



VOSS-4-UC Business Admin Portal Guide

Release 21.1

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1. What's New

1.1. Business Admin Portal Guide: Release 20.1.1

- EKB-4188: Drop-downs in new portal do not support paging which results in slow performance loading options. See: [Search in Drop-Down Lists](#)
- EKB-4360: Clear filter action always showing regardless if a filter is set or not (transaction list). See: [View Transactions](#)
- EKB-6710: Counts on Subscriber page are not correctly counting Subscribers for LDAP and Local. See: [Subscribers](#)
- EKB-6758: Move Subscriber - Allow Provider Lvl Subscribers to be moved. See: [Move Subscriber](#)
- EKB-6817: Number Inventory Usage tab breaks if multiple Hunt Groups are added with the same DN. See: [Number Inventory](#)
- EKB-7156: Move Subscriber - Phone Type title to Phone Profile. See: [Move Subscriber](#)
- EKB-7163: Move Subscriber - Add ability to select Feature Template once the Phone Config or Line Config Profile has been selected. See: [Move Subscriber](#)
- VOSS-634: PLACEHOLDER (EKB-3035: Expose Move Subscriber in BAP) . See: [Move Subscriber](#)
- VOSS-670: Small Enhancements 20.1.1 (EKB-4062: Add custom boolean and string fields to Site Default Doc schema) . See: [Modify Site Defaults](#)
- VOSS-670: Small Enhancements 20.1.1 (EKB-4802: Allow system level transactions to be hidden from the transaction log) . See: [View Transactions](#)
- VOSS-670: Small Enhancements 20.1.1 (EKB-5817: Subscriber details page should show summary of all lines in the Business Admin Portal) . See: [Administrator User Interface](#)
- VOSS-670: Small Enhancements 20.1.1 (EKB-5070: Add support for setting phone description on the Add Phone feature) . See: [Phones](#)
- VOSS-676: New Administration Portal (EKB-3967: Support for session timeout warning) . See: [Administrator User Interface](#)
- VOSS-676: New Administration Portal (EKB-3581: Mechanism to define default app mode on login) . See: [Administrator User Interface](#)
- VOSS-676: New Administration Portal (EKB-4078: Display login attempt info to user after login) . See: [Administrator User Interface](#)
- VOSS-676: New Administration Portal (EKB-3318: New GUI must support the Cache Control Policy for each model type) . See: [User Interface Controls](#)
- VOSS-687: Provide Extension Mobility Management in BAP Portal. See: [Extension Mobility](#)

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- EKB-10133: Update “default” Business Admin Portal Profile to Allow Switch to Admin Portal. See: [Business Admin Portal Profiles](#)
- EKB-5670: Existing CUCM LDAP Synced users not showing in BAP view/AddSubscriberFromProfile. See: [Subscribers](#)
- EKB-5993: PLACEHOLDER. See: [Introduction to the Business Administration Portal](#)
- VOSS-785: Small Enhancements 19.3.4 (EKB-6027: Inform user when not all choices of a dropdown have been fetched) . See: [Search in Drop-Down Lists](#)
- VOSS-790: Pexip Support. See: [Conferencing](#)
- VOSS-795: Multi-vendor Subscriber List and Dashboard. See: [View Subscribers](#)
- VOSS-795: Multi-vendor Subscriber List and Dashboard. See: [Multi Vendor Subscribers](#)
- VOSS-795: Multi-vendor Subscriber List and Dashboard (EKB-1059: PLACEHOLDER) . See: [Enable User to Host Conference Now](#)
- VOSS-847: Support for Microsoft O365 and MS Teams Management. See: [Modify Site Defaults](#)

2. Introduction to the 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.

 [VOSS-4-UC Business Admin Portal](#)

3. Assign a Business Admin Portal Profile to a Role

This procedure assigns a Business Admin Portal profile to a user role to define how users with this role can access the Business Admin Portal.

Perform these steps:

1. Log in to the VOSS-4-UC Admin Portal with hcsadmin or entadmin (depending on installation type).
2. Go to (default menu) **Role Management > Roles**.
3. Open the role for which you want to enable access to Business Admin Portal.
You can add a new role, or open an existing role, clone it, and configure custom settings for the new role.
4. Click the Plus sign (+) at **Custom Interfaces**:
 - From the **Interface Type** drop-down, select **InterfaceBusinessAdminPortal**.
 - From the **Name** drop-down, select a Business Admin Portal profile (options are default, Disabled, Full Access, or Read Only).
5. Save the role.
6. Use the log in credentials of a user with the role you just configured, and log in to the Business Admin Portal to verify that this user role has appropriate access (as configured for the role).

`https://<IP>/portal/#/login`

Note:

- By default, access to the Business Admin Portal Interface is read-only. To assign a user role with a different administration profile, refer to the Business Admin Portal Custom Interface topic in the Core Feature Guide.
 - If the administrator has set the “Change Password on Next Login” for a Business Admin Portal admin user credential policy, the Change Password prompt page is loaded.
-

Related Topics

- Business Admin Portal Profiles in the Core Feature Guide

4. Log In

This procedure logs you in to the Business Admin Portal.

Note:

- The Business Admin Portal uses the same base address (URL) as the Admin Portal. 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`
 - `/account`

-
1. Go 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. Fill out your username and password.

If you have forgotten your password, click **Forgot Password**.



3. Click **Login** (or press **Enter**).

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

5. Working in the Business Admin Portal

5.1. Search

5.1.1. Run a Search

This procedure performs a search in the Business Admin Portal.

1. Log in to the Business Admin Portal.
2. Click the **Search** icon (magnifying glass icon on the toolbar).
3. In the search pop-up, choose a feature or service to search on, such as:
 - Subscribers
 - Phones
 - Lines
 - Internal Number Inventory
 - Hunt Groups
 - Sites
 - Voicemail

Options in the drop-down are permissions-based, and defined by your administrator.

4. Configure search criteria:
 - **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.

X

Searching for: Subscribers X

Select Field	Select Condition	Enter Search Value
<div style="background-color: #4CAF50; color: white; padding: 2px;">User Id</div> <div style="padding: 2px;">First Name</div> <div style="padding: 2px;">Last Name</div> <div style="padding: 2px;">Email</div> <div style="padding: 2px;">Primary Line</div> <div style="padding: 2px;">Phone Name</div>	<div style="background-color: #4CAF50; color: white; padding: 2px;">Contains</div> <div style="padding: 2px;">Equals</div> <div style="padding: 2px;">Does Not Equal</div> <div style="padding: 2px;">Starts with</div> <div style="padding: 2px;">Ends with</div> <div style="padding: 2px;">Does Not Contain</div>	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;">Search value</div> <div style="padding: 5px;"><input checked="" type="checkbox"/> Ignore Case?</div> <div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px; margin-top: 5px;">Add Search Condition</div>

Cancel

Search

- Enter criteria in the **Enter Search Value** field, and choose string case sensitivity.
 - To add additional criteria, select **Add Search Condition**, and fill out values.
- You can remove and edit search criteria before running the search.

5. Click **Search**.

6. View results.

The search results list header displays the search criteria, and search displays 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 works on any column in the list view.
- With a search filter applied to a single column, sort works 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.

Related Topics

- [Save a Search in the Business Admin Portal Guide](#)

5.1.2. Save a Search

This procedure saves a search as a filter so that you can run it from the landing page in future.

1. Configure search criteria and run a search.
2. Select the **Save this filter** link to save the search criteria saved search or filter. You can access the filter on the **Saved Searches** panel on the landing page.

Once a filter is saved, a table header above the header rows displays the filter with a proposed name and a “Save this filter” link, for example:

```
Filter: Device Name contains 'BAT'(Save this filter)
```

Note: Additional filter options (such as “Start with” and “Equals” instead of only “Contains”) are available when using the **Search** control.

3. Rows matching the filter on the organizational level display per page, up to the paging number in the footer row drop-down of the page.

Note: If a list is currently filtered, column sort is applied only to the filtered column.

Related Topics

- Run a Search in the Business Admin Portal Guide

5.1.3. Search in Drop-Down Lists

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.”


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 filtering capability. Note that both types of drop-down searches are case insensitive.

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

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.

5.1.4. Filtering Lists

Lists can be filtered on columns that support filters. A **Filter** input box is shown for these columns just below the column header. Filters on multiple columns are supported.

1. Navigate to the required organizational level.
2. Enter filter values into the **Filter** input boxes of the columns to be filtered.

For the filter values:

- Input will match sub-strings of column values.
- The filter will return rows that *contain* the filter value as a sub-string.

For example, a column filter `ers` in a **Username** column will match both `lakendra.ingersoll` and `tisha.macpherson`.

- The filter condition is case-insensitive.

For example, any of the column filters `ERS`, `Ers` or `ers` in a **Username** column will match `lakendra.ingersoll` and `tisha.macpherson`.

Note:

- To filter for rows with no value in a selected Column, type `None` in the **Filter** input box.
 - The list is dynamically filtered while strings are typed into the boxes.
 - Only if there is a *single* column filter, is the list sortable on the filtered column. A tooltip is shown for other columns: "Sorting temporarily disabled on this column because of currently applied filter".
-

Home / Phones

Rows: 0 - 2 / 2

<input type="checkbox"/>	Device Name	Description	Product Type
<input checked="" type="checkbox"/>	Filter	son	dual m
<input type="checkbox"/>	TCTNKASPERSON01	Neal Kasperson x8201101	Cisco Dual Mode for iPhone
<input type="checkbox"/>	TCTLCASTELSON01	Lucy Castelson x8201106	Cisco Dual Mode for iPhone

Navigation: << < 1 > >>

- Click **X** next to the **Filter** input box or delete the filter string. Click the **X** in the left hand selection column to clear *all* column filters.

Home / Phones

Rows: 0 - 200 / 524

<input checked="" type="checkbox"/>	Device Name	Description
<input checked="" type="checkbox"/>	Filter	Filter
<input type="checkbox"/>	SEPAEAE2902B7A2	Dallas- Davidson

- Once the result rows are returned, a table header above the header rows displays the filter.
- 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: If there is an active filtered list, column sort can only be applied to a the filtered column.

5.2. Organizations

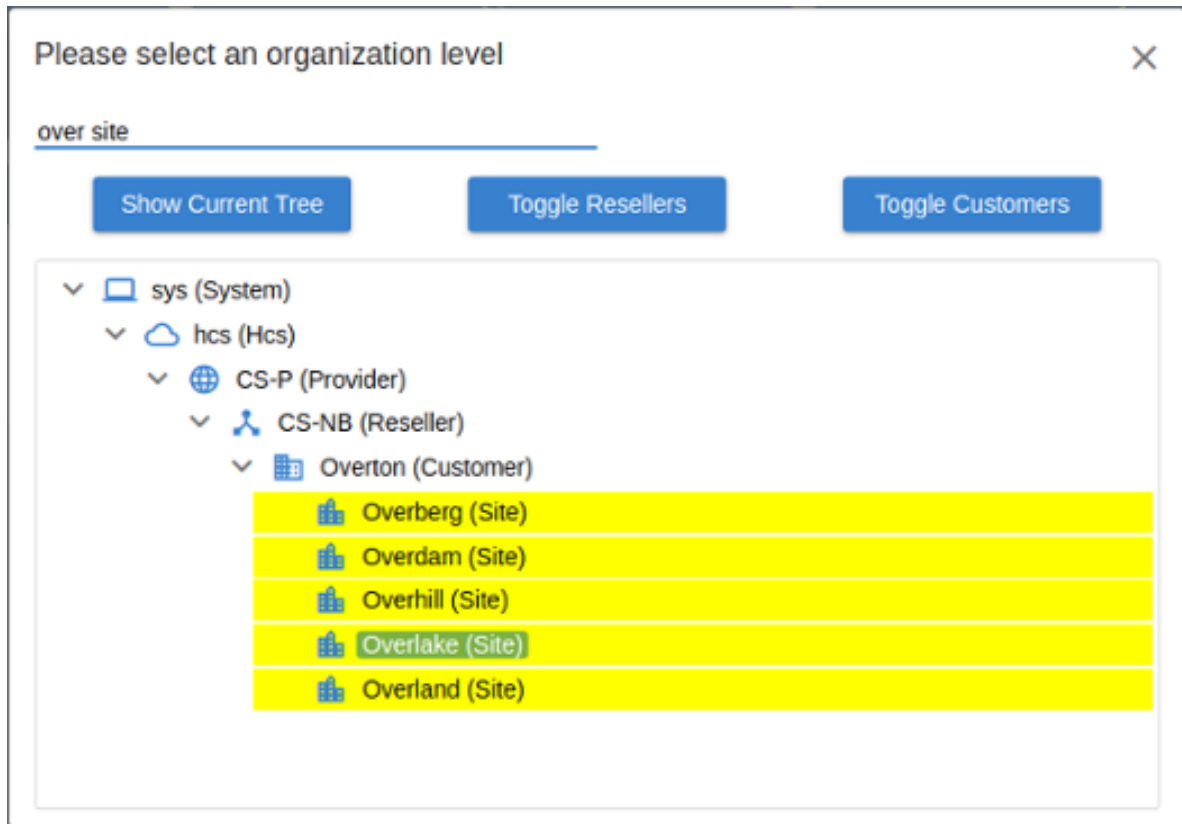
5.2.1. Navigate Organizations

Organization (or hierarchy) levels define where you want to view or change data in the system, for example, at either system level, or provider, reseller, customer, sites, or intermediate nodes.

For most tasks, you'll need to select the appropriate organization level before you start.

- To choose an organization level, click the **Organization Selection** button  on the top menu bar to open the Organization Selection widget.

The widget displays an organization tree, along with search, filter, and view options.



- To show or hide elements in the tree, click the relevant Expand / Collapse icons (> / v).
- To search the tree, enter criteria in the filter field above the tree. Criteria may include organization labels, and phrases such as “contains”, and “AND”.
Filter results are highlighted in the tree.
- To expand or collapse the tree at resellers or customers, click **Toggle Resellers** or **Toggle Customers**.
- To show the entire tree, click **Show Entire Tree**.

Note: When a node in the tree organization is selected and highlighted, nodes on the same level are hidden. Clicking **Show Entire Tree** expands the entire tree, showing any hidden branches.

5.2.2. Modify Site Defaults

This procedure displays and updates site defaults.

Note: Site defaults provide the default values for several of the tasks performed during onboarding. When creating a site, a site defaults instance is created on the site, having the same name as the new site, and pre-populated with several default values.

For Provider deployments, when creating a Cisco HCS site dial plan, the site defaults on the site are updated with dial-plan-related attributes that are affected by the deployed site dial plan. Any related existing values are overwritten. When the site dial plan is removed, these values are reset (set to empty) in the site defaults.

The Site Defaults Doc (SDD) is useful for managing multi-site, multi-country customers. A SDD allows a Provider administrator (or higher) to define geo-specific information at a site level, allowing multinational sites to stay in sync.

Geo-specific information includes CUCM user-locale and network-locale defaults, as well as the CUC time zone and language defaults.

See Also:

- Site Defaults Doc Templates in the Core Feature Guide.

Perform these steps

1. Log in to VOSS-4-UC (to the Admin Portal or to the Business Admin Portal), as provider, reseller, or customer administrator.
2. Open the site defaults editing screen:
 - In the Business Admin Portal, go to **Site Management > Site Defaults**; then, select the relevant site to open the Site Defaults[name] screen.
 - In the Admin Portal, go to **Site Management > Defaults** to open the Defaults screen; then, select the relevant site to open the Defaults[name] screen.
3. Click through the following tabs to modify default values, as required in accordance with your devices and vendors:
 - General Defaults
 - Device Defaults
 - Line Defaults
 - User Defaults
 - CUC Defaults
 - HotDial Defaults
 - Overbuild Defaults
 - MS Teams
4. Save your changes.

Note:

- Field descriptions for the tabs on this screen are documented below.
- Note that the SDD also contains ten custom string fields and ten custom boolean fields, which are, by default, untitled and hidden:
 - `custom_string_1` to `custom_string_10`
 - `custom_boolean_1` to `custom_boolean_10`

To enable and use these fields, higher-level administrators can modify the field display policy for the SDD (at a specific hierarchy). Once the fields are available, designers can reference the fields in custom configuration templates and workflows.

General Defaults Tab

Option	Default Value
Name	Mandatory. The same name as the site. Only one instance of site defaults exists for a site.
Default CUCM Device Pool	Cu{CustomerId}Si{SiteId}-DevicePool
Default CUCM Location	Cu{CustomerId}Si{SiteId}-Location
Default CUCM Region	Cu{CustomerId}Si{SiteId}-Region
Default CUCM Date/Time Group	CMLocal For Provider deployments, choose from the drop-down list.
Default User Locale	The user locale identifies a set of detailed information to support users at the specific location, including language and font. Choose the required user locale from the drop-down list, which contains all user locales available on the CUCM at the selected location.
Default Network Locale	The network locale contains a definition of the tones and cadences that the phones and gateways use at the specific location. Choose the required network locale from the drop-down list, which contains all network locales available on the CUCM at the selected location.
Default User Profile (for User Self Provisioning)	Choose from the drop-down list.
Default CUCM Hunt Pilot Partition	Cu{CustomerId}Si{SiteId}-Feature-PT
Default CUCM Call Pickup Partition	Cu{CustomerId}Si{SiteId}-Feature-PT
Default CUCM Call Park Partition	Cu{CustomerId}Si{SiteId}-Feature-PT
Default CUCM MeetMe Partition	Cu{CustomerId}Si{SiteId}-Feature-PT
Default CUCM Group	Default value: Default

Device Defaults Tab

Values on the **Device Defaults** tab are applied to the configuration template associated with adding a subscriber (SubscriberPhonePrePopulate).

Option	Default Value
Default CUCM Phone Product	Cisco 9971
Default CUCM Phone Protocol	SIP
Default CUCM Phone Button Template	Standard 9971 SIP
Default CUCM Phone Security Profile	Cisco 9971 - Standard SIP Non-Secure Profile
Default CUCM Phone Softkey Template	Standard User
Default CUCM Phone SIP Profile	Standard SIP Profile
Default CUCM Phone Presence Group	Standard Presence Group
Default CUCM Phone Common Profile	Standard Common Phone Profile
Default CUCM Phone Line E164 Mask	Enter a E164 mask value that will be applied as a default when devices have not been configured with static values.
Default CUCM Device CSS	Cu{CustomerId}Si{SiteId}-{countryIsoCode}- DP-Emer-CSS
Default CUCM User Subscribe CSS	Internal-CSS
Default CUCM Phone Subscribe CSS	Cu{CustomerId}Si{SiteId}-InternalOnly-CSS
Default CUCM Device Profile Product	Cisco 9971
Default CUCM Device Profile Protocol	SIP
Default CUCM Device Profile Button Template	Standard 9971 SIP

Option	Default Value
Default CUCM Device Profile Line E164 Mask	None. Enter a E164 mask value that will be applied as a default when devices have not been configured with static values.
Default CUCM Device Profile EMCC CSS	None
Default CUCM Remote Destination Profile CSS	None
Default CUCM Remote Destination Profile ReRouting CSS	None
Default CUCM Remote Destination Profile Line E164 Mask	None. Enter a E164 mask value that will be applied as a default when devices have not been configured with static values.
Use National Mask Format	<p>When this check box is selected, the E164 Mask will use the National format of the associated E164 Number.</p> <p>For example, if the E164 Number has been added in the format +44 1234 5000, and this check box is selected, the E164 Mask on the device will have the International Dialing Code prefix removed e.g. +44, and a '0' will be prefixed to the number e.g. 012345000.</p> <p>Note: For Quick Add Subscriber, set the following value in the E164 Mask field of the relevant phone, device profile and remote destination profile configuration template <code>{{ macro.SDD_QAS_E164Number_MCR }}</code>. See the "Reference CUCM Phone Template" CFT for an example configuration.</p>

Line Defaults Tab

Values on the **Line Defaults** tab are applied to the configuration template associated with adding a line (line-cft).

Option	Default Value
Default CUCM Line BLF Presence Group	Standard Presence Group
Default CUCM Line Voice-mail Profile	None
Default CUCM Line Partition	
Default CUCM Line Alternate E164 Partition	None
Default CUCM Line CSS	Cu{CustomerId}Si{SiteId}-InternalOnly-CSS
Default CUCM Line Call Forward CSS	Internal-CSS
Default CUCM Line Call Forward No Answer CSS	Internal-CSS
Default CUCM Line Call Forward All CSS	Internal-CSS
Default CUCM Line Call Forward No Answer Internal CSS	Internal-CSS
Default CUCM Line Call Forward Busy CSS	Internal-CSS

Option	Default Value
Default CUCM Line Call Forward Busy Internal CSS	Internal-CSS
Default CUCM Line Call Forward No Coverage CSS	Internal-CSS
Default CUCM Line Call Forward No Coverage Internal CSS	Internal-CSS
Default CUCM Line Call Forward On Failure CSS	Internal-CSS
Default CUCM Line Call Forward On Failure Internal CSS	Internal-CSS
Default CUCM Line Call Forward Not Registered CSS	Internal-CSS
Default CUCM Line Call Forward Alternate Party CSS	CU1-DummyBlk-CSS
Default CUCM Line Call Forward Secondary CSS	Internal-CSS

User Defaults Tab

Option	Default Value
Default System User Role	{SiteName}SelfService
Default CUCM User BLF Presence Group	Standard Presence group
Default CUCM Service Profile	None
Default Self-service Language	Choose from the drop-down list of installed Self-service languages. Default is English (en-us).

CUC Defaults Tab

For more information about the settings on this tab, see:

Cisco Unity Connection Localization in the Core Feature Guide.

Option	Default Value
Default CUC Phone System	This field is 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	This field is 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 HTML Notification Template	Default_Dynamic_Icons
Default CUC SMPP Provider	None
Default CUC TimeZone	None. Choose from the drop-down list, for example: GMT-05:00-America-New_York. The timezones available in this drop-down are those added in Services > CUC Localization > CUC TimeZone Filters (see cross reference below). You can also 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 CUC server associated to this site.
Default CUC Language	None. Choose from the drop-down list, for example: English-US. The languages available in this drop-down are those in Services > CUC Localization > CUC Language Filters (see cross reference below). You can also 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 CUC server associated to this site.
Default Language That Callers Hear	None. Choose from the drop-down list: <ul style="list-style-type: none"> • Inherit Language From Caller • Use System Default Language • [Use the User Language] e.g. English (United States). See “Default CUC Language” above. • [Choice of Languages] e.g. Spanish (Spain Traditional). See “Default CUC Language” above).

HotDial Defaults Tab

Option	Default Value
Default PLAR CSS	None
Default HotDial TimeZone	None

Overbuild Defaults Tab

The Overbuild Defaults tab is visible only to Provider and Reseller administrators.

Settings on this tab:

- Include Site for Overbuild (yes/no)

- Create Internal Number Inventory at CustomerId (yes/no)
- Overbuild Device Control (e.g., Move All Devices, Limit Moved Devices)
- Add additional device pools

For more information about the settings on this tab, see:

Overbuild Site Defaults: Overview in the Core Feature Guide.

MS Teams Tab

Settings on this tab:

- Allow you to manage MS Azure user deletion on VOSS-4-UC. Set: **Auto Delete VOSS4UC User**
- Specify a dial plan: **Default Tenant Dial Plan** - See:
Configure Microsoft Tenant Dialplan in the Core Feature Guide.
- Set MS Teams policies - See:
Introduction to Microsoft Teams Policies in the Core Feature Guide.
- Select a country for default usage: **Default Usage Location**

5.3. Subscribers

5.3.1. Manage Services

This procedure allows you to access the lists, or to add, delete, and edit services.

Perform these steps:

1. Log in to the Business Admin Portal.
2. Navigate to the relevant organization. Click **Organization Selection** and select the relevant level.
3. Select the menu for the feature or service you wish to work with.

If you're not at the appropriate level to manage the service, you may be prompted to select an organization level from a pop-up.

4. View, add, edit, or delete the service or resource, as required. Refer to the documentation specific to the service or resource you wish to view or update.

Related topics

- [User Interface Controls](#)
- [Lists](#) (working in the lists)
- [Navigate Organizations](#)
- Resource and Service Dashboards
- Administrator User Interface in the Business Admin Portal Guide

5.3.2. View Subscribers

In the Business Admin Portal you can view and manage subscribers and services in the Subscriber lists and on the Subscriber dashboard.

Note:

- To view multi vendor subscribers, your user role must be assigned a Business Admin Portal profile enabled for multi vendor, and multi vendor must be appropriately configured for your system.
- In a Microsoft-only environment, you can configure the Business Admin Portal for Microsoft-only user roles, as follows:
 - Configure the MS Only Business Admin Portal profile to use the Microsoft-only field display policy (default: MS_Only_FDP)
 - Assign the MS Only Business Admin Portal profile to user roles that will be used only for the Business Admin Portal.






See Business Admin Portal Profiles in the Core Feature Guide.

Subscribers List

The Subscribers list view in the Business Admin Portal provides a summary view of subscriber services, from a MACD perspective, and displays:

- All users from a given hierarchy and down (Reseller, Provider, Customer, or Site)
- A **Services** column, with icons representing the user's currently provisioned services (tooltips describe the service types and provisioning vendors).

The table describes the **Services** column icons on the Business Admin Portal Subscribers summary list:

Icon	Description
	Phones icon.
	Voicemail icon.
	Conferencing icon.
	Collaboration icon.
	Contact Center Express icon.

Subscriber Dashboard

The subscriber dashboard in the Business Admin Portal displays user details, quick actions, and service cards that provide a detailed view of services provisioned to the subscriber, including vendor information.

To access a subscriber's dashboard:

1. Click **Subscribers** in the left menu (default menu) to open the **Subscribers** landing page.
2. Click the **Subscribers** count card to view the list of all subscribers.
3. Click on a subscriber in the list to open the subscriber's dashboard.

From the dashboard, provided your role has appropriate permissions at the hierarchy, you can:

- View and edit subscriber details
- View and edit subscriber services, which display in a card layout (one card per service)
- Access quick actions for the subscriber (based on settings enabled at the hierarchy, installed devices/services, and specific to the vendor services available to the user)
- Initiate MACDs, per service
- Define the extension to use as primary line

Note: The service cards that display on the Subscriber dashboard in the Business Admin Portal are defined via field display policies. Devices and services should be installed, and the user should be enabled for the relevant vendor services. For example, only Cisco-related quick actions and service cards display if the user only has Cisco services, and the same for Microsoft-only subscribers. For multi vendor users with services from two or more vendors (for example, Microsoft and Cisco), the service cards specify vendor information.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide
- Multi Vendor Subscribers in the Core Feature Guide
- Subscribers in the Business Admin Portal Guide
- Lists in the Business Admin Portal Guide
- Business Admin Portal Profiles

5.3.3. Multi Vendor Subscribers

The multi vendor subscribers feature allows you to provision and manage services from one or more vendors on the VOSS-4-UC platform. For example, to use both Microsoft meeting and collaboration tools and Cisco tools.

VOSS-4-UC supports provisioning for two categories of subscriber, representing either a single or multi vendor deployment:

Single vendor subscriber	Subscribers using services from a single vendor, for example, either all Cisco services, or all Microsoft services.
Multi vendor subscriber	Subscribers using services from two or more vendors.

You can access a multi vendor subscribers service summary list view from:

Interface	Description
Admin GUI	Go to (default menu): User Management > User Services > Multi Vendor Subscribers
Business Admin Portal	<p>View subscribers from (default menu):</p> <ul style="list-style-type: none"> • Subscribers menu • Home page <ul style="list-style-type: none"> – Subscribers service card – Quick Actions link (View Subscribers) <hr/> <p>Important: Multi vendor subscriber must be enabled (via the Subscribers tab in the Business Admin Portal profile).</p> <hr/>

Related Topics

- **Configuration**
 - Configure Multi Vendor Subscribers in the Core Feature Guide
 - Global Settings
 - Role-based Access for Multi Vendor Subscriber in the Core Feature Guide
- **Field Display Policies**
 - Multi Vendor Subscriber Field Display Policy in the Core Feature Guide
- **Profiles**
 - Business Admin Portal Profiles in the Core Feature Guide
 - Entitlement in the Core Feature Guide
- **Subscribers and Users**
 - View Subscribers in the Business Admin Portal Guide
 - Users and Subscribers in the Core Feature Guide
 - Subscribers in the Business Admin Portal Guide
 - Enable User to Host Conference Now in the Business Admin Portal Guide
- **Interface**
 - View Subscribers in the Core Feature Guide

5.3.4. Move Subscriber

This feature allows a customer administrator (or higher) to move a subscriber:

- from provider level to a site (must be logged in as provider administrator)
- from customer level to a site
- from one site to a different site under the same customer

- from one site to another site on a different Unified CM cluster and CUCxn cluster

This is done using the **Move Subscriber** form (default menu **Subscriber Management > Move Subscriber**) as follows:

Subscriber Configuration

- When moving a subscriber, the subscriber, phones, device profiles, SNR, voicemail, and VOSS-4-UC data are processed in the move.
- When moving a subscriber to a different Unified CM cluster, you need to select a **New CUC User Template**.
- The subscriber will be updated with a new primary extension where appropriate. The services associated to the selected subscriber that will be moved with the subscriber are shown on the **Existing Services** card (see below).
- The subscriber role at the ‘move to’ hierarchy is selectable via a drop-down.
- A device pool at the hierarchy is mandatory. You can select either the default device pool at the ‘move to’ hierarchy or choose a different device pool from a drop-down list.
- An optional user template `MoveUpdateUserCustom_CFT` can be selected to make custom subscriber updates. You can clone and customize this template if required. The available user templates are listed on the **Configuration Templates** form (default menu **Customizations > Configuration Templates**).

Desk Phone Configuration

- Desk phones can either remain at the old site or move with the subscriber. Existing softphone devices, such as Jabber or Dual Mode devices will always be moved, but can be configured by the Jabber/Dual Mode configuration templates (see *Jabber/Dual-Mode Device Configuration*).
- The default operation is to move all phones, i.e. **Move Desk Phones** check box = **Selected**. If the desk phones are not moved, they remain at the original site and are disassociated from the subscriber.
- A new phone can be created at the ‘move to’ hierarchy by selecting the **Create New Phone** check box.
 - When also selecting **Use Existing Phone Configuration**, the existing phone configuration can be used as a template, and the **Phone Configuration Source**, **Desk Phone Profile** and **Phone Name** can be selected from drop-down lists.
 - * The **Phone Configuration Source** drop-down displays a list of the subscriber’s existing phones. If an existing phone is selected, the new phone will be created using the configuration of the existing phone.
 - * The **Desk Phone Profile**, which defines the phone type (and associated configurations), and the **Phone Name** available in the drop-downs are those displayed on the **Phone Configuration Mapping** form (default menu **Customizations > Phone Configuration Mapping**).

Default phone configuration mappings are available per hierarchy and are used at the selected hierarchy and below.

See “Configuration Mapping Files” in the Core Feature Guide for more details.
 - For new phones, when *not* selecting **Use Existing Phone Configuration**, the user should choose:
 - * The **Desk Phone Profile**, which defines the phone type (and associated configurations), and the **Phone Name** available in the drop-downs are those displayed on the **Phone Configuration Mapping** form (default menu **Customizations > Phone Configuration Mapping**).

- * The **Desk Phone Feature Template** is available for the selection of a template from the first Phone Mapping Configuration found up the hierarchy tree.

The Move Subscriber process applies the newly created phone with the desk phone profile and then on top of it the details from the chosen Feature Template.

Jabber/Dual-Mode Device Configuration

- Jabber and Dual Mode devices are automatically moved with the Subscriber.
- The device configuration is derived from the device profile selected in the associated **Profile** drop-down, i.e. Android, CSF, Tablet, iPhone, Carrier Integrated Mobile and CTI Remote Device. The default device profiles are found on the **Phone Mapping [Default]** form (default menu **Customizations > Phone Configuration Mapping**).
- You can clone and save a profile if required, and customize the relevant settings, e.g. **Basic Phone CFT** in order to apply different settings to the device.

See “Configuration Mapping Files” in the Core Feature Guide for more details.

Line Configuration

Creating Lines

When moving to another Unified CM cluster, new lines must be defined.

When a new line is defined, a **Line Template** can be selected for the new line. One line template may apply to all lines.

The CSS's for the new lines can be defined, and a configuration template `MoveUpdateLineCustom_CFT` is available to make custom line updates.

The system performs a check to ensure that the first line across devices is common. All new lines created (or existing lines moved) in the move, will be assigned to SNR. For example, if a Subscriber with 3 lines and a Phone, SoftPhone, DeviceProfile, SNR is moved, all these services will be associated with the 3 lines. The only exception to this is for Voicemail, where the first line is always selected as the Voicemail line.

Moving Lines

Important:

- **Moving of lines functionality is neither exposed nor supported by VOSS-4-UC.** If you want to assume the risk of moving lines, contact VOSS support to expose the move line functionality.
 - Lines can only be moved if your system is using a type 4 dial plan, and only *if the move is on the same cluster*. Make sure that the customer dial plan supports moving of lines between sites before attempting to move the line.
 - SLC based dial plans (types 1, 2 and 3) do not support moving of lines between sites.
-

If the move is between sites hosted on the same Unified CM cluster, the subscriber data is moved to the new hierarchy and updated as above. It is assumed that the CUCxn (if used) will remain.

If the move is between different Unified CM clusters, the specific move data as defined above is re-provisioned on the new cluster and deleted on the original cluster, except for the Unified CM subscriber. When the Unified CM subscriber is local, the old subscriber is removed.

In the case of an LDAP user, the VOSS-4-UC subscriber is purged. The user is removed from the `device/cucm/User` model of the source Unified CM in VOSS-4-UC. The home cluster flag is maintained such that it is only set to true on the Unified CM cluster hosting the subscriber, even if the subscriber exists on other Unified CM clusters.

When moving between clusters, the CUCxn server can be retained. In this case, the model instances are moved. In the case that the CUCxn server changes, a new CUCxn subscriber is created against a chosen subscriber template. This will not copy custom settings for the CUCxn subscriber or any recorded prompts and messages.

Caveats

- The first line on all devices must be common prior to the move. Replacing lines creates the same line layout on all devices.
- When moving cross cluster, the Unified CM cluster is changed. The CUCxn cluster may be retained or changed, based on the new site NDL. If the CUCxn cluster is changed, only basic voicemail is created - user customized configuration, as well as prompts and messages are not moved to the new CUCxn cluster.
- CUCxn cluster moves are only supported where the Unified CM cluster changes.

Existing Services

The following existing services associated to a subscriber will also be moved:

- phones (and associated lines)
- devices
- device profiles
- single number reach
- voicemail
- webex
- webex teams
- contact center

5.3.5. Business Admin Portal Profiles

Business Admin Portal profiles (Disabled, default, Read Only, or Full Access) are assigned to user roles via the Business Admin Portal custom interface type (`InterfaceBusinessAdminPortal`), and define the level of access a user has to the following functionality in the Business Admin Portal.

- Features (menus)
- MACDs/Day 2 functionality
- Dashboard widgets, such as charts

The table describes the predefined Business Admin Portal profiles that ship with `InterfaceBusinessAdminPortal`:

Profile	Description
Disabled	A user role with this profile is unable to access the Business Admin Portal.
default	<p>This profile is applied by default to new user roles, at the user's hierarchy level or the first level up. System-level administrators can clone this profile down the hierarchy and modify it to create custom default profiles for the Business Admin Portal interface type.</p> <p>A user role associated with the <code>default</code> profile:</p> <ul style="list-style-type: none"> • Has access to the Admin Portal: Allow switch to Admin mode is enabled. An icon shows in the upper Business Admin Portal interface toolbar to allow switching. If users should not have access, this profile can be cloned to the appropriate hierarchy and the setting can be disabled. • Has no access to the following Business Admin Portal menus: <ul style="list-style-type: none"> – Site management – Tools • Has view access (read-only) to data from other Business Admin Portal menus, including example model counts and charts.
Read Only	<p>The profile applied by default to all operator administrator user roles, with the same permissions as the <code>default</code> profile:</p> <ul style="list-style-type: none"> • No access to the following Business Admin Portal menus: <ul style="list-style-type: none"> – Site management – Tools • Read-only access (view) to data from other Business Admin Portal menus, including example model counts and charts.
Full Access	<p>This profile is applied by default to the provider admin role for new installations. User roles assigned with this profile have full access to all Business Admin Portal menus and features.</p>
MS Only	Select this profile if you have a Microsoft-only environment. In this case, assign this Business Admin Portal profile to user roles that will be used for the Business Admin Portal.

Note: When upgrading to Release 19.1.2 or higher, only the roles at the `sys.hcs` level are updated.

Business Admin Portal Profiles and Field Display Policies

The default Business Admin Portal profile is associated with the following field display (FDP) policies:

- BusinessAdminPhoneFDP
- BusinessAdminLineFDP
- BusinessAdminVoicemailFDP
- BusinessAdminWebexTeamsUserFDP
- BusinessAdminUccxAgentFDP
- BusinessAdminUccxTeamFDP
- BusinessAdminUccxContactServiceQueueFDP
- BusinessAdminHuntGroupFDP
- BusinessAdminCallPickupGroupFDP

These FDPs can be cloned and edited to create new customized FDPs. Or you can create completely new FDPs for the Business Admin Portal profile.

Multi Vendor and Business Admin Portal Profiles

The default FDP for multi vendor scenarios (`MultiVendorFDP`) is not associated with any Business Admin Portal profiles by default. You will need to manually enable multi-vendor for any of the Business Admin Portal profiles, which will then use the multi-vendor FDP.

To enable multi vendor for a Business Admin Portal profile:

1. Log in to the Admin Portal as a provider administrator (or higher).
2. Go to (default menus) **Customizations > Business Admin Portal Profiles**.
3. Click on the relevant profile to open the editing screen.
4. Clone the profile to create a new custom Business Admin Portal profile.
5. On the **Subscribers** tab, select **Enable Multi Vendor**.
6. Save the profile. Allowed features will now be determined via the multi vendor FDP.

Microsoft-Only Business Admin Portal Profile and Field Display Policy

The default FDP for a Microsoft-only scenario (`MS_Only_FDP`) is associated with the default Microsoft-only Business Admin Portal profile, `MS_Only`. This profile may be assigned to user roles that will be used in the Business Admin Portal in a Microsoft-only environment.

Additionally, VOSS-4-UC allows you to (optionally), apply the same look and feel of the Business Admin Portal to the Admin Portal via a custom component.

For user roles that will access the Business Admin Portal in a Microsoft-only environment:

1. Go to **Customizations > Business Admin Portal Profiles**, and edit a cloned version of the `MS_Only` Business Admin Portal profile:
 - On the **Details** tab, select **Enable Business Admin**.
 - On the **Subscribers** tab, select **Enable Multi Vendor**, and from **User Details Display Policy**, select the default Business Admin Portal field display policy for Microsoft-only environments, `MS_Only_FDP`.

2. Assign the `MS-only` Business Admin Portal profile to user roles that will use the Business Admin Portal in a Microsoft-only scenario.
3. Optionally, to apply the same look and feel of the Business Admin Portal to the Admin Portal (new VOSS-4-UC GUI only), go to (default menus) **Role Management > Menu Layouts** and select custom component `list-mv-subscribers`.

Add a Business Admin Portal Profile

This procedure adds a new Business Admin Portal profile.

Perform these steps:

1. Log in to the Admin Portal as a provider administrator (or higher).
2. Go to (default menu) **Customizations > Business Admin Portal Profiles**.
3. Click on an existing Business Admin Portal profile to open its editing screen:
 - If you're using the VOSS-4-UC legacy Admin GUI, click **Actions > Clone**.
 - If you're using the new VOSS-4-UC Admin Portal, click the toolbar **Clone** icon.

Configure the profile

4. On the **Details** tab:

Note: This is the **Base** tab in the legacy Admin GUI.

Interface Business Admin Portal [CS-P]

Base	Dashboard	Site Management	Number Management	Subscribers	Phones
Name*	CS-P				
Description	Default System BAP Profile				
Enable Business Admin	<input checked="" type="checkbox"/>				
Site Management	<input checked="" type="checkbox"/>				
Number Management	<input checked="" type="checkbox"/>				
Subscribers	<input checked="" type="checkbox"/>				
Phones	<input checked="" type="checkbox"/>				

- Enter a name and description.
- Select **Enable Business Admin** to display the Dashboard tab.

- Select or clear the relevant checkboxes to enable access to menus and other functionality in the Business Admin Portal for this profile. The rest of the tabs on this form are hidden or display depending on whether the relevant checkbox is selected on this tab.
- To add custom features to the Quick Actions card for a feature, click the Plus icon (+) in **Custom Features**; then, configure the custom feature:

- Select an icon and an icon title.
- From the **Feature Area** drop-down, select the feature, for example, Extension Mobility, or Phones.
- From the **Type** drop-down, choose a model type.

Note: Similar to menu layout configuration, you'll need to set up additional configuration associated with the model type. The model type must be exposed in the user's access profile, if the custom interface type is associated with a user.

- Choose a field display policy, and a configuration template.
- Click **OK**.

5. On the **Dashboard** tab:

- Enter a title for the dashboard.
- Optionally, select a landing page. When selecting a landing page, the header and line text details on the landing page **Welcome Header** tab display. See Create a Landing page in the Core Feature Guide.
- To select MACDs the admin will have access to on the dashboard, move options from the **Available** transfer box to the **Selected** transfer box.

6. On each feature tab you enabled via the **Details** tab, move required options from the **Available** transfer box to the **Selected** box to enable these features on the relevant dashboard.
7. On the **Miscellaneous** tab, configure functionality and display options for the Business Admin Portal:
 - In **Display About Information**, define whether to show or hide the **Settings > About** menu.
 - To display the **Export** action on the lists and forms, enable **Allow Data Export**; else, clear the field (disable).
 - To display options such as Replay and Cancel on the transaction instances and the list view, enable **Transaction Log Actions**; else, clear the field (disable).
 - To display options for showing and hiding selected information on the transaction when viewing a transaction instance, such as logs and sub-transactions, enable **Transaction Log Display Fields**; else, clear the field (disable).
8. On the **Subscribers** tab, configure functionality available on subscriber dashboards. Available options are defined via the User Details Display Policy you choose.
 - To enable multi vendor, select **Enable Multi Vendor**. The multi vendor subscriber field display policy (default name: MultiVendorFDP) is applied. To change any fields and available functionality, edit `MultiVendorFDP`, via (default menus) **Customizations > Field Display Policies**.
 - To disable multi vendor, clear the **Enable Multi Vendor** checkbox. In this case, the Subscribers landing page will now display a count card for both subscribers (total number of provisioned users) and for end users (total number of end users).
9. Save the profile.

A provider level admin can assign the new profile and the InterfaceBusinessAdminPortal interface type when adding or updating a user role.

Related Topics

- Multi Vendor Subscribers in the Core Feature Guide
- Assign a Business Admin Portal Profile to a Role in the Business Admin Portal Guide
- Add and Edit Roles in the Core Feature Guide

5.3.6. Enable User to Host Conference Now

This procedure allows a subscriber to host a conference.

Note: Conference Now is a Cisco Call Manager Ad Hoc conference service, available only to Cisco users. See the Cisco Unified Communications Manager documentation for more information about Conference Now.

Prerequisite:

- Configure the **CUCM User Details** field display policy to show the **Enable User To Host Conference Now** setting on the pop-up that displays when selecting **Update User (Cisco User)** in the Quick Actions:
 - In the VOSS-4-UC Admin interface, go to (default menu navigation) **Customizations > Field Display Policies**).

- Add the following field: `mvs_cucm_user.enableUserToHostConferenceNow`

Note: Only fields prefixed `mvs_cucm_user` may be added to the Cisco settings pop-up.

- In the Business Admin Portal the subscriber you're editing must have a Cisco user. There are two ways to add a Cisco user in the Business Admin Portal:

Open the Subscriber from the list view; then, choose an option:

- Click **Add Cisco User (Profile)**, (adds a Cisco user from profiles); or,
- Click **Add Cisco User (QAS)** (adds a Cisco user from Quick Add Subscriber).

Note: This procedure enables a user to host Conference Now from within the Business Admin Portal (via the Subscribers dashboard Quick Links).

There are three options for enabling this feature in the VOSS-4-UC Admin interface:

- On the Details tab of the CUCM Users[username] page), or;
- When adding a subscriber using Quick Add Subscriber (via the Quick Add Group and a CUCM user template that has Conference Now enabled), or;
- When adding a subscriber from profiles, and selecting a user template that has Conference Now enabled

Perform these steps:

1. Log in to the Business Admin Portal.
2. In the left menu, click (default menu) **Subscribers** to open the Subscribers landing page.
3. Click **View All Subscribers** to open the Subscribers list.
4. Locate the relevant user; then, click in the row to open the Subscribers[subscriber name] dashboard.
5. In the **Quick Actions** pane, click **Update User (Cisco User)** to open the pop-up displaying the Cisco settings available for editing via the quick actions link.

At the time of writing, options are:

Field	Description
IM and Presence Enable	Displays by default
IPCC Extension	Displays by default; drop-down list showing a list of user associated line/route partitions
Enable User To Host Conference Now	Defines whether to allow a user to host a conference.
Meeting Number	Displays only when Enable User to Host Conference Now is enabled.
Attendee Access Code	Displays only when Enable User to Host Conference Now is enabled.

6. Select **Enable User To Host Conference Now**.

The meeting number and attendee access code displays.

Please update Cisco User Details ✕


IM And Presence Enable	<input checked="" type="checkbox"/>
IPCC Extension	82010006 in Cu1Si1-Feature-PT v 🔍
Enable User To Host Conference Now	<input checked="" type="checkbox"/>
Meeting Number	82010006
Attendees Access Code	645131

7. Click **Submit**. The Cisco user is updated.

5.4. Transactions

5.4.1. View Transactions

The Transaction list provides auditing information for each transaction.

- To open the Transactions list:
 - Choose **Transactions** from the menu (default menu **Administration Tools > Transaction**); or,
 - Click the **Transaction Log** button on the top menu bar .

By default, the **Transaction** list view (default menu **Administration Tools > Transaction**) displays all parent transactions in progress or executed.

- To view child transactions (sub-transactions) in the list view, filter the list, and select the **Include Sub Transactions** checkbox.
- Select **Select to exclude system transactions in results** to show the transaction filter result list rows where the **Username** column with value `system` is *excluded*. By default, these are included in the filter result list.
- The **Status** column displays the transaction status. If transactions are running, clicking **Refresh** updates the transaction status **Status** field.


For completed transactions, the **Status** column displays either **Success**, **Success With Async Failures**, or **Fail**.

By default, failed transactions are highlighted in red. This can be overridden in the Theme (if required). An exclamation icon displays adjacent to the word **Fail**.

- The **Detail** column provides additional details on the transaction if available.
The contents of the Detail column of transaction lists are not localized.

Filter Transactions in the List

- Use the **Filter** button to open the pop up dialog with which you can filter the transaction list .

- A transaction filter is a logical AND operation over a number of active search criteria related to column values that are entered in the **Filter** pop-up form
- Select **Include Sub Transactions** to also see sub-transactions in the list - the **Id** is displayed as indented and listed above the parent on an unsorted **Id** column.
- Use the **My Transactions** button to filter the transaction list to the current user 
- A filter on the list of transactions is displayed on the list header as a link. Use the link to see or modify a filter.

Note: To clear a filter, click the **Clear filter** (red X) icon located next to the filter details at the center above the column headers.

- To view transaction details, select a transaction from the list.

5.5. Unified Messaging

5.5.1. 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

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.

5.6. Contact Center

5.6.1. 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

5.7. Bulk Load

5.7.1. 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.

5.7.2. 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.

5.7.3. 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.

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.

	Y	Z	AA	AB	
1					
2	forwardHuntNoAnswer.destination	forwardHuntNoAnswer.usePersonalPreferences	forwardHuntNoAnswer.callingSearchSpaceName	forwardHuntBusy.destination	forwardH...
3	# Destination	# Use Personal Preferences	# Calling Search Space Name	# Destination	# Use
4		TRUE			

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.

6. Business Admin Portal User Interface

6.1. Overview

6.1.1. Administrator User Interface

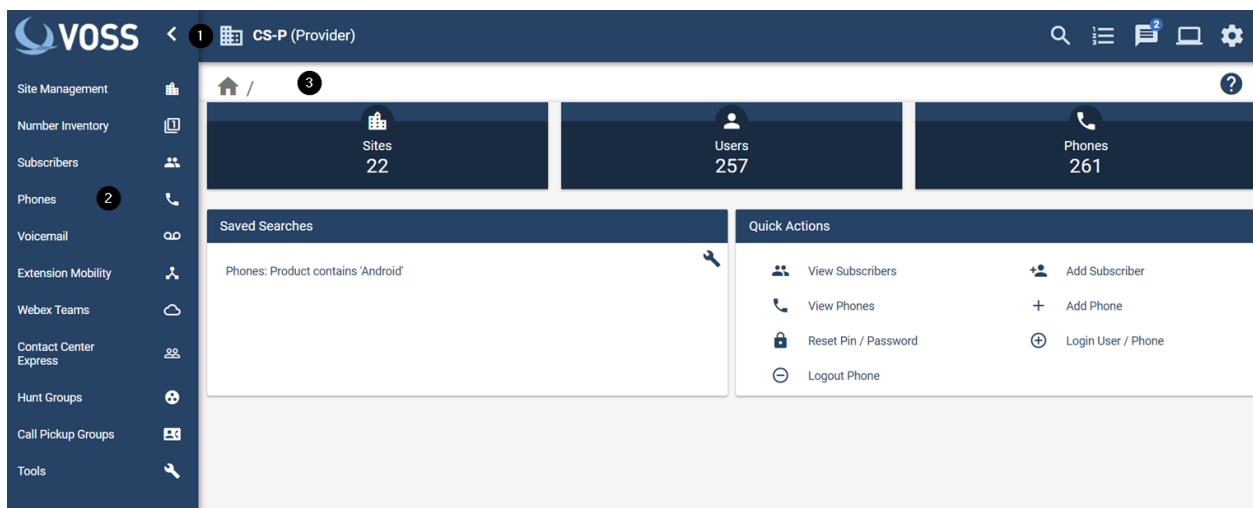
The Business Administration Portal (BAP) interface menus and functionality is defined as an interface type in VOSS-4-UC, along with the required role-based access.

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

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/hide the side menu labels. Set to '<' to show the labels, else set to '>' to hide the labels.
Organization (hierarchy) selection	A pop-up allowing you to navigate to a specific level in the organization, for example, to provider, customer, or site level. The ability to select the organization level means you can view and manage resources and services at any level of the hierarchy. When working in the interface, the hierarchy level you're at remains visible at all times. For details, see Navigate Organizations .
Search icon	Define search criteria to search for specific items in the system. For details, see Run a Search .
Transaction log icon	Opens the Transaction page, which lists the most recent transactions in your system. See: View Transactions .
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 Administration interface and the Business Admin Portal (provided you have access to both interfaces).
Settings	A drop-down menu providing access to the following information and settings: <ul style="list-style-type: none"> • Log in account details • Account Settings - Displays your user details, such as username, email address, or last login details. • Quick Actions - Provides shortcuts to actions such as change password, or sign out. • Preferences - Allows you to change the default application mode to either Administration or Business Administration (providing you have access to both interfaces). • About - displays release and version details • Sign out
Home icon	Click the Home button to go to the Business Admin Portal home page for your 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.

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.


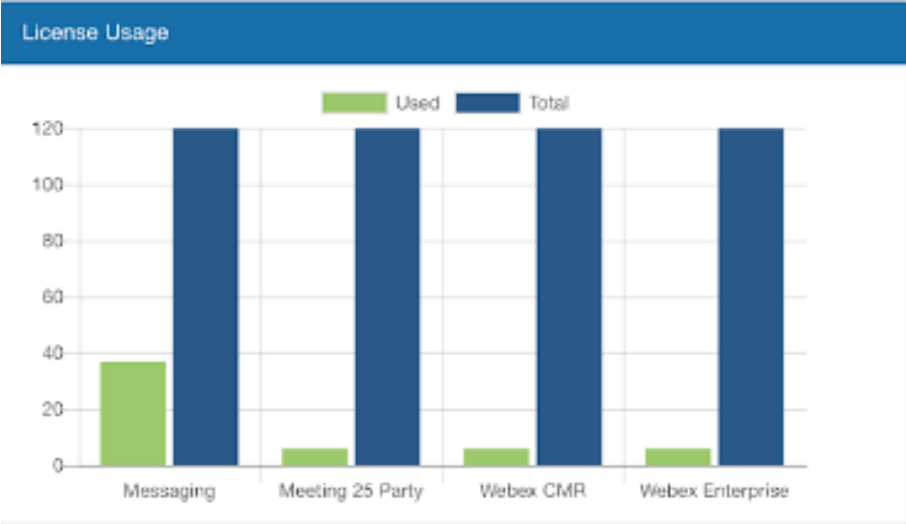
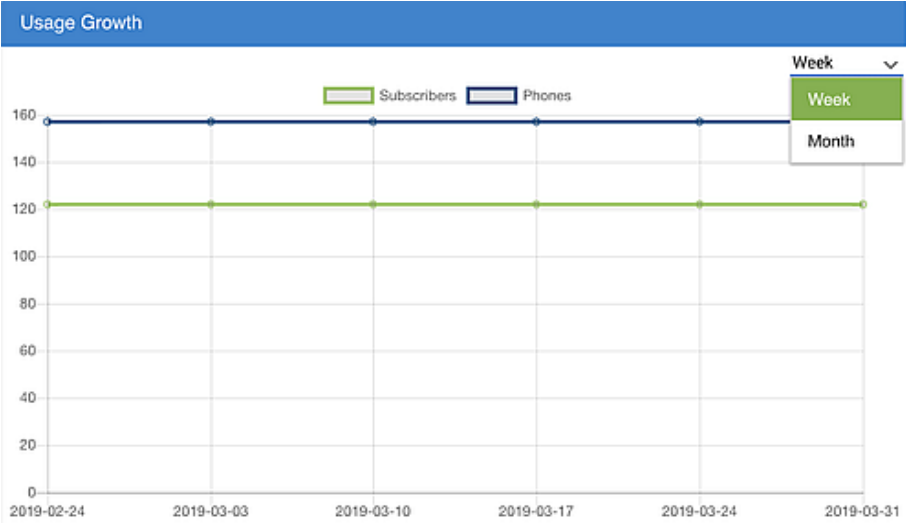
Selecting a menu item opens the landing page for the option you choose. The default menus are as follows:

- 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	<p>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.</p> 
Quick Actions	<p>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 <i>View</i> links (for example, view sites, view internal inventory) open the list views, allowing you to view and manage these items from the lists.</p>
Graphs and charts	<p>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.</p>  <p>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.</p> 
















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:










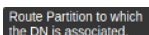

Counters	Cards displaying the total number of sites, users (subscribers), or phones, at the current hierarchy level (for example, at customer or site level). You can click in the counter to go to the relevant menu landing page.
Quick Actions	Links to common tasks, such as View Subscribers , Add Subscriber , View Phones , Add Phone , Reset Pin/Password , Login User/Phone , and Logout Phone .
Saved Searches	Links to a list of your 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 there is available data.
Notifications	The following notification types display on the home page: <ul style="list-style-type: none"> • 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.

6.1.2. 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.

6.1.3. 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.






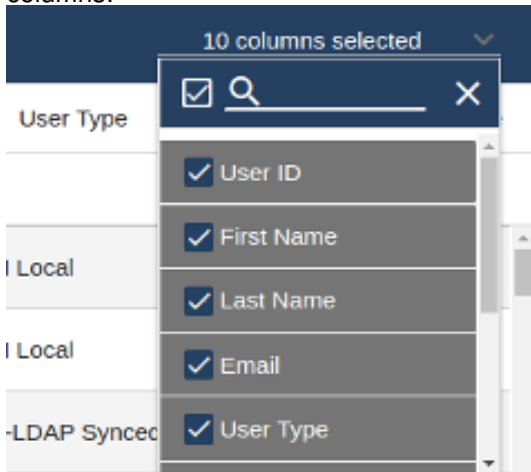
Home / Subscriber + [] [] [] []

Rows: 0 / 89 / 89 19 columns selected

<input type="checkbox"/>	User ID	First Name	Last Name	Email	User Type	Entitlement Profile	Primary Extension	Phones	Services	Located At
<input type="checkbox"/>	01_gas_15n23	01_gas_15n23n	01_gas_15n23n	01_gas_15n23@mail.com	CUCM Local	RST Entitlement Profile			→ GD	LOC005 (Site)
<input type="checkbox"/>	2233		2233		CUCM Local				GD	LOCALIZE009 (Site)
<input type="checkbox"/>	2243		2243		CUCM Local				GD	LOCALIZE009 (Site)
<input type="checkbox"/>	_AAbattery		Battery		CUCM Local				GD	LOC001 (Site)
<input type="checkbox"/>	ade11	ade11	ade11	ade11@ade11.com	CUCM Local					Overton (Customer)
<input type="checkbox"/>	auto_user_09n56	auto_user_09n56FN	auto_user_09n56LN	auto_user_09n56@mail.com	CUCM Local				GD	LOC001 (Site)
<input type="checkbox"/>	Betty Bloom	Betty	Bloom	BettyB@ingen.com	CUCM-LDAP Synced					AAAGlobal (Customer)
<input type="checkbox"/>	Bob Rambo	Bob	Rambo	BobR@ingen.com	CUCM-LDAP Synced					AAAGlobal (Customer)
<input type="checkbox"/>	JohnD000	John000	Doe000	john000@aaaglobal.com	CUCM Local				→ J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD003	John003	Doe003	john003@aaaglobal.com	CUCM Local				J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD006	John006	Doe006	john006@aaaglobal.com	CUCM Local				→ J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD009	John009	Doe009	john009@aaaglobal.com	CUCM Local				→ J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD012	John012	Doe012	john012@aaaglobal.com	CUCM Local				J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD015	John015	Doe015	john015@aaaglobal.com	CUCM Local				J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD018	John018	Doe018	john018@aaaglobal.com	CUCM Local				J GD	LOC001 (Site)
<input type="checkbox"/>	JohnD021	John021	Doe021	john021@aaaglobal.com	CUCM Local				J GD	LOC001 (Site)

K < 1 > 200

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	<p>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:</p> <ul style="list-style-type: none"> • Add:  • Delete:  Delete: • Move:  • Export:  • Help: 
View and sort lists	<ul style="list-style-type: none"> • List headers display the number of displayed rows (out of total rows), and provides <i>n columns selected</i> control to show/hide columns:  <ul style="list-style-type: none"> • 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

- Hover over an icon to view details
- Click on an icon to edit the device or service

6.1.4. Dashboards

In the VOSS-4-UC system list views, clicking in a row opens a management dashboard for the resource or service, for example, subscribers or phones. The content of the dashboard panels depend on whether custom interfaces are configured for your system, and on the field display policy applied to your role.

Components display in a panel layout. For example, the Subscribers dashboard may contain panels for:

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



The number and type of panels you can add to a dashboard depends on the services and functionality enabled for your system. For example:

- If subscribers have associated headsets, a **Headset** panel may be included, showing details such as vendor, model, firmware version, and serial number.
- Device dashboards provide a **Generate PRT** link for creating and collecting the Problem Report Tool (PRT) file that is uploaded at the Customer support upload URL.

View and Edit Content in the Dashboards

The feature detail dashboard panels provide functionality that allows you to view and work with the feature. For example:

- Editable fields, such as the subscriber **User Details** panel
- Disabled, read-only fields
- Pop-up input forms
- Mandatory fields display a *required* notification (in red text) to indicate that input is required prior to saving a form
- Tooltips in some fields provide additional details
- Links provide access to additional properties, for example, to inspect line details for phones.








Go to Line settings [Line](#)  

Line * 6060

Label Clark Castillo 6060

Display Clark Castillo

- A Plus icon (+) in a panel indicates that you can add additional devices or services.
- Panels containing multiple properties, such as lines for a phone, contains rows that can be re-ordered, cloned, or deleted.

Lines				
	Line	Label	Display	
	88001006	82010006	82010006	 
	88001007		Brad	 

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

6.2. Menus

6.2.1. Site Management

The **Site Management** landing page in the Business Admin Portal provides a high-level management interface to site management functions at the current hierarchy:

- Counters indicate the number of sites at the current hierarchy.
- A Quick Actions panel with links to view, add, and delete sites, and to view and edit site defaults for the current hierarchy.

Related Topics

- For more information around managing sites, see topics on Site Management in the Core Feature Guide.
- Modify Site Defaults in the Business Admin Portal Guide
- Features and Services Interfaces in the Business Admin Portal Guide

6.2.2. Number Inventory

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). See also **View Lines / Line Usage** below.
 - **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** panel is a central point that shows where the line is used throughout the system, including hyperlinks to those areas, such as:

- * Subscribers
- * Phones
- * Extension Mobility Profiles
- * Voicemail Boxes
- * Phones
- * Hunt Pilot

- * Call Pickup Group

Note: If the same number is shared by multiple devices/services of the same type, using different partitions, only the first 10 instances will be displayed.

- **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: 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).

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

- Number Inventory Overview in the Core Feature Guide

6.2.3. Subscribers

The **Subscribers** landing page in the Business Admin Portal provides an overview of subscribers and services at the current hierarchy, as well as access to general subscriber management functions, such as view all subscribers (lists), move or add subscribers, bulk add subscriber, and access to subscriber profiles.

Note:

- To access this page (default menu), click **Subscribers** in the left-side menu.
 - In a Microsoft-only environment, a system administrator can configure the Business Admin Portal to display only Microsoft-related subscribers and services. See Business Admin Portal profiles in the Core Feature Guide.
-

The table describes functionality available from the Subscribers landing page:

Counters	<p>Cards displaying the total number of subscribers and/or users, and services (e.g, phones, voicemails, etc.) at the hierarchy.</p> <p>Note:</p> <ul style="list-style-type: none"> • When multi-vendor is <i>enabled</i> in the applied Business Admin Portal profile, the counter displays only total number of subscribers. • When multi-vendor is <i>disabled</i> in the applied Business Admin Portal profile, the counter displays a total for subscribers and users. <p>Click on a card to open the list view for the service or resource.</p>
----------	--

Quick Actions	<p>Links to popular services and actions, as defined by your administrator. Examples:</p> <ul style="list-style-type: none"> • View All Subscribers: opens a summary list view of all subscribers at the selected hierarchy. <ul style="list-style-type: none"> – Click in a row to open a subscriber’s dashboard, where you can view and edit the subscriber and their services. On the dashboard you can click the Plus icon (+) in a service card to add a new service. – Fields are pre-populated for some services, based on the selected Quick Add Group (QAG), and on other configuration templates chosen when adding the subscriber. • Add Subscriber: opens a page to add a new subscriber. Here you can: <ul style="list-style-type: none"> – Add a mobile number, phone name, and a line. – Choose a subscriber profile, which defines the services the subscriber can have. <hr/> <p>Note:</p> <ul style="list-style-type: none"> * The default subscriber profile (if available) can only be deleted by a system-level administrator. * Subscribers cannot be added if the selected subscriber profile has no services enabled. <hr/> <ul style="list-style-type: none"> – Choose to send a welcome email, provided: <ul style="list-style-type: none"> * SMTP server is set up * The global setting Allow email to be sent to user after Quick Add Subscriber is enabled for the hierarchy (on the Email tab of the Global Settings). <p>The welcome email is sent to the subscribers email address, using the configured “Quick Add Subscriber” HTML email template applicable to the hierarchy. See Email in the Core Feature Guide.</p> • On the Services panel: <ul style="list-style-type: none"> – View services assigned to the subscriber via the profile. – By default, service names are auto-generated (based on username). To override the phone name and line details, clear the relevant checkboxes, and manually enter new details. – When editing a subscriber, New Services does not display already assigned services, or services where the necessary servers aren’t set up (for example, Unity Connection is required for voice-mail).
Copyright © 2021 VisionOSS Limited. All rights reserved. We appreciate and value your feedback. Please email us at doc-feedback@voss-solutions.com	53

User Details	<ul style="list-style-type: none"> • Entitlement Profile: a drop-down for choosing an entitlement profile to associate with the subscriber. <ul style="list-style-type: none"> – Enable IM & Presence (Cisco) Gives a subscriber access to IM and Presence (provided the customer is configured for IM and Presence and the BusinessAdminUserDetailsFDP field display policy, which defines the fields available on the page, is configured to show the checkbox). Regardless of the setup of the BusinessAdminUserDetailsFDP field display policy, the <code>previous_username</code> and <code>cucm_bkey</code> fields don't display since these are used only by the workflows. – IPCC Extension (Cisco) Displays all lines the subscriber has for IPCC extension, and may be enabled via the BusinessAdminUserDetailsFDP field display policy (when <code>ipccExtension</code> and <code>ipccRoutePartition</code> is enabled). For the drop-down to display however: <ul style="list-style-type: none"> * A CCX device must exist and be available for the hierarchy. * Contact Center service must be configured and available for the hierarchy. * The subscriber entitlement profile must allow support for Contact Center The IPCC Route Partition drop-down displays once you choose a line (Cisco).
Service cards	A service card displays for each service assigned and available to subscriber, and provides access to MACD functions allowed by the Business Admin profile.

Related Topics

- View Subscribers in the Business Admin Guide
- Subscriber Profiles in the Business Admin Guide
- Multi-vendor Subscribers in the Core Feature Guide

6.2.4. Phones

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

- **Counters** that indicate the number of **Phones** and **Unassigned Phones** at the selected level.
- **Quick Actions** that provide the following hyperlinks:
 - **View Phones** - Opens a list view showing all phones located at the selected level. Information for each phone is provided under the following headings; Device Name, Description, Product, Owner User ID, Phone Button Template, Softkey Template, Device Pool, and Location.

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

– Add Phone

- * Device Type - Available device types are determined by the Phone Template.
- * Phone Description - text will override 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.
- * Phone Name - The phone name must include the correct prefix for the specified device type, for instance:
 - Android = BOT
 - Carrier Integrated Mobile = CIM
 - Cisco 69XX, 78XX and 88XX = SEP
 - CTI Remote Device = CTI
 - iPhone = TCT
 - Jabber = CSF or TAB.
- * Phone Template - 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.

- * Standalone Phone - Select to add a standalone phone only (not associated to a subscriber).
- * Username - If the **Standalone Phone** check box is clear, you must choose a subscriber (username) from the drop-down list.

Optionally, complete the following fields on the **Lines** panel:

- * Line Template - This template configures device attributes from values in the site default that apply to the organization selection.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

6.2.5. Headsets

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.

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.

- **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.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

6.2.6. Voicemail

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.

Related Topics

- Features and Services Interfaces in the Business Admin Portal Guide

6.2.7. Extension Mobility

The **Extension Mobility** dashboard 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 mobility 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.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

6.2.8. Webex Teams

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 landing page 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**

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

6.2.9. Conferencing

The Conferencing landing page allows you to view and manage conference services from **Quick Actions**. A Pexip Conference Accounts counter shows the total number of Pexip conference accounts.

- View Pexip Conferencing Accounts

Provides a list of conferencing accounts that have been set up at the current hierarchy or lower. An account can be selected to see or edit details. Refer to Add Pexip Conference Account below for field details.

- Add Pexip Conference Account

1. To manage Virtual Meeting Rooms (VMR), use the **Add** icon from the **Conferencing** menu or from the **Quick Actions** link. You will be prompted to select a hierarchy.
2. The **Name** and **Owner's email address** are mandatory fields.
3. If used, the **Host PIN** can be reset on the administrator interface (resetting UC passwords).
4. If you select **Allow Guests**, an input box is shown to enter the **Guest PIN**.
5. Complete the required fields and click **Save**.

The name of the VMR will now show on the **Conferencing** menu list. Any changes to the VMR on the Pexip Conferencing Platform will also update the VMR in the Business Admin Portal.

6.2.10. Hunt Groups

The Hunt Groups landing page 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 panels.
 - * **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 Company-nameLocationGroup format usually provides a sufficient level of detail and is short enough to enable you to quickly and easily identify a line group.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide
- Hunt Group Management in the Core Feature Guide

6.2.11. Call Pickup Groups

The Call Pickup Groups landing page 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.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide

6.2.12. Tools

The Tools landing page provides the following:

A Quick Actions panel provides links 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 panels 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.

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