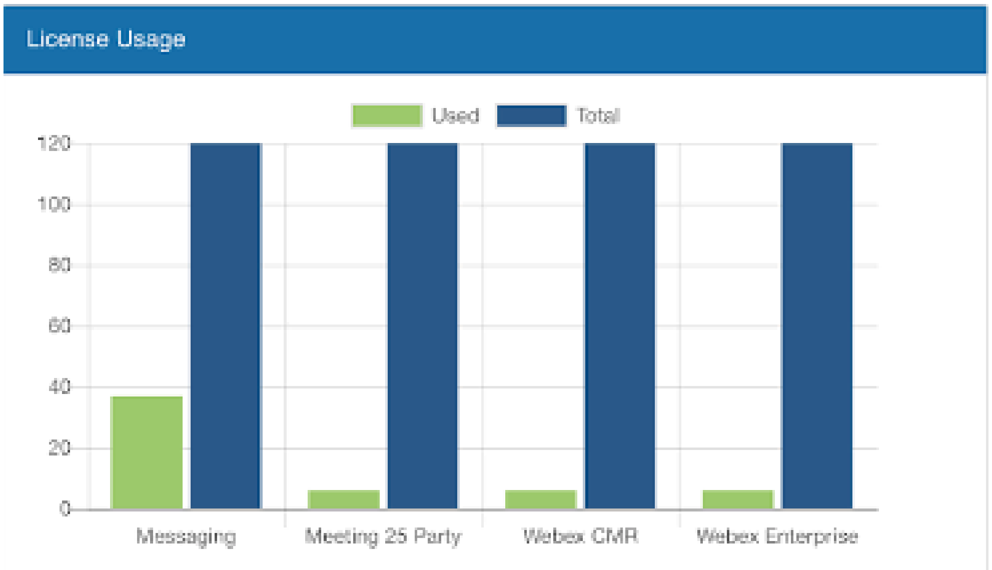
  

- **Quick Actions** - a group of links to carry out feature management.

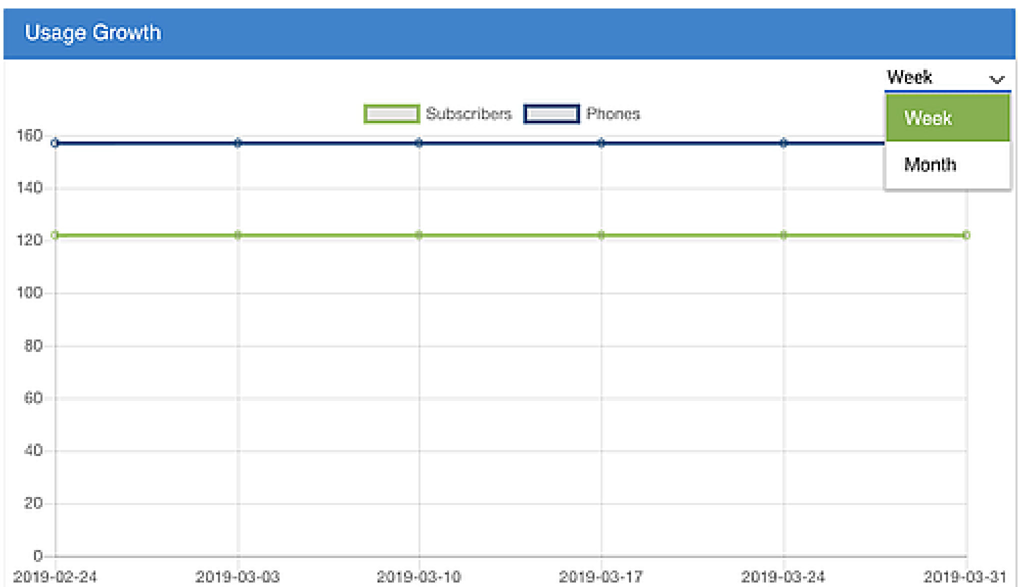
  Some feature details can be managed from a pop up launched from a Quick Action or panel link (for example, Delete). If available, the **View** hyperlink (for example View Sites, View Internal Inventory, and so on) also provides access to the list view for that item and its associated controls.

  Select a feature Quick Action or panel link to manage the feature item, for example Add, Delete, Edit.

- **Graphs and Charts** - only when data is available, visual displays provide you with a quick view of metrics of the feature, for example the **License Usage** for the **Webex teams** feature at an organization level.



On Usage charts that illustrate time periods, for example **Usage Growth**, you can configure the chart to display in either weeks or months using a drop-down located in the top right-hand corner of the chart.



- For details on a *general* feature management, see: *User Interface Controls*.
- For details on a *specific* feature management, see: *Feature Detail Dashboard* and topics on the specific feature.
- For the **List View** of a feature, see: *List View Functionality*.

3.7.3. Feature Detail Dashboard

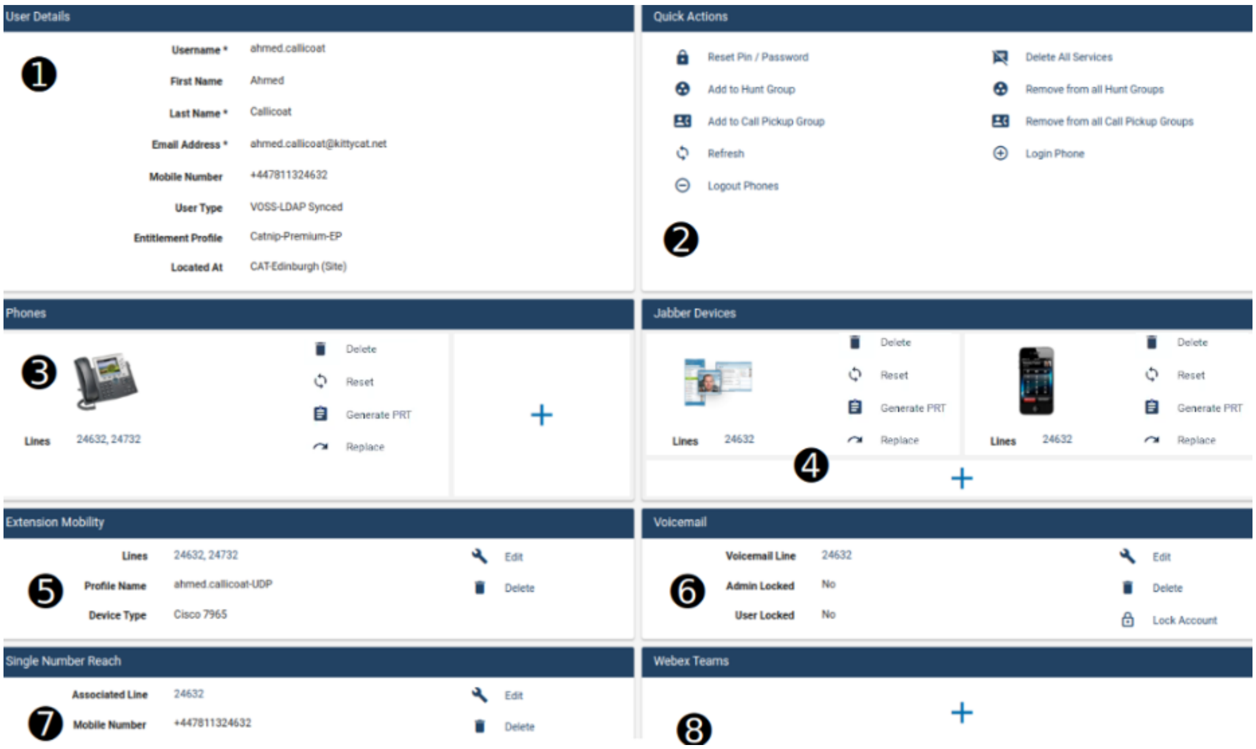
This topic describes the common controls and functionality that you may find when you select an individual instance row in the list view. To see details on a *specific* feature or device, refer to the topics for it.

The dashboard interface shows components of a feature in a *panel layout*, for example a panel layout of **Subscribers** services, with:

1. User Details
2. Quick Actions
3. Phones
4. Jabber Devices
5. Extension Mobility
6. Voicemail
7. Single Number Reach
8. Webex Teams

In addition to the panels for the services listed above, if a subscriber has a headset associated, a **Headset** panel for the service is also shown, showing headset details such as Vendor, Model, Firmware version and Serial Number.

Panels for devices also provide a **Generate PRT** link to create and collect the Problem Report Tool (PRT) file that is uploaded at the Customer support upload URL.



The available panels may vary according to the custom interface and Field Display Policy applied to your role. Component Device or Service management panels as well as a Quick Action panel with tasks to carry out on the instance are available to offer a single overview of the feature or device.

- When editing an *existing* instance:

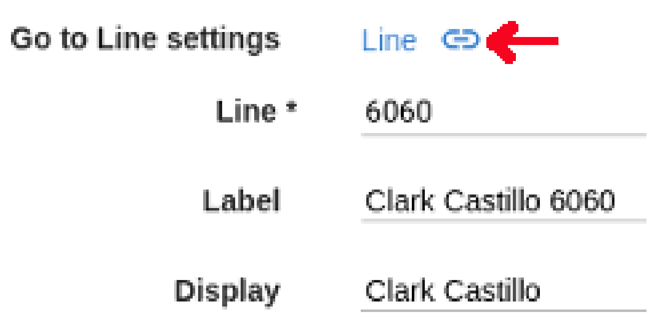
  The navigation header row shows the organization level and instance name as endpoint.

- When adding a *new* instance:

  The navigation header organization endpoint shows as /**New Record** until the instance is named and saved.

Some panels allow you to edit contents inside it, for example a subscriber's User Details. Other panels may be a table or a control that opens a pop-up input form. Hover over the input box or control on the form to see its tooltip if available. Fields on a form that cannot be edited, are greyed out and when you move off a mandatory input field without completing it, a "required" notification shows in red. Panels may also show hyperlinks to further properties so that you can for example easily inspect Line details when inspecting one or more lines on a Phone.

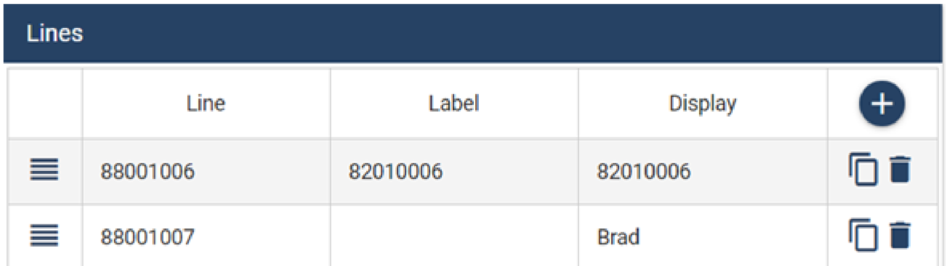
Some detail forms also show a hyperlink to further properties so that you can for example easily inspect Line details when inspecting a line on a Phone.



Note: When you add or update details on the **Feature Detail Dashboard**, or you are about to navigate away from it, a pop-up notice will remind you to save your changes before you navigate away from the feature detail dashboard.

Panels on the dashboard that allow you to add one or more devices or services may also show a "**+**".

Otherwise, where details allow for multiple properties, (for example **Lines** for a Phone), the panel control can be presented as a table with controls so that rows can be reordered (by dragging, dropping and saving), cloned or deleted.



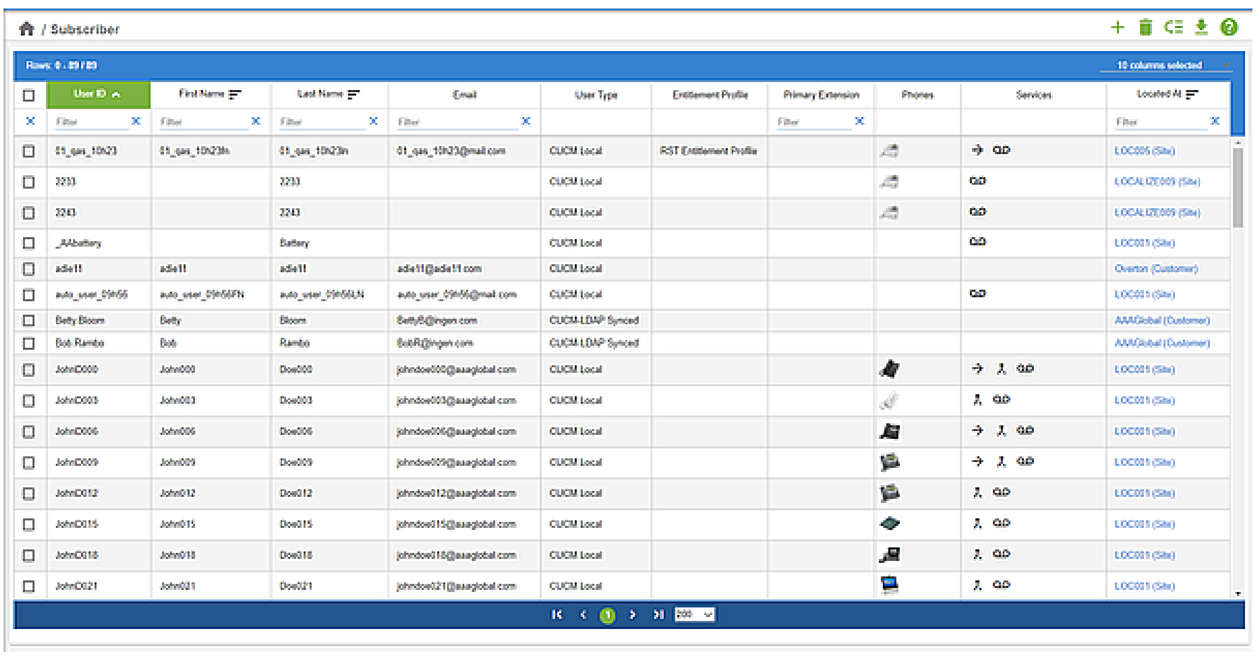
Lines

	Line	Label	Display	
	88001006	82010006	82010006	
	88001007		Brad	

3.8. List View Functionality

3.8.1. Organization Level and Controls

The list view displays data according to your organization selection and feature.



- The **Home** organization selection icon to navigate to the home page.
- The *path* to and name of currently selected feature. You can also use this path to navigate the organization level.

- According to the *allowed actions* on the feature, additional icons are available on the top list view bar to obtain information or to manage the feature or service, for example:
  - Add: 
  - Delete: 
  - Move: 
  - Export: 
  - Help: 

3.8.2. Viewing, Paging and Sorting Lists

The list header:

- shows the number of displayed rows of total rows
- provides a *n columns selected* control to show or hide columns
- columns can be resized by dragging the column divider

The list footer provides list page navigation controls and a drop-down to set the number of displayed rows per page. Up to 2000 items can be shown on a single page of a list, but since this can take some time, a warning is raised if a value higher than 200 is selected.

By default, the data in the first column is sorted in descending order, as indicated by the column highlight and order direction chevron ("^").

Columns that also show the sort icon, can be sorted.

3.8.3. Icons in Columns

Where columns contain device or service references, these are indicated as icons.

- Hover over the icon to see its details.
- Click the icon to edit it directly.

3.8.4. Located At in Columns

If a **Located At** columns is available, organizational level location name and type (for example, "Overton (Customer)") is shown as a hyperlink that can be used to show the list items for the selected organizational level. This organizational level will then also be shown above the list view.

3.8.5. Filtering Lists

List can be filtered on multiple columns that support filters. A **Filter** input box is shown for these columns.

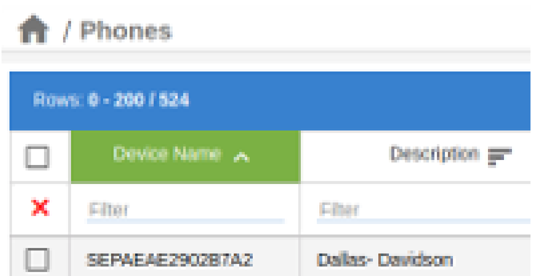
1. Navigate to the required organizational level.
2. Enter filter strings into the **Filter** input boxes of columns to be filtered.
    - Input strings can be sub-strings.
    - The search will return results that contain the value entered.
    - The search is case-insensitive.

    Note:

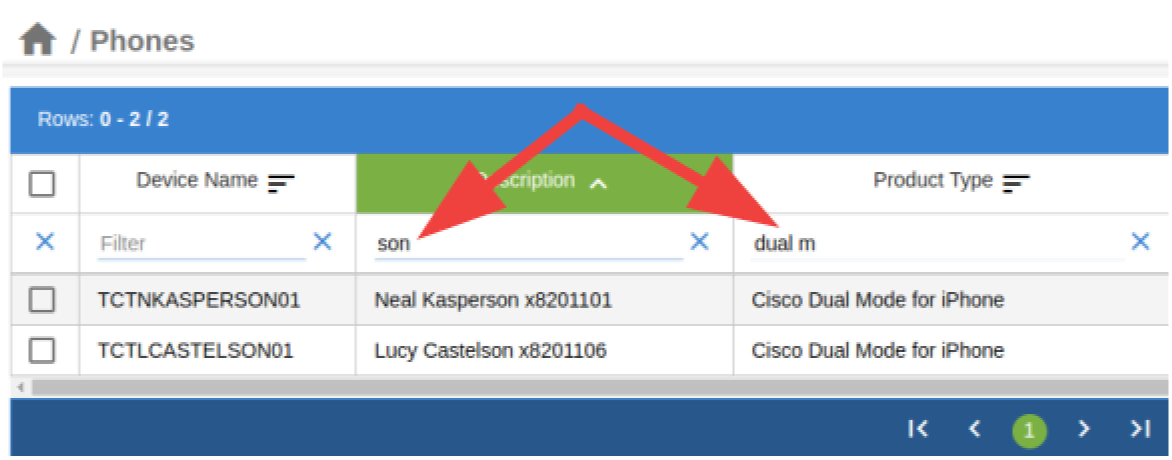
    - To filter for rows with no value in a selected Column, type `None` in the **Filter** input box.
    - The list is dynamically filtered as strings are typed into the boxes.

3. Click **X** next to the **Filter** input box or delete the filter string from a column to remove it.

    If list filters are active in columns that are not visible, these can all be cleared by selecting the **X** in the left column.



4. Rows that match a filter on the organizational level are displayed per page, up to the paging number in the footer row drop-down of the page.



Note:

- Filters are not retained when you navigate away from the list.
- Without any filter, sort can be applied to any column.

 We appreciate and value your comments. Email: doc-feedback@voss-solutions.com

- With a list view filter applied to a column, column sorting may not return a filtered list sorted by that column.

4 Menu Items

4.1. Site Management

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Site Management** landing page provides an overview of the items and tasks available at the **Organization Selection** level:

- **Counter** that indicates the number of **Sites** at the selected level.
- **Quick Actions** that provide the following hyperlinks:
  - View Sites - Also provides an option to add and delete sites.
  - *Site Defaults* - Lists all site default values available at the selected level.

4.1.1. Site Defaults

Site Defaults provide the default values for many tasks undertaken while onboarding, and are not limited to the Subscriber Management tasks. When a site is created, a site defaults instance is created on that site with the same name as the site. Many of the attributes in this data model contain default values when this instance is created.

When a Cisco HCS site dial plan is created, the site defaults on that site are updated. The updated defaults are dial plan-related attributes that are affected by the site dial plan that was deployed. If these specific site defaults attributes already had values before the site dial plan was deployed, they are overwritten. When the site dial plan is removed, these same attributes are reset (set to empty string) in the site defaults.

Modify Site Defaults

Access the relevant view, add, or edit form as described in *Features and Services Interfaces*.

Take note of the following additional information for the fields on the tabs below:

General Defaults Tab

Field	Remarks
Name	Should be the same name as the site. Only one instance of site defaults exists for a site.
Default Network Locale	Contains a definition of the tones and cadences that the phones and gateways use at the specific location.
Default User Locale	Identifies a set of detailed information to support users at the specific location, including language and font.
Default CUC Subscriber	Populated by the Voice Mail Template workflow when a Voice Mail pilot number is associated with a site. Likewise, the field is reset (Empty) when the Voice Mail pilot number is disassociated from a site.
Default CUC Phone System	Populated by the Voice Mail workflow when a Voice Mail pilot number is associated with a site. Likewise, the field is reset (Empty) when the Voice Mail pilot number is disassociated from a site.

Device Defaults Tab

Field	Remarks
Default CUCM Phone Line E164 Mask	
Default CUCM Device Profile Line E164 Mask	These E164 mask values will be applied as a default when devices have not been configured with static values.
Default CUCM Remote Destination Profile Line E164 Mask	

CUC Defaults Tab

Option	Default Value
Default CUC Phone System	Populated by the Voice Mail workflow when a Voice Mail pilot number is associated with a site. Likewise, the field is reset (empty) when the Voice Mail pilot number is disassociated from a site.
Default CUC Subscriber Template	Populated by the Voice Mail workflow when a Voice Mail pilot number is associated with a site. Likewise, the field is reset (empty) when the Voice Mail pilot number is disassociated from a site.
Default CUC TimeZone	You can manually enter a valid timezone index value in this field, for example 035 for (GMT-05:00) Eastern Time (US and Canada). Note that the code entered must already be installed on the Cisco Unity Connection server associated to this site.
Default CUC Language	You can manually enter a valid Locale ID (LCID) value for the language in this field, for example 1036 for French - France. Note that the code entered must already be installed on the Cisco Unity Connection server associated to this site.

4.2. Number Inventory

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Number Inventory** landing page provides an overview of the items and tasks available at the **Organization Selection** level:

- **Counters** that indicate the number of items located at the selected level, for example: **Internal Inventory**, **Available Internal Inventory**, **External Inventory**, and **Lines**.

  Click the appropriate counter to open the list view for that item.

- **Quick Actions** that provide the following hyperlinks:
  - **View Internal Inventory** - List all internal numbers available at the selected level (customer or site).
  - **Add Internal Inventory** - Allows you to add internal numbers.
  - **View External Directory** - List all external numbers available at the selected level (customer or site)
  - **Add External Directory** - Define external numbers available to users.
    - The **Starting Number** * must be prefixed with a '+', followed by the country code for the selected country, and then completed by the external number itself.
    - The format of the **Ending Number** is the same as the **Starting Number** and is optional. If not provided, the single number specified as the **Starting Number** is added. If provided, the range of external numbers is added: Starting Number to Ending Number inclusive. A maximum of 1000 numbers can be added at a time.
    - The **Number Type** is informational only, and may be hidden.
  - **View Lines** - Click a specific line to view the line details.

    The **Line Usage** card is a central point that shows where the line is used throughout the system, including hyperlinks to those areas, such as:
    - Subscribers
    - Extension Mobility Profiles
    - Voicemail Boxes
    - Phones
  - **Associate Internal/External Inventory (One-to-many)** - If you create the association at a site, you can mix customer-level DNs and external (E.164) numbers with site-level DNs and E.164 numbers.

    You can optionally specify a primary E.164 number to associate with the DN. This step can be useful when you perform a DN-to-E.164 translation (for example, when provisioning translation rules for LBO gateways) and the DN is associated to more than one E.164 presentation. Note

    Note: You cannot associate numbers if Number Management has been disabled for the customer. Only DNs or E.164 numbers that are not currently associated are available for association.

    - **E164 Range** * - The range values you select map to the mask value when the association translation pattern is created. For example, when 1 is selected all external numbers and directory numbers are listed, when 10 is selected, all external numbers and directory numbers that end in 0 are listed. The mask affects all digits 0 to 9, so you can't start the mask on a nonzero number. Likewise, when 100 is selected, the external numbers and directory numbers end in two zeros. This pattern results in a mask of XX.

  * **E164 Number** * - Choose the starting number of the range of E.164 numbers from the drop-down menu. For a customer-level association, only customer-level E.164 numbers are available. For a site-level configuration, both customer-level and site-level E.164 numbers are available.
  * **Primary E164** - The primary E.164 number to associate with the DN. Make sure the E.164 number you enter starts with '+' and falls within the range you specified in the **E164 Range** drop-down.

- **Associate Internal/External Inventory (Many-to-many)** - These associations create Direct Dial Inward (DDI) associations so that incoming PSTN numbers are routed to directory numbers. If you create the association at a site, you can mix customer-level DNs and external (E164) numbers with site-level DNs and E164 numbers.

  * **Range** - The range values you select map to the mask value when the association translation pattern is created. For example, when 1 is selected all external numbers and directory numbers are listed, when 10 is selected, all external numbers and directory numbers that end in 0 are listed. The mask affects all digits 0 to 9, so you can't start the mask on a nonzero number. Likewise, when 100 is selected, the external numbers and directory numbers end in two zeros. This pattern results in a mask of XX.
  * **E164 Number** * - Choose the starting number of the range of E.164 numbers from the drop-down menu. For a customer-level association, only customer-level E.164 numbers are available. For a site-level configuration, both customer-level and site-level E.164 numbers are available.
  * **DN Number** * - Choose the starting extension number from the drop-down menu. Note that you cannot associate extension numbers that begin with the prefix '*' (asterisk) or '#' (hash).

4.3. Subscribers

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Subscribers** landing page provides an overview of the items and tasks available at the **Organization Selection** level:

- **Counters** that indicate the number of subscribers and services at the selected level, for example: **Subscribers**, **End Users**, **Phones**, **Extension Mobility Profiles**, **Voicemail Boxes**, and **Webex Teams**.

  Click the appropriate counter to open the list view for that item.

- **Quick Actions** that provide the following hyperlinks:

  - **View All Subscribers** - Opens a list view showing all subscribers at the selected level. Click a specific subscriber to edit the subscriber and to view their detail dashboard. See *Feature Detail Dashboard* for general information about detail dashboards.
  - When editing a subscriber:

    * Panels for services are shown. New services can be added by clicking "+" on a panel.

      Certain fields on selected services are pre-populated based on the selected **Quick Add Group** and other configuration templates selected on the Subscriber Add panel, e.g. 'Default Webex Teams User Template'.

* An **Entitlement Profile** can be selected from the drop down list and will be then associated with the Subscriber.
* If a Customer is configured for IM and Presence, and if you want the subscriber to have access to IM and Presence, select the **Enable IM & Presence** check box.

  Note:

  - The *BusinessAdminUserDetailsFDP* field display policy should be set to expose this check box.
  - In general, the *BusinessAdminUserDetailsFDP* field display policy can be modified to show or hide fields. Refer to the customization of Field Display Policies in the Advanced Configuration Guide. The fields `previous_username` and `cucm_bkey fields` will however not be shown if enabled, since these are used by workflows only.

  ---

* If:
  - A UCCX device has been added and is available to the hierarchy
  - Contact Center Service has been configured and is available to the hierarchy
  - A subscriber Entitlement Profile provides for Contact Center support

  then an **IPCC Extension** drop down list can be enabled on the *BusinessAdminUserDetailsFDP* field display policy by enabling `ipccExtension` and `ipccRoutePartition`, showing all lines the subscriber has for IPCC Extension. Once you've selected a line, the **IPCC Route Partition** drop down shows.

– **Add Subscriber** - Opens a panel to add a subscriber.

* The subscriber is added with the details entered on the **Subscriber Detail** panel. On the panel, the following minimal details can be added: mobile number, optionally a phone name and one line.
* A check box called **Send welcome email** is displayed when you type in a user email address *only if* the following configuration has been made and is enabled:
  - An SMTP server has been set up (refer to the SMTP server topic in the Core Feature Guide)
  - The **Allow email to be sent to user after Quick Add Subscriber** on **Email** tab of the **Global Settings** is set to **Yes** for the relevant hierarchy. (refer to the Global Settings topic in the Core Feature Guide)

  A welcome email is then sent to the subscriber email address using the configured "Quick Add Subscriber" HTML email template that applies to the hierarchy. (refer to the Email topic in the Core Feature Guide)
* Features and services assigned to the subscriber by the selected **Subscriber Profile** see *Subscriber Profiles*.

In addition to the **Subscriber Detail** panel, a **Services** panel shows:

* **Existing Services** currently associated to a subscriber (for existing subscribers only).
* **New Services** that will be added to an existing or new subscriber based on the **Subscriber Profile** selected in the **Subscriber Detail** panel (see also *Subscriber Profiles*).

  By default these service names are auto generated based on the user name. You can override the Phone name and Line details by clearing the relevant check box and manually entering the details.

If one or more services is already associated to a subscriber, or if the required server has not been set up, e.g. Unity Connection Server for Voicemail, the service will not be shown under **New Services**.

– **Bulk Add Subscribers** - Click this hyperlink to bulk add more than one subscriber from a single page.

Note: The **Default** subscriber profile (if present) can only be deleted by a System Administrator at sys (System) level .

The following input fields are exposed for **Bulk Add Subscribers**:

* **User ID**
* **First Name**
* **Last Name**
* **Email Address**
* **Mobile Number**
* **Profile** : the selected subscriber profile determines features and services available during the bulk add.

Values for the following are automatically generated or assigned:

* Phone Name: generated - format is `BAT<random number>`.

  Generate Phone Name = True

* Line - assigned as next available and unused number from the internal number inventory.

  Use next available line = True

4.3.1. Subscriber Profiles

A subscriber profile allows for quick provisioning of subscribers with the same (or similar) set of features and services.

Click this hyperlink to open the **Subscriber Profiles** list view showing the subscriber profiles available at the selected hierarchy level.

Subscriber profiles can be created by an administrator using either the Administration GUI or the Business Admin Portal (BAP).

Created profiles will be available in the BAP **Subscriber Profile** drop-down at that hierarchy level (and below) only, and can be assigned to a subscriber when the subscriber is added using the **Subscriber Detail** panel.

See "Subscriber Profiles" in the Core Feature Guide for more details about the available options and fields.

Considerations when a service is enabled in the Subscriber Profile:

- Extension Mobility - The device types available in the drop-down, are determined by the extension mobility profile template, which in turn determines the device configuration settings. The **Line** drop-down default is the first subscriber line. The **Line Label** and **Line Display** are derived from the subscriber.

  Only one device profile can be added for extension mobility in VOSS-4-UC. If a subscriber is associated with more than one extension mobility profile on the Unified CM, and you sync with VOSS-4-UC, only the first extension mobility profile is displayed on the **Subscribers** list view in VOSS-4-UC.

- Voicemail - If enabled by the subscriber profile, and when adding this service, the subscriber can be added as a voicemail user. See also *Voicemail*.
- Single Number Reach - You cannot add more than one remote destination profile for single number reach.

  If a mobile number has already been configured for a subscriber, it is used to pre-populate the **Mobile Number** field when adding Single Number Reach (SNR) for that subscriber. You can enter a different mobile number for SNR if required.
- Webex Teams - If enabled by the subscriber profile, and when adding this service, the subscriber can be added as a webex teams user. See also *Webex Teams Dashboard*.
- Contact Center Express - If enabled by the subscriber profile, and when adding this service, a panel shows the subscriber default extension and depending on the selected controlled device type, (phone or extension mobility) the phone or device profile for the subscriber. An **Agent Profile** can be selected. For details, see *Contact Center Management*.
- Voice -

  If the selected Subscriber Profile *does not* have **Voice** enabled, the **Use generated phone name** and **Phone Name** fields are *hidden* on the Business Admin Portal Subscriber form.

  If the selected Subscriber Profile has **Voice** enabled, the **Use generated phone name** is enabled by default. The **Phone Name** field field is hidden by default until you uncheck **Use generated phone name**.

4.4. Phones

The **Phones** landing page provides an overview of the resources and actions available at the current hierarchy level.

Component	Description
Counters	Cards indicating the total number of phones, and the total number of unassigned phones. Click on a counter to open a summary list view of the resource.
Quick Actions	Links to actions: • **View Phones**: opens a list view showing all phones at the current hierarchy, with details for the following: device name, description, product, registration status, IP address, owner user ID, phone button template, softkey template, device pool name, location. – Click on a phone in the list to open the phone detail page. – In the list view, you can click the toolbar icon **Fetch real-time phone status** to fetch and display the latest data for phones. To use this feature, you must be an administrator with an appropriate role and access profile. See *Configure Phones* for details. • **Add Phone**: opens the Add Phone page, where you can add a new phone.

Add a Phone

To add a phone in the Business Admin Portal:

1. Log in to the Business Admin Portal.
2. Click **Phones** in the left-side menu to open the **Phones** landing page.
3. Use either of the following methods to open the **Add Phones** page from the landing page:
   - In the **Quick Actions**, click **Add Phone**.
   - Click the **Phones** counter to open the list view; then, in the list view, click the toolbar Plus icon (+).
4. In the organization picker, select the site where you want to add the phone.
5. In the **Phone Details** field group:
   - Select the device type. Available device types are determined by the phone template.
   - Add a description for the phone. The text you add here will override the description in the phone template, or can be combined with phone template data using a macro in the template. Description values could for example include the phone extension.
   - Add a phone name.

     Note: The phone name must include the correct prefix for the specified device type, for example:

     – Android = BOT
     – Carrier Integrated Mobile = CIM
     – Cisco 69XX, 78XX and 88XX = SEP
     – CTI Remote Device = CTI
     – iPhone = TCT
     – Jabber = CSF or TAB.

   - Select a phone template, which will be used as the phone configuration settings.

     Note: The phone template you choose determines the available phone types and associated default settings when adding a phone. Additional custom settings are populated using Configuration template values. The **Default** option is always selected unless a different phone template is chosen from the drop-down list.

     Phone settings configured by the phone template and configuration templates can be viewed and edited on the detail dashboard for the phone.

   - Select **Standalone Phone** if this phone will not be associated with a subscriber, else, clear the checkbox, and then select a username.
6. In the **Lines** field group, click the Plus sign to open the Lines information dialog; then, fill out the line details:
   - Select a line template for the configuration settings. This template configures device attributes from values in the site default that apply to the organization selection.
   - Select an inventory filter, for example, to show only unused numbers with associated E164s, or to show only used numbers.

- Select a directory number. Numbers are filtered based on the inventory filter.
- Specify a label and a display value for the line. By default, this will be the directory number.
- Click **OK**.

7. Click **Save**.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide
- Configure Phones in the Core Feature Guide
- Activate Phone Status Service in the Advanced Configuration Guide

4.5. Headsets

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

Note: Headset details on Unified CM are updated dynamically, for example when a headset is either connected or disconnected from a phone connected to the Unified CM.

To ensure regular headset status updates in VOSS-4-UC, we recommend that you create a custom data sync and schedule it to run on a daily basis or more frequently if required.

The **Headsets** landing page provides a **Headset Inventory By Model** summary view of all headsets connected at the **Organization Selection** level. These are displayed per **Headset Model**, and provide information such as; quantity connected, the number of active and inactive headsets, as well as the number of unassigned headsets. From this view you can click on the numbers to show the filtered list of items.

- **Quick Actions** that provide the following hyperlinks:
  - **View Headset Inventory** - Opens a list view showing all headsets located at the selected level. Information for each headset is provided under the following headings; Headset Serial Number, Headset Vendor, Headset Model, Headset Owner, Connected Device Owner, Headset Connection Type, Headset Firmware Version, Headset Connection Status, Connected Device Name, Headset Last Change, and Located At.

    Click on a headset to open the detail dashboard for that specific headset.
  - **View Headset Templates** - Opens a list view showing all headset templates located at the selected level. Information for each headset template is provided under the following headings; Name, Description, Standard, Version, and Located At.

    Click on a headset template to open the detail dashboard for that specific template.

See *Feature Detail Dashboard* for general information about detail dashboards.

4.6. Voicemail

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Voicemail** landing page provides an overview of the items and tasks available at the **Organization Selection** level:

- **Counters** that indicate the number of **Voicemail Boxes** at the selected level.
- **Quick Actions** that provide hyperlinks allowing the administrator to view and manage voicemail boxes:
  - **View Voicemail Boxes** - Opens a list view showing all Voicemail Boxes located at the selected level.
  - **Add Voicemail Box** - A Voicemail Box is added from the Voicemail Detail Dashboard, which is opened by clicking either this hyperlink **or** by clicking **Add** on the list view.
    - **Unified Messaging Account** - One per subscriber can be added by choosing a service from the **Unified Messaging Service** drop-down.

4.7. Unified Messaging Account

Unified Messaging (Single Inbox) is a Cisco Unity Connection service that enables users to have a single inbox in their e-mail client that is used for their e-mail as well as their Voicemail.

Note:

- VOSS-4-UC only supports either the Exchange or Office 365 Unified Messaging Service, MeetingPlace is **not** supported.
- Only **one** Unified Messaging Account (Single Inbox) per Subscriber can be added by VOSS-4-UC. However, if an existing Cisco Unity Connection subscriber is imported into VOSS-4-UC already has more than one account, then all associated services are imported, and will be available in VOSS-4-UC.
- Administrators must manually sync VOSS-4-UC with Cisco Unity Connection to obtain the required Unified Messaging Services. A manual sync must also be done whenever changes are made to the Cisco Unity Connection server.
- VOSS-4-UC does not automatically integrate Cisco Unity Connection Servers with Microsoft Exchange, the details for that process can be found here: https://www.cisco.com/c/en/us/td/docs/voice_ip_comm/connection/11x/unified_messaging/b_11xcucumgx.html

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The following Cisco Unity Connection settings set to ‘True’ (On), are included in Unified Messaging:

- EmailAddressUseCorp - Use Corporate Email Address
- EnableMailboxSynchCapability - Synchronize Connection and Exchange Mailboxes (Single Inbox)

The following two models were added to the Model Type List **CUCXN Overbuild Resources** for Unified Messaging:

- device/cuc/ExternalService
- device/cuc/ExternalServiceAccount (the actual Cisco Unity Connection User’s model which contains their Unified Messaging Account)

VOSS-4-UC also added a new Model Type list **CUCXN Unified Messaging Services**, and added the same two Models: device/cuc/ExternalService and device/cuc/ExternalServiceAccount.

4.8. Extension Mobility

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Extension Mobility** landing page provides an overview of the items and tasks available at the **Organization Selection** level:

- A **Counter** that indicates the number of **Extension Mobility Profiles** at the selected level.
- **Quick Actions** that provide hyperlinks allowing the administrator to view and manage extension mobilty profiles:
  - **View Extension Mobility Profiles** - Opens a list view showing all extension mobility profiles located at the selected level.
  - **Add Extension Mobility Profile** - An extension mobility profile is added from the **Extension Mobility** dashboard, by clicking either this hyperlink *or* by clicking **Add** on the list view.

4.9. Webex Teams Dashboard

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

Webex Teams is a Cloud-Based Business Collaboration Service, which allows employees to message, meet, and call instantly in order to strengthen relationships and increase productivity. It combines mobile devices and other communications tools to provide instant communications and live meetings to ensure a professional and effective collaboration experience.

Webex Teams main functionality includes:

- Messaging: Business messaging allows users to prepare, share, and repeat content. It facilitates one-on-one or team messaging facilities in virtual rooms.
- Meeting: Connect teams and meet customers easily with the added benefits of messaging and content sharing before, during, and after the meeting.
- Call: The service enables voice and video communications via mobile, desktop, and room-based devices. Connect your existing PSTN1 services to Webex Teams to enjoy one-touch directory dialing and join meetings from anywhere on any device. Mobile users get features such as single number reach, single voicemail service, video services, and the ability to seamlessly move between devices during a call.

The **Webex Teams Dashboard** provides an overview of the items and tasks available at the **Organization Selection** level:

- A **Counter** that indicates the number of **Users**.
- **Quick Actions** that provide the following hyperlinks:
  - **View Users** (including manage)

    Add or manage a user's:

    * User account details
    * Services

    * Roles

  The Webex Teams User fields, **Login Enabled** and **Invite Pending** check boxes are read-only and can not be edited.

  Webex users can also be managed from the *Subscribers*.

- **Sync Users** and **Sync Licenses**

4.10. Contact Center Management

The Cisco Unified Contact Center Express (UCCX) feature in VOSS-4-UC allows administrators to manage Agents and related configuration from a single pane of glass.

In addition to managing these configuration elements directly, the VOSS-4-UC Day 2 features also provide seamless UCCX management.

As a part of Contact Center management, VOSS-4-UC provides the a number of interfaces. The associated Contact Center device models that will also be synced to the Contact Center server (UCCX device) upon a data sync.

- UCCX Server Management:
- Day 2 Integration:
  - When a UCCX device has been added to an organization level and Entitlement Profiles have been added that have Contact Center entitlement enabled, subscribers can be configured as Contact Center Agents.

    Further management can be carried out in VOSS-4-UC.
- Direct Management:
  - **Agents**
  - **Skills**
  - **Teams**
  - **Resource Group**
  - **Contact Service Queues**
- Agent Device association with Unified CM Application users

  Administrators can specify the agent's controlled device via:
  - Subscriber
  - Direct Agent management
- A number of interfaces simplify Contact Center management:
  - **Agent Profiles**
  - **Re-skilling**: skills and their competency levels can easily be managed in bulk (add, remove) by means of a set of side-by-side transfer boxes that are available for:
    * Agents
    * Teams
    * Resource Groups

4.11. Hunt Groups Dashboard

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Hunt Groups Dashboard** provides an overview of the items and tasks available at the **Organization Selection** level:

- **Counters** that indicate the number of **Hunt Groups** and **Hunt Pilots**.
- **Quick Actions** that provide the following hyperlinks:
  - **View Hunt Groups** - A list view with controls to manage selected hunt groups.
  - **Add Hunt Group** - A Hunt Group is added or edited on the Hunt Group Details Dashboard on various cards.
    - **Call Behaviour**. The Hunt Pilot Pattern consists of a string of digits (an address) and a set of associated digit manipulations that route calls to a hunt list. Hunt pilots provide flexibility in network design. They work in conjunction with route filters and hunt lists to direct calls to specific devices and to include, exclude, or modify specific digit patterns.
    - **Membership**. The **Line Group Name** is a drop-down list, which allows you to choose an existing line group. The drop-down list displays all existing line groups available at the site.

      This field can also be used as a free text field. To create a new line group, enter a name in this field.

      Make sure that each line group name is unique to the route plan.

      Best practice is to use concise and descriptive names for your line groups. The CompanynameLocationGroup format usually provides a sufficient level of detail and is short enough to enable you to quickly and easily identify a line group.

4.12. Call Pickup Groups Dashboard

For common details on managing a feature, see: *Manage a Feature or Service* and *Feature Detail Dashboard*.

The **Call Pickup Groups Dashboard** provides an overview of the items and tasks available at the **Organization Selection** level:

- A **Counter** that indicates the number of **Call Pickup Groups**.
- **Quick Actions** that provide the following hyperlinks:
  - **View Call Pickup Groups** - Opens a list view showing all Call Pickup Groups at that level.

    Click on a Call Pickup Group to open the selected detail dashboard.
  - **Add Call Pickup Group**

    If you are using partitions with the call pickup numbers, ensure that the directory numbers that are assigned to the call pickup group have a Calling Search Space that includes the appropriate partitions. We recommend using `CU{macro}-PreISR-PT` partition for the call pickup groups added at the customer level.

    The **Call Pickup Group Number** drop-down lists the call pickup groups created at the customer and the site level. Select the required call pickup group numbers from both the customer and the site level.

Added members are only seen if the Call Pickup Group and its members are at the same organization level.

Verify the individual Member Line association with the Call Pickup Groups. The Call Pickup Group under the **Lines** list displays associated Call Pickup Groups.

4.13. Tools

4.13.1. Tools Dashboard

- A **Quick Actions** section providing hyperlinks that allow the administrator to:
  - Bulk Load. See:
    - *Bulk Load Sheets*
    - *Bulk Loading a File*
    - *Bulk Load Limitations*
  - Manage user interface themes at a selected organizational level:

    The themes dashboard provides cards to:
    - Enter **Theme Details** text
    - Choose theme colors and upload a logo and background colors.
    - Click **Preview** to see the theme changes.
    - Click **Save** to save the theme.

4.13.2. Bulk Load Sheets

An exported bulk load template is a workbook containing a single sheet and serves as the basis for bulk loading. A workbook can also be created that contains more than one sheet as a tabbed workbook.

For tabbed workbooks, bulk load transactions are carried out from the leftmost sheet or tab to the rightmost. For example, if a site is to be added under a customer, the customer sheet tab should be to the left of the associated site.

The spreadsheet workbook is in Microsoft Excel .xlsx format. Any name can be provided for the workbook and the same filename can be loaded multiple times, although the best practice is to use different names.

To bulk load data, preliminary steps need to be carried out. Verify existing information on the sheet and determine required information in order to complete the required data and prepare the spreadsheet.

4.13.3. Bulk Loading a File

Completed Bulk Load XLS sheets can be loaded immediately, ensure that:

- The file has a valid file extension `.xlsx`. An error message will display on the user interface to indicate that the file does not have a valid file extension.
- Any configuration templates that are referenced, are available.
- Any comments that your spreadsheet application allows you to add (for example showing as a marker in the cell with a pop-up) have been removed. Otherwise, an error message is shown:

  "An error occurred while opening the workbook. For possible resolution, please remove all comments from the worksheets and try again. If the problem persists, contact your administrator for support."

To send empty values for a file, type a space in the cell of the value column on the sheet.

1. Click **Choose** to open the file upload dialog.
2. Click **Bulk Load** on the button bar to carry out the bulk load.
3. Inspect the bulk load in the transaction log if necessary. The **Execute Bulk Load** sub-transaction list shows the transaction for each row of the sheet.

4.13.4. Bulk Load Limitations

The VOSS-4-UC automation templates include a rich set of features that incorporate the use of Configuration Templates, customizable Field Display Policies and GUI rules that are used to enhance the user experience of the user interface.

Generated bulk load templates for certain resources that make use of such advanced features are limited in their ability to produce the same provisioning results that can be obtained when using the user interface and as such require additional consideration.

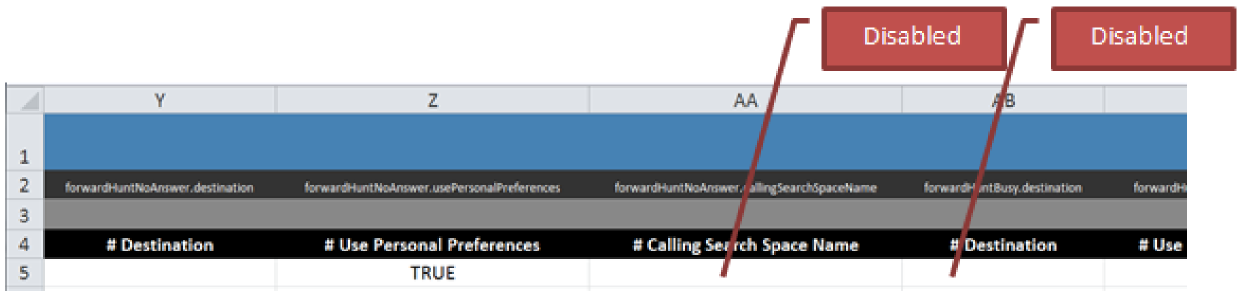
An overview of these limitations is provided below, whilst the implications of these limitations, how they may apply to specific resources in the system as well as how best to use the generated loaders, are documented in the Bulkload Reference Guides under resource specific sheet notes.

- Certain fields are used to link together different resources (for example, the name of the Cisco Unified CM remote destination is linked to the user ID of the user name).

  These fields may not be exposed in the user interface or may, for some resources, be exposed as read-only in the user interface. Such fields are currently exposed as mandatory fields in the generated bulk load templates. The fields and the specific conventions that are used in the template to link the fields together are highlighted in notes specific to the resource. For example, the value for remote destination name should be specified as `RDP-<username>`.
- Certain fields are derived from other data in the system. The notes specific to the resource highlights where to get the possible values for such fields. Examples of this are key-value type fields of a phone's vendor configuration settings.
- GUI Rules defined in the user interface that are not replicated in the backend workflow need to be considered in the loader to get the same provisioning results as the GUI. For example, the GUI rules may:
  - Set a default value for a visible field (fixed value or derived from other data in the system). This column and corresponding value will have to be included in the loader for this to be provisioned.

- Set a value for a hidden field - This column and corresponding value will have to be included in the loader for this to be provisioned. Note that this means that fields may be included in the loader that would not be visible in the user interface.
- Make a field visible depending on some condition such as the value of another field (for example, a check box being selected). The column(s) need to be included in the loader and populated under the appropriate conditions.

A GUI Rule may for example disable input fields based on the state of a check box. On the sheet, the ticked check box is represented as TRUE in the column. The columns associated with the disabled fields should not be filled.



To overcome the complexities introduced by the above limitations, a set of sample bulk load sheets have been generated that enable users to get started quickly and to leverage the best practices developed by VOSS.

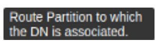
5 Appendix A

5.1. User Interface Controls

The following controls are available on the New Business Admin Portal User Interface:

Icon	Description
	Add. Open the Add input form to add a feature or service.
	Delete. Delete the item(s) selected on the list.
	Move. Move the selected items to another organizational level.
	Export. Export selected items as rows in a spreadsheet or in JSON format.
	Configuration Template.
	Save. Save data on the current input form. Note that the **Save** button is unavailable during initial loading of the form data, and is replaced by a 'Spinning Wheel'. Once the form data is fully loaded, the 'Spinning Wheel' disappears and is replaced by the **Save** button.
	Help. Open the context sensitive help.
	Toggle Menu. Hide or show menu label text.
	Organization Selection. Navigate the organizational level.
	Search. Located next to the **Search** input box. Used to quickly search for specific items.
	Transaction Log. Open the transaction log.
	Messages. Open the messages notifications list.
	Application Mode. Switch between available applications interfaces.
	Settings. Access the About or Log out options.
	Home. Navigate to the main home dashboard.

Icon	Description
	Filter. Filter lists and transactions.
	My Transactions. Only show current user transactions.
	Replay. Located on some transaction detail views to replay the transaction.
	Edit and Replay. Located on some transaction detail views to open the transaction edit form and then to replay it.
	Organization Selection. On the top menu bar. Click to open the navigation control.
	Open Search. Located near the top-right of the list view. Opens the search filter box.
	Voicemail Service. Located under the **Services** column on the **Subscriber** list view. Opens detailed information about the voicemail service for the relevant user, for example alternate extensions, notification devices, and so on.
	WebEx Service. Located under the **Services** column on the **Subscriber** list view. Opens detailed information about the WebEx service for the relevant user, for example status, email address, and so on.
	Extension Mobility. Located under the **Services** column on the **Subscriber** list view. Tooltip shows detailed information.
	Single Number Reach. Located under the **Services** column on the **Subscriber** list view. Tooltip shows detailed information.
	Headset. Located under the **Services** column on the **Subscriber** list view. Tooltip shows headset model information.
	Contact Center Express Agent icon. Agent is located under the **Services** column on the **Subscriber** list view. Opens detailed information about the agent.

Icon	Description
	**Number Inventory** menu icon.
	**Subscribers** menu icon.
	**Voicemail** menu icon.
	**Webex Teams** menu icon.
	**Contact Center Express** menu icon.
	**Hunt Groups** menu icon.
	**Call Pickup Groups** menu icon.
	**Phones**. Each icon tooltip shows details of the device.
	Mandatory fields are indicated by pop up next to the field.
	Tooltips are provided for certain fields when adding or editing a feature or service and contain helpful text. Hover your mouse pointer over a field text box or control to display the tooltip text.
Blue icons or text	**Hyperlinks**. Clicking blue icons or blue text opens the target selection in another screen or view.
	**Drop-down input box**. Use the backspace key to clear the field selection, alternatively select the text and then delete it. Search in drop-down. The **Search** icon next to the drop-down icon opens a paginated pop-up table displaying the search results.